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.

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 1: Generate Report.*

Figure 1: Generate Report

- In the list of reports available, click on "Ad Hoc List Report". See *Figure 2: Ad Hoc List Report.*

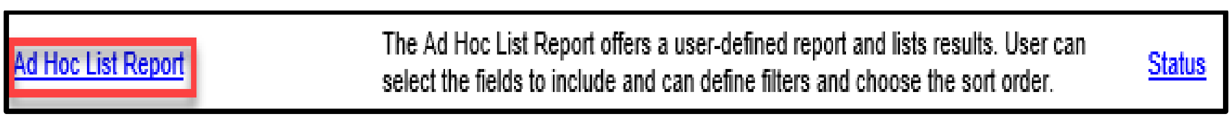

Figure 2: Ad Hoc List Report

Section 1: "What items would you like to display on the report?"

The first choice to make is which items you want to display on the client listing. See *Figure 3: 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.

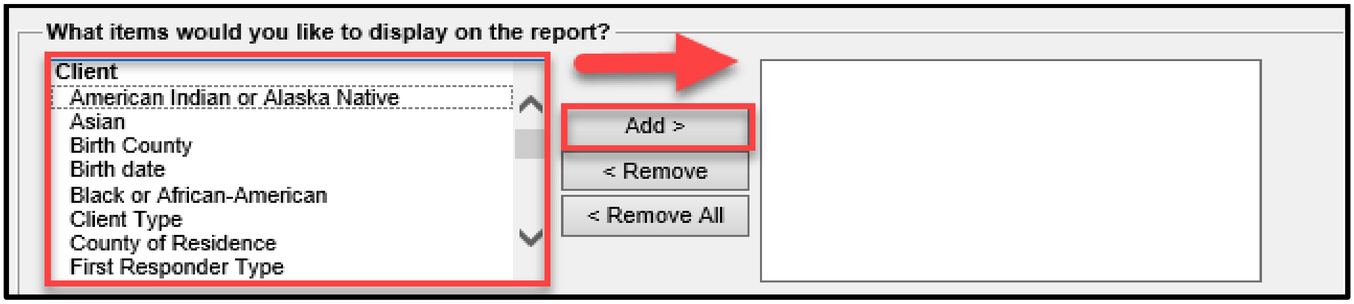

Figure 3: Items to be Displayed on the Report

Some items you might want to display would be First name, Last name, Birth date, Gender, Street, City, State, and Zip Code. See *Figure 4: Example of Selected Items*.

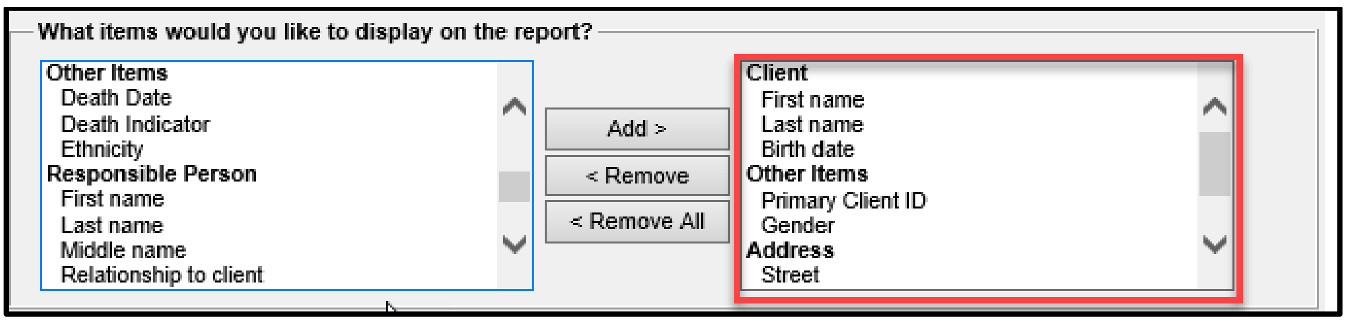

Figure 4: Example of Selected Items

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 5: Removing Items to be Displayed*.

