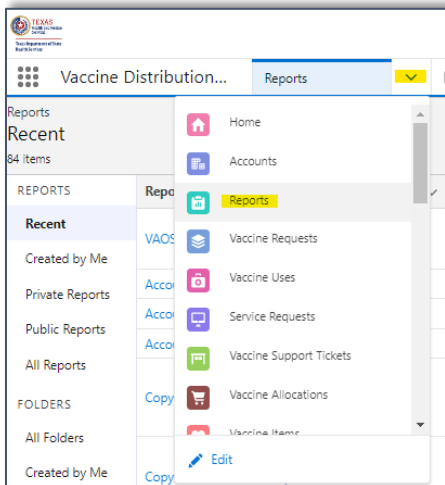


## **PHR-specific Prebook Report in VAOS**

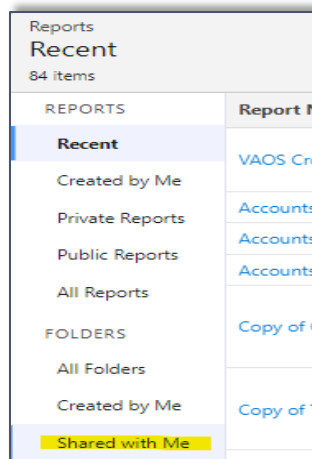
These instructions review how to use the “2023-2024 Provider Flu Prebook” Report(s) in VAOS to find prebook requests in your PHR for the upcoming Influenza Season now that the Prebooking Window has closed.

If you have questions, please email: [TXVaccineOrders@dshs.texas.gov](mailto:TXVaccineOrders@dshs.texas.gov)

1. Log in to VAOS using your Responsible Entity (RE) account.
2. Navigate to the **Reports** Object in the drop-down menu located towards the top-left of your screen:



3. Next, click the “Shared with Me” option located under “Folders” on the left side of the page:



4. The folders that you have access to will be listed on the screen. As an RE, you should have the "Regional User Reports" folder and the "Region \_ RE Reports" folder.

a. In this example, Central Office Staff have access to all the Regional Folders.

| REPORTS         | Name                           | Created By        | Created On          |
|-----------------|--------------------------------|-------------------|---------------------|
| Recent          |                                |                   |                     |
| Created by Me   |                                |                   |                     |
| Private Reports | Region 1 RE Reports            | Ashley Underwood  | 1/5/2023, 2:02 PM   |
| Public Reports  | Region 11 RE Reports           | Ashley Underwood  | 1/6/2023, 10:50 AM  |
| All Reports     | Region 2/3 RE Reports          | Ashley Underwood  | 1/6/2023, 10:33 AM  |
| FOLDERS         | Region 4/SN RE Reports         | Ashley Underwood  | 1/6/2023, 10:43 AM  |
| All Folders     | Region 6/5S and COH RE Reports | Ashley Underwood  | 1/6/2023, 10:44 AM  |
| Created by Me   | Region 7 RE Reports            | Ashley Underwood  | 1/6/2023, 10:45 AM  |
| Shared with Me  | Region 8 and SAMHD RE Reports  | Ashley Underwood  | 1/6/2023, 10:47 AM  |
| FAVORITES       | Region 9/10 RE Reports         | Ashley Underwood  | 1/6/2023, 10:48 AM  |
| All Favorites   | Regional User Reports          | Srinidhi Babu     | 4/14/2022, 1:34 PM  |
|                 | Vaccine Ordering Reports       | Sandeep Mahankali | 10/31/2020, 9:25 PM |

5. Next, click the Regional Folder that corresponds to your PHR. The following examples will use the Region 7 RE Reports folder.

