



CT WiZ Reports Manual

Clinic Users

May 2022



Overview

This manual provides clinic users an overview of selected reports that are the most commonly used in CT WiZ. The reports can be used to optimize staff time and resources, and to improve clinical workflow. The manual is organized according to report function and aligns with the categories listed on the CT WiZ Reports page.



Users will be guided through each report including detailed sections on Purpose, Intended Audience, Location, Parameters (including step-by-step instructions and helpful tips), Results, and How to Use this Report. Appropriate screenshots and examples have been provided to help illustrate the steps to generate reports and accompanying outputs. Where applicable, related reports are cross-referenced and hyperlinked to support easy navigation.



Some reports can be quite large and may take several minutes to generate the output. If the report is too large to process, it may time out before processing is complete. To reduce processing time, users are encouraged to leverage the report filters on the main parameter screen of each report. Limiting the vaccination date range or restricting the report to a certain age range can significantly improve the processing time needed to produce the report. Note that some reports are required to be run overnight due to their size and complexity. CT WiZ will automatically schedule these reports to run during off-peak hours. The user will see results once logged in on the following day. Users are also cautioned against being too restrictive with their filter choices, especially with the use of optional parameters, because it may produce the unintended consequence of returning little or no data on the report output.



Several reports can be used to clean up data prior to running administrative or statistical reports, or before reminder/recall. These reports help providers identify and resolve patient duplicates, shots listed before date of birth, duplicate vaccinations, and other data quality issues. The How to Use this Report section for each report indicates when a report can be used to improve data quality.



Lightbulb icons are displayed throughout the CT WiZ Reports Manual to indicate helpful tips for generating or using the report.

To navigate this manual quickly and easily, utilize the interactive Table of Contents located on the following page. Click on the specific report to navigate directly to the appropriate page within the document.

NOTE: Some Internet browser configurations may cause Excel and PDF reports generated in CT WiZ to download rather than display. If a generated report does not display, check the bottom of your screen for the downloaded file. Click the arrow and choose Open to view the report or Show in Folder to navigate to the location on your computer where the report was saved. Web browsers Chrome and Firefox are recommended when using CT WiZ.

CT WiZ Support

- Visit [All About CT WiZ](#) for quick links to training materials and technical support.
- Need additional support? Submit a request to our [CT WiZ Helpdesk](#).

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Patient Reports



Official Immunization Record

Purpose

The Official Immunization Record report provides a Connecticut Department of Public Health Immunization Record for a particular patient. The record details vaccines administered, date given, age at the time of vaccination, and documented precautions/contraindications. Results also indicate whether patients have opted out of participating in CT WiZ.

Intended Audience

Clinic staff who:

- Print immunization records

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Patient section, locate the Official Immunization Record report.
- Click on the name of the report to open the report parameters page.



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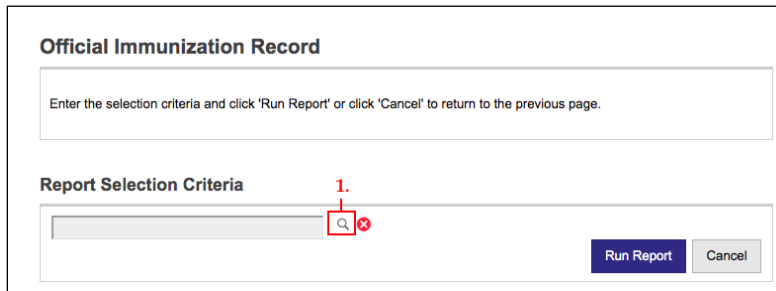
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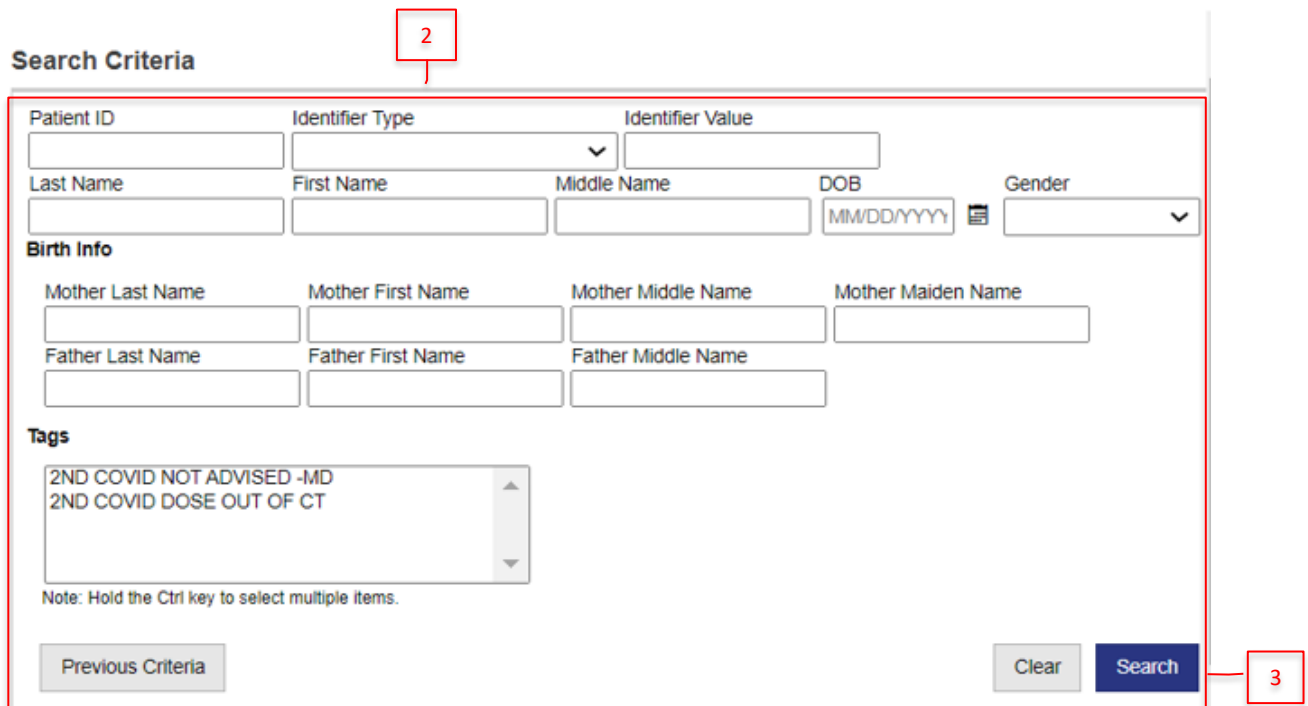
Parameters

Enter information into the report selection criteria.




1. Click on the magnifying glass to search for a patient.

- A pop-up box will display with a list of search parameters.



2. Enter one of the following patient identifiers:


- Patient ID
- Identifier Type + Identifier Value (e.g., Medicaid ID)
- Name (minimum requirement = first two letters of the first name and last name)

 Date of Birth and Gender are optional fields that can be used to further filter search results.

3. Click Search.

A pop-up box will display with search results.

The screenshot shows a pop-up window titled "Patient Search Results - 2 record(s)". It contains a table with two records. The first record is highlighted in grey. A red box with the number "4" is positioned above the first record, with a red arrow pointing to the name "MOUSE, MINNIE".

ID	Name	Gender	DOB
896095	MOUSE, MINNIE	F	12/26/1953
896040	MOUSE, MINNIE 125 MAIN ST HARTFORD, CT 06150	F	04/10/2019 


Buttons: "Revise" and "Cancel" are located at the top right and bottom right of the window.

4. Double click on the correct patient's name to view the immunization record.



To view a record for a different patient than displayed, click Revise.



A thumbs down icon () to the right of the patient's DOB indicates the patient has opted out of participating in CT WiZ.


- The Official Immunization Record page displays for the selected patient.

The screenshot shows the "Official Immunization Record" page. At the top, there is a text box with the instruction: "Enter the selection criteria and click 'Run Report' or click 'Cancel' to return to the previous page." Below this is a section titled "Report Selection Criteria" which contains a search input field with the text "MOUSE, MINNIE (896095)", a search icon, and a close icon. To the right of the search field is a blue button labeled "Run Report" and a grey button labeled "Cancel". A red box with the number "5" is positioned above the "Run Report" button, with a red arrow pointing to it.


5. Click Run Report.

Results

The report output provides a static PDF file of the patient's Official Immunization Record and can be saved or printed.





Connecticut Department Of Public Health
Keeping Connecticut Healthy
Connecticut Immunization Information System
Official Immunization Record



As of Date: May 12, 2021

This represents the Official State of Connecticut, Department of Public Health immunization record. This record contains immunizations reported to the Department of Public Health by your medical provider. If you believe this record is incomplete or incorrect please contact your medical provider.

MINNIE MOUSE
Date of Birth: 12/26/1953
Gender: FEMALE

 = Invalid Dose.  = Dose determined invalid by provider.

DTaP / TD / Tdap				Varicella (CPOX)			
Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination	Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination
1				1			
Polio				Meningococcal			
Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination	Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination
1				1			
Hib				HPV			
Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination	Vaccine		Date Given MM/DD/YYYY	Age at Time of Vaccination
1				1			

How to Use this Report

Results from the Official Immunization Record report can be used to view patient immunization details as documented in CT WiZ, such as Vaccine, Date Given, and Age at Time of Vaccination. The user can also view documented precautions/contraindications.



Invalid doses are indicated with an “!” icon.



Doses determined invalid by a provider are indicated with a “⊘” icon.

Patient Management Reports



Inactivate Patients

Purpose

The Inactivate Patients report provides a quick way to view a patient roster and mark patients as Inactive- Lost to Follow-Up or Inactive- No Longer a Patient.

Intended Audience

Clinic staff who:

- Conduct Reminder/Recall outreach
- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Patient Management section, locate the Inactivate Patients report .
- Click on the name of the report to open the report parameters page.



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Parameters

Enter information into the report selection criteria.

Inactivate Patients Cancel

Search Options


Provider **1.** COMMUNITY VACCINATORS Clinic COMMUNITY PEDIATRICS

Age Range From **2.** Age Range To Unit of Measure **3.** MONTHS Show All Patients Show Only Patients That Qualify For Lost to Follow-up **4.**

[Qualifies for Lost To Follow-up settings](#) **6.** Search

5. Last Name	First Name	Middle Name	Patient Id	Last Vaccination Date	Qualifies for Lost To Follow-up
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="checkbox"/>

1. Verify that the correct provider and clinic are displayed on the screen.
2. Enter an age range in the Age Range From and Age Range To fields to restrict results to patients within the specified age range.
3. Select a Unit of Measure (i.e., Months or Years) corresponding to the age range specified in step 2.
4. Use the radio buttons to select a patient option:
 - Show All Patients. Report output will include all Active patients at the selected clinic.
 - Show Only Patients That Qualify For Lost to Follow-up. Report output will only include patients who qualify for Lost to Follow-up designation (i.e., patient must have three reminder/recalls and no vaccinations within the last 120 days).
5. An alternate option is to search by patient name, ID, or last vaccination date.
6. Click Search to generate a patient list that corresponds to the parameters identified in steps 2-5.

 Click the Search dropdown arrow and select Clear to clear all fields.

The Inactivate Patients page will refresh to display a list of patients matching the search parameters.

Inactivate Patients Cancel

Search Options

Provider: Clinic:

Age Range From: Age Range To: Unit of Measure:

Show All Patients Show Only Patients That Qualify For Lost to Follow-up

[Qualifies for Lost To Follow-up settings](#) Search

Last Name	First Name	Middle Name	Patient Id	Last Vaccination Date	Qualifies for Lost To Follow-up
BEAR	Y			MM/DD/YYYY	
BEAR	YOGGI		944545	12/11/2019	7. - Action

Showing 1 to 1 of 1 entries ← Previous 1 Next →

7. Change a patient’s status by selecting the Action button and then the corresponding status change (i.e., No Longer a Patient).

A pop-up window will appear.

No Longer a Patient ?

Name: Patient Id:

Status:

Effective Date:

Notification Method:

Notification Date:

Reason:

Comment:

8.

8. Complete the required fields and select Update.

Results

A patient roster is displayed on the Inactivate Patients page for users to quickly identify and inactivate patients as needed. The roster lists Name, Patient ID, and Last Vaccination Date. If the patient qualifies for the Lost to Follow-up designation (i.e., three reminder/recalls and no vaccinations within the last 120 days), a check mark will appear in the Qualifies column.

Last Name	First Name	Middle Name	Patient Id	Last Vaccination Date	Qualifies for Lost To Follow-up
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>
BEAR	YOGGI		944545	12/11/2019	<input type="checkbox"/>

How to Use this Report

Results from the Inactivate Patients report can be used to quickly identify and inactivate patients as needed, as indicated in steps 7 and 8 above. It is recommended that clinics use this report to clean up their denominator prior to running Reminder/Recall reports or coverage statistics reports.

Patient Detail with Services

Purpose

The Patient Detail with Services report provides a patient-level line listing of vaccinations that were administered by the selected provider/clinic over a specified time period or for a specified age cohort. The report shows details for patients that have received vaccinations and had vaccines added but not administered for the provider/clinic selected. Historical vaccinations and invalid vaccinations are also included in the report output.

This report is particularly helpful for troubleshooting inventory discrepancies or identifying issues with an HL7 interface between an EHR and CT WiZ. The report can be viewed as a PDF or exported into an Excel spreadsheet or extract (i.e., flat file) for sorting or additional manipulation.


Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Manage inventory
- Monitor the HL7 interface
- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Patient Management section, locate the Patient Detail with Services report.
- Click on the name of the report to open the report parameters page.



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Parameters

Enter information into the report selection criteria.

Patient Detail with Services [i Learn More](#)

Cancel Run Report

6

Report Selection Criteria

Provider *
CVP TRAINING CLINIC REGION 4

Clinic *
CVP TRAINING CLINIC REGION 4

Vaccination Date Range
From: MM/DD/YYYY Through: MM/DD/YYYY

Date of Birth Date Range
From: MM/DD/YYYY Through: MM/DD/YYYY

Vaccination Created Date Range
From: MM/DD/YYYY Through: MM/DD/YYYY

Funding Source
[Dropdown]

Vaccines

Available Vaccines
ADENOVIRUS, TYPE 4
ADENOVIRUS, TYPE 7
ANTHRAX
ANTHRAX IG
BCG
COVID-19 MRNA (MOD)
COVID-19 MRNA (PFR)
COVID-19 UF
COVID-19 VECTOR-NR (JSN)
DIPHtheria ANTITOXIN
DT, IPV ADSORBED

Selected Vaccines (Default is ALL)

Note: hold the Ctrl key to select multiple items.

5 **Output Type** PDF EXCEL EXTRACT - Delimiter: |

1. Verify that the correct provider and clinic are displayed on the screen.
2. Use the filters to narrow the report results by the Vaccination Date Range, Date of Birth Date Range, and/or Vaccination Create Date Range.



The Vaccination Created Date Range is the date the vaccination was reported to CT WiZ through either direct entry or electronic reporting. This date may or may not be the same as the actual vaccination date.



At a minimum, either the Date of Birth Date Range or the Vaccination Date Range is required in order to proceed with running the report.

3. Select a Funding Source to filter results by BLENDED PUBLIC CVP or PRIVATE. Leave the default selection of ALL FUNDING SOURCES to include both options.
4. Select from the Available Vaccines and use the arrows to add and remove them to the Selected Vaccines (Default is ALL) section of the page.
5. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF, an Excel spreadsheet, or a delimited flat file extract. Use of the extract is not recommended for this report.
6. Click Run Report.

Results

The report output provides a detailed line-listing of vaccination services provided by the selected clinic. Output will include patient details such as Name, DOB, and ID number. It will also include details about each vaccination event including Vaccine Type, Date, Lot #, Funding Source, and patient's VFC Eligibility. Indicators for Historical and Invalid doses are also included.



The spreadsheet and flat file extract contain additional details not included on the PDF due to size/space restrictions.



CT WiZ Patient Detail with Services

May 12, 2021

Provider = CT DPH CLINIC, Clinic = CT DPH CLINIC, From Vaccination Date = 04/01/2019, Through Vaccination Date = 05/12/2021, Vaccine Types = (ALL VACCINES)

DUCK, DONALD (896064)		Default Clinic: CVP TRAINING CLINIC REGION 4							
DOB: 10/15/1985	Gender: Male	Patient Eligibility: Not VFC Eligible							
Date	Clinic	Type	Lot #	Fund Source	Eligibility	Historical?	Invalid?	Created By	Last Updated By
04/17/2019	CTDPH	Hep A, adult	2356487	PRIVATE	317			ADMINISTRATOR, SYSTEM	ADMINISTRATOR, SYSTEM
REYES, GEORGE (652713)		Default Clinic: COMMUNITY HEALTH SERVICES/PEDIATRIC							
DOB: 08/07/1991	Gender: Male	Patient Eligibility: VFC Eligibility Not Determined/Unknown							
Date	Clinic	Type	Lot #	Fund Source	Eligibility	Historical?	Invalid?	Created By	Last Updated By
04/17/2019	CTDPH	Hep A, adult	2356487	PRIVATE	VFC Eligibility Not Determined/Unknown			ADMINISTRATOR, SYSTEM	ADMINISTRATOR, SYSTEM
SECOND, JOEY (896070)		Default Clinic: CT DPH CLINIC							
DOB: 07/11/1980	Gender: Male	Patient Eligibility: 317							
Date	Clinic	Type	Lot #	Fund Source	Eligibility	Historical?	Invalid?	Created By	Last Updated By
04/17/2019	CTDPH	Hep A, adult	2356487	PRIVATE	317			ADMINISTRATOR, SYSTEM	ADMINISTRATOR, SYSTEM
SKYWALKER, LUKE (896055)		Default Clinic: CVP TRAINING CLINIC REGION 4							
DOB: 04/10/2008	Gender: Male	Patient Eligibility: VFC Eligible - Underinsured At FQHC							
Date	Clinic	Type	Lot #	Fund Source	Eligibility	Historical?	Invalid?	Created By	Last Updated By
05/30/2019	CTDPH	Hep B, ped/adol	ABC123	BLENDEN PUBLIK	VFC Eligible - Underinsured At FQHC			KING, LAURA	KING, LAURA
Totals									
Patients			4						
Administered Vaccinations			4						
Added But Not Administered Vaccinations			0						
Historical Vaccinations			0						
Invalid Vaccinations			0						
Administered + Historical Vaccinations			4						

How to Use this Report

Results from the Patient Detail with Services report can be used to verify that all doses administered by the clinic have been reported to CT WiZ. Results can also be used to identify possible data quality issues for resolution and/or training opportunities. Run this report on a weekly basis to determine if any immunizations or patients are missing from CT WiZ. Any missing data must be manually entered in CT WiZ or resubmitted through the EHR.





Use the Excel output to sort these details by specific parameters (i.e., vaccination date, lot number, reporting method, etc.).