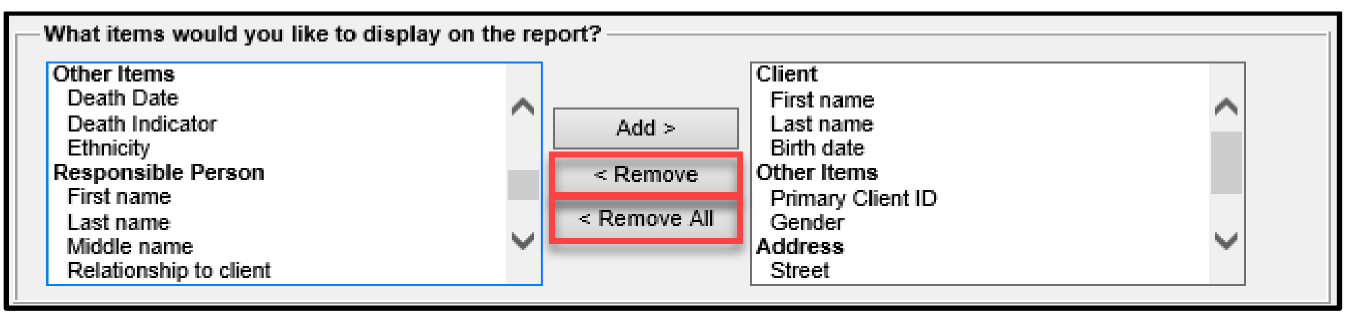

Figure 5: Removing Items to be Displayed

Section 2: "How would you like the report to be sorted?"

In the second 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 6: Choosing How to Sort*.

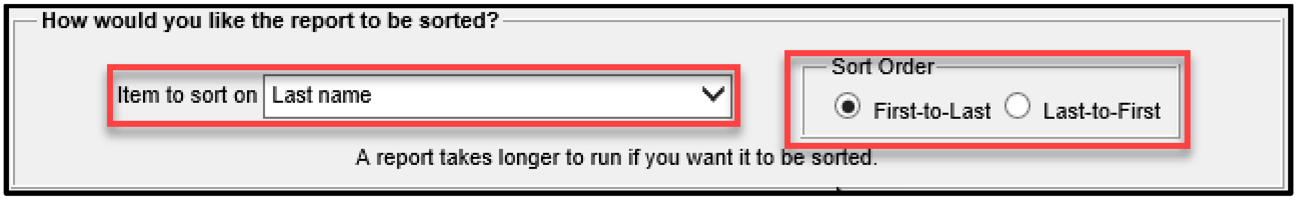

Figure 6: Choosing How to Sort

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 3: "How would you like to filter the data?"

<u>You don't have to enter anything</u> 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 7: 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 7/9/2015 and 7/9/2019.
- **Step 4**: Click the "Add/Save Edit" button to add this edit to the filter.

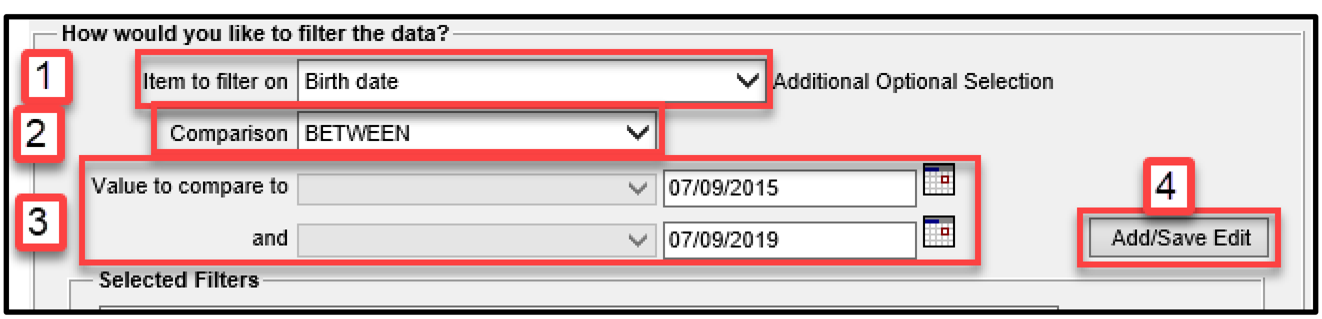

Figure 7: Building a Filter

See *Figure 8: Generating the Report* for the next steps:

- **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).

