

## Schools – Creating School List and Viewing List Reports (Video Script #6)

### Welcome to the ImmTrac2 Training Video: Creating School Lists and Viewing List Reports

#### Training Objectives

The objectives of this video are to demonstrate how to use the Schools menu options to create school lists and how to view school list reports.

In this video we will cover the **Manage List**, **Find Student**, and **Check School Report** menu options.

**NOTE:** For this video we have logged in as a **View Only – Non Provider** user.

#### Manage Lists

Let's begin by clicking the **Manage List** menu option. From this screen users can create a new school list, edit a list name, and delete a school list.

##### Create New List

To create a student list, enter a list name in the **New List Name**. Then click the **Save** button.

The following message will display: *"The list has been created successfully."* The newly created list will display in the **Report List** section with a student count of zero.

##### Edit List Name

To edit a list name, click the **Edit** button for the List name you wish to change.

Users are redirected to the **Edit List Name** screen, where the **New List Name** is entered. Let's update the 1<sup>st</sup> Graders 2016 list to the 2<sup>nd</sup> Graders 2017. Then click the **Save** button.

Users are returned to the **Manage List** screen, when the new list name is reflected in the **Report List** section.

##### Deleting a List

From this screen, users can also permanently delete a list by clicking the **Delete** button. Let's delete the '4th Graders 2016' list.

A message box will appear asking *"Are you sure you want to delete this list?"* Click the **OK** to continue.

Users are returned to the **Manage List** screen, and the following message displays: *"The list has been deleted successfully."*

#### Find Student

Now let's add students to the "3<sup>rd</sup> Graders 2016" list we previously created. To do this, we'll use the **Find Student** menu option.

To add a student to a list, search for the student/client using one of the search options.

For our example, let's use the **Basic Search** option. Let's search for Brian Blue with a birth date of January 01, 2010, then click the Find button.

**NOTE:** For more details on how to use the search options, see the *ImmTrac2 Training Video - Searching, Viewing and Editing Client Records*.

Because there was only one client meeting the search criteria, the **Student Information** screen display immediately.

This screen contains the following information:

**Student Information:** This section displays the student's personal information and the **Official Immunization Record** button that can be used to view and print the student's official immunization record.

**Reports / Current Report Lists:** This section is used to add students to a list, and display all the lists the student is currently assigned.

**Student's immunization record:** This section displays the student's immunization history.

**Vaccines Recommended by Selected Tracking Schedule:** Displays the recommended vaccines for the student.

Now let's add Brian Blue to the '3<sup>rd</sup> Graders 2016' list. Use the drop down arrow in the **Reports** section to select a report list. The options available in the drop down, are the lists which the student can be assigned

Let's select the '3<sup>rd</sup> Graders 2016.'

Next, click the **Add this Student to a Report List** hyperlink. The newly selected report will display in the **Current Report Lists** section.

Let's return to the **Manage List** screen and review the '3<sup>rd</sup> Graders 2016' list. The student count for this list is '1', and the is now an active hyperlink.

## Viewing a School List and List Reports

To view a school report list, click a **List Name** hyperlink. For this example, let's select the '2<sup>nd</sup> Graders 2017' list.

This navigates users to the **Reports Available for: 2<sup>nd</sup> Graders 2017** screen. This screen consists of the following sections.

**Reports Available:** This section lists the reports that can be generated for all students in the displayed list.

**Select Tracking Schedule:** This section provides drop-down options to select which tracking schedule will be used when running a school report for the displayed list.

**NOTE:** *The Tracking Schedule defaults to the ACIP schedule. Once changed, the selection is sticky and will not revert back to the default.*

Let's select the **ACIP** schedule.

**Client List:** This section displays the students assigned to the list and allows the user to remove students from the list.

Clicking the **Last Name** hyperlink will redirect users to the **Student Information** screen when the student can be assigned to different lists.

To remove a student from the list, select the **Delete** check box next to the student you wish to delete. Then click the **Delete** button. Click **OK** to permanently delete the student.

Users are returned to the Reports Available screen where the following message displays: *'The list has been updated successfully.'*

### [Reports Available](#)

Now let's take a look at the reports that are available for each school list: Student List, Student Immunization History List, and the Immunization Due report.

All reports open as a PDF file in a new browser window.

- **Student List:** Clicking this link generates a PDF file with the name and date of birth for each student on the selected list sorted alphabetically by last name.

As previously mentioned, the Student List PDF is opened in a separate browser window. Close the window to return to the ImmTrac2 Registry.

- **Student Immunization History List:** Clicking this link generates a PDF file with the immunization history and immunizations due for each student on the list.

After clicking the report hyperlink, users are redirected to the **School Report Job Status** screen. This screen shows the status of the report requested on the previous screen, and it lists previously generated reports.

Users can navigate to this screen at any time by clicking the **Check School Report** link in the menu panel.

Click the **Refresh** button until the status equals '100%.'

When the status reaches '100%,' the **Student** count displays and the list **Name** displays as a hyperlink. The most recent report will display at the top of the list.

Click the hyperlink to open the **Student Immunization History List** in a separate browser window.

The **Student Immunization History report** includes the immunization history and immunizations due for all the students in the selected list in one file in alphabetical order. **NOTE: These are not official immunization records.**

This report displays the student's immunization record and their immunizations due. Close the window to return to the ImmTrac2 Registry.

Users are returned to the **School Report Job Status** screen. Click the **Manage List** option to navigate back to the **Reports Available** screen.

Let's select the '2nd Graders 2017' list, and review the last report option.

- **Immunization Due:** Clicking this link generates a PDF file that displays the immunizations due for each client on the list, based on selected criteria.

After clicking the report hyperlink, users are redirected to the **School Immunization Due List Request** screen which allows users to configure the report based on the selected criteria.

**Select the Vaccine Group to Report on...:** This section allows you to choose specific Vaccine Groups within the selected tracking schedule to report on. If specific groups are selected, only these will display in the report output.

**'Enter the Date Criteria':** Entering a target date range will return clients who are due, or will be past due for the selected vaccine within the specified date range. **NOTE: If the Target Date is blank, today's date will be used.**

For our example, let's enter a **'From'** date of January 1st, 2017 and a **'To'** date of March 1st 2017. Then click the **Generate** button.

Once again, users are redirected to the **School Report Job Status** screen. Notice the Student Immunization History reports are still visible.

Click the **Refresh** button until the status equals '100%.'

When the status reaches '100%,' the Student count displays reflecting the number of students that meets the selected criteria.

The most recent report will display at the top of the list. Click the hyperlink to open the **Immunization Due Report** in a separate window browser.

The **Immunization Due Report** displays the immunizations due for each client on the list based on the selected criteria. Close the window to return to the ImmTrac2 Registry.

Users are returned to the School Report Job Status screen.

## Check School Report

When either the **Student immunization history list** or the **Immunization due report** is generated, they go into a holding queue while waiting for the report to generate.

Remember, you can navigate to this screen and can view the school reports at any time by clicking the Check School Report link in the menu panel.

The Name and Type column will indicate if the report is a 'Student Immunization History List,' or an 'Immunization Due Report.'

Reports will be accessible for up to 7 days, with the most recent report displayed at the top of the School Report Status section.

If a report has not completed processing, as in this example, you may navigate away from this screen and return later to check the status.

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at <https://immtrac.dshs.texas.gov> at your convenience.