- Compare the list of patients from the EHR to the patients on Patient Detail with Services report to confirm whether all doses administered were reported to the IIS. If not, this could indicate a delay in direct entry reporting or a problem with the HL7 interface.
- Use in conjunction with inventory reports (i.e., [Aggregate Administered Doses](#), [Inventory On-Hand](#), and [Inventory Transaction Inquiry](#)) to help troubleshoot a lot number or inventory discrepancy.



For data quality, look for any patients where the lot number is blank, or the patient's dose level eligibility is unknown. Correct if possible and use it as an opportunity to educate and train staff.

 Review the method used to report the immunization to CT WiZ (i.e., HL7, direct data entry, etc.) and which user was associated with the action.

 If Historical indicator is marked, the vaccine was entered into the system as a historical vaccination.

 If Invalid indicator is marked, the vaccine was manually invalidated. This report does not capture vaccines that were marked invalid automatically by the CT WiZ Recommender.

Patient Reminder-Recall

Purpose

The Patient Reminder/Recall report is used to identify patients who are due for a vaccination in the future (Reminder) or patients who are currently overdue for a vaccination (Recall). A patient is only included in your report if they have an active status at your clinic or your clinic gave a prior dose. Previously run Reminder/Recall reports are saved and can be re-run to reflect any changes in vaccination status for the patient cohort since the report was last generated. A user must have delete privileges in the CT WiZ Reports module to remove a report from the list.

Patients can be identified through targeted selection criteria, including date of birth, age range, vaccine(s) due, dose number within a vaccine series, and more. Forecasting logic is based on Advisory Committee on Immunization Practices (ACIP) recommendations and is provided to assist with clinical decision making.



Reminder/Recall activities are most effective when carried out regularly and consistently.



Reminder/Recall reports run overnight.



Updating your patient roster regularly will help generate reports that are up to date and will save you time in the long run.



Clinics should consider developing a process for maintaining their active patient roster. For example, if a patient moves and is requesting their medical records, that is a perfect time to update the roster for your clinic.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Monitor the HL7 interface
- Conduct Reminder/Recall outreach

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Patient Management section, locate the Patient Reminder/Recall report.
- Click on the name of the report to open the main Reminder/Recall page.

CT WIZ COMMUNITY VACCINATORS, COMMUNITY PED... PATIENT SEARCH

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Parameters

On the initial Patient Reminder/Recall page, users have the option to view a previous report or run a new report. To view previously run reports, click on the **Filter** button and previously run reports will appear on the bottom of the page.

To create a new Reminder/Recall report:

Patient Reminder/Recall Cancel Add Reminder/Recall Run

Search Criteria 2

Provider/Clinic: CVP TRAINING CLINIC REGION 4, CVP TRAINING CLINIC REGION 4 (4444) 1
SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

Run Name

Run Schedule Date
From: 01/29/2022 Through: 04/29/2022

Run Completed Date
From: MM/DD/YYYY Through: MM/DD/YYYY

Filter

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed	
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0	? View
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6	? View

1. Verify that the correct provider and clinic are displayed on the screen.
2. Click Add Reminder/Recall Run to open the report parameters page.

The Patient Reminder/Recall page will refresh to display additional parameters.

Patient Reminder/Recall

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page. i

Add

Create
Cancel

Run Name 3

Provider *

4
CVP TRAINING CLINIC REGION 4

Clinic *

CVP TRAINING CLINIC REGION 4

Report Type 5

Patient Default Clinic

Vaccination Clinic

Run Schedule Date * **Run Completed Date** 6

MM/DD/YYYY MM/DD/YYYY

Reminder/Recall Date Range * 7

From: MM/DD/YYYY Through: MM/DD/YYYY

Age Range * 7

From: Through: UOM: MONTHS

Date of Birth Date Range * 7

From: MM/DD/YYYY Through: MM/DD/YYYY

Options To Target Patients Included For Reminder/Recall

City Zip Code 8

Gender

Ignore Setting For "Do Not Include Patient in Reminder/Recall"?

Only Include Patients With Address (i.e., Street Address, City, State, Zip)?

Increment Patient Reminders/Recall Count?

Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination

Generate Reminder/Recall Event?

Include Patients Due For Vaccinations (Reminders)?


Include Patients Overdue For Vaccinations (Recalls)?


Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include


Only include patients with 2 or more non- Influenza/H1N1-09/COVID-19 vaccinations?


Exclude patients with one or more vaccine refusals?

3. Enter a Run Name. This is used to identify a specific Reminder/Recall run on the main Reminder/Recall listing screen.
4. Verify the correct provider and clinic are selected from the drop-down menu.
5. Select a Report Type. Options include Patient Default Clinic (for medical homes) and Vaccination Clinic (for non-medical homes). Use the radio button to indicate whether reminder/recalls should be pulled by default clinic or vaccinating clinic.


 When creating a report for routine vaccinations, users should select the report type of Patient Default Clinic.


 The report type of Vaccination Clinic better serves pandemic and flu vaccines where the patient default clinic is not updated when the vaccination is documented.


 For COVID-19 vaccinations, please select Vaccination Clinic.

 Pharmacies, Health Departments and Hospitals should use Vaccination Clinic to find who needs reminder or recall for an additional dose because they gave a prior dose.


6. Enter a Run Schedule Date.


 Reminder/Recall reports can be very large and resource intensive depending on the selected query parameters. Scheduling the report allows this report to be run during off-peak hours. This report will run overnight on the Run Scheduled Date indicated.


 The Run Completed Date is a read-only field and will be system-populated once the run is complete.

 For COVID-19 reports, it is suggested to use a From date of 12/1/2020 and today's date as the Through date.

7. Use the filters to narrow the report results by Reminder/Recall Date Range, Age Range, and Date of Birth Range. These fields restrict the list of patients to only those who need or are due a vaccination within these parameters.


 Reminder/Recall Date Range restricts the list of patients to only those patients who need or are due a vaccination within these parameters as of the date the report is generated. This field is required.

 Either Age Range or Date of Birth Range is required, not both.

 Age Range requires a Unit of Measure (UOM) of months or years. Select UOM type from the drop-down menu.


8. Use the filters listed under "Options To Target Patients Included For Reminder/Recall" to restrict the Reminder/Recall to specific user-defined parameters. These filters are optional.

This section includes the following options:

- City. Targets patients who reside in a specific city.
-  The city indicated will be used to match against the city drop-down on the patient demographics screen.
- Zip Code. Targets patients who reside in a specific Zip Code.
- Gender. Narrows the results by patient gender.
- Ignore Setting For “Do Not Include Patient in Reminder/Recall”. Checking this option will allow patients to be included in the Reminder/Recall regardless of whether or not the Do Not Send Reminders option on the patient demographics screen has been indicated.
- Only Include Patients with Address. Limits Reminder/Recall to only those patients with a complete address (i.e., Street Address, City, State, Zip).
- Increment Patient Reminders/Recall Count. Indicates this Reminder/Recall should be included when counting the number of Reminder/Recalls for a patient. The number of “countable” Reminder/Recalls is utilized in other areas of the application that provide functionality to inactivate patients or exclude patients with an “X” number of Reminder/Recalls without a response. This option should be left unchecked when doing a test run or running a Reminder/Recall for informational or planning purposes.
 - Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination. Enter a number here to indicate that patients with “X” number of Reminder/Recalls without a vaccination be excluded from the Reminder/Recall. Only those Reminder/Recalls that have been indicated to count towards the patient Reminder/Recall count will be examined here.
- Generate Reminder/Recall Event. Check this option to automatically log the Reminder/Recall event on the Patient Events page for those included in the report. This is nothing more than documentation and need not be checked for Reminder/Recalls to function properly.
- Include Patients Due for Vaccinations (Reminders). Targets patients coming due for vaccinations. Patients will be included if they are due for one or more vaccinations during the period specified by the minimum and maximum reminder dates.
- Include Patients Overdue for Vaccinations (Recalls). Includes patients who are overdue for one or more vaccinations as of the minimum reminder date (minus any offset).
 - Minimum Number of Days Past Due to Include. Limits recalls by indicating a minimum number of days overdue for patients to be included. For example, entering “30” indicates that patients must be *at least* 30 days overdue to be included in the Reminder/Recall. Leave blank or use 0 (zero) to include patients who are overdue as of the minimum reminder date.
 - Maximum Number of Days Past Due to Include. Limit recalls by indicating a maximum number of days overdue for patients to be included. For example, entering “30” indicates that patients must be *less than* 30 days overdue to be included in the Reminder/Recall. Leave blank or use 0 (zero) to include patients who are overdue as of the maximum reminder date.

- Only include patients with 2 or more non-Influenza/H1N1-09 Vaccinations. Excludes patients who do not have at least two vaccinations that are not part of the influenza or H1N1 groups.
- Exclude Patients with One or More Vaccine Refusals. Excludes patients who have one or more vaccine refusals indicated in CT WiZ.

9. Select the vaccine series to include in the Reminder/Recall run. Only patients needing a vaccine from the selected series will be included.


 The dose number field is optional and will limit results to patients needing the specific vaccine series and dose required. For example, by selecting Varicella and entering a “2” in the dose field, the results will only include patients needing a second dose of the Varicella vaccine.

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series) 9

<input type="checkbox"/>	Vaccine Series	Dose Number
<input checked="" type="checkbox"/>	COVID-19	<input type="text"/>
<input checked="" type="checkbox"/>	DTaP / TD / Tdap	<input type="text"/>
<input checked="" type="checkbox"/>	H1N1-09	<input type="text"/>
<input checked="" type="checkbox"/>	Hep A	<input type="text"/>
<input checked="" type="checkbox"/>	Hep B	<input type="text"/>
<input checked="" type="checkbox"/>	Hib	<input type="text"/>
<input checked="" type="checkbox"/>	HPV	<input type="text"/>
<input checked="" type="checkbox"/>	Influenza	<input type="text"/>
<input checked="" type="checkbox"/>	Meningococcal	<input type="text"/>
<input checked="" type="checkbox"/>	MMR	<input type="text"/>
<input checked="" type="checkbox"/>	Pneumococcal	<input type="text"/>
<input checked="" type="checkbox"/>	Polio	<input type="text"/>
<input checked="" type="checkbox"/>	Rotavirus	<input type="text"/>
<input checked="" type="checkbox"/>	Varicella (CPOX)	<input type="text"/>
<input checked="" type="checkbox"/>	Zoster	<input type="text"/>

10
Create
Cancel

10. Once all Reminder/Recall parameters have been indicated, click Create to schedule the run.

 An automated job is run every night that processes all Reminder/Recall runs scheduled for that date. When it has finished, the Run Completed Date will appear on the Patient Reminder/Recall page to indicate that reports can now be generated against the list of patients.

💡 Once a Reminder/Recall run has been created, the criteria cannot be edited. If a Reminder/Recall run is created in error, simply delete it and create a new one.

💡 As a general rule, the user will want to limit the use of optional parameters to as few as possible. All criteria are used inclusively to determine the patients included in the report (i.e., criteria A AND criteria B AND criteria C).

💡 Patients will only be included in the report if they have an Active status at the clinic and your clinic gave a prior dose. The status of the patient can be found on the Programs screen under the Patients module.

💡 Run separate reports for Reminders and Recalls – the report does not differentiate between a Reminder and a Recall.

💡 Run smaller reports – they are easier to manage and less likely to time out.

💡 Multiple reports can be generated to cover all patients and you can stagger them over different days.

💡 Use the dose box by the vaccine/s to help target the data you are looking to generate.

11. Log in to CT WiZ the following day to view results.

To view results or generate address labels for a previously run report:

The screenshot shows the 'Patient Reminder/Recall' interface. At the top right, there are 'Cancel' and 'Add Reminder/Recall Run' buttons. Below is a 'Search Criteria' section with a dropdown arrow. The 'Provider/Clinic' field is set to 'CVP TRAINING CLINIC REGION 4, CVP TRAINING CLINIC REGION 4 (4444)' and has a red box labeled '1' around it. Below this is a 'Run Name' field. The 'Run Schedule Date' section has 'From' and 'Through' date pickers, with '01/29/2022' and '04/29/2022' respectively, and a red box labeled '3' around the 'Through' date. The 'Run Completed Date' section has 'From' and 'Through' date pickers with 'MM/DD/YYYY' placeholders. To the right of these fields is a 'Filter' button with a dropdown arrow, and a red box labeled '2' around it. Below the search criteria is a table with columns: Provider, Clinic, Run Name, Run Schedule Date, Run Completed Date, Reminder/Recall From Date, Reminder/Recall Through Date, # of Patients in Run, and # of Patients Assessed. The first row has a red box labeled '4' around the 'View' button. The second row has a 'View' button with a dropdown arrow.

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6

1. Verify that the correct provider and clinic are displayed on the screen.
2. Click the Filter button to see the Reminder/Recall reports that you have already created at the bottom of the page.

3. If you have a long list, use the filter options to search the list of Reminder/Recall runs by entering specific search criteria (e.g., run name, provider name) in the blank boxes at the top of the list, then press Enter on your keyboard.
4. To view the parameters selected for this Reminder/Recall run, click on the View button for the run you wish to view.



If the Reminder/Recall list has already been created, the criteria may only be viewed and not changed.

Previously run reports can be deleted by users who have been assigned delete privileges for the Report module. To delete a Reminder/Recall:

Patient Reminder/Recall											
		MM/DD/YYYY		MM/DD/YYYY						Cancel	Add Reminder/Recall Run
										Filter	
Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed			
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0	1	View	
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6	?	View	

1. Click the View button for the Reminder/Recall to be removed.

The Patient Reminder/Recall edit page will display with criteria selected when the report was initially run.

Edit

?

Cancel

Run Name **Number of Patients in Run: 6**
 VACCINATION CLINIC **Number of Patients Assessed: 6**

Provider/Clinic : CVP TRAINING CLINIC REGION 4 , CVP TRAINING CLINIC REGION 4
 SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE X

Report Type

Patient Default Clinic
 Vaccination Clinic

Run Schedule Date * **Run Completed Date**
 04/14/2022 [calendar] 04/15/2022 [calendar]

Reminder/Recall Date Range *
From: 01/01/2022 [calendar] **Through:** 04/14/2022 [calendar]

2. To delete this Reminder/Recall, scroll to the bottom of the page and select Delete.

<input checked="" type="checkbox"/>	Rotavirus	
<input checked="" type="checkbox"/>	Varicella (CPOX)	
<input checked="" type="checkbox"/>	Zoster	

?

Delete — 2.

Cancel

Results

The Patient Reminder/Recall report provides a number of output options for the user. To view the outputs, click on the Drop-Down Arrow to the right of the View button.

Patient Reminder/Recall

Cancel Add Reminder/Recall Run

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed	
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0	View
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6	View
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	PATIENT DEFAULT CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	16		
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	TEST 2	04/14/2022	04/15/2022	11/01/2021	04/14/2022	9		
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	COVID-19 1/12/2022 - 4/12/2022	04/12/2022	04/13/2022	01/12/2022	04/12/2022	0		

Showing 1 to 5 of 5 entries

← Previous 1 Next →


- VIEW
- REPROCESS
- UNVACCINATED REPORT
- REPORT
- EXTENDED REPORT
- DYMO LABELS
- AVERY LABELS
- POSTCARD
- FULL EXTRACT
- AUTO-DIALER EMAIL EXTRACT
- AUTO-DIALER PHONE NUMBER EXTRACT

See below for a description of each option.

- Note: Use of the Reprocess feature is not recommended at this time.
- Unvaccinated Report. Lists patients that correspond to the Reminder/Recall criteria for the associated Reminder/Recall that have not returned for immunizations since Reminder/Recall was last generated. The report includes name, contact information, patient vaccination history, and immunization recommendations. The Unvaccinated Report displays as a PDF that can be printed and/or saved.
- Report. Lists ALL patients that correspond to the Reminder/Recall criteria for the associated reminder/recall. The report includes name, contact information, patient vaccination history, and immunization recommendations. The Report displays as a PDF that can be printed and/or saved.



This report can also be used as a call list for patient reminders.



CT WIZ Reminder

April 09, 2020

Reminder Criteria

Reminder Run Name: JAN 2020 TEST	Run Schedule Date: 01/08/2020	Run Completed Date: 01/09/2020
	Reminder Date From: 01/01/2020	Reminder Date Through: 01/08/2020
	# of Patients in Run: 53	# of Patients Assessed: 1314

Vaccine Series: DTaP / TD / Tdap - All, Polio - All, Hib - All, Pneumococcal - All, Rotavirus - All, Hep A - All, Hep B - All, MMR - All, Varicella (CPOX) - All, Meningococcal - All, HPV - All, Influenza - All, H1N1-09 - All, Zoster - All

Other Criteria: Include Patients Due For Vaccinations (Reminders)? Y

Provider: COMMUNITY VACCINATORS
Clinic: COMMUNITY PEDIATRICS

Age Range From (months): 2 Age Range Through (months): 60

School Dist: ALL SCHOOL DISTRICTS School: ALL SCHOOLS VFC Eligibility:


City: County: Zip: Gender: Both


BEAR, YOGGI (944545) - DOB: 11/01/2019		Home Phone: 860-890-1488	DTAP (1), HEP B, PED/ADOL (1), HIB (PRP-T) (1), PCV13 (1),
County:		Work Phone: 860-890-1488	POLIO-IPV (1)
		Cell Phone:	
Gender: Male		Email:	
Reminder Date: 01/01/2020	Age At Date: 0Y 2M 0D	Primary Contact:	Relationship:
VFC Eligibility:		Most Recent Refusal:	
Default Clinic: COMMUNITY PEDIATRICS (C0006P405X)		Primary Insurance:	
Most Recent Immunization Date: 12/11/2019	Most Recent Immunization Clinic: C0006P405X		
Immunization History: ROTAVIRUS(12/11/2019)			


- **Extended Report.** Very similar to “Report” in style and content but also includes language information. The Extended Report displays as a PDF that can be printed and/or saved.
- **Dymo Labels.** Generate a set of address labels designed to be printed on a Dymo Label printer using Dymo address labels. These labels are based on the “Report” option results.
 - 💡 Only documented mailing addresses will be printed on the labels. Patients with only a physical address documented in CT WiZ will display on the labels but no address will be printed.
 - 💡 The top right-hand corner of the label includes the language code for the patient on the label, which can be used to place the label on language specific postcards if desired.
- **Avery Labels.** Generate a set of address labels designed to be printed on Avery 5160 style labels. These labels are based on the “Report” option results.
 - 💡 Only documented mailing addresses will be printed on the labels. Patients with only a physical address documented in CT WiZ will display on the labels but no address will be printed.
 - 💡 When printing, indicate to Adobe Reader that it should not attempt to fix the report to fit within the margins. This may cause the printer to print outside of the label margins.
 - 💡 The top right-hand corner of the label includes the language code for the patient on the label, which can be used to place the label on language specific postcards if desired.
- **Postcard.** Formatted to print addresses on pre-printed reminder postcards.
- **Full Extract, Auto Dialer Email Extract and Auto Dialer Phone Number Extract.** Downloads a csv. file with the patient data for the Reminder/Recall in a comma delimited format. This can then be imported into Excel for mail merge or other uses.
 - 💡 The data can be saved by copying the contents of the browser window and pasting into another application or file.