6. With the PHR-specific folder open, scroll through until you find the "PHR \_ 2023-2024 Provider Flu Prebook" Report.

| REPORTS         | Name                                    | Description   | Folder              |
|-----------------|---|---|---------------------|
| Recent          |   | doses passing inspection upon receipt for particular vaccines and lot numbers. Excludes COVID-19.   |                     |
| Created by Me   | Dual COVID-19 & TVFC Providers PHR 7    | View providers enrolled in both TVFC and COVID-19 programs.   | Region 7 RE Reports |
| Private Reports | FLU (Allocated vs Accepted) PHR 7       |   | Region 7 RE Reports |
| Public Reports  | MSL History (COVID-19) PHR 7            | View Maximum Stock Level history for COVID-19 Providers from the previous year to today's date.   | Region 7 RE Reports |
| All Reports     | Maximum Stock Level History PHR 7       | View Maximum Stock Level history for TVFC/ASN/FLU Providers from the previous year to today's date.   | Region 7 RE Reports |
| FOLDERS         |   |   |                     |
| All Folders     | Maximum Stock Levels (COVID-19) PHR 7   | View this month's Maximum Stock Levels for COVID-19 Providers.  | Region 7 RE Reports |
| Created by Me   | Maximum Stock Levels (TVFC/ASN) PHR 7   | View this month's Maximum Stock Levels for TVFC/ASN/FLU Providers.  | Region 7 RE Reports |
| Shared with Me  | Outstanding Vaccine Requests PHR 7      | View Provider Vaccine Requests in Pending or On Hold Status.  | Region 7 RE Reports |
| FAVORITES       |   |   |                     |
| All Favorites   | Provider Vaccine Activity Report PHR 7  | Qty Shipped, Starting Inventory, Doses Administered (Qty Consumed), Qty Wasted and Qty on hand by provider  | Region 7 RE Reports |
|                 | Short-Dated Inventory PHR 7             | View Non-COVID provider inventory expiring within the next 90 days.   | Region 7 RE Reports |
|                 | TVFC Transfer Export PHR 7              | Transfer details including transferring provider org code, receiving provider PIN, quantity to transfer, vaccine type, status, created date, created by (used to populate priority transfer excel file) | Region 7 RE Reports |
|                 | TVFC/ASN Doses Administered - PHR 7     | View Doses Administered data for TVFC/ASN/FLU for the current month.  | Region 7 RE Reports |
|                 | TVFC/ASN Ordered/Shipped/Received PHR 7 | Excludes flu allocations  | Region 7 RE Reports |
|                 | TVFC/ASN Vaccine Loss PHR 7             | Vaccine Loss reported by providers (excluding Flu).   | Region 7 RE Reports |
|                 | Vaccine Loss - Flu Only PHR 7           | Vaccine Loss reported by providers, excluding all vaccine except Influenza.   | Region 7 RE Reports |
|                 | Vaccines Near Expiration PHR 7          | View TVFC/ASN/FLU provider inventory expiring within the next 120 days.   | Region 7 RE Reports |
|                 | PHR 7 2023-2024 Provider Flu Prebook    | View Provider 23-24 Flu PreBook Vaccine Requests in Ordering, Not Ordering, Survey Not Completed, or Received Statuses for PHR 7  | Region 7 RE Reports |

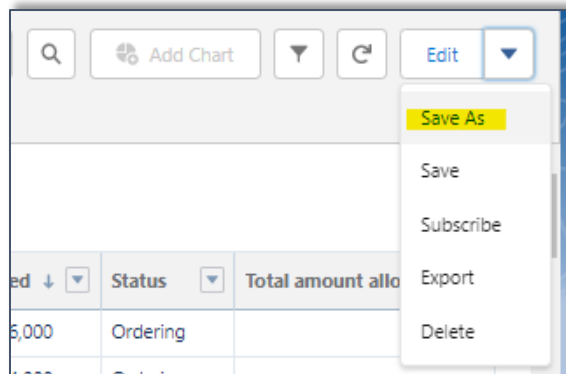
7. Click the Report's Name to open it in a new window of VAOS.