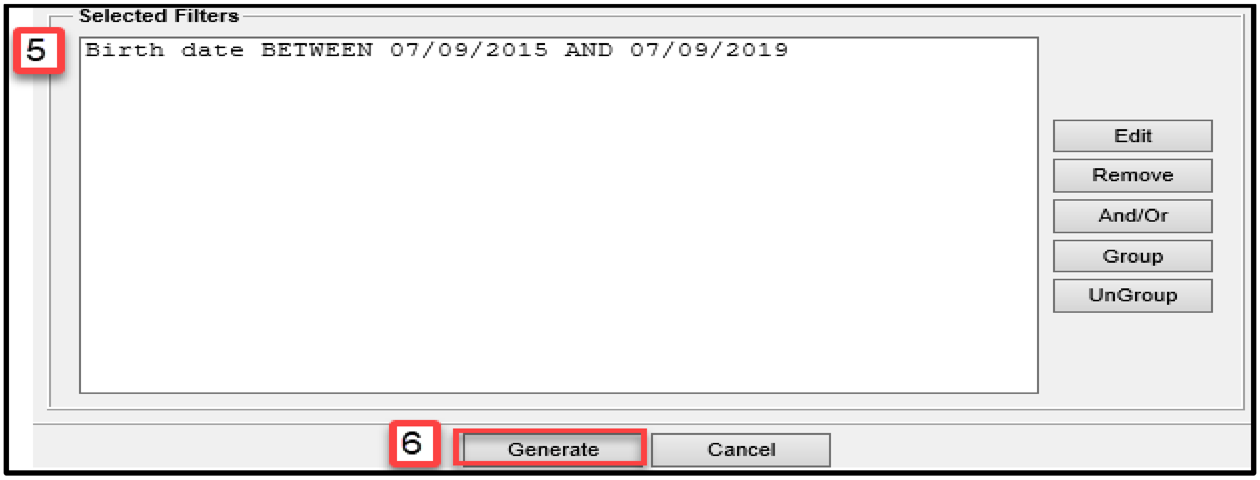

Figure 8: Generating the Report

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 9: Refresh Button*.

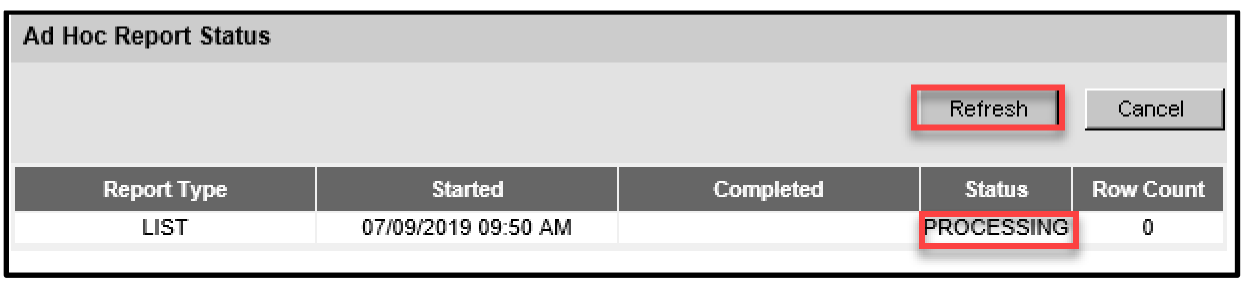

Figure 9: Refresh Button

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 10: The LIST Link to the Report.*

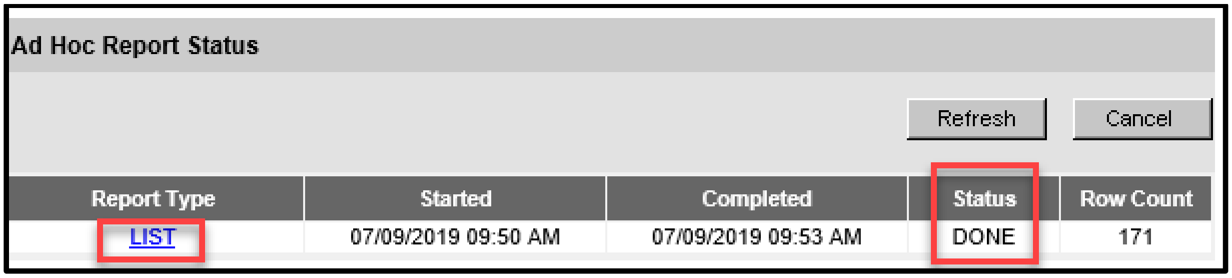

Figure 10: The LIST Link to the Report

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 11: Status Link to the Report*.

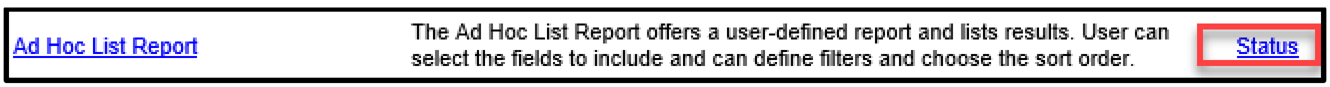

Figure 11: Status Link to the Report

Section 4: 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 7/9/2015 and 7/9/2019, 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 12: Filter with Two Edits*.