How to Use this Report

Results from the Patient Reminder/Recall report can be used by providers to improve their vaccination coverage rate by identifying patients in need of immunization services. The report will identify patients who have missed or are coming due for vaccinations.

 Providers are encouraged to run Reminder/Recall on a routine basis (monthly or quarterly) for targeted populations (0-36 months and 13-17 years).

 The “Report” option will display vaccination updates that take place after the initial run was generated and can be reviewed over time to evaluate the success of Reminder/Recall activities. The “Unvaccinated Report” option will continue to display patients who still need vaccinations.

 The Full Extract option allows clinic staff to view report information in Excel for sorting and other uses.

 Use returned mail as an opportunity to update addresses and/or inactivate patients that may no longer live within the clinic’s service area.

Patient Roster

Purpose

The Patient Roster report provides a list of patients associated with a clinic according to specified parameters. The report is useful for administrative functions related to patient management. Results can be viewed as a PDF or exported into an Excel spreadsheet or extract (i.e., flat file) for sorting or additional manipulation.

Intended Audience

Clinic staff who:

- Conduct Reminder/Recall outreach
- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Patient Management section, locate the Patient Roster report.
- Click on the name of the report to open the report parameters page.

The screenshot shows the CT WiZ Reports page. On the left is a navigation menu with the following items: Home, Patients, Immunizations, Education, Inventory, Clinic Tools, Reports (highlighted with a red box), and HL7 Management. The main content area is titled 'Reports' and contains several sections:

- Patient**: Batch Patient Administrative Record, IZ History/Risk/Recommendations, Official Immunization Record, Patient Administrative Record, Patient Cohorts
- Forms / Informational Documents**: ACIP Child and Adolescent Immunization Schedule, ACIP Adult Immunization Schedule, Clinic Contact Listing, Product Listing, Vaccine Information Statements (VIS)
- CT Forms and Resources**: Training Materials, Technical Support, Application Help
- Patient Management**: Birth Vaccinations, Inactivate Patients, Patient Detail with Services, Patient List By Insurance Source, Patient List/Counts By Clinic Report, Patient Reminder/Recall, Patient Roster (highlighted with a red box), Patient VFC Eligibility History, Patients By Birth Facility Type

Parameters

Enter information into the report selection criteria.

Patient Roster Cancel Run Report **9.**

Report Selection Criteria

Provider *
COMMUNITY VACCINATORS

Clinic *
COMMUNITY PEDIATRICS

County of Residence *
(ALL) — 2.

Group Report Totals by — 3.
 Provider/Clinic
 County

Vaccination Date Range
From: MM/DD/YYYY Through: MM/DD/YYYY — 4.

Age Range
From: Through: UOM: — 5.



Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations? — 6.

Patient Status (Clinic) — 7.
ACTIVE
INACTIVE
DECEASED

Note: hold the Ctrl key to select multiple items.


Output Type PDF EXCEL EXTRACT - Delimiter: | — 8.


1. Verify that the correct provider and clinic are displayed on the screen.
2. Select a County of Residence for the patients to be included in the report. Leave selection as default value of ALL to include patients who may reside in any Connecticut county.
3. Use the radio buttons to select the grouping by which to display report results (i.e., Group Report Totals by):
 - Provider/Clinic. Provides a list of patients grouped by their default provider and clinic.
 - County. Provides a list of patients grouped by their county of residence.
4. Enter a Vaccination Date Range to filter results by vaccinations given during the specified time frame.

5. Enter an Age Range to restrict the list of patients to only those patients whose age is within the specified parameters as of the date the report is generated. Use the UOM field to indicate the Unit of Measure (e.g., Month or Year) used to interpret the Age Range values.
6. Checkmark the box for “Exclude Patients with Less than 2 non-Influenza/H1N1-09 Vaccinations” to remove patients from the list if they do not have at least two non-influenza or H1N1 vaccinations.
7. Select a Patient Status option to restrict the results to only Active, Inactive, or Deceased patients.
 -  More than one status type can be selected by holding the Ctrl key.
 -  If no selection is made, results will include all patient status types.
8. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF, an Excel spreadsheet, or a delimited flat file extract. Use of the extract is not recommended for this report.
9. Click Run Report.

Results

The report provides a current roster of patients associated with the selected clinic according to the specified parameters. Patients are listed by either patient county of residence or provider/clinic. Output includes patient information such as Patient ID, Name, Age, Date of Birth, as well as Last Vaccination Date and Clinic Status (i.e., Active, Inactive, Deceased). Inactive Reason will also be indicated for relevant patients. Summary totals are provided at the end of the report.

 The report is sorted by patients’ clinic status, then last name and first name. This allows for Active patients to be grouped at the beginning of the report, followed by Inactive patients and then Deceased patients.

 Deleted patients and patients who opted out of CT WiZ are not included in the results.



CT WIZ Patient Roster

February 20, 2020

Provider = COMMUNITY VACCINATORS, Clinic = COMMUNITY PEDIATRICS, County = (ALL), Group By = Provider/Clinic, Age From = 3, Age Through = 4, Age Unit of Measure = MONTHS, Vaccination Date From = 12/12/2019, Vaccination Date Through = 02/20/2020, Exclude = N

Provider/Clinic: COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS

Patient ID	Last Name	First Name	Age	Date of Birth	Last Vac Date	Clinic Status	Status Eff Date	Inactive Reason
944803	ALABAMA	FRED	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944886	BOWLING	BARRY	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944794	GOOFY	DOG	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944808	KING	FRED	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944893	LOVE	GAGA	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944783	MADONNA	HAILY	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944787	ROBIN	RED	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	
944804	SUMMERTON	FRED	0Y 3M 19D	11/01/2019	12/12/2019	ACTIVE	12/12/2019	

COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS

Patient Totals

Active: 8
 Inactive: 0
 Total: 8

Report Patient Totals

Total Patients: 8
 Total Active: 8

How to Use this Report

Results from the Patient Roster report can be used to view a roster of patients associated with the clinic according to selected parameters.

This information can be used to identify patients who were vaccinated on a specific date (e.g., if there are concerns about sub-potent doses following a temperature excursion). The report can also be used to identify patients by clinic status (i.e., Active, Inactive, Deceased).

Use the Excel output to sort these details by specific parameters (i.e., Age, Last Vac Date, Clinic Status).

Run this report prior to running a Reminder/Recall or coverage assessment in order to confirm the Active patient list. If needed, a patient's status with the clinic can be changed to Inactive or Deceased by using the [Inactivate Patients](#) report. Reasons that a patient may be inactivated:

- Clinic has received notification that the patient has moved out of the area or the clinic has received a medical record transfer request and the patient is now receiving services elsewhere.
- Use Last Vac Date to identify children (0-36 months) that have not received vaccination services at the clinic in more than 12 months. *Note: for older children and adolescents, use the date of last visit to the clinic since vaccination schedules become more spread out.*

Coverage Statistics Reports



Coverage Assessment Snapshot Reports

Purpose

The Coverage Assessment Snapshot Reports allow clinics/providers to use childhood and adolescent immunization data to run various IQIP* coverage reports, including coverage assessments by age and vaccine series/antigen, Invalid Dose Patient Listing, Not Up to Date Patient Listing, and Patient Roster. The data generated in these reports can be used by clinic staff to prepare for a site visit from CT DPH staff. Data can also be used to educate administrators and staff to support clinic-level quality improvement initiatives.

Clinic-created snapshots (i.e., IQIP Childhood On-Demand and IQIP Adolescent On-Demand assessments) are retained in CT WiZ for 30 days, with automatic removal occurring overnight. Users assigned the Manage Coverage Assessments security function can delete these snapshots at any time.

CT DPH staff utilize a Master Rate Comparison report to identify and prioritize providers in need of IQIP visits. The Master Rate Comparison report is auto generated for all clinics twice a year on June 1st and December 1st and includes all standard childhood and adolescent vaccines. Master Rate Comparison reports are saved for three years.

**Center for Disease Control and Prevention's (CDC) Immunization Quality Improvement for Providers. As of July 1, 2019, IQIP is the replacement program for the AFIX program.*

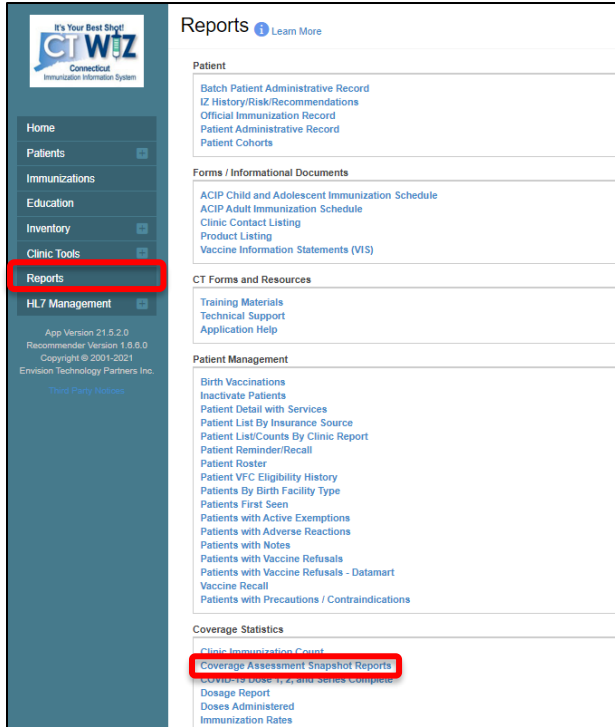
Intended Audience

Clinic staff who:

- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Coverage Statistics section, locate the Coverage Assessment Snapshot Reports.
- Click on the name of the report to open the report parameters page.



Parameters

On the main Coverage Assessment Snapshot Reports page, users have the option to view previous assessments or generate a new set of snapshot reports.

To create a new Coverage Assessment Snapshot:

1. Verify that the correct provider and clinic are displayed on the screen.

2. Select Create New Data Snapshot.



This screen also displays all assessment snapshots that have been created for this clinic. These snapshots can be sorted by assessment type and provide access to various report outputs.

3. On the Create Snapshot page, select an Assessment Type from the dropdown menu.

The screenshot shows the 'Create Snapshot' form with the 'Assessment Type' dropdown menu open. The dropdown menu lists the following options: AFIX CHILDHOOD OFFICIAL, AFIX ADOLESCENT OFFICIAL, AFIX CHILDHOOD ON-DEMAND, AFIX ADOLESCENT ON-DEMAND, IQIP CHILDHOOD OFFICIAL, IQIP CHILDHOOD ON-DEMAND, IQIP ADOLESCENT OFFICIAL, and IQIP ADOLESCENT ON-DEMAND. A red box highlights the IQIP options with the text: "Select one of the IQIP assessment options (IQIP has replaced AFIX.)".



Select either the IQIP CHILDHOOD ON-DEMAND or the IQIP ADOLESCENT ON-DEMAND assessment type. IQIP replaced the AFIX program in July 2019.


Once an assessment type is selected, the page will refresh to display additional parameters. On the refreshed Create Snapshot screen:

The screenshot shows the 'Create Snapshot' form after selecting an assessment type. The form displays various parameters. The 'As of Date Options' dropdown menu is set to 'CURRENT DATE', which is highlighted with a red box labeled '4'. The 'As of Date' field is set to '05/13/2021'. The 'Feedback Date (AFIX Visit Date)' field is highlighted with a red box labeled '5'. Other parameters include 'Age Range' (24-35 MONTHS), 'Age Range by Date of Birth' (05/14/2018 - 05/13/2019), and 'Compliance by Age' (24 MONTHS).

4. Select an "As of Date Options" from the dropdown menu.

- CURRENT DATE populates the As of Date field with the date the user is creating the report. This is the default selection.
- 7 DAYS IN THE PAST populates the As of Date field with the date one week prior to the current date. This option can be used to cover reporting delays.

- 14 DAYS IN THE PAST populates the As of Date field with the date two weeks prior to the current date. This option can be used to cover reporting delays.
- CUSTOM DATE allows the user to enter a date in the As of Date field from the current date to two months in the past. This option can be used to assess on an exact date such as the first of the month.

 The As of Date is read only and will be calculated based on the As of Date Option selected.

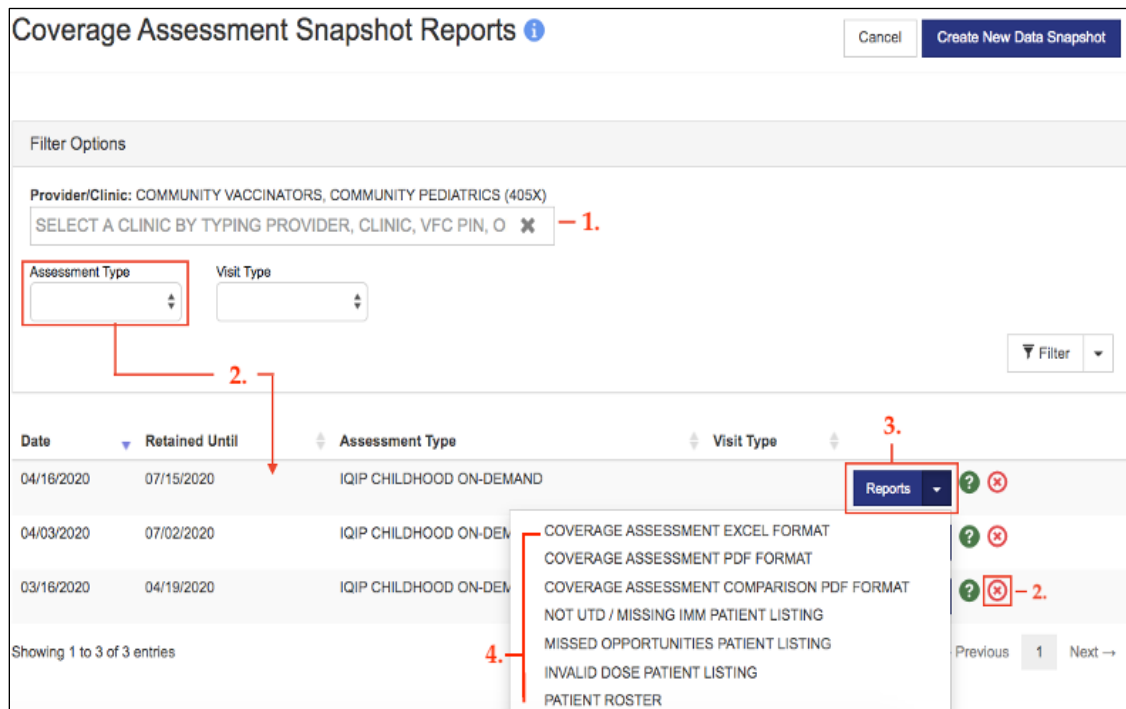
5. Feedback Date is intended for use by state-level IQIP staff. This field is optional and should be left blank for all other users.

 The following fields are read only:

- Age Range. Age range is based on the assessment type selected.
- Age Range by Date of Birth. This field displays a calculated birthdate range based on the Age Range and As of Date.
- Compliance by Age. This date is based on the Assessment Type selected. When IQIP Childhood On-Demand is selected, Compliance by Age will default to 24 MONTHS. When IQIP Adolescent On-Demand is selected, Compliance by Age will default to 13 years.

6. Select Create.

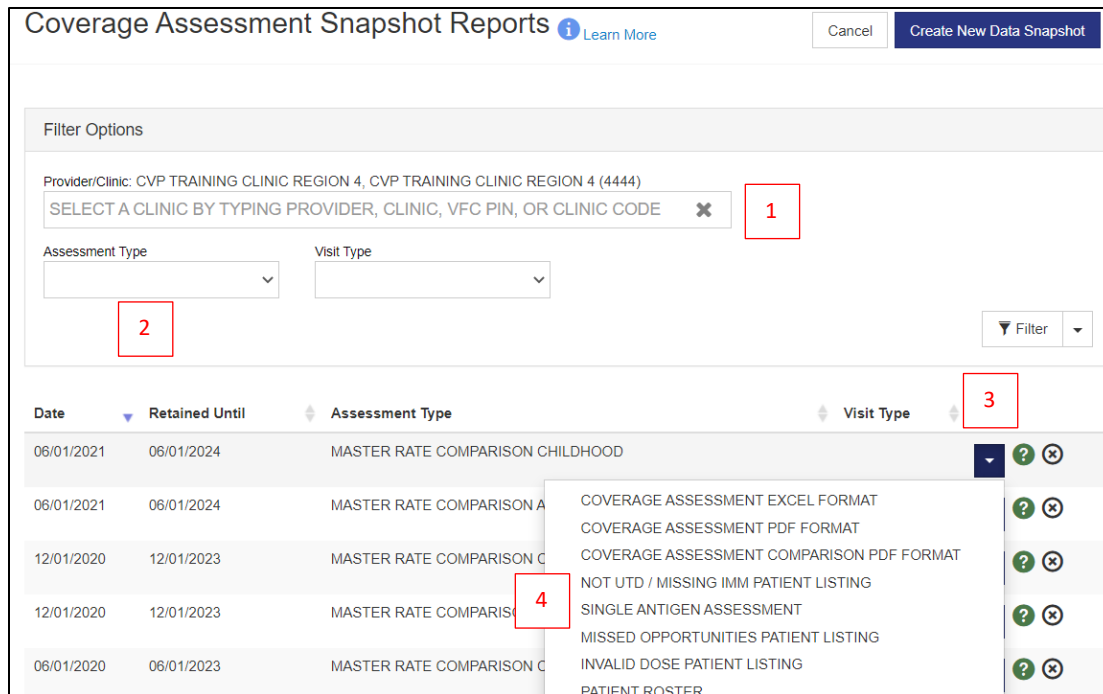
Once the user creates a new snapshot, it is available on the main Coverage Assessment Snapshot Reports screen, along with other previously created snapshots. To generate reports for a recently-run or previously-run Coverage Assessment Snapshot:






The screenshot shows the 'Coverage Assessment Snapshot Reports' interface. At the top right, there are 'Cancel' and 'Create New Data Snapshot' buttons. Below is a 'Filter Options' section with a search box for 'Provider/Clinic' (containing 'COMMUNITY VACCINATORS, COMMUNITY PEDIATRICS (405X)') and a dropdown for 'Assessment Type'. A table lists three entries with columns for 'Date', 'Retained Until', 'Assessment Type', and 'Visit Type'. A 'Reports' dropdown menu is open for the first entry, showing options like 'COVERAGE ASSESSMENT EXCEL FORMAT' and 'COVERAGE ASSESSMENT PDF FORMAT'. A 'Filter' button is also visible.

Numbered callouts in the image:

- 1. Points to the search box in the Filter Options.
- 2. Points to the Assessment Type dropdown.
- 3. Points to the Reports dropdown menu.
- 4. Points to the list of report options in the dropdown menu.



