

## Quick Guide – Creating a List of Active Clients with the Ad Hoc List Report

### Purpose

The Ad Hoc List Report offers a user-defined report and lists results for Full-Access Provider users. You can select fields to be displayed in the report, define filters for which clients you wish to include, and choose the sort order for the report, which makes it a good choice for creating a list of active clients.

### Recommended Browser

See *Figure 1: Icons for Browsers*. The recommended browser for ImmTrac2 is **Internet Explorer 11**. ImmTrac2 does not support Windows 10 Edge nor Google Chrome. Users may experience issues using ImmTrac2 with these browsers on drop-down menus or radio button selection and other functions.



Figure 1: Icons for Browsers

### Getting Started with the Ad Hoc List Report

- Log into the appropriate organization in ImmTrac2. On the left side of the screen, on the menu panel look for "Reports" and click on "generate report". See *Figure 2: Generate Report*.

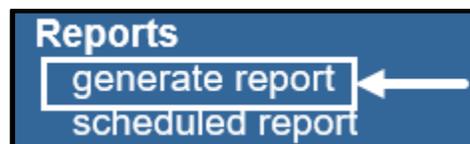


Figure 2: Generate Report

- In the list of reports available, click on "Ad Hoc List Report". See *Figure 3: Ad Hoc List Report*.

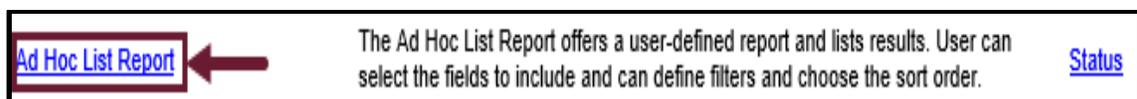


Figure 3: Ad Hoc List Report

## Section 1: "Include Active Clients, Inactive Clients, or Both?"

The first choice to make is if you want to list active clients or inactive clients (see *Figure 4: Select Active or Inactive Clients*). To create a list of active clients, click on "Active" and then click the "Add" button, or double-click the "Active" link. The word Active will be moved from the left box to the right box. In this example, do not click on any of the inactive statuses because you want to create a list of active clients.



Figure 4: Select Active or Inactive Clients

## Section 2: "What items would you like to display on the report?"

The second choice to make is which items you want to display on the client listing. See *Figure 5: Items to be Displayed on the Report*. The window on the left side lists items you can select to be displayed on the report, and the window on the right-side lists items that you have selected to be displayed.

To select an item to display, either double-click on an item in the left window, or click once on the item and then click the "Add" button. After an item has been selected it will be moved to the window on the right.

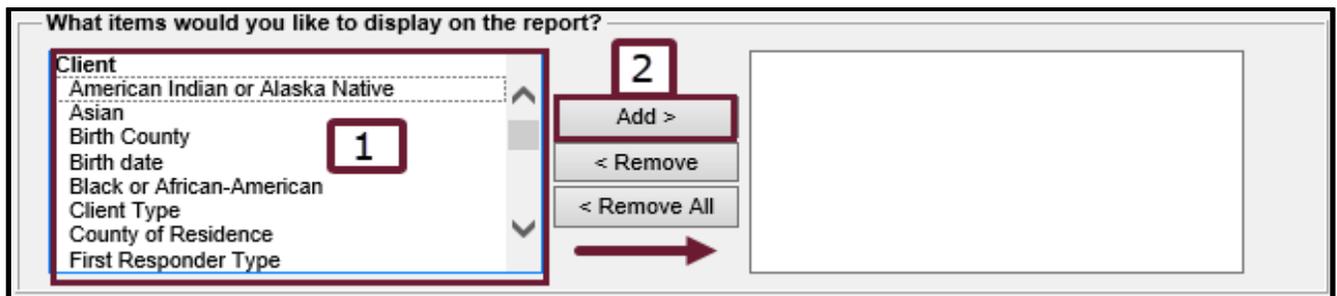
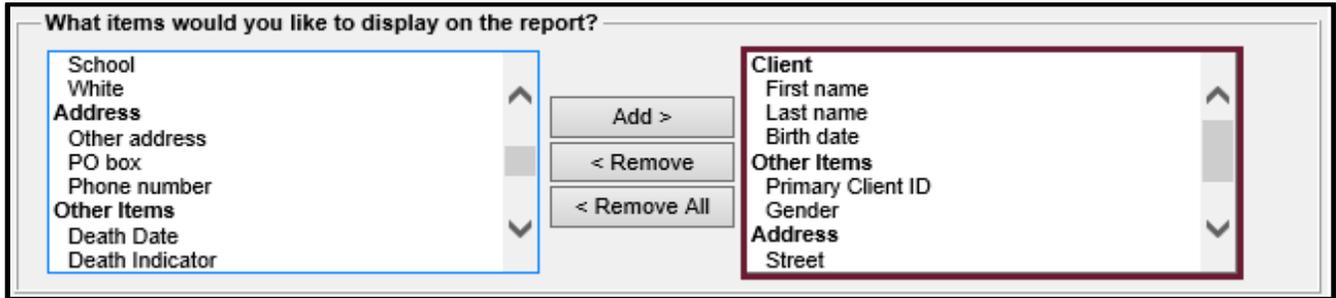