8. The "2023-2024 Provider Flu Prebook" Report is shown below:

| Provider PIN | Account Name: Account Name                          | Region   | Sub-region                         | Master Order Number | Vaccine Request Start Date | Vaccine Request Number | Vaccine: Vaccine Name             | Vaccine Program | Quantity requested | Status   | Total amount allocated |
|--------------|---|----------|------------------------------------|---------------------|----------------------------|------------------------|-----------------------------------|-----------------|--------------------|----------|------------------------|
| 070582       | Carouel Springsgate                                 | REGION 7 | Austin HHS Division (city off)     | 00330710            | 1/04/2023                  | 00330710               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 6,000              | Ordering | -                      |
| 070225       | People's Community Clinic - Austin 2                | REGION 7 | Austin HHS Division (city off)     | 00333084            | 1/30/2023                  | 00333084               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 4,000              | Ordering | -                      |
| 070460       | Baylor Scott And White McCombs Children Clinic      | REGION 7 | Bell County Public Health District | 00332914            | 1/30/2023                  | 00332914               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 3,250              | Ordering | -                      |
| 070907       | Carouel Southbrook                                  | REGION 7 | Austin HHS Division (city off)     | 00330402            | 1/30/2023                  | 00330402               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 2,800              | Ordering | -                      |
| 070693       | Communitycare South East Health And Wellness Clinic | REGION 7 | Austin HHS Division (city off)     | 00334657            | 1/10/2023                  | 00334657               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 2,500              | Ordering | -                      |
| 070737       | Carouel Pediatrics Riverside                        | REGION 7 | Austin HHS Division (city off)     | 00324571            | 1/10/2023                  | 00324571               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 2,500              | Ordering | -                      |
| 070917       | Kyle Communicare Health Center                      | REGION 7 | Hays County Health Department      | 00333023            | 1/30/2023                  | 00333023               | Fluzone Quad PPS, Pre: 2023-2024  | FLU             | 2,500              | Ordering | -                      |
| 070951       | Communitycare North Central                         | REGION 7 | Austin HHS Division (city off)     | 00325528            | 1/11/2023                  | 00325528               | FluLaval Quad PPS, Pre: 2023-2024 | FLU             | 2,000              | Ordering | -                      |
| 070271       | Round Rock Health Clinic                            | REGION 7 | Williamson CO & Cities PH Dist     | 00334749            | 1/10/2023                  | 00334749               | Fluzone Quad PPS, Pre: 2023-2024  | FLU             | 2,000              | Ordering | -                      |
| 070545       | Lone Star Circle Care Lake Ains Ped                 | REGION 7 | Williamson CO & Cities PH Dist     | 00334572            | 1/10/2023                  | 00334572               | Fluzone Quad PPS, Pre: 2023-2024  | FLU             | 2,000              | Ordering | -                      |

9. There are several components to the report, each of which will be covered in more detail as well as what an RE can do with the report to find specific information.

- a. First, let's cover how to **Clone the Report** for Personal Use.
  - i. Use the "Save As" button, located in the drop-down menu at the top-right, to save the report in your Private Folder.
  - ii. This allows the report to be modified, filtered, and edited without disrupting the template for other users in the PHR Folder.



The image shows a 'Save Report As' dialog box. It has the following fields:

- Report Name:** Copy\_of\_2023-2024 Provider Flu Prebook
- Report Unique Name:** Copy\_of\_20232024\_Provider\_Flu\_Prebook\_fw2
- Report Description:** View Provider 23-24 Flu PreBook Vaccine Requests in Ordering, Not Ordering, Survey Not Completed, or Received Statuses for PHR 7
- Folder:** Private Reports (highlighted in yellow)