1. Verify that the correct provider and clinic are displayed on the screen.
2. Find the new Coverage Assessment Snapshot created in the previous steps.
 -  To find and generate reports from a different snapshot previously created, use the Assessment Type dropdown menu to filter the list of snapshots, if needed.
 -  On-Demand snapshots are retained in CT WiZ for 30 days. Those indicated with a red X can be deleted at any time by users assigned the Manage Coverage Assessments security function. Click the red x icon to delete the snapshot.
 -  Snapshots created by CT-DPH staff are saved for three years.
3. Click the Reports dropdown menu to select a report type to generate. Note: The seven reports listed below are hyperlinked to individual report sections that include report options (where applicable), report results/output, and information on how to use each report.
 - [Coverage Assessment Excel Format](#)
 - [Coverage Assessment PDF Format](#)
 - [Coverage Assessment Comparison PDF Format](#)
 - [Not UTD / Missing Imm Patient Listing](#)
 - [Missed Opportunities Patient Listing](#)
 - [Invalid Dose Patient Listing](#)
 - [Patient Roster Report](#)
4. Click on report name to generate.

Coverage Assessment Reports

Coverage Assessment Excel Format

Provides a quick view of coverage rates and missed opportunities for the assessed vaccines/series in a table-style layout.

Results

The Excel workbook contains two worksheets:

- The Coverage Rates tab provides results for the assessed vaccine series/antigen including # Complete (Numerator), % Complete, and a total patient count (Denominator).
- The Missed Opportunities tab details the number and percentage of patients who presented for vaccination services but were not vaccinated with all of the immunizations recommended at the time of the visit. This worksheet includes vaccine Series/Antigen assessed, # Missed (Numerator), % Missed, and a total patient count (Denominator).

Provider = CVP TRAINING CLINIC REGION 4, Clinic = CVP TRAINING CLINIC REGION 4, VFC = 4444, 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, UTD Pneumococcal, UTD RV, 1 Flu, 2 Hep A, 4:3:1:3:3:1:4 Series
Assessment Date = 06/01/2021, Birthdate Range = 06/02/2018 - 06/01/2019, Age Range = 24-35 MONTHS as of 06/01/2021, Compliance by 24 MONTHS

CVP TRAINING CLINIC REGION 4 - CVP TRAINING CLINIC REGION 4 : VFC - 4444 : Master Rate Comparison Childhood : 19 Patients (Denominator)

Series/Antigen	# Complete (Numerator)	% Complete
4 DTaP	0	0.00%
3 Polio	0	0.00%
1 MMR	0	0.00%
UTD Hib	0	0.00%
UTD Hep B	0	0.00%
1 VAR	3	15.79%
UTD Pneumococcal	0	0.00%
UTD RV	0	0.00%
1 Flu	0	0.00%
2 Hep A	0	0.00%
4:3:1:3:3:1:4 Series	0	0.00%

Coverage Rates Missed Opportunities

Provider = CVP TRAINING CLINIC REGION 4, Clinic = CVP TRAINING CLINIC REGION 4, VFC = 4444, 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, UTD Pneumococcal, UTD RV, 1 Flu, 2 Hep A, 4:3:1:3:3:1:4 Series
Assessment Date = 06/01/2021, Birthdate Range = 06/02/2018 - 06/01/2019, Age Range = 24-35 MONTHS as of 06/01/2021, Compliance by 24 MONTHS

CVP TRAINING CLINIC REGION 4 - CVP TRAINING CLINIC REGION 4 : VFC - 4444 : Master Rate Comparison Childhood : 19 Patients (Denominator)

Series/Antigen	# Missed (Numerator)	% Missed
4 DTaP	5	26.32%
3 Polio	4	21.05%
1 MMR	0	0.00%
UTD Hib	4	21.05%
UTD Hep B	3	15.79%
1 VAR	0	0.00%
UTD Pneumococcal	3	15.79%
UTD RV	3	15.79%
1 Flu	2	10.53%
2 Hep A	0	0.00%
4:3:1:3:3:1:4 Series	7	36.84%

Coverage Rates Missed Opportunities

How to Use this Report

The Coverage Assessment Excel Format report can be used to view the number and percentage of patients in the selected age range who are up to date or had missed opportunities for the vaccine series/antigens included in the data snapshot.



Report data can be utilized in staff training and quality improvement activities to track immunization rates and reduce the number of missed opportunities.

Coverage Assessment PDF Format

This report provides coverage rates for selected vaccines/series in a PDF format. Upon selection, a new screen will display with PDF report options.

PDF Options

Assessment Type: IQIP CHILDHOOD ON-DEMAND

<input checked="" type="checkbox"/> 4 DTaP	<input checked="" type="checkbox"/> 3 Polio
<input checked="" type="checkbox"/> 1 MMR	<input checked="" type="checkbox"/> UTD Hib
<input checked="" type="checkbox"/> UTD Hep B	<input checked="" type="checkbox"/> 1 VAR
<input checked="" type="checkbox"/> UTD Pneumococcal	<input checked="" type="checkbox"/> 4:3:1:3:3:1:4 Series

If a checkbox is unselected, the vaccine will not appear on the PDF output within the graph.

Milestones

<input type="checkbox"/> Healthy People 2020 Targets
<input type="checkbox"/> Jurisdiction Average
<input type="checkbox"/> County Average

Cancel Run Report

Report Options

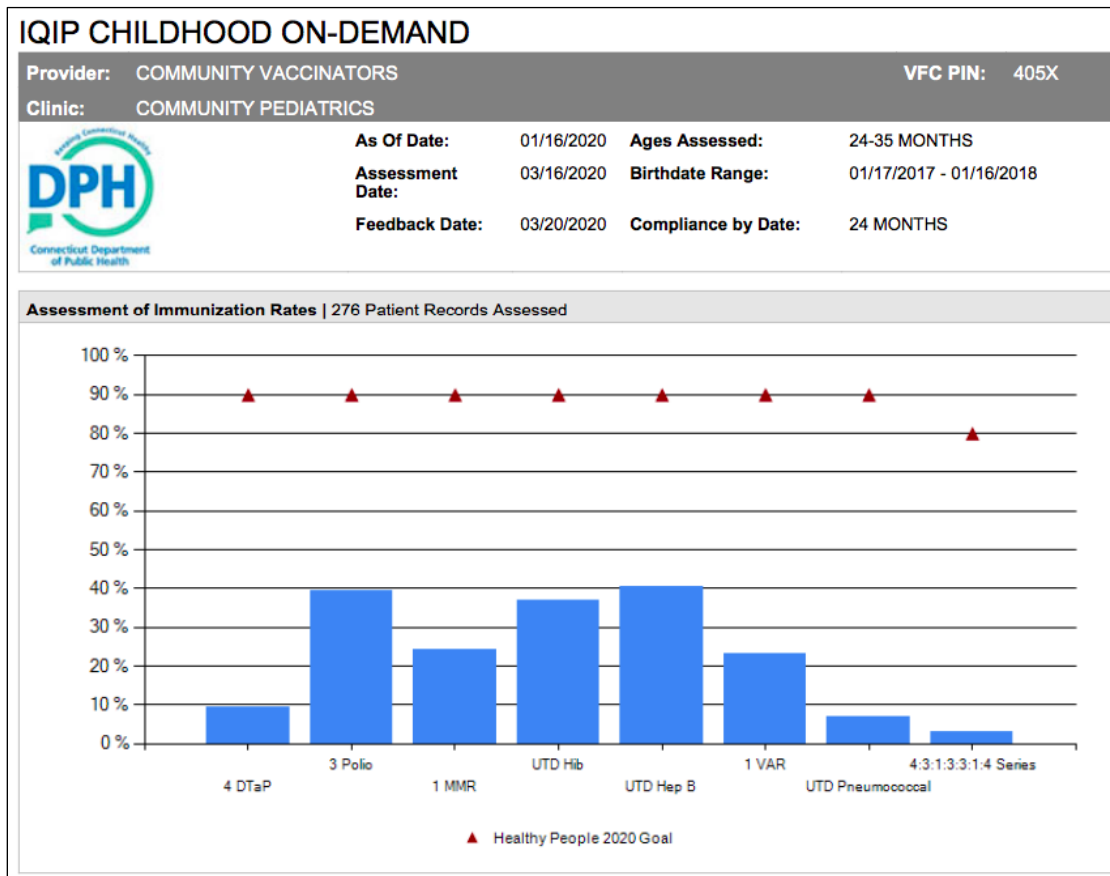
1. Unselect a checkbox to exclude the vaccine series/antigen from the report.
2. Select Milestones to compare assessment results with the following options:
 - Healthy People 2020 Targets– National objectives for immunizations and infectious diseases.
 - Jurisdiction Average- State average calculated when the Master Rate Comparison report metrics are auto-run twice a year. Includes both VFC and non-VFC clinics.
 - County Average- County average calculated when the Master Rate Comparison report metrics are auto-run twice a year. Includes both VFC and non-VFC clinics.

3. Click Run Report.

Results

Results will be presented in a PDF format that can be printed and/or saved.

- The first page includes a bar graph and corresponding table of vaccines, doses, number and percentage of doses up to date, and selected milestones (i.e., Healthy People 2020 targets, state/county averages).
- The second page provides a Missed Opportunity Assessment, including vaccine, number of doses, and number and percentage of patients with a missed opportunity.



The following vaccines and doses are recommended for this patient population.


	Doses Up To Date		Healthy People	
	#	%		
4 DTaP	26	9%	90%	4 valid doses of DTaP
3 Polio	109	39%	90%	3 valid doses of Polio
1 MMR	67	24%	90%	1 valid dose of MMR
UTD Hib	102	37%	90%	Patient Series Status Complete for Hib
UTD Hep B	112	41%	90%	Patient Series Status Complete for Hep B
1 VAR	64	23%	90%	1 valid dose of VAR
UTD Pneumococcal	19	7%	90%	Patient Series Status Complete for Pneumococcal
4:3:1:3:3:1:4 Series	8	3%	80%	Valid number of doses or Patient Series Status of complete for 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 Varicella and UTD Pneumococcal


*Patient Series Status Complete is a status defined by the CDSi logic. A patient can achieve a Complete status by meeting all of the ACIP recommendations for the patient series. For some AFIX childhood and adolescent assessments, this status can be achieved with a range of doses depending on the age at first vaccination, the vaccine product administered, and/or patient age.

Missed Opportunity Assessment 276 Patient Records Assessed								
	4 DTaP	3 Polio	1 MMR	UTD Hib	UTD Hep B	1 VAR	UTD Pneumococcal	4:3:1:3:3:1:4 Series
# of Patients with a Missed Opportunity *	89	106	103	67	103	106	124	158
% of Patients with a Missed Opportunity	32%	38%	37%	24%	37%	38%	45%	57%

How to Use this Report

The Coverage Assessment PDF Format report can be used to view and print the up to date and missed opportunity data captured by the assessment snapshot.

 Use selected milestones to compare clinic rates to Healthy People 2020 targets or state/county averages.

 Report data can be utilized in staff training and quality improvement activities to track immunization rates and reduce the number of missed opportunities.

Coverage Assessment Comparison PDF Format

This report allows comparison between a current assessment and a previous assessment of the same type. Upon selection, a new screen will display with PDF report options.

PDF Options ?

Assessment Type: IQIP CHILDHOOD ON-DEMAND

4 DTaP

1 MMR

UTD Hep B

UTD Pneumococcal

3 Polio

UTD Hib

1 VAR

4:3:1:3:3:1:4 Series

1.

If a checkbox is unselected, the vaccine will not appear on the PDF output within the graph.

Comparison Assessment • 2.

Milestones

Healthy People 2020 Targets

Jurisdiction Average

County Average

3.

4.

Cancel Run Report

Report Options

1. Unselect a checkbox to exclude the vaccine series/antigen from the report.
2. Select a Comparison Assessment from the required dropdown menu containing a list of snapshots with the same assessment type as the selected snapshot.
3. Select Milestones to compare assessment results with the following options:
 - Healthy People 2020 Targets- National objectives for immunizations and infectious diseases.
 - Jurisdiction Average- State average calculated when the Master Rate Comparison report metrics are auto-run twice a year. Includes both VFC and non-VFC clinics.
 - County Average- County average calculated when the Master Rate Comparison report metrics are auto-run twice a year. Includes both VFC and non-VFC clinics.
4. Click Run Report.

Results

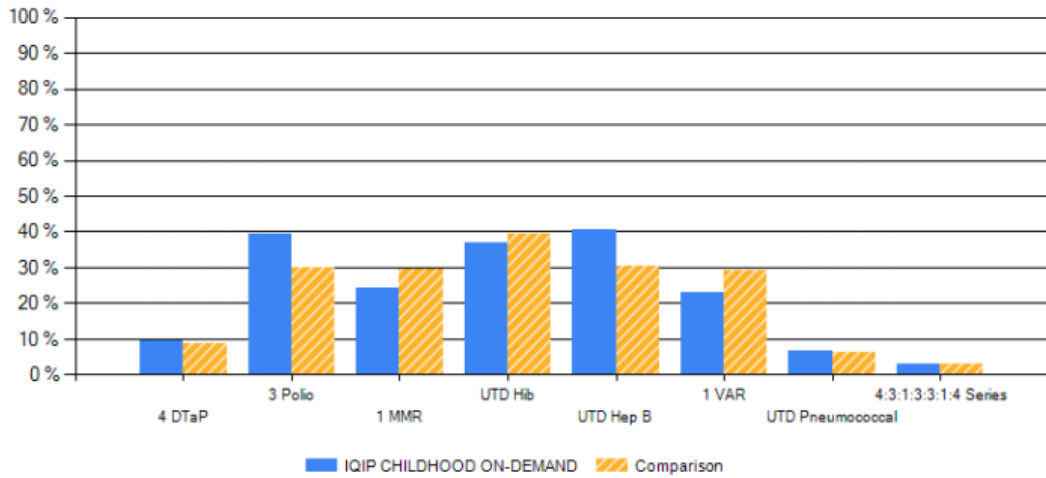
Results will be presented in a PDF format that can be printed and/or saved.

- The first page displays a bar graph and corresponding table comparison of immunization rates for the two snapshots for each vaccine series/antigen selected. Milestone comparisons are included if selected (i.e., Healthy People 2020 targets, state/county averages).
- The second page provides a Missed Opportunity Comparison, including vaccine, number of doses, and number and percentage of patients with a missed opportunity.



The first item in the comparison will be the original report selected, and the second item represents the assessment selected in the comparison field.

Assessment of Immunization Rates | 276 Patient Records Assessed | 272 Comparison Patient Records Assessed



The following vaccines and doses are recommended for this patient population.

Vaccine Category	IQIP CHILDHOOD ON-DEMAND		Comparison		Notes
	Doses Up To Date #	%	Doses Up To Date #	%	
4 DTaP	26	9%	24	9%	4 valid doses of DTaP
3 Polio	109	39%	81	30%	3 valid doses of Polio
1 MMR	67	24%	80	29%	1 valid dose of MMR
UTD Hib	102	37%	107	39%	Patient Series Status Complete for Hib
UTD Hep B	112	41%	83	31%	Patient Series Status Complete for Hep B
1 VAR	64	23%	79	29%	1 valid dose of VAR
UTD Pneumococcal	19	7%	17	6%	Patient Series Status Complete for Pneumococcal
4:3:1:3:3:1:4 Series	8	3%	8	3%	Valid number of doses or Patient Series Status of complete for 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 Varicella and UTD Pneumococcal

*Patient Series Status Complete is a status defined by the CDSi logic. A patient can achieve a Complete status by meeting all of the ACIP recommendations for the patient series. For some AFIX childhood and adolescent assessments, this status can be achieved with a range of doses depending on the age at first vaccination, the vaccine product administered, and/or patient age.

Missed Opportunity Assessment | 36 Patient Records Assessed

	4 DTaP	3 Polio	1 MMR	UTD Hib	UTD Hep B	1 VAR	UTD Pneumococcal	UTD RV	1 Flu	2 Hep A	4:3:1:3:3:1:4 Series
# of Patients with a Missed Opportunity *	3	0	0	5	0	0	1	2	5	0	8
% of Patients with a Missed Opportunity	8%	0%	0%	14%	0%	0%	3%	6%	14%	0%	22%

Comparison

Missed Opportunity Assessment | 38 Patient Records Assessed

	4 DTaP	3 Polio	1 MMR	UTD Hib	UTD Hep B	1 VAR	UTD Pneumococcal	UTD RV	1 Flu	2 Hep A	4:3:1:3:3:1:4 Series
# of Patients with a Missed Opportunity *	4	0	0	3	0	0	2	2	5	1	8
% of Patients with a Missed Opportunity	11%	0%	0%	8%	0%	0%	5%	5%	13%	3%	21%

How to Use this Report

The Coverage Assessment Comparison PDF Format report can be used to compare vaccine coverage rates between a current assessment and a previous assessment. This information can be used to track immunization rates over time.



Utilize snapshot data to compare clinic immunization rates over time.



Check for notable changes in coverage rates in order to identify inconsistencies in clinic processes or staff training needs.

Not UTD / Missing Imm Patient Listing

This report provides additional details about the patient cohort not up to date or missing immunizations for a coverage assessment. Upon selection, the report options screen will display.

The screenshot shows a dialog box titled "Not Up To Date / Missing Immunizations Patient Listing Options". It contains several sections:

- Series/Antigens - 1.**: A list of checkboxes for vaccine series: 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, and UTD Pneumococcal. All are checked.
- As Of Date**: A date field set to 04/16/2020.
- Age Range**: A field set to 24 THROUGH 35 MONTHS.
- Age Range by Date of Birth**: A date range field set to 04/17/2017 - 04/16/2018.
- Compliance by Age**: A field set to 24 MONTHS.
- Include Additional UTD and Not UTD Detail - 2.**: An unchecked checkbox.
- Include Dose Numbers for Missing Vaccines - 3.**: An unchecked checkbox.
- Output**: Radio buttons for PDF (selected) and EXCEL - 4.
- Buttons**: "Cancel" and "Run Report" (with a red arrow and number 5 pointing to it).

Report Options

1. Unselect a checkbox to exclude the vaccine series/antigen from the report.



As of Date, Age Range, Age Range by Date of Birth, and Compliance by Age are read only and cannot be edited.

2. Check the box for "Include Additional UTD and Not UTD Detail" to include the following details, if desired:

- Patients UTD- Total patients in the cohort who were UTD as of the Assessment Date (i.e., date report is run).