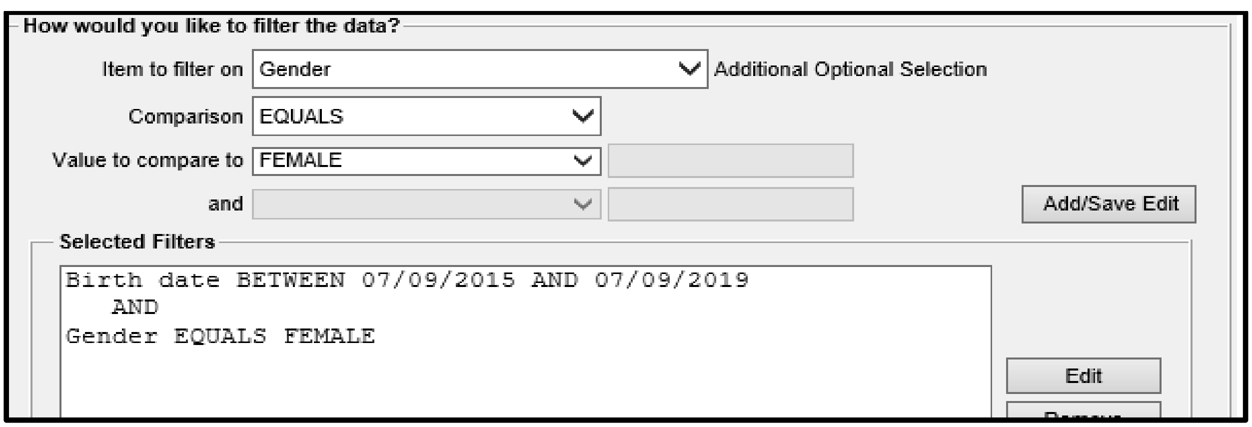

Figure 12: Filter with Two Edits

4A. Building Complex Filters: Edit Button

To change an edit line in the filter, click on the edit (in this case Birth date BETWEEN 07/09/2015 AND 07/09/2019) and then click the "Edit" button. You will be able to change that line. See *Figure 13: Edit Button.*

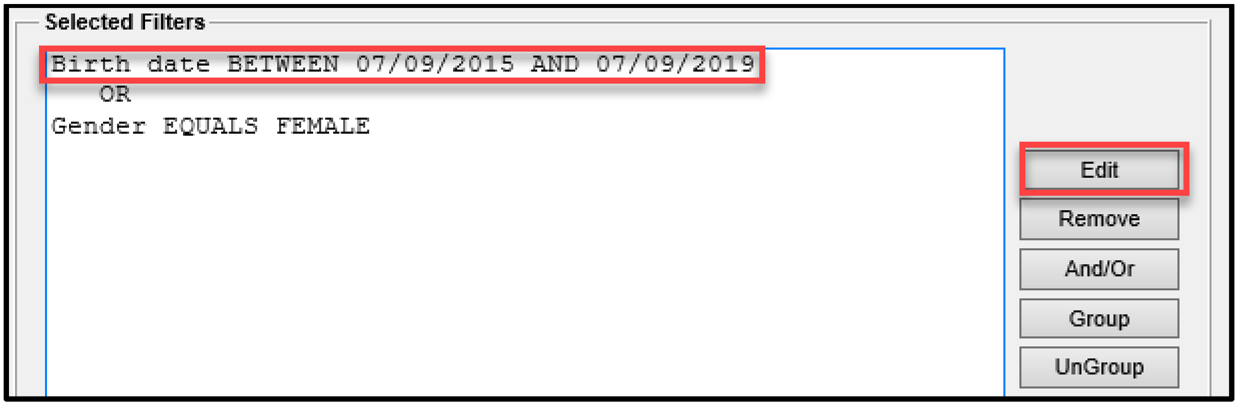

Figure 13: Edit Button

4B. 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 14: Remove Button*.