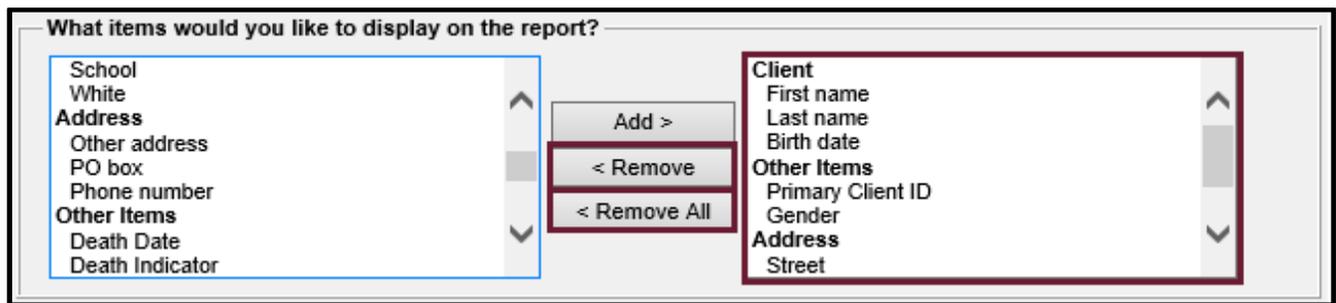
Figure 5: Items to be Displayed on the Report

Some items you might want to display would be First name, Last name, Birth date, Gender, Street, City, State, and Zip Code. See *Figure 6: Example of Selected Items*.



*Figure 6: Example of Selected Items*

To reverse the selection, either double-click on the item in the right window, or click once on the item and then click the "Remove" button. Clicking "Remove All" will remove all selections and allow you to start over. See *Figure 7: Removing Items to be Displayed*.



*Figure 7: Removing Items to be Displayed*

### Section 3: "How would you like the report to be sorted?"

In the third section, choose which item you want the report to be sorted on, and if you want the sort order to be "First-to-Last" or "Last-to-First". See *Figure 8: Choosing How to Sort*.



*Figure 8: Choosing How to Sort*

Note that the list of items to sort on will be the same list that you chose to display in the prior step. In other words, you can't sort on an item that you didn't already choose to display.

## Section 4: "How would you like to filter the data?"

You don't have to enter anything in the third section if you do not want to filter the data you have already chosen.

Here's how you build a filter (see *Figure 9: Building a Filter*):

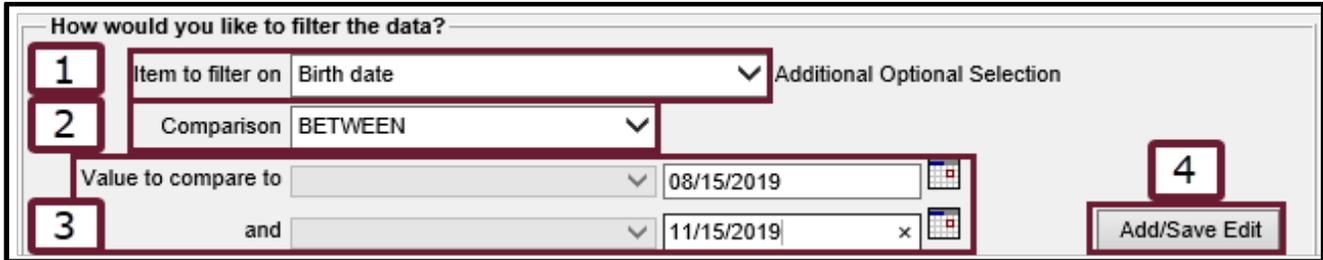


Figure 9: Building a Filter

- **Step 1:** Choose an item to filter on from the drop-down list. In this example "Birth date" was chosen.
- **Step 2:** Choose a comparison. The options you have for comparisons depend on the item you chose in step 1. In this example, the comparison options are "before", "Equals", "Not equal to", "After", "Between", "Is", and "Is Not".
- **Step 3:** Select values. In this example, the data is set to select clients whose birthday lies between 8/15/2019 and 11/15/2019.
- **Step 4:** Click the "Add/Save Edit" button to add this edit to the filter.

