

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.

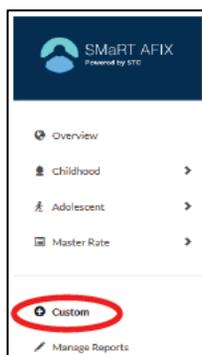
2. Select a provider by entering an organization/ facility or VFC PIN in the Search Bar and pressing Enter.



Provider

Enter Facility/Organization name or VFC PIN

Organization/Facility Search



SMaRT AFIX
Powered by STC

- Overview
- Childhood
- Adolescent
- Master Rate
- Custom**
- Manage Reports

3. For the **Provider Relationship**, select whether to run the report for:

- **All active patients** – All patients with an active states with 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.



As Of Date

Select the number of days in the past to use for the 'As of Date' for the report.

14

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.



Age as of 02/18/2020

- AFIX Childhood: from 24 to 35 months
- AFIX Adolescent: 13 years
- Select Custom Range (Current: from 11 to 19 years)

Select Custom Age Range

| From | To | <input type="radio"/> months | <input checked="" type="radio"/> years |
|--------|---------|------------------------------|--|
| 11 | 19 | | |
| 0 - 19 | 11 - 19 | | |

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.



Vaccination

Enter vaccine, antigen, or series

+ Add Filter

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.



VFC Eligibility Status

Select Eligibility Status Filter

All Statuses (Default)

- All Statuses (Default)
- Not VFC Eligible-Underinsured
- VFC Eligible - State Specific Eligibility
- Local-Specific Eligibility
- Not VFC Eligible
- American Indian/Alaska Native
- Uninsured
- Federally Qualified Health Center patient
- Medicaid

- 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) ▼

- Click the icons on the right to **Reset Filters, Preview Report, and Save Report.**



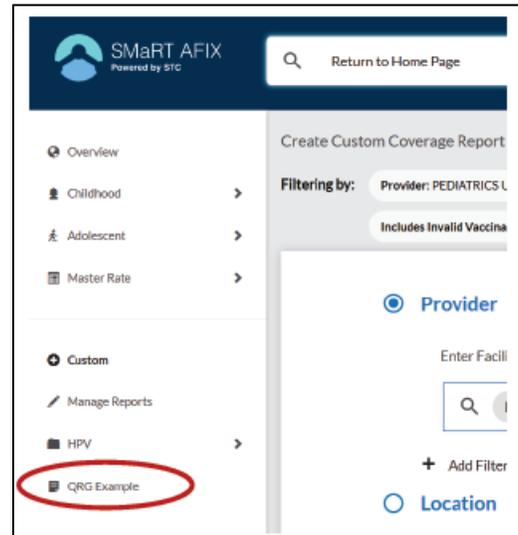
- When saving the report, the report is being saved as a template. After clicking **Save Report**, a pop-up window prompts you to name the report and click **Save**.

SAVE CUSTOM REPORT

Name Your Report
QRG Example

SAVE

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



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.



NOTE: The report filters (parameters) also display at the top of the page.