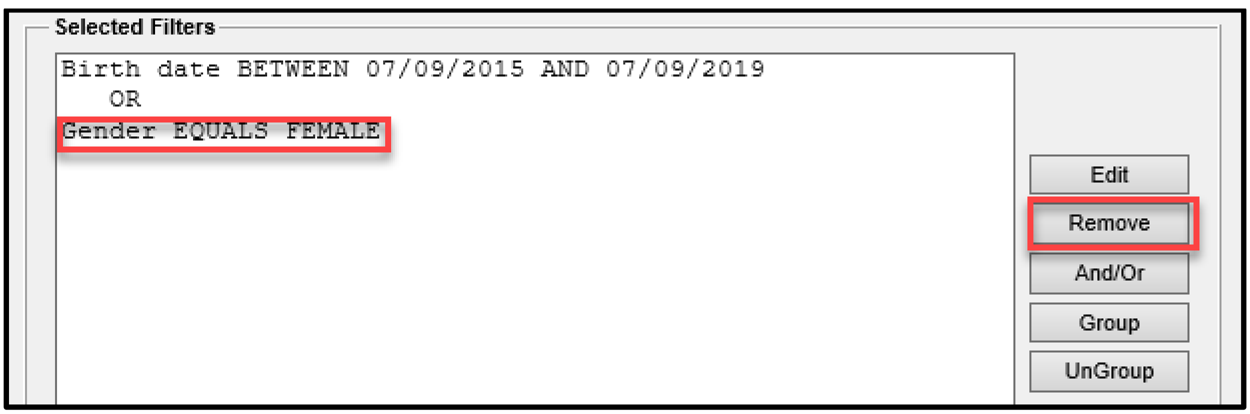

Figure 14: Remove Button

4C. 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 15: And/Or Button*.

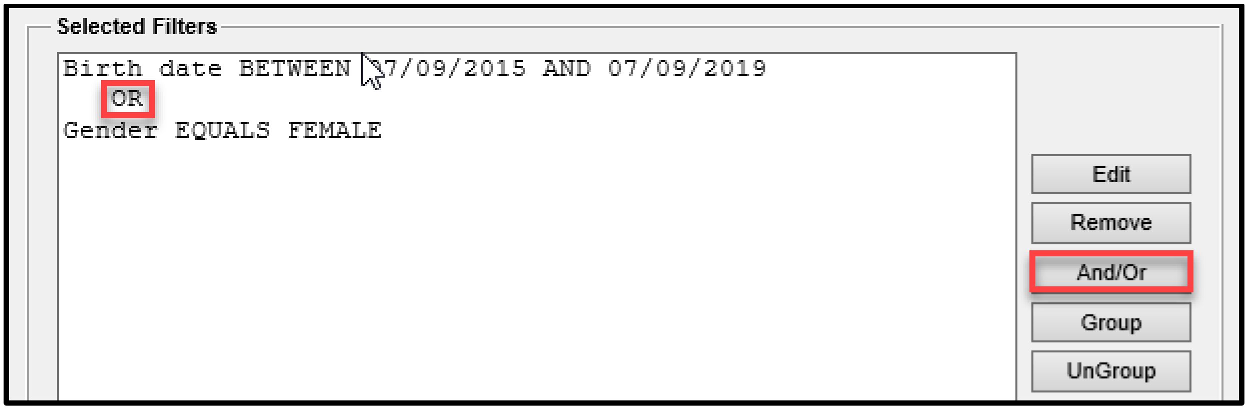

Figure 15: And/Or Button

4D. 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 16: Group Button*.

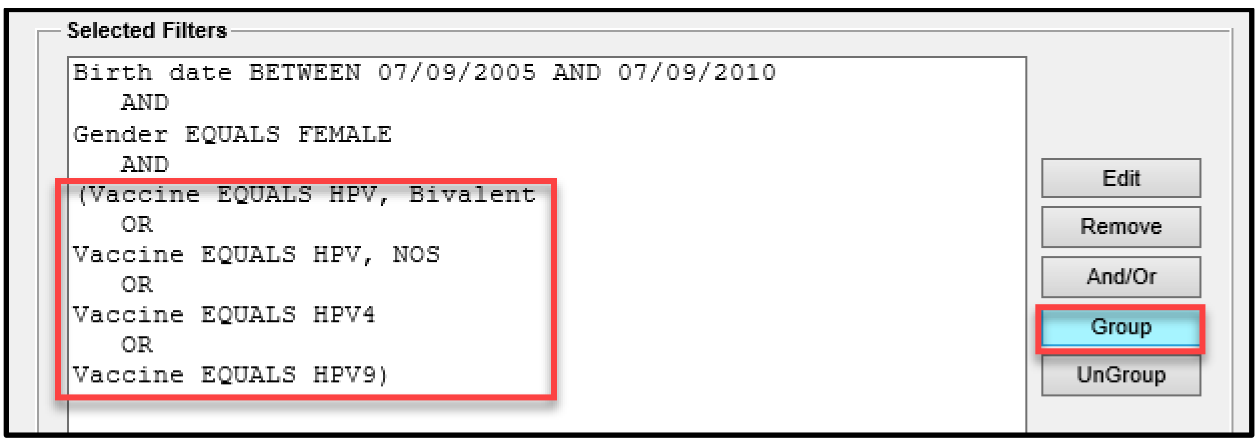

Figure 16: Group Button

4E. 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 17: UnGroup Button*.