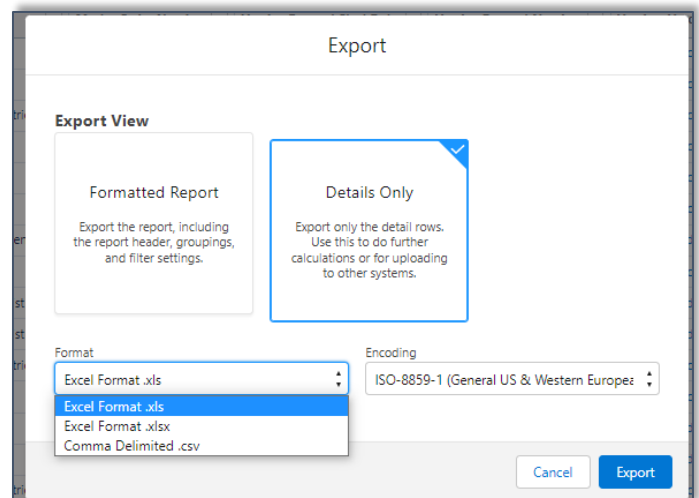
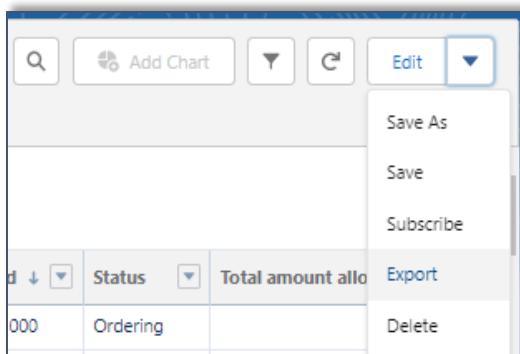
At the bottom right, there are 'Cancel' and 'Save' buttons.

10. After the report is saved in your Private Folder it can be edited and filtered as necessary.

11. Fields of Interest include:

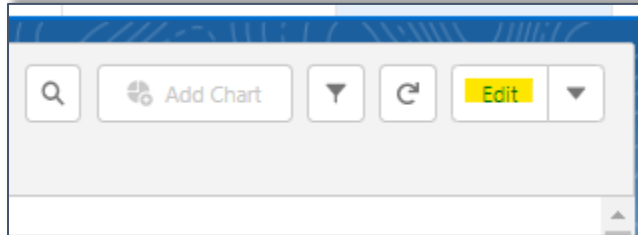
- a. PIN/Account Name
- b. Vaccine Name (that was prebooked)
- c. Quantity Requested (prebooked amount)
- d. Status
  - i. **Ordering**: Prebook Module was submitted and a request for a 2023-2024 Presentation was generated.
  - ii. **Not Ordering**: Prebook Module was submitted but the provider chose not to prebook for the 2023-2024 season.
  - iii. **Survey Not Completed**: The provider did not interact with the prebook module and has no prebook on file.
- e. Created Date

12. To Export the report into a .xlsx, .xls, or .csv File, click the drop-down arrow at the top-right and click "Export". The file format can be selected when "Details Only" is chosen:



13. If you're using a copy in your Private Folder, you may add fields or adjust the filter options after clicking "Edit" from the top-right of the page:

- a. The report builder menu appears after Edit is clicked.



**REPORT** ▾  
 PHR7 2023-2024 Provider Flu Prebook ✎ **Vaccine Requests with Facility**

> **Outline** ▾ **Filters** 6

Previewing a limited number of records. Run the report to see all records.

|    | Provider PIN ▾ | Account Name: Account Name           |
|----|----------------|--------------------------------------|
| 1  | 070951         | Communitycare North Central          |
| 2  | 071080         | Health Hero America                  |
| 3  | 070052         | Shots For Tots Far South             |
| 4  | 070027         | Lhd Waco-Mclennan Co Phealth Dis     |
| 5  | 071119         | LSCC Pediatrics at Mopac North       |
| 6  | 070135         | Killeen Pediatric Care Clinic Pa     |
| 7  | 070187         | Health Point Clinic Caldwell         |
| 8  | 071066         | Banks Pediatrics                     |
| 9  | 070967         | Coryell Health Medical Clinic        |
| 10 | 071096         | Austin Regional Clinic - Georgetow   |
| 11 | 070700         | Shl Care A Van                       |
| 12 | 070240         | DCMG Pediatrics Mueller              |
| 13 | 070285         | Ut Austin School of Nursing Childre  |
| 14 | 070029         | Lhd Bell County Public Health Distri |
| 15 | 070609         | Waco Family Medicine - Elm Ave       |
| 16 | 070959         | River Ridge Pediatrics               |
| 17 | 071085         | Lone Star Circle Of Care At Cedar Pa |
| 18 | 071122         | Aurora Concepts Madisonville         |
| 19 | 070932         | Waco Family Medicine - MCC           |
| 20 | 070041         | Communitycare- Manor Health Cen      |
| 21 | 071096         | Austin Regional Clinic - Georgetow   |
| 22 | 070552         | Brenham Family Practice and Obste    |
| 23 | 071003         | Austin Regional Clinic - Georgetow   |