See *Figure 10: Generating the Report* for the next steps:

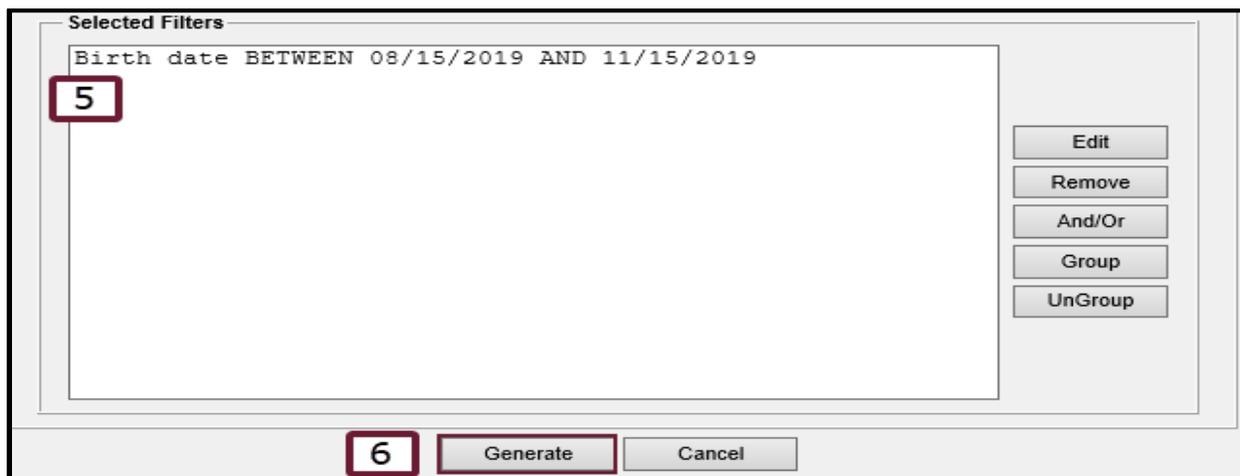


Figure 10: Generating the Report

- **Step 5:** Note that the filters previously selected have been added to the "Selected Filters" box.
- **Step 6:** You can click the "Generate" button to generate the report, or you can continue to build more complex filters (see the section on *Building Complex Filters* later).

After you click the generate button, the Ad Hoc Report Status screen appears and will display "PROCESSING" in the status column. As the report generates it will display the status as a percentage. Click the "Refresh" button to get updates. See *Figure 11: Refresh Button*.

Ad Hoc Report Status				
			<a href="#">Refresh</a>	<a href="#">Cancel</a>
Report Type	Started	Completed	Status	Row Count
LIST	11/18/2019 11:34 AM		PROCESSING	0

*Figure 11: Refresh Button*

Once the report has generated the status will change to "DONE" and can be accessed by clicking the "LIST" link to see the report. See *Figure 12: The LIST Link to the Report*.

Ad Hoc Report Status				
			<a href="#">Refresh</a>	<a href="#">Cancel</a>
Report Type	Started	Completed	Status	Row Count
<a href="#">LIST</a>	11/18/2019 11:34 AM	11/18/2019 11:35 AM	DONE	0

*Figure 12: The LIST Link to the Report*

Please note that only one Ad Hoc List Report can be generated at a time. If the report is still being processed and you need to do other work in ImmTrac2, as long as you stay logged in to that organization you can go back to the generated reports and click the "Status" link of the Ad Hoc List Report to take you back to the Ad Hoc Report Status screen and see if the report is done. See *Figure 13: Status Link to the Report*.

<a href="#">Ad Hoc List Report</a>	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.	<a href="#">Status</a>
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*Figure 13: Status Link to the Report*

## Section 5: Building Complex Filters

You can combine edits to create more complex filters. For example, if you want to restrict the data to females who were born between 8/15/2019 and 11/15/2019, you could additionally filter on "gender equals female" and again click the "Add/Save Edit" button to add that to the selection criteria. See *Figure 14: Filter with Two Edits*.