- UTD by Compliance Date- Patients in the cohort who were UTD for all assessed measures by the Compliance Age/Date.
 - Late UTD by Assessment Date- Patients who were not UTD by the Compliance Age/Date but did reach UTD status as of the Assessment Date.
 - Patients not UTD- Total patients in the cohort who were not UTD as of the Assessment Date (i.e., date report is run).
 - Last Immunization Visit More than 12 Months- Patients in the cohort who are not UTD but are eligible to be vaccinated, where the last recorded vaccination date occurred greater than 12 months ago (i.e., Assessment Date minus 366 days or more).
 - Last Immunization Visit Less than 12 Months- Patients in the cohort who are Not UTD but are eligible to be vaccinated, where the last recorded vaccination date occurred within the past 12 months (i.e., Assessment Date minus 365 days).
 - Missed Opportunities- Patient in the cohort is not UTD and during their last immunization visit did not receive one or more doses of vaccine that they were eligible to receive.
 - No Missed Opportunities- Patient in the cohort is not UTD and received all doses due at their last immunization visit.
 - Eligible for Immunizations- Patients in the cohort who were not UTD as of the Assessment Date but are immediately eligible to receive one or more of the missing assessed vaccinations.
 - Not Eligible for Immunizations- Patients in the cohort who were not UTD as of the Assessment Date but are not immediately eligible to receive one or more of the missing assessed vaccinations due to required scheduling per ACIP guidance (e.g., minimum intervals, age guidelines, brand licensure).
 - Needs One Dose- Patients in the cohort who could be brought UTD for assessed measures with a single dose of vaccine.
 - Needs One Visit- Patients in the cohort who could be brought UTD for assessed measures during a single clinic visit.
3. Check the box for “Include Dose Numbers for Missing Vaccines” to include the dose number for each missing vaccine for patients included in the report, if desired.
 4. Select an output type. PDF is the best option for printing. The Excel worksheet allows the user to sort as needed.
 5. Click Run Report.


Results

Results will be presented as either a PDF format (best for printing and/or saving) or an Excel worksheet. Note: the Excel output will mirror the PDF by tab.

- Section one- A summary of total patients assessed for each series/antigen.
- Section two- A patient summary listing with Patient Name, Patient ID, Date of Birth, Missing Vaccine(s), Missing Reason(s), and Last Immunization Date.
- Section three- A patient listing broken down by vaccine series with Patient Name, ID, Date of Birth, Missing Vaccine(s), Missing Reason(s), and Last Immunization Date.



Additional information selected on the report options screen is displayed on the report output. Example below reflects no additional option selections.

Not Up To Date / Missing Immunizations Report	
Provider: COMMUNITY VACCINATORS Clinic: COMMUNITY PEDIATRICS	VFC PIN: 405X
	Assessment Date: 03/02/2020 Age Range: Age Range: 24 -35 MONTHS as of 03/02/2020 Series: 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, UTD Pneumococcal
Summary	Totals
4 DTaP	247
3 Polio	191
1 MMR	192
UTD Hib	164
UTD Hep B	188
1 VAR	193
UTD Pneumococcal	255
Patients	264

Patient Listing					
Patient Name	Patient ID	DOB	Missing Vaccine(s)	Missing Reason(s)	Last Imm Date
		07/10/2017	DTaP, MMR, Hib, VAR, Pneumococcal		02/08/2018
		05/27/2017	DTaP, MMR, Hib, VAR, Pneumococcal	Missed Opportunity (DTaP), Missed Opportunity (MMR), Missed Opportunity (Hib), Missed Opportunity (VAR), Missed Opportunity (Pneumococcal)	12/05/2018
		01/15/2018	Polio, Hep B, Pneumococcal, DTaP	Missed Opportunity (Polio), Missed Opportunity (Hep B), Missed Opportunity (Pneumococcal)	04/30/2019
		11/11/2017	DTaP, Polio, MMR, Hib, Hep B, VAR, Pneumococcal		11/11/2017
		03/24/2017	DTaP, MMR, Hib, VAR, Pneumococcal		11/02/2017
		03/30/2017	DTaP, MMR, Hib, VAR, Pneumococcal		10/02/2017
		02/05/2018	DTaP, Polio, MMR, Hib, Hep B, VAR, Pneumococcal		02/05/2018

Patient Vaccine Listing					
Patient Name	Patient ID	DOB	Missing Vaccine	Missing Reason	Last Imm Date
Patient #1		07/10/201	DTaP		02/08/2018
		07/10/201	MMR		
		07/10/201	Hib		02/08/2018
		07/10/201	VAR		
		07/10/201	Pneumococcal		02/08/2018
Patient #2		05/27/201	DTaP	Missed Opportunity	11/27/2017
		05/27/201	MMR	Missed Opportunity	
		05/27/201	Hib	Missed Opportunity	11/27/2017
		05/27/201	VAR	Missed Opportunity	
		05/27/201	Pneumococcal	Missed Opportunity	11/27/2017

How to Use this Report

The Not UTD / Missing Immunizations Patient Listing report can be used to identify patients in the selected cohort who are due for vaccinations.



Patients not UTD, Eligible for Immunizations, Needs One Dose, and Needs One Visit can be used to contact patients for a vaccination recall event as an easy way to improve late UTD coverage.



Last immunization visit more than 12 months ago can provide an opportunity to identify patients that may no longer be active in the practice. If so, use the [Inactivate Patients](#) report to deactivate patients and remove them from future coverage assessments.



Missed opportunities can be used for staff training purposes and to develop standing orders to ensure that all patients presenting for immunizations receive all vaccines recommended at the time of service.

Missed Opportunities Patient Listing

This report provides details on the patients who were considered not up to date at their last immunization visit but did not receive one or more doses for which they were eligible. Upon selection, the report options screen will display.

Report Options

1. Unselect a checkbox to exclude patients missing the vaccine series/antigen from the report.



As of Date, Age Range, Age Range by Date of Birth, and Compliance by Age are read only and cannot be edited.

2. Select an output type. PDF is the best option for printing. The Excel worksheet allows the user to sort as needed.

3. Click Run Report.

Results

Results will be presented as either a PDF format (best for printing and/or saving) or an Excel worksheet.

Note: the Excel output will mirror the PDF by tab.

- Section one- A summary of total patients assessed for each series/antigen.
- Section two- A patient summary listing with Patient Name, Patient ID, Date of Birth, Date of Last Immunization Visit, Missing Vaccine(s) from last immunization visit, Missing Reason(s), Last Immunization Clinic, Valid Vaccines at Last Visit, and Invalid Vaccines at Last Visit.

Missed Opportunities Report

Provider: COMMUNITY VACCINATORS
Clinic: COMMUNITY PEDIATRICS

VFC PIN: 405X



Assessment Date: 01/16/2020
Age Range: 24-35 MONTHS as of 01/16/2020
Series: 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, UTD Pneumococcal

Summary

Totals

4 DTaP	89
3 Polio	106
1 MMR	103
UTD Hib	67
UTD Hep B	103
1 VAR	106
UTD Pneumococcal	124
Patients w/ Missed Opp	158

Patient Listing

Patient Name	Patient ID	DOB	Date of Last Imm Visit	Missing Vaccine(s)	Missing Reason(s)	Last Imm Clinic	Valid Vaccines at Last Visit	Invalid Vaccines at Last Visit
		05/27/2017	12/05/2018	DTaP, MMR, Hib, VAR, Pneumococcal			HEP A, Influenza	
		02/18/2017	02/08/2019	DTaP, Polio, MMR, Hib, VAR, Pneumococcal			HEP A, Influenza	
		01/15/2018	04/30/2019	Polio, Hep B, Pneumococcal			DTaP, Hib	

How to Use this Report

The Missed Opportunities Patient Listing report can be used to identify and recall patients in the selected cohort who were considered not up to date at their last immunization visit but did not receive one or more doses for which they were eligible.



Report data can be utilized in staff training and quality improvement activities to reduce the number of missed opportunities.



Look for a cluster of missed opportunities within the same time frame to identify potential reasons (i.e., new staff or clinic processes implemented during this time, inventory shortfall, etc.).



Missed opportunities can be used for staff training purposes and to develop standing orders to ensure that all patients presenting for immunizations receive all vaccines recommended at the time of service.

Invalid Dose Patient Listing

This report shows all patients within the cohort with one or more invalid vaccinations recorded on their record for the selected vaccine series/antigens. Vaccines may be considered invalid based on ACIP violations or provider reported invalid doses. Upon selection, the report options screen will display.

The screenshot shows a web form titled "Invalid Dose Patient Listing Options". It has a close button (X) in the top right corner. The form is divided into several sections:

- Series/Antigens - 1.**: A group of checkboxes for vaccine series. The checked options are: 4 DTaP, 3 Polio, 1 MMR, UTD Hib, UTD Hep B, 1 VAR, and UTD Pneumococcal.
- As Of Date**: A date field containing "01/16/2020" with a calendar icon to its right.
- Age Range**: A text field containing "24 THROUGH 35 MONTHS".
- Age Range by Date of Birth**: A text field containing "01/17/2017 - 01/16/2018".
- Compliance by Age**: A text field containing "24 MONTHS".
- Only include patients that are NOT UTD - 2.**: An unchecked checkbox.
- Output**: Radio buttons for "PDF" (selected) and "EXCEL - 3.".
- Buttons**: "Cancel" and "Run Report" (with a red "4." pointing to it).

Report Options

1. Unselect a checkbox to exclude patients with invalid doses from the vaccine series/antigen from the report.



As of Date, Age Range, Age Range by Date of Birth, and Compliance by Age are read only and cannot be edited.

2. Check the box for "Only Include Patients that are NOT UTD" to exclude patients who are up to date but have an invalid dose, if desired.
3. Select an output type. PDF is the best option for printing. The Excel worksheet allows the user to sort as needed.
4. Click Run Report.


Results

Results will be presented as either a PDF format (best for printing and/or saving) or an Excel worksheet.

Note: the Excel output will mirror the PDF by tab.

- Section one- A summary of total patients assessed for each series/antigen.

- Section two- A patient listing broken down by vaccine series with Patient Name, Patient ID, Date of Birth, Vaccine, Series, Date Given, Historical or Administered, Vaccination Clinic, and Invalid Reason.

Invalid Dose Patient Listing																									
Provider: COMMUNITY VACCINATORS Clinic: COMMUNITY PEDIATRICS	VFC PIN: 405X																								
	Assessment Date: 12/01/2019 Age Range: 13-17 YEARS as of 12/01/2019 Series: UTD Hep B, 2 MMR, 2 VAR, 1 Tdap, UTD MCV, UTD HPV, 1 HPV, 1 Flu, 2 Hep A, UTD Polio																								
	<table border="1"> <thead> <tr> <th><u>Summary</u></th> <th><u>Totals</u></th> </tr> </thead> <tbody> <tr><td>UTD Hep B</td><td>1</td></tr> <tr><td>2 MMR</td><td>3</td></tr> <tr><td>2 VAR</td><td>3</td></tr> <tr><td>1 Tdap</td><td>16</td></tr> <tr><td>UTD MCV</td><td>3</td></tr> <tr><td>UTD HPV</td><td>1</td></tr> <tr><td>1 HPV</td><td>0</td></tr> <tr><td>1 Flu</td><td>3</td></tr> <tr><td>2 Hep A</td><td>15</td></tr> <tr><td>UTD Polio</td><td>3</td></tr> <tr><td>Patients w/ Invalid Dose</td><td>48</td></tr> </tbody> </table>	<u>Summary</u>	<u>Totals</u>	UTD Hep B	1	2 MMR	3	2 VAR	3	1 Tdap	16	UTD MCV	3	UTD HPV	1	1 HPV	0	1 Flu	3	2 Hep A	15	UTD Polio	3	Patients w/ Invalid Dose	48
	<u>Summary</u>	<u>Totals</u>																							
UTD Hep B	1																								
2 MMR	3																								
2 VAR	3																								
1 Tdap	16																								
UTD MCV	3																								
UTD HPV	1																								
1 HPV	0																								
1 Flu	3																								
2 Hep A	15																								
UTD Polio	3																								
Patients w/ Invalid Dose	48																								

Patient Listing								
Patient Name	Patient ID	DOB	Vaccine	Series	Date Given	Historical or Administered	Vaccination Clinic	Invalid Reason
		09/11/2005	Hep A, ped/adol, 2D	2 Hep A	09/24/2007	A	COMMUNITY PEDIATRICS	Preferable Interval: Too short, Allowable Interval: Too soon
		06/20/2006	DTaP, UF	1 Tdap	08/07/2008	A	COMMUNITY PEDIATRICS	Preferable Interval: Too short, Allowable Interval: Too soon
		09/08/2005	DTaP, UF	1 Tdap	12/28/2006	A	COMMUNITY PEDIATRICS	Preferable Interval: Too short, Allowable Interval: Too soon
		08/01/2004	DTaP, UF	1 Tdap	11/17/2005	A	COMMUNITY PEDIATRICS	Preferable Interval: Too short, Allowable Interval: Too soon
		04/27/2002	Hep B, UF	UTD Hep B	05/21/2002	A	COMMUNITY PEDIATRICS	Age: Grace period, Preferable Interval: Too short

How to Use this Report

The Invalid Dose Patient Listing can be used to identify and recall, as needed, patients in the selected cohort who received invalid doses of vaccine.



Report data can be utilized in staff training and quality improvement activities to reduce the number of invalid doses administered.

Patient Roster Report

This report will display a list of the clinic’s active patients that are included in the selected cohort.

Patient Roster Options X

Assessment Type: IQIP CHILDHOOD ON-DEMAND

As Of Date:

Age Range:

Age Range by Date of Birth:

Compliance by Age:

Output: PDF EXCEL **- 1.**

Cancel **2.**
Run Report

Report Options



Assessment Type, As of Date, Age Range, Age Range by Date of Birth, and Compliance by Age are read only and cannot be edited.

1. Select an output type. PDF is the best option for printing. The Excel worksheet allows the user to sort as needed.
2. Click Run Report.

Results

Results will be presented as either a PDF format (best for printing and/or saving) or an Excel worksheet.

- Data included in the report: patient Last Name, First Name, Patient ID, Date of Birth, Age, Last Vaccination Date, County, Patient Status, Status Effective Date, and Ethnicity.

Patient Roster

Provider: COMMUNITY VACCINATORS
Clinic: COMMUNITY PEDIATRICS

VFC PIN: 405X



Assessment Type: IQIP CHILDHOOD ON-DEMAND

Age Range: 24-35 MONTHS as of 01/20/202

Assessment Date: 01/20/2020

Age Range by Date of Birth : 01/21/2017 - 01/20/2018

Compliance by Age: 01/20/2020

Last Name	First Name	Patient ID	DOB	Age	Last Vaccination Date	County	Patient Status	Status Effective Date	Ethnicity
			07/10/2017	2Y 6M 10D	02/08/2018	Hartford	ACTIVE	09/13/2017	Hispanic or Latino
			05/27/2017	2Y 7M 24D	12/05/2018	Hartford	ACTIVE	08/01/2017	Hispanic or Latino
			02/24/2017	2Y 10M 27D	02/24/2017	Hartford	ACTIVE	03/03/2017	Hispanic or Latino
			02/18/2017	2Y 11M 2D	02/08/2019	Hartford	ACTIVE	09/01/2017	Hispanic or Latino
			02/09/2017	2Y 11M 11D	09/15/2017	Hartford	ACTIVE	04/10/2017	Hispanic or Latino
			01/15/2018	2Y 0M 5D	04/30/2019	Hartford	ACTIVE	01/26/2018	Not Hispanic or Latino

How to Use this Report

The Patient Roster report can be used to view the list of patients included in the selected coverage assessment age cohort (i.e., 24-35 months or 13 years).



Use the Excel output to sort by specific parameters (i.e., Age, Last Vaccination Date, Patient Status, etc.)



This report can be used to identify patients who may need to be inactivated for the clinic. See the [Inactivate Patients](#) report for instructions on how to perform this process.

COVID-19 Dose 1, 2, and Series Complete Report

Purpose

The COVID-19 Dose 1, 2, and Series Complete Report provides a summary of all COVID-19 doses administered by the selected provider/clinic. The report can be further filtered to examine the data by age range, date of birth range, and dose number. Results will display as an Excel spreadsheet for sorting or additional manipulation. When this report is run, a detailed line listing of each patient and vaccine administration is provided to the user.

The report can be used to determine the dose number and series complete for recipients who may need a follow-up appointment.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Monitor the HL7 interface
- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Coverage Statistics section, locate the COVID-19 Dose 1, 2, and Series Complete Report.
- Click on the name of the report to open the report parameters page.

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- Patients with Vaccine Refusals - Datamart
- Vaccine Recall
- Patients with Precautions / Contraindications

Coverage Statistics

- Clinic Immunization Count
- COVID-19 Dose 1, 2, and Series Complete**
- Doses Administered
- Immunization Rates

Parameters

Enter information into the report selection criteria.

COVID-19 Dose 1, 2, and Series Complete Cancel Actions **Run Report**

8

Report Selection Criteria

Provider/Clinic: CVP TRAINING CLINIC REGION 4, CVP TRAINING CLINIC REGION 4 (4444)

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE **1**

Vaccination Date Range

From: 05/01/2021 Through: 06/11/2021 **2**

Audit Create Date Range

From: MM/DD/YYYY Through: MM/DD/YYYY **2**

Vaccines

Available Items: [Empty List] Selected Items: COVID-19 MRNA (MOD), COVID-19 MRNA (PFR), COVID-19 SUBUNIT (NVX), COVID-19 UF, COVID-19 VECTOR-NR (ASZ), COVID-19 VECTOR-NR (JSN) **3**

Note: hold the Ctrl key to select multiple items.

Age Range

From: [Empty] Through: [Empty] Unit of Measure: MONTHS **4**

Date of Birth Range

From: MM/DD/YYYY Through: MM/DD/YYYY **5**

Dose Number

[Empty] **6**

Report Type *

Patient Count (Aggregate Statistics) **7**

Patient Details

1. Provider/Clinic (auto-complete)
2. At least one of the following is required: Add validation on Run Report that either date range has been entered like the existing "The 'Vaccination Date Range - From Date' field is required."
 - Vaccination Date Range (From and Through)
 - Vaccination Audit Create Date Range (From and Through)
3. COVID-19 Vaccines (switch list) - Active and Inactive vaccine codes
4. Age Range (From and Through) and UOM (Years or Months)
5. Date of Birth Range
6. Dose Number - Blank, 1, 2, Series Complete default is blank
7. Report Type (Excel only) - Patient Count (Aggregate) or Patient Details
 - When Patient Count (Aggregate) selected, date range is limited to 90 days
 - When Patient Details selected, date range is limited to 30 days
 - Report format generates in Excel only
8. Click Run Report

Results

	B	C	E	Z	AA	AB	AC	AD	AE	AF	AI	AJ	AK
1	recip_id	recip_first_name	recip_last_name	admin_date	cvx	cvx_desc	ndc	mvx	lot_number	vax_expiration	dose_num	vax_series_complete	responsible_org
2	5555555	MINNIE	MOUSE	01/01/2021	208	COVID-19 mRNA (PFR)	59267-1000-01	PFR	24QTGA	12/31/2021	1	NO	CVP TRAINING CLINIC 4
3	7777777	MICKEY	MOUSE	01/01/2021	208	COVID-19 mRNA (PFR)	59267-1000-01	PFR	24QTGA	12/31/2021	1	NO	CVP TRAINING CLINIC 4
4	9999999	DONAND	DUCK	01/12/2021	208	COVID-19 mRNA (PFR)	59267-1000-01	PFR	24QTGA	12/31/2021	1	NO	CVP TRAINING CLINIC 4

- The COVID-19 Dose 1, 2, and Series Complete Report includes the following data:
 - Vax Event ID, Recipient ID, Recipient First Name, Middle Name, Date of Birth, Gender
 - Address, City, County, State, Zip Code
 - Race, Ethnicity
 - Administration Date, CVX, CVX Description, NDC, MVX, Lot Number, Vax Expiration, Vax Admin Site, Vax Route, Dose Number, Vax Series Complete
 - Responsible Organization, Admin Name, VTrckS Provider PIN, Admin Type
 - Admin Street Address, Admin City, Admin County, Admin State, Admin Zip Code
 - Historical Flag, Audit Create Date and Time, Audit Create User

How to Use this Report

The report can be used to determine the COVID-19 doses administered by the selected provider/clinic. The report can be further filtered to examine the data by age range, date of birth range, and dose number. The report can be used to determine the dose number and series complete for recipients who may need a follow-up appointment.

