Create a Custom Patient List

With a custom Patient List, you can select the provider, age range, VFC eligibility status, immunization compliance, gender, race, and/or ethnicity. The report can then be generated, printed, and exported, and the report template can be saved for later re-use.

Create a Custom Patient List

1. Click the **Custom** link in the navigation menu.

2. Select a provider by entering an organization/ facility or VFC PIN in the Search Bar and pressing Enter.
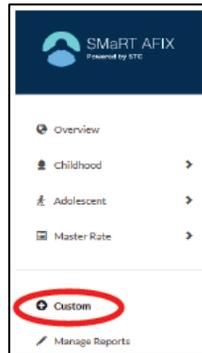
3. For the Provider Relationship, select whether to run the report for:

   - **All active patients** – All patients with an active states for the provider, whether or not they are owned by the provider

   - **Active patients owned by the facility** – All patients with an active status who are also owned by the provider

4. Select an As of Date for up to 14 days in the past.

   Note that selecting a prior As of Date provides more accurate information about patients if providers have a delay in posting UTD vaccination information.

5. Select an age range. You can select the standard CDC age groupings for Childhood and Adolescent cohorts, or you can select a custom age range.

6. For a custom age range, select the **Select Custom Range** option, then enter the **From** and **To** age range and select either **Months** or **Years**. The age range in the parenthesis after Select Custom Range changes to match the age range you entered.

7. Enter vaccines, antigens, or series names in the Vaccination box and press Enter, or scroll through the list and select one. To add additional vaccines, click the Add Filter (+) icon.

8. Select the VFC Eligibility Status from the drop-down list. By default, all VFC Statuses is selected. However, the options available in the drop-down list allow users to run reports by different eligibility status types.

9. Select the demographic information from the Gender, Race, and Ethnicity drop-down lists.

Patient Demographics

Select Gender Filter

All Genders (Default)

Select Race Filter

All Races (Default)

Select Ethnicity Filter

All Ethnicities (Default)
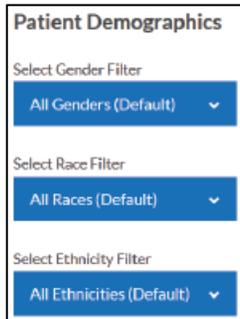
10. Click the icons on the right to **Reset Filters**, **Preview Report**, and **Save Report**.

Clear & Refresh Report Filters

Preview Report

Save Report

11. When saving the report, you are actually saving the report as a template. After clicking **Save Report**, a pop-up window prompts you to name the report and click **Save**.

SAVE CUSTOM REPORT

Name Your Report

QRG Example   SAVE
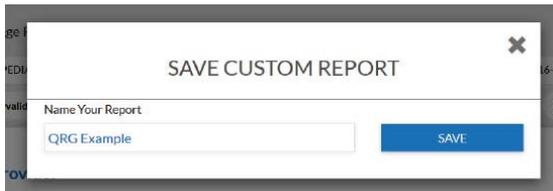
12. Saved report templates appear on the left-hand navigation menu under **Manage Reports**.

SMaRT AFIX
Powered by STC

Return to Home Page

Overview

Childhood

Adolescent

Master Rate

Custom

Manage Reports

HPV

QRG Example

Create Custom Coverage Report

Filtering by: Provider: PEDIATRICS U

Includes Invalid Vaccina

⦿ Provider

Enter Facili

○ Location

+ Add Filter
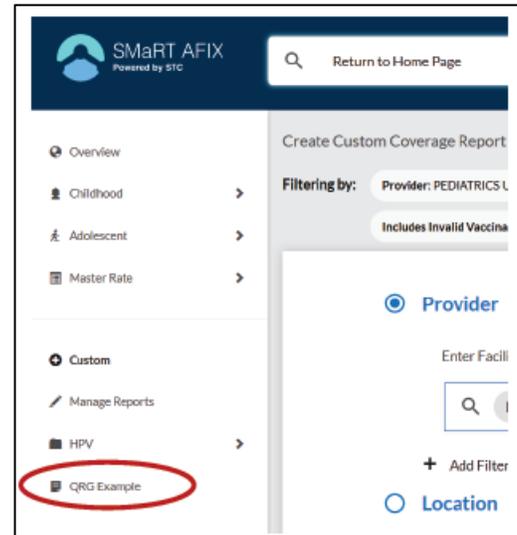
For more information on how to manage reports and report groups, see the *Manage Report Templates and Groups* QRG.

Print, Export, or Edit a Custom Patient List

After a report template is saved, it can be run again by clicking the link (the name of the saved report template) in the left-hand menu. To print, export, or edit a custom Patient List, click the appropriate icon located toward the top left-hand side of the page.

QRG Example - Coverage Report

Filtering by: Provider: PEDIATRICS UNLIMITED (3253)   Provider Relationship: Active patients owned by the facility   As of Date: 2016-10-25   Vaccine/Antigen/Series: HEP_B - Dose 1

Includes Invalid Vaccinations: False   Ages Assessed: 24 to 35 months   VFC Eligibility Status: ALL   Gender: ALL   Race: ALL   Ethnicity: ALL
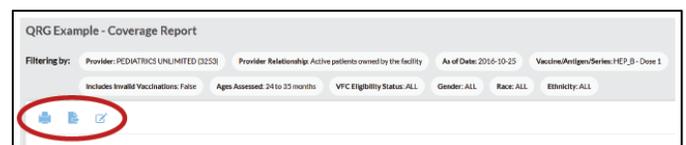
NOTE: The report filters (parameters) also display at the top of the page.