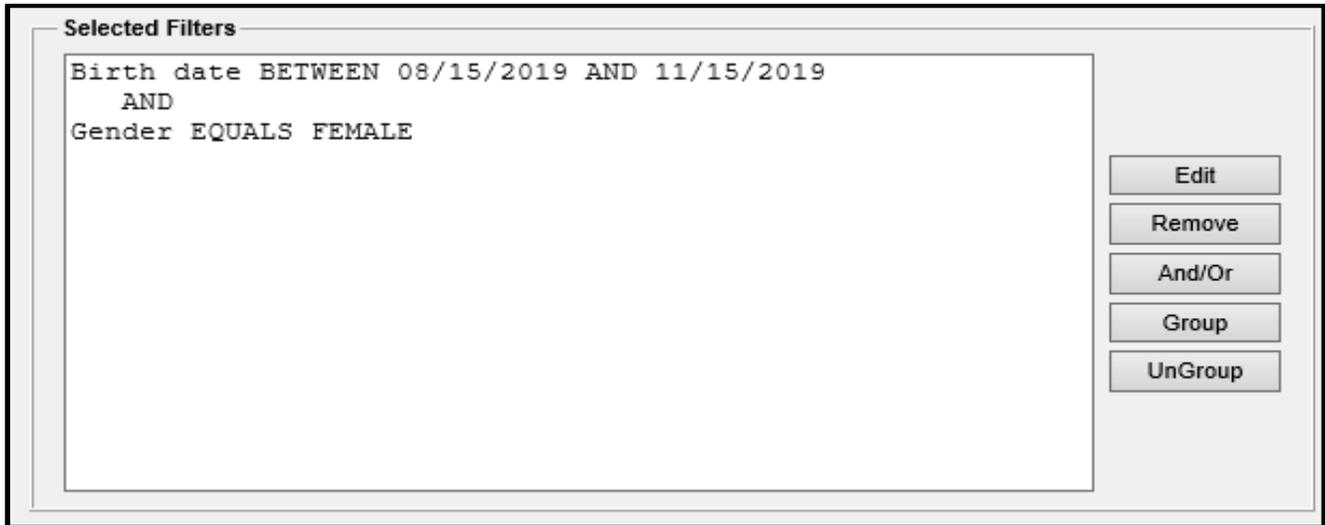


Figure 14: Filter with Two Edits

### 5A. Building Complex Filters: Edit Button

To change an edit line in the filter, click on the edit (in this case Birth date BETWEEN 8/15/2019 AND 11/15/2019) and then click the "Edit" button. You will be able to change that line. See *Figure 15: Edit Button*.