Dosage Report

Purpose

The Dosage Report provides an aggregate summary of all doses administered by vaccine type and age bracket for the selected provider/clinic. The report can be further filtered to examine the data by birth date range, vaccination date, and funding source. Results can be viewed as a PDF or exported into an Excel spreadsheet or extract (i.e., flat file) for sorting or additional manipulation. When this report is run using the Excel output option, a detailed line listing of each patient and vaccine administration is provided to the user.

The report can be used to determine the amount of vaccine a clinic has administered over a given time period and estimate how much vaccine to order for the future. In addition, this report can be used to confirm that all patients and vaccinations administered by the clinic during the selected time period were reported to CT WiZ.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Manage inventory
- Monitor the HL7 interface
- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Coverage Statistics section, locate the Dosage Report.
- Click on the name of the report to open the report parameters page.

Parameters

Enter information into the report selection criteria.

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- Patients with Precautions / Contraindications

Coverage Statistics

- Clinic Immunization Count
- Coverage Assessment Snapshot Reports
- COVID-19 Data 1, 2, and 3 Series Complete
- Dosage Report**
- Doses Administered
- Immunization Rates

Dosage Report [i](#)

Cancel Run Report

Report Selection Criteria

Report Type

Specific Clinics - Show vaccination totals by clinic

Provider *

CVP TRAINING CLINIC REGION 4

Clinic *

CVP TRAINING CLINIC REGION 4

County (Clinic Address) Zip Code (Clinic Address)

HARTFORD	06001
	06002
	06006
	06010
	06011
	06013
	06016
	06019
	06020
	06022

Note: hold the Ctrl key to select multiple items. Note: hold the Ctrl key to select multiple items.

Dosage Report Cancel Run Report

Vaccines

Available

- ADENOVIRUS, TYPE 4
- ADENOVIRUS, TYPE 7
- ANTHRAX
- ANTHRAX IG
- BCG
- COVID-19 MRNA (MOD)
- COVID-19 MRNA (PFR)
- COVID-19 UF
- COVID-19 VECTOR-NR (JSN)
- DIPHTHERIA ANTITOXIN
- DT, IPV ADSORBED
- DT, PFD

>>
>
<
<<

Selected (If none are selected, default is ALL)

-

5

2

DOB Date Range

From: MM/DD/YYYY Through: MM/DD/YYYY

2

Vaccination Date Range *

From: MM/DD/YYYY Through: MM/DD/YYYY

2

Audit Date Range

From: MM/DD/YYYY Through: MM/DD/YYYY

2

Funding Source *

(ALL FUNDING SOURCES) v

3

Output Type PDF EXCEL EXTRACT - Delimiter: |

4

1. Verify that the correct provider and clinic are displayed on the screen.
2. Use parameters to filter the report, if desired, by the following choices:
 - County/Zip Code. This will default to the county associated with the clinic address. Altering the default for this field is not recommended.
 - Vaccines. Select a vaccine and use the arrow buttons to add the vaccine(s) to the Selected list. If none are selected, default is ALL.
 - Date of Birth (DOB) Date Range. Enter a valid date range to filter the results by the patient's date of birth.
 - Vaccination Date Range. Enter a Vaccination Date Range to filter results by the date on which vaccines were administered.
 - Audit Date Range. Use of this field is not recommended.
3. Select a Funding Source to filter results by BLENDED PUBLIC CVP or PRIVATE. Leave the default selection of ALL FUNDING SOURCES to include both options.
4. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF, an Excel spreadsheet, or a delimited flat file extract. Use of the extract is not recommended for this report.
5. Click Run Report.

Results

The report output provides a list of vaccines administered by vaccine and patient's age at time of vaccination.



Only vaccines included in the report selection criteria are included in the summary counts.



Deleted patients are not included in the results.



Opted out patients are not included in the results.

Output options include:

- PDF. The PDF version of this report includes the following data:
 - Vaccine type and VFC eligibility. Each vaccine row includes the number of doses administered to each age group. Totals for each vaccine are listed in the far-right column.
 - Total number of doses administered per vaccine type.
 - Vaccine type totals by VFC eligibility.
 - Vaccines totals by age group.



CT WIZ Dosage Report

May 13, 2021

Report Type = Clinic, Provider = COMMUNITY HEALTH CENTER, INC., Clinic = CHC/WATERBURY, Vaccines = COVID-19 mRNA (MOD), COVID-19 mRNA (PFR), COVID-19 UF, COVID-19 Vector-NR (JSN), Vaccination Date Range = 05/01/2021 - 05/13/2021, Funding Source = (ALL FUNDING SOURCES), Audit Create/Update Date Range = -, Patient Date of Birth Date Range = -

Age Group	<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Age Unknown	Total
SARS-COV-2 (COVID-19) vaccine, mRNA, spike protein, LNP, preservative free, 100 mcg/0.5mL dose														
	0	0	0	0	0	0	0	6	22	95	144	24	0	291
	0	0	0	0	0	0	0	6	22	95	144	24	0	291
Clinic TOT	0	0	0	0	0	0	0	6	22	95	144	24	0	291

Vaccine Series Totals

Series Name	VFC Eligible	Non-VFC Eligible	Total
COVID-19	0	291	291

Vaccine Series Totals

Series Name	VFC Eligible	Non-VFC Eligible	Total
COVID-19	0	291	291

Age Group Totals

Vaccine	<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Age Unknown	Total
COVID-19 mRNA (MOD)	0	0	0	0	0	0	0	6	22	95	144	24	0	291
	0	0	0	0	0	0	0	6	22	95	144	24	0	291

- Excel. The Excel version of this report includes the following data:
 - Patient ID, Patient Zip Code, Patient County, Patient Eligibility
 - Vaccination Date, Clinic Description, Immunization Eligibility
 - Vaccination Code, Lot Number
 - Created by User, Last Updated User, Date Created, Date Last Updated
 - Created by Global User, Updated by Global User
- Extract. Use of the extract is not recommended for this report. The extract version of this report includes the following data:
 - Clinic ID, Clinic Code, Clinic Description
 - HL7 Facility Code
 - Patient ID
 - Vaccination Date and Age at Vaccination

- Vaccine Code ID, Vaccine Code, Funding Source

How to Use this Report

Results from the Dosage Report can be used to determine the amount of vaccine a clinic has administered over a given time period and allows clinic staff to examine the data by vaccine, age at vaccination, VFC eligibility, and other parameters. Results can also be used to estimate how much vaccine to order for the future. This information can be used to confirm that all doses administered were reported to and accounted for in CT WiZ.

Ongoing weekly monitoring of the HL7 interface should be performed to verify that the number of immunizations administered that week and recorded in the EHR matches the number received by CT WiZ.



PDF version results can be used to:

- Determine the amount of vaccine a clinic has administered over a given time period
- Estimate how much vaccine to order
- Confirm whether all doses administered in the clinic were reported to and accounted for in CT WiZ
- Identify invalid dose administrations/ACIP violations (e.g. doses given too early or too late)



Excel version results can be used to:

- Sort by specific parameters (i.e., vaccination date, lot number, VFC eligibility, funding source, etc.).
- Examine the patient and vaccination detail behind the aggregate information displayed in the PDF version
- Identify patients and vaccinations missing in CT WiZ when there are differences between the clinic numbers and CT WiZ report
- Identify violations between patient eligibility and vaccine funding source

Invalid Doses

Purpose

The Invalid Doses report allows clinics/providers to identify patients who have one or more invalid immunizations. Invalid doses should be repeated to assure patients are protected from vaccine-preventable diseases and meet school/childcare attendance requirements. The report can be viewed as a PDF or exported into an extract (i.e., flat file) for sorting or additional manipulation.

Immunizations can be invalidated automatically by the CT WiZ Recommender or manually by a user. Both types of invalid immunizations are included on this report. Report results can be filtered by specific antigen and dose number or by a pre-defined series of vaccines.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Monitor the HL7 interface
- Conduct Reminder/Recall outreach
- Monitor data quality
- Run coverage reports

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Coverage Statistics section, locate the Invalid Doses report.
- Click on the name of the report to open the report parameters page.

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Parameters

Enter information into the report selection criteria.

Invalid Doses Cancel **Run Report**

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Provider *
 CVP TRAINING CLINIC REGION 4 1

Clinic *
 CVP TRAINING CLINIC REGION 4

Doses By Vaccine Series

Vaccine Series Dose Presets
 [Dropdown]

DTaP/Tdap * 0	Hepatitis A * 0	Hepatitis B * 0	HIB * 0
HPV * 0	Influenza * 0	Meningococcal * 0	MMR * 0 2
Pneumococcal * 0	Polio * 0	Rotavirus * 0	Varicella * 0



COVID-19 *
0

Include patients that have ANY invalid doses (manual or recommender based) regardless of series completion. 3

Age Range * 4 **As Of Date Range *** 5

From: 19 Through: 35 UOM: MONTHS From: MM/DD/YYYY Through: MM/DD/YYYY

Output Type PDF EXTRACT - Delimiter: | 6

1. Verify that the correct provider and clinic are displayed on the screen.
2. Select vaccine(s) to include in the report. The user can choose to select a predefined series or build their own series by manually entering dose numbers in the vaccine fields.
 -  Specifying a dose number under a vaccine series will report all invalid doses for that vaccine series if the following conditions are true:
 - An invalid dose exists; AND
 - Valid doses are less than the dose number specified. NOTE: If an invalid dose exists but the number of valid doses is equal to or greater than the dose number specified, invalid dose information will not be returned.
 -  The Vaccine Series Dose Presets dropdown menu will populate the vaccine boxes below based on the selected preset (e.g., 4:3:1:3:3 [4DTAP/TDAP, 3POLIO, 1MMR, 3HIB, 3HEPB]).
3. Check the box for “Include patients that have ANY invalid doses, regardless of series completion,” if desired. This selection ignores any Doses by Vaccine Series selections or any manually entered doses and returns ALL invalid doses that match specified parameters.



Vaccines other than the 12 specified on the screen will also be returned, if invalid.

4. Specify an Age Range by entering a value in the From and Through fields. This restricts the list of patients to only those whose age is within these parameters as of the date the report is generated. Use the UOM field to indicate the unit of measure (i.e., months or years) used to interpret the Age Range values.
5. Specify an As of Date Range by entering a date in the From and Through fields. This corresponds with the Age Range selection by generating a report that only includes patients who were within the specified age range on/during the As of Date(s).



Users should populate both fields with today's date, or if generating a monthly snapshot, populate both fields with the last date of the previous month.

6. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF or a delimited flat file extract.



If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.

7. Click Run Report.

Results

The report output provides a PDF or extract file containing the following fields:

- Patient Name
- Patient ID
- Patient DOB
- Vaccine
- Vaccine Group
- Date Given
- Administering Clinic
- Invalid Reason



Use the extract file to sort the report data by a specific field.



CT WIZ Invalid Doses

January 29, 2020

Provider = COMMUNITY VACCINATORS, Clinic = COMMUNITY PEDIATRICS, From Date = 01/29/2020, Through Date = 01/29/2020, From Age = 9, Through Age = 35, Unit Of Measure = MONTHS, DTaP = 4, Flu = 0, HepA = 0, HepB = 3, Hib = 3, HPV = 0, Meningococcal = 0, MMR = 1, PCV7 = 0, Polio = 3, Rota = 0, Varicella = 0

Patient	DOB	Vaccination	Vaccine Group	Date Given	Vaccination Clinic	Invalid Reason
List of patient names would appear in this column.	03/27/2018	DTaP-HepB-IPV	Polio	11/14/2018	C0006P405X	Preferable Interval: Too short
	03/27/2018	DTaP-HepB-IPV	DTaP / TD / Tdap	11/14/2018	C0006P405X	Preferable Interval: Too short
	03/27/2018	Hib (PRP-T)	Hib	11/14/2018	C0006P405X	Preferable Interval: Too short
	08/22/2017	DTaP	DTaP / TD / Tdap	04/30/2019	C0006P405X	Preferable Interval: Too short
	08/22/2017	Hep B, ped/adol	Hep B	04/30/2019	C0006P405X	Preferable Interval: Too short
	08/22/2017	Polio-IPV	Polio	04/30/2019	C0006P405X	Preferable Interval: Too short
	11/06/2017	OPV, UF	Polio	03/05/2018	C0000PR	Inadvertent Vaccine: Inadvertent Administration
	11/06/2017	OPV, UF	Polio	05/21/2018	C0000PR	Inadvertent Vaccine: Inadvertent Administration
	02/08/2018	DTaP-HepB-IPV	DTaP / TD / Tdap	10/22/2018	C0006P405X	Preferable Interval: Too short
	02/08/2018	Hib (PRP-T)	Hib	10/22/2018	C0006P405X	Preferable Interval: Too short
	03/18/2017	DTaP	DTaP / TD / Tdap	05/19/2017	C0000PR	Age: Too young, Preferable Interval: Too short
	03/18/2017	DTaP	DTaP / TD / Tdap	09/21/2017	C0000PR	Preferable Interval: Too short
	08/01/2017	Hib (PRP-T)	Hib	11/30/2018	C0006P405X	Dose Condition: Lot expired
	08/01/2017	DTaP	DTaP / TD / Tdap	11/30/2018	C0006P405X	Preferable Interval: Too short, Allowable Interval: Too soon
	08/03/2018	Hib, UF	Hib	08/04/2018	C0000PR	Age: Too young, Allowable Vaccine: Invalid administration
	02/09/2019	DTaP	DTaP / TD / Tdap	04/11/2019	C0768P4263	Age: Too young, Preferable Interval: Too short

Total Patients: 9

Vaccine Totals

DTaP	5	DTaP-HepB-IPV	3	Hep B, ped/adol	1
Hib (PRP-T)	3	Hib, UF	1	OPV, UF	2
Polio-IPV	1				

How to Use this Report

Results from the Invalid Doses report can be used to revaccinate patients who have been identified as receiving invalid doses.



The repeat dose should be spaced after the invalid dose by the recommended minimum interval.



Report data can also be used for staff training and quality checks by identifying vaccine administration errors, such as doses given too soon, doses given too young, and administration of expired doses.



Check for data entry errors and make necessary corrections in both the EHR and in CT WIZ.



Review this report monthly as a part of ongoing HL7 interface monitoring.

Data Quality – User Reports



Data Quality – Statistics

Purpose

The Data Quality – Statistics report allows clinics/providers to conduct data quality checks on an as-needed basis, determined by the user. The report provides real-time general data quality statistics, such as completeness, accuracy, and timeliness. Results can be viewed as a PDF or exported into an Excel spreadsheet for sorting or additional manipulation.

Intended Audience

Clinic staff who:

- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WIZ.
- In the Data Quality-User section, locate the Data Quality – Statistics report.



Clinics should disregard the other similar report listed in this section (i.e., Data Quality – Statistics – Scheduled).

- Click on the name of the report to open the report parameters page.

The screenshot shows the 'Reports' page in the CT WIZ system. The left-hand navigation menu includes: Home, Patients, Immunizations, Education, Inventory, Clinic Tools, Reports (highlighted with a red box), and HL7 Management. The main content area is titled 'Reports' and includes a 'Learn More' link. It is organized into three sections:

- Patient**
 - Batch Patient Administrative Record
 - IZ History/Risk/Recommendations
 - Official Immunization Record
 - Patient Administrative Record
 - Patient Cohorts
- Forms / Informational Documents**
 - ACIP Child and Adolescent Immunization Schedule
 - ACIP Adult Immunization Schedule
 - Clinic Contact Listing
 - Product Listing
 - Vaccine Information Statements (VIS)
- CT Forms and Resources**
 - Training Materials
 - Technical Support

	Data Quality - User
	Data Quality - Statistics - Scheduled
	Data Quality - Statistics
	Data Quality - Patient Exceptions
	Patients with Possible Duplicate Vaccinations - CT
	Patients with Possible Duplicate Vaccinations - Datamart
	Data Quality - Patient Immunization Exceptions
	Patients with Possible Duplicate Vaccinations
	Possible Patient Duplicates
	Shots Before Birth
	User Vaccination Details
	Vaccines Added but not Administered

Parameters

Enter information into the report selection criteria.

Data Quality, Statistics Cancel Links Run Report **6.**

Report Selection Criteria

Provider *
COMMUNITY VACCINATORS

Clinic *
COMMUNITY PEDIATRICS

Date Range Type *

- Date Of Birth
- Vaccination

Date Range *

From: MM/DD/YYYY Through: MM/DD/YYYY

Report Type * - 4.

- Patients Active at Selected Clinic
- All Patient Vaccinations

Output Type PDF EXCEL - 5.

[Previous Criteria](#)

1. Verify that the correct provider and clinic are displayed on the screen.
2. Select a Date Range Type to filter report results according to the desired parameter:
 - Date of Birth; or
 - Vaccination
3. Enter a date range in the From and Through fields based on the Date Range Type selected in Step 2.
4. Select a Report Type to filter results according to the desired parameter:
 - Patients Active at Selected Clinic. Results are restricted to active clinic patients; Or
 - All Patient Vaccinations. Results will include all doses administered at the selected clinic, regardless of the default clinic to which the patient is assigned.



If Vaccination is selected as the Date Range Type and the Patients Active at Selected Clinic is chosen as the Report Type, the report first looks for patients belonging to the selected Provider/Clinic, and then limits the patients included in the report to those who had a vaccination during the date range specified.



If Vaccination is selected as the Date Range Type and All Patient Vaccinations is selected as the Report Type, the report will include patients who received one or more vaccinations during the vaccination date range at the identified clinic, regardless of where the patient is active.



If Date of Birth is selected as the Date Range Type and Patients Active at Selected Clinic is the Report Type, the results will include patients with a date of birth that falls within the specified date range and who are active at the selected clinic.



If Date of Birth is selected as the Date Range Type and All Patient Vaccinations is selected as the Report Type, the results will include patients with a date of birth that falls within the specified date range and who received one or more vaccinations at any time at the selected clinic, regardless of where the patient is active.

5. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file or an Excel.
6. Click Run Report.

Results

The report output provides a detailed list of counts and percentages of various data quality measures, including patient counts, patient completeness, vaccination completeness, accuracy, and timeliness within the specified date range for either patient date of birth or vaccination. The Excel output displays each data quality measure on a separate tab and can be sorted by desired parameters.