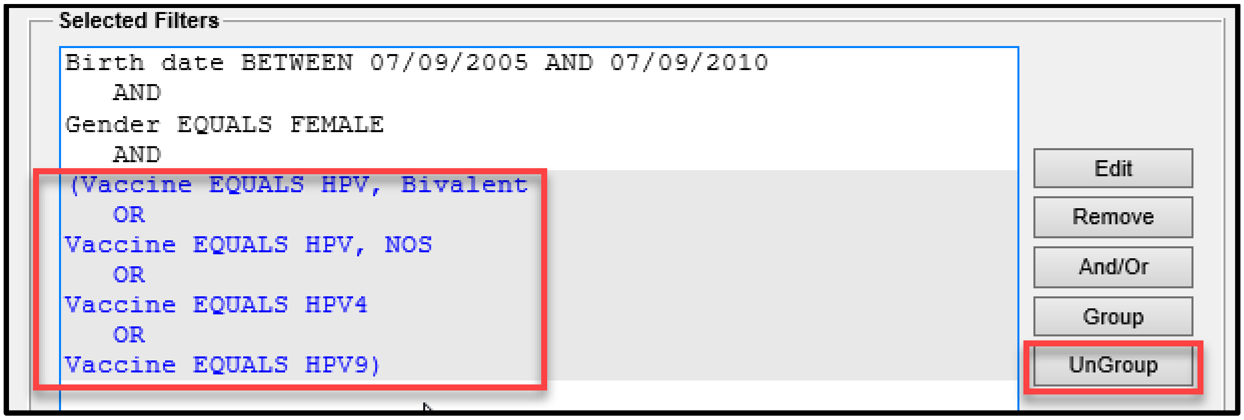

Figure 17: UnGroup Button

Section 5: 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 18: Inactive Status*) to Active (see *Figure 19: 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.

Figure 18: Inactive Status

Figure 19: Active Status

Section 6: How to Inactivate Clients

Clients will <u>not</u> be included in the Ad Hoc List if they have:

- An inactive status in the Organization Information tab of the client record, such as MOGE (Moved or Gone Elsewhere), Deceased, or Lost to Follow Up (see *Figure 20: Inactive Status and Reminder/Recall Flag*), or if "No" is selected for "Allow Reminder Recall Contact"; **OR**

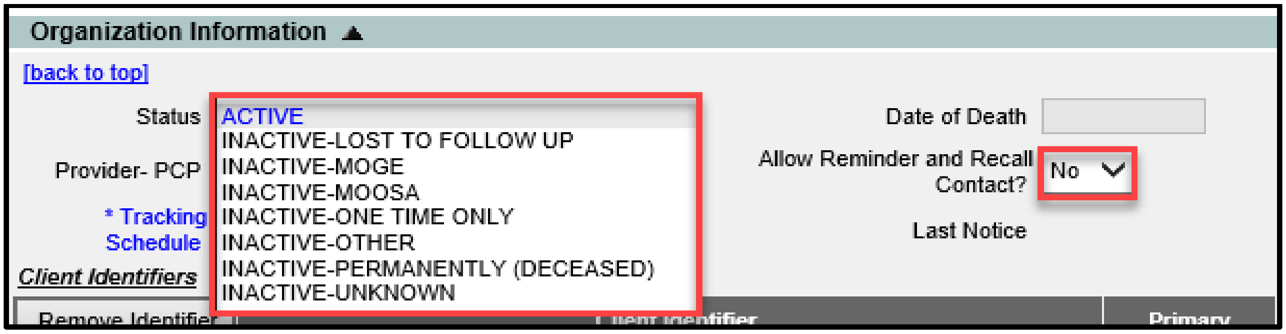

Figure 20: Inactive Status and Reminder/Recall Flag

- The “No Viable Address” box checked in the Address Information tab of the client record (see *Figure 21: No Viable Address Box*).

Figure 21: No Viable Address Box

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

ImmTrac2 Customer Support Team
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