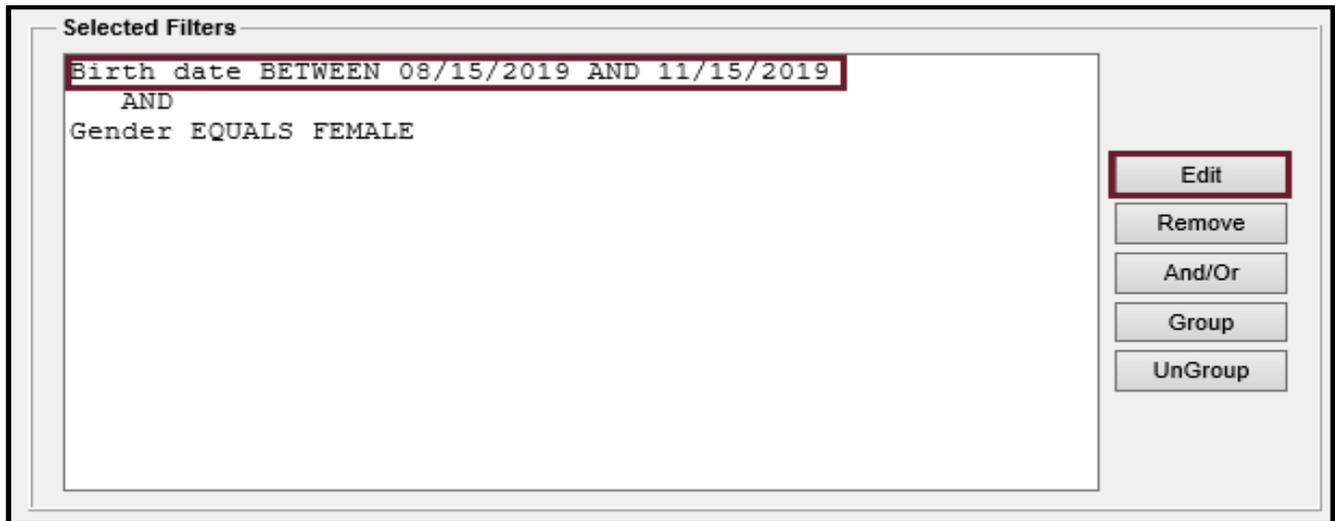
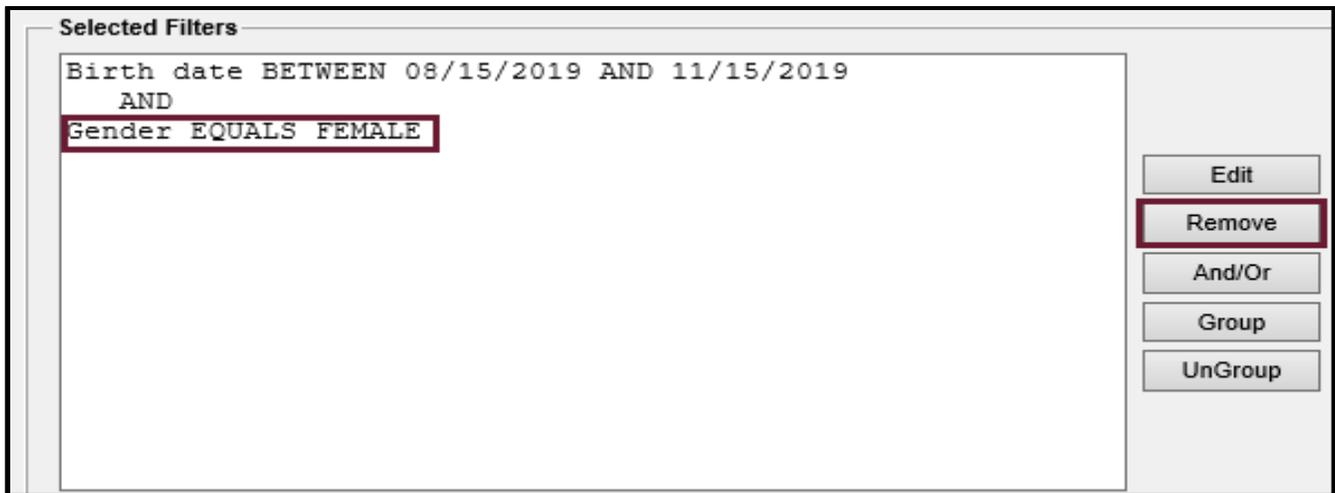


Figure 15: Edit Button

**5B. Building Complex Filters: Remove Button**

To remove an edit line from the filter (in this case Gender EQUALS FEMALE), click on the line and then click the "Remove" button. See *Figure 16: Remove Button*.