- Patient Counts. The number and percentage of patients associated to the clinic according to their patient program status.
- Patient Completeness. The number and percentage of patient records that have a value in the demographic and other fields (e.g., First and Last Name, Gender, Date of Birth, Ethnicity, Mother's Maiden Name, etc.).
- Vaccination Completeness. The number and percentage of vaccination events for patients associated to the selected clinic that have a value in the vaccination data fields (e.g., Vaccination Date, Manufacturer, Lot Number, Expiration Date, Administered By, etc.).
- Accuracy, Vaccination Given at Invalid Age. The number and percentage of vaccination events and the patients impacted that were given any single immunization outside of ACIP age recommendations or vaccine label guidelines (e.g., vaccinations given before the ACIP minimum age guidelines, vaccinations given before the patient's date of birth, and vaccinations given after the vaccine expiration date).
- Timeliness. The number and percentage of vaccination events where the amount of time elapsed between the date of vaccination and the date it was created in the IIS is within the indicated time frames for each category.



CT WiZ

February 13, 2020

Report Type = Patients Active at Selected Clinic, Date of Birth Date - From = 06/01/2019, Date of Birth Date - Through = 02/13/2020, Provider = COMMUNITY VACCINATORS, Clinic = COMMUNITY PEDIATRICS

Provider: COMMUNITY VACCINATORS Go Live Date Legacy Data Import Date Legacy Data System
Clinic: COMMUNITY PEDIATRICS
Date Generated: Feb 13 2020 3:50 pm

Inventory Type: 3
Jurisdiction: CONNECTICUT

PATIENT COUNTS

This section calculates the number and percentage of patients associated to the clinic according to their patient program status.

	Patients	Percentage	Percentage of Total Patients
Active Patients in Jurisdiction	31	100.00%	100.00%
Active Patients not in Jurisdiction	0	0.00%	0.00%
Total Active Patients	31	100.00%	100.00%
Total Inactive Patients	0	0.00%	0.00%
Total Patients	31	100.00%	100.00%

PATIENT COMPLETENESS

This section calculates the number and percentage of active patient records that have a value in the following data fields.

	Patients	Percentage of Total Active Patients
Patients with First Name	31	100.00%
Patients with Last Name	31	100.00%
Patients with Middle Name	0	0.00%
Patients with DOB	31	100.00%
Patients with Gender	31	100.00%
Patients with Birth State	0	0.00%
Patients with Birth Country	0	0.00%
Patients with Birth Order	0	0.00%
Patients with Race	31	100.00%
Patients with Ethnicity	31	100.00%
Patients with WEC Eligibility	0	0.00%

Provider: COMMUNITY VACCINATORS Date Generated: Feb 13 2020 3:50 pm
Clinic: COMMUNITY PEDIATRICS

Patients with Mother's Last Name	0	0.00%
Patients with 'Test' in First Name	3	9.68%
Patients with 'Test' in Last Name	3	9.68%
Patients with 'Test' in Birth Record First Name	0	0.00%
Patients with 'Test' in Birth Record Last Name	0	0.00%
Patients with 'Test' in Alias First Name	0	0.00%
Patients with 'Test' in Alias Last Name	0	0.00%
Patients with Street Name or PO Box	0	0.00%
Patients with City	0	0.00%
Patients with County	0	0.00%
Patients with State	0	0.00%
Patients with Zip Code	0	0.00%
Patients with Home Phone Number	31	100.00%
Patients with Cell Phone Number	0	0.00%
Patients with Email Address	0	0.00%
Patients with History of Varicella Disease	0	0.00%
Patients with Date of Varicella Disease	0	0.00%
Patients created by Vital Statistics Import	0	0.00%

VACCINATION COMPLETENESS

This section calculates the number and percentage of vaccination events (for those active patients associated to the selected clinic) that have a value in the following data fields for each category.

	All Vaccinations	Percentage of All Vaccinations	All Non-Historical Vaccinations	Percentage of All Non-Historical Vaccinations	Clinic Non-Historical Vaccinations	Percentage of Clinic Non-Historical Vaccinations
Total Vaccinations	28	100.00%	27	100.00%	27	100.00%
Vaccinations Added but not Administered	0	0.00%	0	0.00%	0	0.00%
Vaccinations with Vaccination Date	28	100.00%	27	100.00%	27	100.00%
Vaccinations with Manufacturer	20	71.43%	19	70.37%	19	70.37%
Vaccinations with Lot Number	22	78.57%	21	77.78%	21	77.78%
Vaccinations with Expiration Date	19	67.86%	18	66.67%	18	66.67%
Vaccinations with NDC	12	42.86%	12	44.44%	12	44.44%
Vaccinations with Funding Source	25	89.29%	24	88.89%	24	88.89%
Vaccinations with Site	14	50.00%	14	51.85%	14	51.85%
Vaccinations with Route	28	100.00%	27	100.00%	27	100.00%
Vaccinations with Administered By	0	0.00%	0	0.00%	0	0.00%
Vaccinations with Patient Eligibility	28	100.00%	27	100.00%	27	100.00%
Non-Historical Vaccinations with VIS	0	0.00%	0	0.00%	0	0.00%
Unspecified Formulation (UF) entered as Non-Historical Vaccines	0	0.00%	0	0.00%	0	0.00%

The report also provides a summary of several key inventory elements for providers who have been trained to reconcile and manage inventory in CT WiZ.

Provider: COMMUNITY VACCINATORS				
Clinic: COMMUNITY PEDIATRICS	Date Generated: Feb 13 2020 4:10 pm			
Vaccinations entered in 30 days or more of Administration	0	0.00%	0	0.00%
INVENTORY MANAGEMENT				
This section summarizes several key inventory elements for full inventory (type 3) providers.				
	Count			
Number of Active Inventory Locations	1			
Number of Closed Reconciliations within the last 12 months	0			
Total Number of Closed Reconciliations	0			
Number of Expired Inventory Line Items with Quantity > 0	8			
Total Number of Doses Wasted or Expired in the last 12 months	0			

How to Use this Report

Results from the Data Quality – Statistics report can be used to identify data quality issues with completeness (i.e., patient and vaccination information), accuracy, and timeliness. The information can be used in staff training and to monitor staff adherence to data quality targets. For example, patients with a documented phone number captured at 60% of the time if the targeted documentation rate is 95%.

- **Patient Counts.** Review to identify the total number of patients who received vaccinations according to the parameters selected in steps 2 and 3 above, including active in jurisdiction, active not in jurisdiction, and inactive.
- **Patient Completeness.** Use this section to identify gaps in documentation of key patient demographic information, including name, address, contact information, and VFC eligibility status.
- **Vaccination Completeness.** Review to identify gaps in documentation of key vaccine details, including vaccine manufacturer, lot number, expiration date, and funding source.
- **Accuracy, Vaccination Give at Invalid Age.** Review this section to identify vaccines administered outside of ACIP age recommendations or vaccine label guidelines, including vaccines given too soon/late, vaccinations administered before patient date of birth, or vaccines provided after the vaccine expiration date.
- **Timeliness.** Use this section to review the time elapsed between vaccine administration and submission of the data to CT WiZ.
- **Inventory Management.** Full inventory providers can use this section to identify key inventory elements, including expired inventory and the number of wasted or expired doses in the last 12 months.

Patients with Possible Duplicate Vaccinations - CT

Purpose

The Patients with Possible Duplicate Vaccinations - CT report is used to identify patients with multiple vaccinations from the same vaccine group administered within a specified number of days. These vaccinations are likely to be duplicates and should be researched to determine accuracy. Patient records can then be updated accordingly.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Monitor the HL7 interface
- Monitor data quality

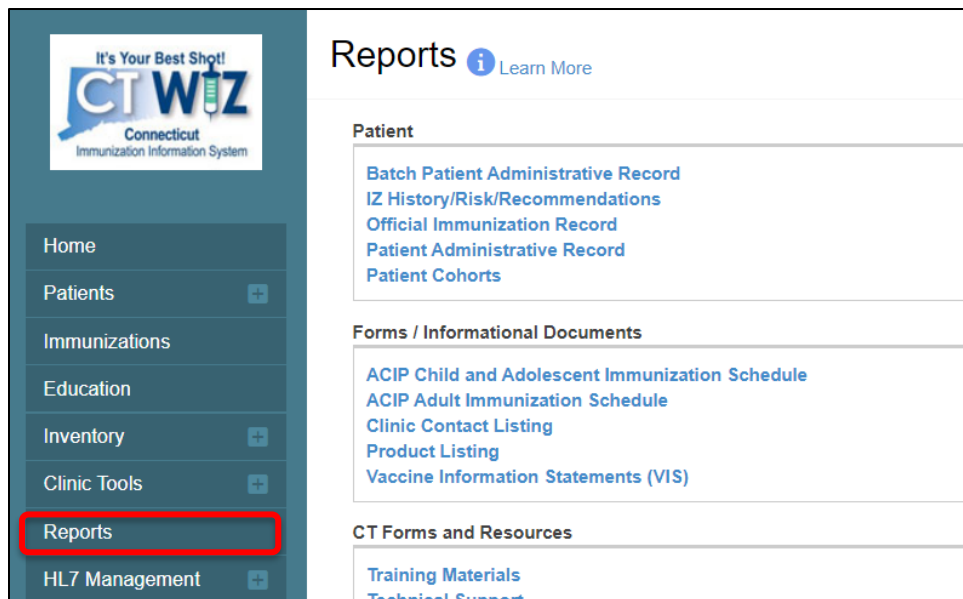
Location

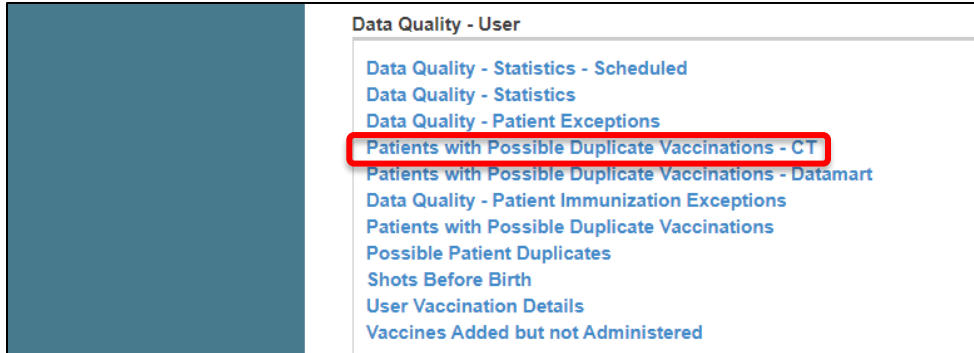
- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Data Quality-Users section, locate the Patients with Possible Duplicate Vaccinations - CT report.



Clinics should disregard the other two similar reports listed in this section (i.e., Patients with Possible Duplicate Vaccinations – Datamart and Patients with Possible Duplicate Vaccinations).

- Click on the name of the report to open the report parameters page.





Parameters

Enter information into the report selection criteria.

Patients with Possible Duplicate Vaccinati... Cancel Clear Run Report

Report Selection Criteria

Provider *
CVP TRAINING CLINIC REGION 4

Clinic *
CVP TRAINING CLINIC REGION 4

Patient Status (Clinic)
ACTIVE
INACTIVE
DECEASED

Note: hold the Ctrl key to select multiple items.

Vaccine Series
CHOLERA
COVID-19
DTAP / TD / TDAP
EBOLA
H1N1-09
HEP A
HEP B
HIB
HPV
INFLUENZA

Note: hold the Ctrl key to select multiple items.

Vaccination Date Range *
From: MM/DD/YYYY Through: MM/DD/YYYY

OR

Date of Birth Date Range *
From: MM/DD/YYYY Through: MM/DD/YYYY

Number Of Days (Plus Or Minus) From Vaccination Date To Detect Possible Duplicate *
7

Output Type EXCEL




1. Verify that the correct provider and clinic are displayed on the screen.
2. Select a Patient Status option to restrict the results to only Active, Inactive, or Deceased patients.



More than one status type can be selected by holding the Ctrl key.





If no selection is made, results will include all patient status types.

- Select one or more vaccine series to restrict the results to specific vaccines.
 -  More than one vaccine type can be selected by holding the Ctrl key.
 -  If no selection is made, results will include all vaccines.
- Enter a Vaccination Date Range OR a Date of Birth Date Range in the From and Through fields of the selected parameter.
 -  Either Vaccination Date Range or Date of Birth Date Range is required, not both.
- Enter a value in the “Number Of Days (Plus or Minus) From Vaccination Date To Detect Possible Duplicate” field. Vaccinations belonging to the same vaccine family within +/- this number of days of each other will be included in the results. The system defaults to seven days.
- Click Run Report.

Results

The report output provides an Excel file containing a line-listing of patient information (ID, Name, DOB, Clinic Status), clinic information (Current Provider/Clinic, Erroneous Vaccine User), and duplicate vaccine information (Vaccine Group, V[#] Vaccine, V[#] Date, V[#] Created By).


 The three vaccine fields (V[#] Vaccine, V[#] Date, and V[#] Created By) will repeat for all of the possible duplicate vaccinations found within the defined time frame.


 Deleted and opted out patients are not included in the results.


DOB	Current Provider/Clinic	Patient's Clinic Status	Vaccine Group	Erroneous Vaccine User	V1 Vaccine	V1 Date	V1 Created By	V2 Vaccine	V2 Date	V2 Created By
08/23/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Hep B	CHS HL7	Hep B, ped/adol	08/23/2018	VITALS USER on 09/04/2018 12:00 AM	Hep B, ped/adol	08/24/2018	CHS HL7 on 12/27/2018 08:46 AM
02/08/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	DTaP / TD / Tdap	CHS HL7	DTaP-HepB-IPV	10/17/2018	CHS HL7 on 11/28/2018 01:50 PM	DTaP-HepB-IPV	10/22/2018	CHS HL7 on 11/28/2018 01:51 PM
02/08/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Hep B	CHS HL7	DTaP-HepB-IPV	10/17/2018	CHS HL7 on 11/28/2018 01:50 PM	DTaP-HepB-IPV	10/22/2018	CHS HL7 on 11/28/2018 01:51 PM
02/08/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Hib	CHS HL7	Hib (PRP-t)	10/17/2018	CHS HL7 on 11/28/2018 01:50 PM	Hib (PRP-t)	10/22/2018	CHS HL7 on 11/28/2018 01:51 PM
02/08/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Pneumococcal	CHS HL7	PCV13	10/17/2018	CHS HL7 on 11/28/2018 01:50 PM	PCV13	10/22/2018	CHS HL7 on 11/28/2018 01:51 PM
02/08/2018	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Polio	CHS HL7	DTaP-HepB-IPV	10/17/2018	CHS HL7 on 11/28/2018 01:50 PM	DTaP-HepB-IPV	10/22/2018	CHS HL7 on 11/28/2018 01:51 PM
08/22/2017	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Polio	CHS HL7	DTaP-HepB-IPV	04/30/2019	CHS HL7 on 04/30/2019 02:10 PM	Polio-IPV	04/30/2019	CHS HL7 on 05/06/2019 10:51 AM
08/22/2017	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Hep B	CHS HL7	DTaP-HepB-IPV	04/30/2019	CHS HL7 on 04/30/2019 02:10 PM	Hep B, ped/adol	04/30/2019	CHS HL7 on 05/06/2019 10:51 AM
08/22/2017	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	DTaP / TD / Tdap	CHS HL7	DTaP-HepB-IPV	04/30/2019	CHS HL7 on 04/30/2019 02:10 PM	DTaP	04/30/2019	CHS HL7 on 05/13/2019 09:29 AM
02/09/2019	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Pneumococcal	GLENWOOD HL7	PCV13	04/11/2019	CHS HL7 on 04/11/2019 10:01 AM	PPV23	04/11/2019	GLENWOOD HL7 on 05/06/2019 02:01 PM
02/09/2019	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	Hep B	GLENWOOD HL7	DTaP-HepB-IPV	04/11/2019	CHS HL7 on 04/11/2019 10:01 AM	Hep B, ped/adol	04/11/2019	GLENWOOD HL7 on 05/06/2019 01:54 PM
02/09/2019	COMMUNITY VACCINATORS / COMMUNITY PEDIATRICS	ACTIVE	DTaP / TD / Tdap	GLENWOOD HL7	DTaP-HepB-IPV	04/11/2019	CHS HL7 on 04/11/2019 10:01 AM	DTaP	04/11/2019	GLENWOOD HL7 on 05/06/2019 01:54 PM

How to Use this Report

Results from the Patients with Possible Duplicate Vaccinations - CT report can be used to improve data quality of CT WiZ immunizations by identifying duplicate immunizations for user resolution. The report also aids in data clean-up prior to running administrative or statistical reports, reminder/recall, and coverage assessments.

 Additional research may be needed to evaluate the information displayed on this report.

 Vaccinations identified as duplicates should be manually deleted from the patient record. Note: For those with an HL7 interface, deleting a vaccination in the EHR will also delete the vaccination event in CT WiZ.

 For clinics with an HL7 interface to CT WiZ, review this report monthly as a part of ongoing HL7 interface monitoring.

Possible Patient Duplicates

Purpose

The Possible Patient Duplicates report allows users to review possible duplicate patient records currently associated with the selected provider/clinic that have been identified in CT WiZ. CT WiZ runs an automated nightly process to identify potential duplicate patient records in the system by comparing the name, date of birth, and if needed, other identifying factors such as unique ID, gender, mother’s maiden name, phone number, email address, and/or physical/ mailing address. Duplicates can also be reported manually if identified and reported by an end user. All duplicates, whether identified by a user or through the automated nightly process, are queued for review and resolution by a CT WiZ system administrator.

The report can be viewed as a PDF or exported into an extract (i.e., flat file) for sorting or additional manipulation.