**Groups**  
 GROUP ROWS  
 Add group... 🔍

**Columns** ▾

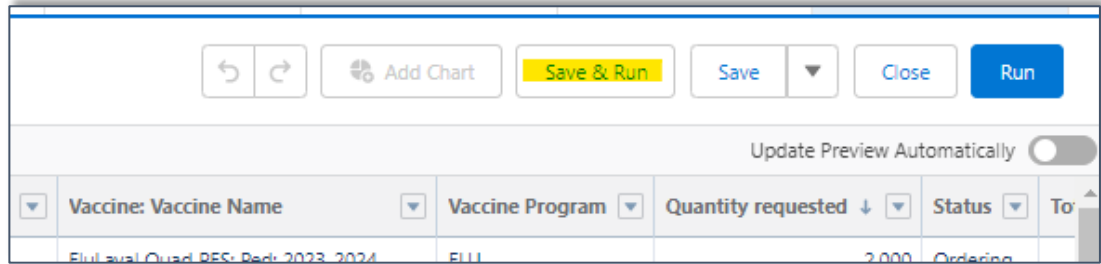
- Add column... 🔍
- Provider PIN ✕
- Account Name: Account Name ✕
- Region ✕
- Sub-region ✕
- Master Order Number ✕
- Vaccine Request Start Date ✕
- Vaccine Request Number ✕
- Vaccine: Vaccine Name ✕
- Vaccine Program ✕
- # Quantity requested ✕
- Status ✕
- # Total amount allocated ✕
- Created Date ✕
- Created By: Full Name ✕
- Last Modified Date ✕

- b. The “Outline” tab allows fields to be added/removed.
- c. The “Filters” tab allows the conditions of the report to be modified. In this example for PHR 7, the filters shown do the following:
  - i. **Created Date**: when the prebook record was created.
  - ii. **Status**: The three statuses mentioned above plus Received, Sent to VTrcks, and Shipped are included to appear in the report.
  - iii. **Record Type**: should remain “Pre-Booking”.
  - iv. **Account Name**: filters out the test facility ZZ Test Data Purge. Can be modified to filter by a facility of interest in your region.
  - v. **Region**: equal to your PHR.
  - vi. **Provider PIN**: not equal to “” removes Blank PINs from the report. Can be modified to “equal to: XXXXXX” to filter by a particular PIN# in your region.

The screenshot shows a software interface for a report titled "PHR7 2023-2024 Provider Flu Prebook". The interface includes a "REPORT" dropdown, a "Vaccine Requests with Facility" button, and a "Filters" sidebar with 6 active filters. The main table displays a list of records with columns for "Provider PIN" and "Account Name".

|    | Provider PIN | Account Name  |
|----|--------------|---------------|
| 1  | 070951       | Community     |
| 2  | 071080       | Health Hero   |
| 3  | 070052       | Shots For To  |
| 4  | 070027       | Lhd Waco-M    |
| 5  | 071119       | LSCC Pediatr  |
| 6  | 070135       | Killeen Pedia |
| 7  | 070187       | Health Point  |
| 8  | 071066       | Banks Pedia   |
| 9  | 070967       | Coryell Healt |
| 10 | 071096       | Austin Regio  |
| 11 | 070700       | Shl Care A Va |
| 12 | 070240       | DCMG Pedia    |
| 13 | 070285       | Ut Austin Sch |
| 14 | 070029       | Lhd Bell Cou  |
| 15 | 070609       | Waco Family   |
| 16 | 070959       | River Ridge P |
| 17 | 071085       | Lone Star Cir |
| 18 | 071122       | Aurora Conc   |

d. Once adjustments have been made, click "Save and Run":



This completes the in-depth look at the Prebook Reports available to REs. If there are additional questions about a topic covered in this document, please email us at: [TXVaccineOrders@dshs.texas.gov](mailto:TXVaccineOrders@dshs.texas.gov)