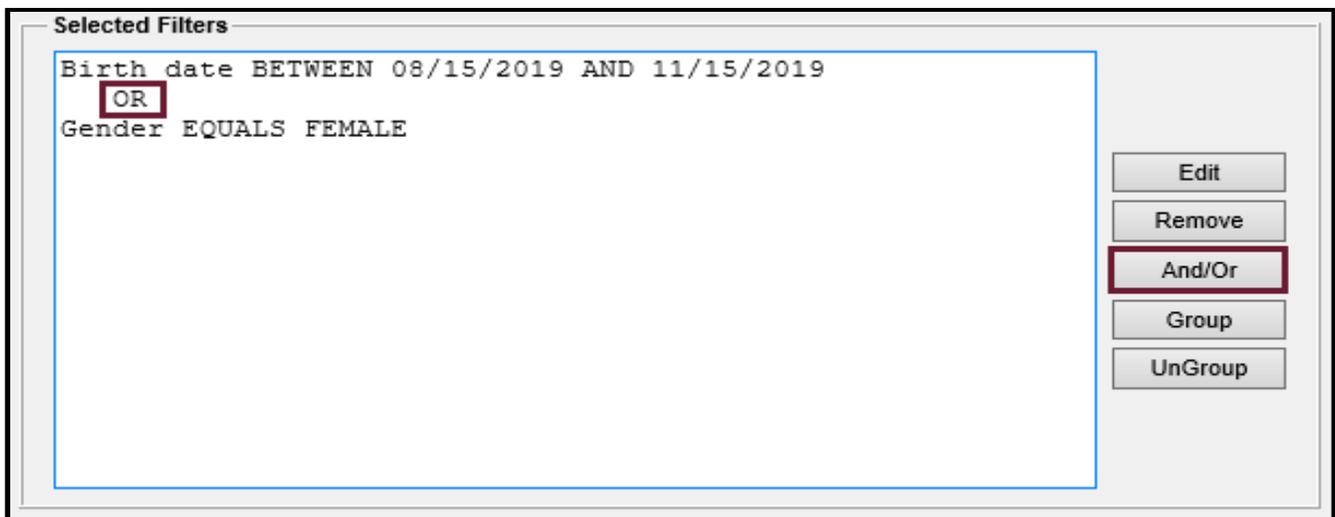


The screenshot shows a window titled "Selected Filters". Inside, there is a text area containing the filter: "Birth date BETWEEN 08/15/2019 AND 11/15/2019 AND Gender EQUALS FEMALE". The "Gender EQUALS FEMALE" line is highlighted with a red border. To the right of the text area are five buttons: "Edit", "Remove", "And/Or", "Group", and "UnGroup". The "Remove" button is also highlighted with a red border.

Figure 16: Remove Button

**5C. Building Complex Filters: And/Or Button**

If you have multiple lines and want to switch an "AND" to an "OR" or vice versa, click the "AND" or "OR" and then click the "And/Or" button. The button will toggle between "AND" and "OR". See *Figure 17: And/Or Button*.

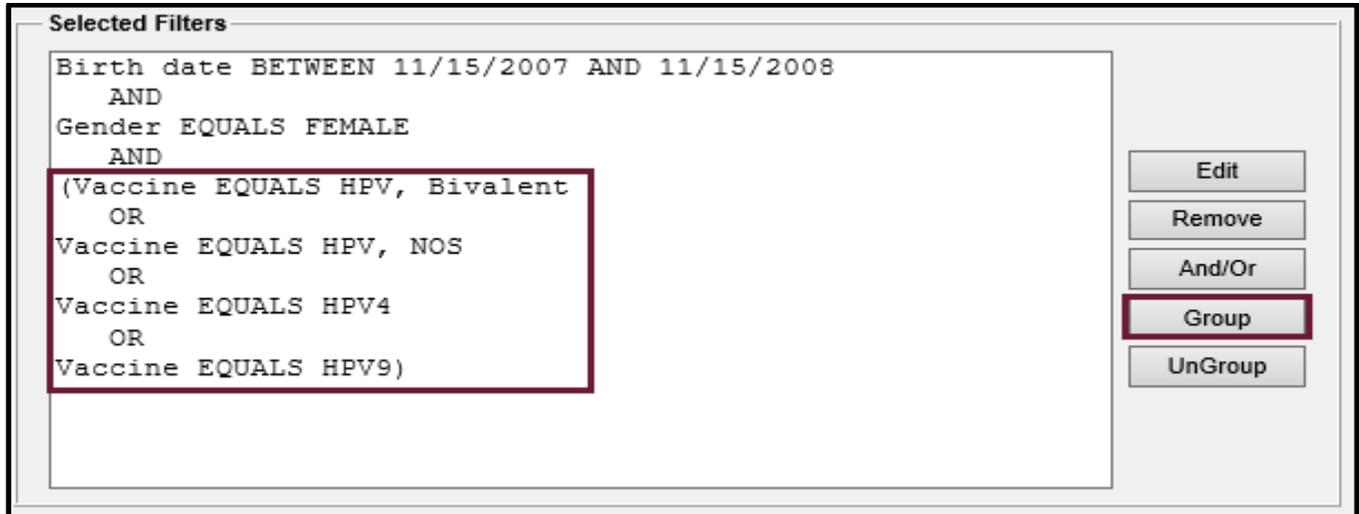


The screenshot shows a window titled "Selected Filters". Inside, there is a text area containing the filter: "Birth date BETWEEN 08/15/2019 AND 11/15/2019 OR Gender EQUALS FEMALE". The "OR" is highlighted with a red border. To the right of the text area are five buttons: "Edit", "Remove", "And/Or", "Group", and "UnGroup". The "And/Or" button is also highlighted with a red border.

Figure 17: And/Or Button

## 5D. Building Complex Filters: Group Button

If you wish to group edits, such as this example that groups HPV vaccines, after the edits have been entered, select the edit lines that you wish to group and then click the "Group" button. See *Figure 18: Group Button*.



**Selected Filters**

```

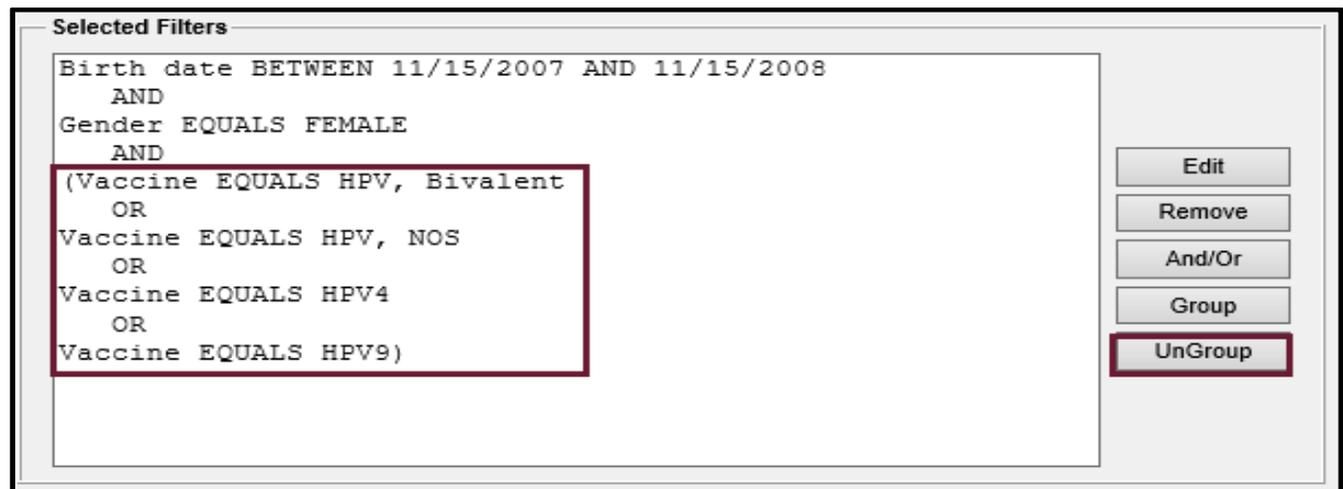
Birth date BETWEEN 11/15/2007 AND 11/15/2008
AND
Gender EQUALS FEMALE
AND
(Vaccine EQUALS HPV, Bivalent
OR
Vaccine EQUALS HPV, NOS
OR
Vaccine EQUALS HPV4
OR
Vaccine EQUALS HPV9)
  
```

Buttons: Edit, Remove, And/Or, **Group**, UnGroup

Figure 18: Group Button

## 5E. Building Complex Filters: UnGroup Button

The UnGroup button functions as the opposite of the Group button. Select a set of edit lines that you have grouped and wish to no longer group, then select the "UnGroup" button. See *Figure 19: UnGroup Button*.



**Selected Filters**

```

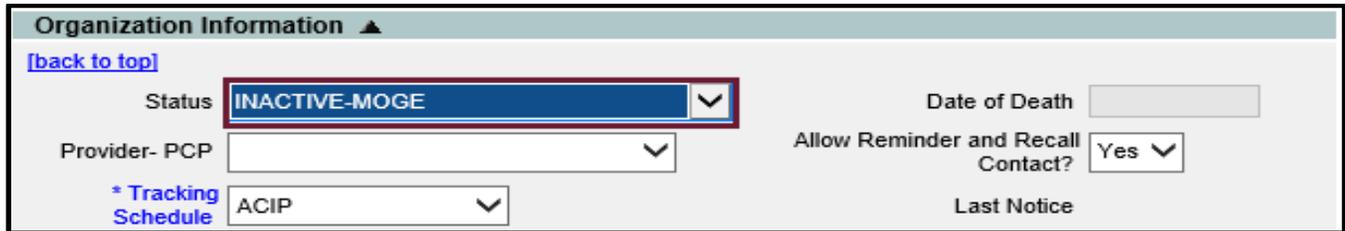
Birth date BETWEEN 11/15/2007 AND 11/15/2008
AND
Gender EQUALS FEMALE
AND
(Vaccine EQUALS HPV, Bivalent
OR
Vaccine EQUALS HPV, NOS
OR
Vaccine EQUALS HPV4
OR
Vaccine EQUALS HPV9)
  
```

Buttons: Edit, Remove, And/Or, Group, **UnGroup**

Figure 19: UnGroup Button

## Section 6: How Clients Become Active

The status of clients, as shown in the Organization Information tab for that client's record, will change from Inactive (see *Figure 20: Inactive Status*) to Active (see *Figure 21: Active Status*) when an organization enters either a historical or a current immunization to that client's record, or enters a consent for that client.

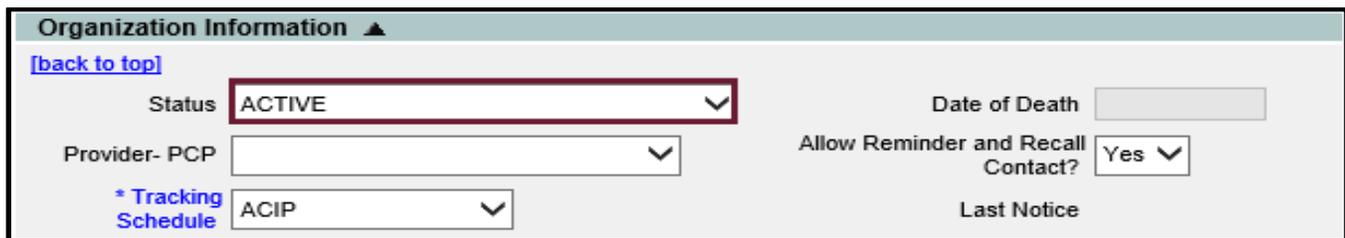


The screenshot shows the 'Organization Information' tab with the following fields:
 

- Status: INACTIVE-MOGE (highlighted with a red box)
- Provider- PCP: [Empty dropdown]
- \* Tracking Schedule: ACIP
- Date of Death: [Empty text box]
- Allow Reminder and Recall Contact?: Yes
- Last Notice: [Empty text box]

Figure 20: Inactive Status

The Organization Information tab of a client record in ImmTrac2 with the status highlighted of "Active".



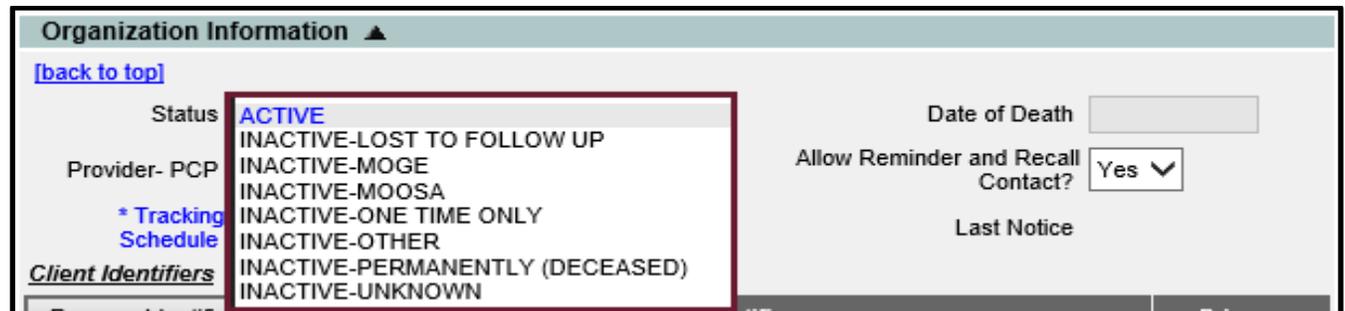
The screenshot shows the 'Organization Information' tab with the following fields:
 

- Status: ACTIVE (highlighted with a red box)
- Provider- PCP: [Empty dropdown]
- \* Tracking Schedule: ACIP
- Date of Death: [Empty text box]
- Allow Reminder and Recall Contact?: Yes
- Last Notice: [Empty text box]

Figure 21: Active Status

## Section 7: How to Inactivate Clients

Clients can be inactivated by selecting an inactive status in the Organization Information tab of the client record (see *Figure 22: Active/Inactive Status*).



The screenshot shows the 'Organization Information' tab with the Status dropdown menu open, listing the following options:
 

- ACTIVE (highlighted with a red box)
- INACTIVE-LOST TO FOLLOW UP
- INACTIVE-MOGE
- INACTIVE-MOOSA
- INACTIVE-ONE TIME ONLY
- INACTIVE-OTHER
- INACTIVE-PERMANENTLY (DECEASED)
- INACTIVE-UNKNOWN

 Other fields visible include Provider- PCP, \* Tracking Schedule (ACIP), Date of Death, Allow Reminder and Recall Contact? (Yes), and Last Notice.

Figure 22: Active/Inactive Status

Clients can also be flagged as 'Inactive' through data exchange. For additional information please contact your Electronic Health Records (EHR) vendor or the ImmTrac2 Interoperability Team toll free at (800) 348-9158 or email [ImmTrac2@dshs.texas.gov](mailto:ImmTrac2@dshs.texas.gov).

ImmTrac2 Customer Support Team  
Toll Free: (800) 348-9158  
E-mail: [ImmTrac2@dshs.texas.gov](mailto:ImmTrac2@dshs.texas.gov)