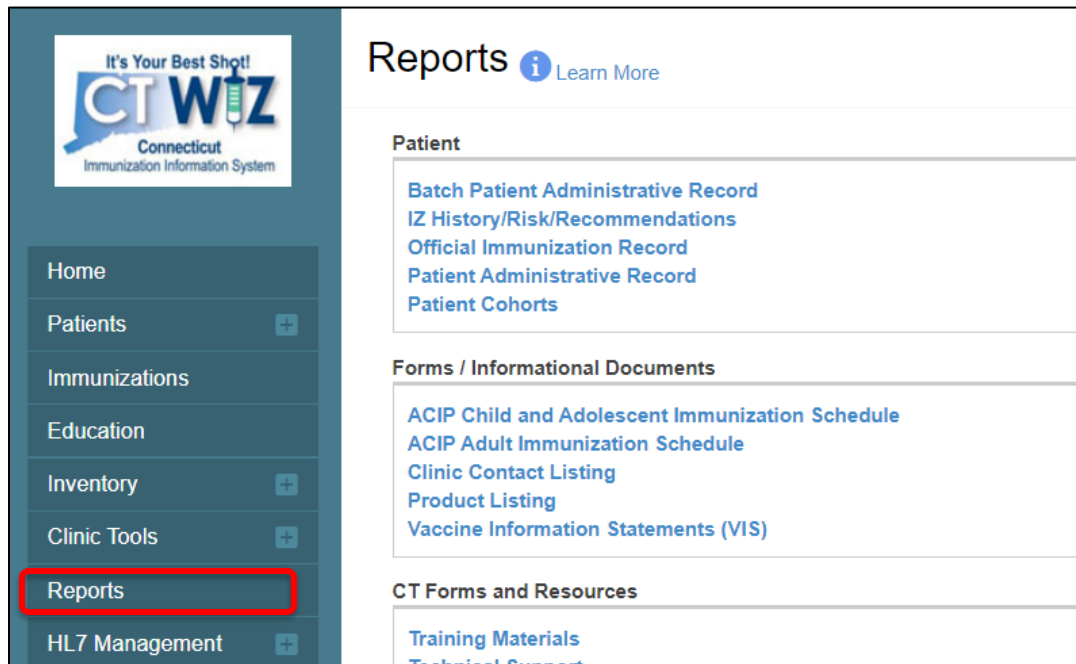
Intended Audience

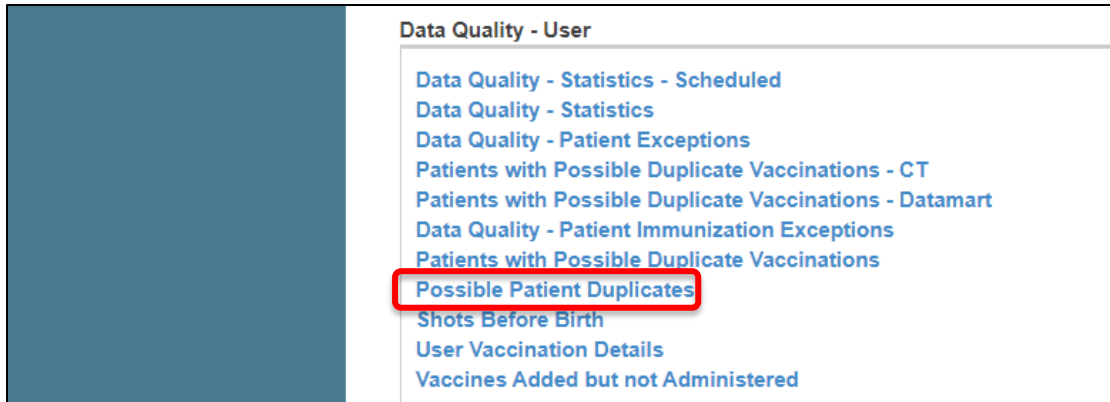
Clinic staff who:

- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Data Quality-User section, locate the Possible Patient Duplicates report.
- Click on the name of the report to open the report parameters page.





Parameters

Enter information into the report selection criteria.

1. Verify that the correct provider and clinic are displayed on the screen.
2. Use the Duplicate Found Date Range to restrict the results to only those duplicates that have been found or reported during the indicated time frame.
3. Use the DOB Date Range to restrict the results to only patients with a date of birth within the specified time frame.
4. Select the Include Only User-Identified box to restrict the search to only patients identified as potential duplicates by a CT WiZ user rather than system identified.



If the Include Only User-Identified box is checked, a new field appears that gives the user the option to restrict results to only duplicates that have been reported by a specific user. Leave the Identified By User field blank to include all clinic-associated users.

- Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file or a delimited flat file extract.



If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.

- Click Run Report.

Results

The report output provides information about potential duplicate patients in a side-by-side listing for easy review and comparison. The output also provides the date the duplicate was identified and a minimum relativity score.



The minimum relativity score indicates the likelihood that the patients identified in the side-by-side comparison are in fact the same patient. The higher the score, the more probable the match.

The report includes patients of all status types (i.e., Active, Inactive, Unknown, Deceased, Opted Out), but does not include pairs where one or both patients has been deleted.

Source Patient		Possible Duplicate Patient	
ID: 944810	DOB: 11/01/2018	Gender: M	
Name: APPLE, RED	Multiple Birth Indicator:	ID: 954131	DOB: 11/01/2018
Alias:		Gender: M	
Mother:	Mother Maiden Name:	Name: APPLE, RED	Multiple Birth Indicator: N
Address:	Telephone: 860-590-1488	Alias:	
	County:	Mother:	Mother Maiden Name:
Ethnicity: Not Hispanic or Latino	Races: Black or African-American	Address: 23 WOODLAND	Telephone:
Allergies/Risks:		HARTFORD, CT 06105	County: Hartford
Insurance Sources:		Ethnicity:	Races:
Default Provider: COMMUNITY VACCINATORS		Allergies/Risks:	
Default Clinic: COMMUNITY PEDIATRICS		Insurance Sources:	
Created By: HL7	Create Date: 12/12/2019	Default Provider: COMMUNITY VACCINATORS	
Last Updated By: HL7	Last Updated Date: 12/12/2019	Default Clinic: COMMUNITY PEDIATRICS	
		Created By: KELLY	Create Date: 02/12/2020
		Last Updated By: KELLY	Last Updated Date: 02/12/2020
Duplicate Identification Date: 02/13/2020		Duplicate Identified By: SYSTEM	
With Minimum Relativity=0.80			

How to Use this Report

Results from the Possible Patient Duplicates report can be used to review potential duplicate patients that have been identified in CT WiZ, where one or both patients identified in the possible match belong to the indicated provider/clinic. Clinic-level staff cannot merge or delete records but can manually report possible duplicates found in CT WiZ. Once a duplicate has been flagged (whether reported by a user or identified through the automated nightly process), a member of the CT WiZ staff will review, merge the records, and/or deactivate the duplicate, if appropriate.

On occasion, a user may identify a potential duplicate patient that has not already been identified by the system or another user. Follow the steps below to report duplicates to CT WiZ for resolution:

1. From the Patient Search screen, note the ID numbers of the potential duplicate patients.

Patient Search Links

Search Criteria

Patient ID: Identifier Type: Identifier Value:

Last Name: First Name: Middle Name: DOB: Gender:

Search Results - 2 record(s)

ID	Name	Gender	DOB	Action
944810	APPLE, RED 233 WOODLAND DR HARTFORD, CT 06105	M	11/01/2018	? Demographics
954131	APPLE, RED 23 WOODLAND HARTFORD, CT 06105	M	11/01/2018	? Demographics

2. Click on the record with the lower ID number and under the Action column, choose Duplicates from the dropdown menu.

Patient Search Links

Search Criteria

Patient ID: Identifier Type: Identifier Value:

Last Name: First Name: Middle Name: DOB: Gender:

Search Results - 2 record(s)

ID	Name	Gender	DOB	Action
944810	APPLE, RED 233 WOODLAND DR HARTFORD, CT 06105	M	11/01/2018	? Demographics
954131	APPLE, RED 23 WOODLAND HARTFORD, CT 06105	M	11/01/2018	? Demographics

You may add a new patient by clicking the 'New Patient' button.

- Demographics
- Immunizations
- Contacts
- Duplicates**
- Education
- Events
- Exemptions
- Local IDs

- Click on the magnifying glass.

APPLE, RED ID: 944810 DOB: 11/01/2018 AGE: 1Y 3M 13D GENDER: M

Patient Duplicates ?

View

Search Criteria

Patient ID	Identifier Type	Identifier Value			
<input type="text"/>	<input type="text"/>	<input type="text"/>			
Last Name	First Name	Middle Name	DOB	Gender	
APPLE	RE	<input type="text"/>	MM/DD/YYYY <input type="text"/>	<input type="text"/>	

Search for Additional Duplicates

Comments *


- Search for the patient again.
- Double click on the record with the higher ID number.

Patient Search Results - 2 record(s)

ID	Name	Gender	DOB
944810	APPLE, RED	M	11/01/2018
954131	APPLE, RED 23 WOODLAND HARTFORD, CT 06105	M	11/01/2018

Double click



6. Enter comment and click Add to Duplicates

 **APPLE, RED** ID: 944810 DOB: 11/01/2018 AGE: 1Y 3M 13D GENDER: M

Patient Duplicates

View


Search for Additional Duplicates

APPLE, RED (954131)   **Comment**

Comments *

ADDRESS SHOULD BE 233 WOODLAND

 **Add To Duplicates**



Shots Before Birth

Purpose

The Shots Before Birth report identifies patients who have at least one vaccination on record before their date of birth. This information can be used to identify and resolve issues with vaccination service data, data import/merges, or an incorrect date of birth on record with the birthing hospital.

The report can be viewed as a PDF or exported into an extract (i.e., flat file) for sorting or additional manipulation.

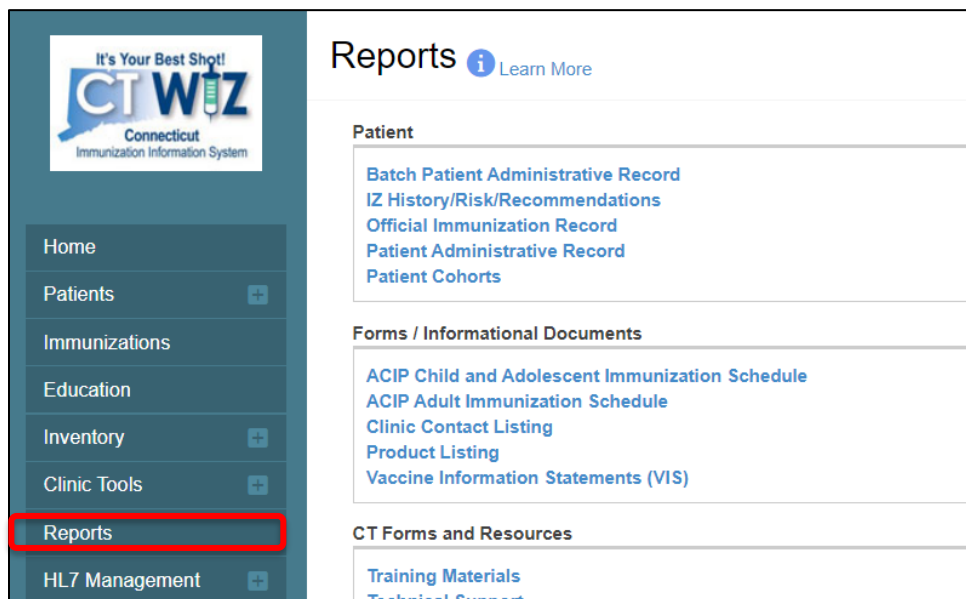
Intended Audience

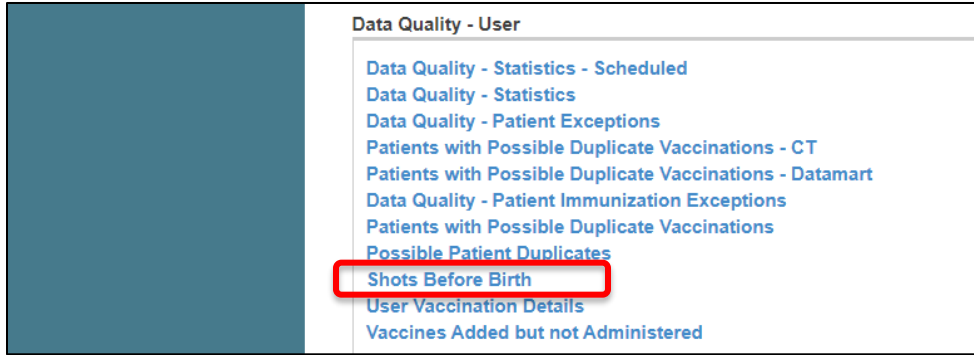
Clinic staff who:

- Enter patients and vaccinations
- Monitor the HL7 interface
- Monitor data quality

Location


- Click on Reports from the left-hand navigation menu in CT WIZ.
- In the Data Quality -User section, locate the Shots Before Birth report.
- Click on the name of the report to open the report parameters page.






Parameters

Enter information into the report selection criteria.

1. Verify that the correct provider and clinic are displayed on the screen.
2. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file or a delimited flat file extract.
 -  If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.
3. Click Run Report.

Results

The report output provides patient and clinic information, along with the vaccine type and vaccination date.

-  The flat file extract contains additional details not included on the PDF due to size/space restrictions, such as Audit Create Username, User Last Name, and User First Name.

DPH Connecticut Department of Public Health		CT WiZ Shots Before Birth			February 07, 2020	
Provider = (ALL PROVIDERS), Clinic = (ALL CLINICS)						
ID	Patient Name	DOB	Time of Birth	Clinic	Vaccine	Vaccination Date/Time
Patient ID/name displays here		06/17/2016		PATIENT RECORD	Hep B, ped/adol	06/13/2016
		03/26/2014		USP/USU	Hep B, ped/adol	03/26/2014

How to Use this Report

Results from the Shots Before Birth report can be used to identify and correct inaccurate date of birth or vaccination service data. This report helps clinic users improve their data quality.



It is advised to run this report prior to running other administrative or statistical reports.



Use the extract version to sort report details by specific parameters (i.e., Vaccination Date, Audit Username, etc.).



Look for patterns that indicate errors in data imports/merges.



Using the flat file extract, look for users who have a pattern of entering shots before birth and leverage as an educational opportunity.



For clinics who have an HL7 interface with CT WiZ, review this report monthly as a part of ongoing HL7 interface monitoring.

User Vaccination Details

Purpose

The User Vaccination Details report can be used to review productivity at the user level by providing a listing of patient vaccinations meeting the indicated search criteria. The report can be used to review productivity by the users who entered the data or by those who last updated the patient record. The report will display the patient immunization details along with information about the user who created and last updated the vaccination record. Aggregate values for patients, administered vaccinations, historical vaccinations, and invalid vaccinations are all found at the end of the report. Results can be viewed as a PDF or exported into an extract (i.e., flat file) for sorting or additional manipulation.

This report is specific to the *user* rather than a provider/clinic. See the Patient Detail with Services report for provider/clinic productivity details.

Intended Audience

Clinic staff who:

- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Data Quality-User section, locate the User Vaccination Details report.
- Click on the name of the report to open the report parameters page.

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Patient

- Batch Patient Administrative Record
- IZ History/Risk/Recommendations
- Official Immunization Record
- Patient Administrative Record
- Patient Cohorts

Forms / Informational Documents

- ACIP Child and Adolescent Immunization Schedule
- ACIP Adult Immunization Schedule
- Clinic Contact Listing
- Product Listing
- Vaccine Information Statements (VIS)

CT Forms and Resources

- Training Materials
- Technical Support

Data Quality - User

- Data Quality - Statistics - Scheduled
- Data Quality - Statistics
- Data Quality - Patient Exceptions
- Patients with Possible Duplicate Vaccinations - CT
- Patients with Possible Duplicate Vaccinations - Datamart
- Data Quality - Patient Immunization Exceptions
- Patients with Possible Duplicate Vaccinations
- Possible Patient Duplicates
- Shots Before Birth
- User Vaccination Details**
- Vaccines Added but not Administered

Parameters

Enter information into the report selection criteria.

User Vaccination Details

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. i

Report Selection Criteria

Vaccine
 (ALL VACCINES) 1.

Provider *
 COMMUNITY VACCINATORS

Clinic *
 COMMUNITY PEDIATRICS 2.

Include All Global Users (WebIZ and School Module) 3.

Date Range Filters

Vaccination Date Range
 From: MM/DD/YYYY Through: MM/DD/YYYY

Audit Create Date Range
 From: MM/DD/YYYY Through: MM/DD/YYYY

Audit Update Date Range
 From: MM/DD/YYYY Through: MM/DD/YYYY

Vaccinations
 All Historical Invalid 5.

Vaccinations Created and Updated By - 6.

Created By *	Updated By *
(ANY USER)	(ANY USER)
TRINELL, ZEEV (DOCTOR OF MEDICINE) HL7, CHS (-)	TRINELL, ZEEV (DOCTOR OF MEDICINE) HL7, CHS (-)


Note: hold the Ctrl key to select multiple items.


Output - 7.


Output Type PDF EXTRACT - Delimiter:


8.-


1. Select a vaccine from the dropdown menu to filter results by a specific vaccine. Leave the default setting of ALL VACCINES to include all vaccinations in the report.
2. Verify that the correct provider and clinic are displayed on the screen.
3. Leave the Include All Global Users (WebIZ and School Module) option on the default setting of NO.
4. Use the Date Range filters to return results based on the date range option(s) selected (i.e., Vaccination Date Range, Audit Create Date Range, or Audit Update Date Range). Enter dates in the From and Through fields of the selected option(s).

 Vaccination Date Range restricts results to vaccinations received by the patient within the specified date range.

 Audit Create Date Range restricts results to patients who received a vaccination that was created in CT WiZ during this time frame.

 Audit Update Date Range restricts results to patients who received a vaccination that was last updated in CT WiZ during this time frame.


 At least one of the date range options must be specified.


 As a general rule, the user will want to limit the use of optional parameters to as few as possible. All criteria are used inclusively to determine the patients included in the report (i.e., criteria A AND criteria B AND criteria C).

5. Select vaccinations to include in the report:


- All. Includes all vaccinations in the results.
- Historical. Includes only historical vaccinations in the results (i.e., vaccinations reported to CT WiZ by the provider but were not administered by the provider).
- Invalid. Includes only vaccinations that have been manually marked as invalid in the results. Note: This report does not capture vaccines that were marked invalid by the CT WiZ Recommender.

6. Select a Created By and Updated By user from the Vaccines Created and Updated By section.

 ANY USER may only be selected for either the Created By list or the Updated By list, not both.

 More than one user can be selected by holding the Ctrl key.

7. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file or a delimited flat file extract.

 If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.

8. Click Run Report.

Results

The report output provides patient information and immunization details along with the user who created and last updated the vaccination record.

- Patient. Name, ID, and DOB.
- Vaccination. Date, Clinic (CT WiZ code where dose was reported), Type, Lot #, Funding Source, and indicators for Completed (administered), Historical, and Invalid doses.
- User. User who created the record and user who last updated the record.



CT WIZ User Vaccination Details

May 14, 2021

BEAR, YOGGI (944545)
DOB: 11/01/2019
Default Clinic: C0006P405X

Vaccination									
Date	Clinic	Type	Lot #	Funding Source	Completed?	Historical?	Invalid?	Created By	Last Updated By
12/11/2019	C0006P405X	Rotavirus (Rotarix)	374XB	BLENDED PUBLIC	Y			HL7, CHS	HL7, CHS

Aggregate values for Patients, Administered Vaccinations, Added But Not Administered Vaccinations (e.g., drawn but not administered), Historical Vaccinations, and Invalid Vaccinations are found at the end of the report.

48	Patients
47	Administered Vaccinations
0	Added But Not Administered Vaccinations
1	Historical Vaccinations
0	Invalid Vaccinations

How to Use this Report

Results from the User Vaccination Details report can be used to review or monitor the productivity of immunization users, including users who entered the immunization data or those who last updated patient records.



Use the Excel output to sort report details by specific parameters (e.g., Historical, Invalid, Created By, Last Updated By).

Inventory Management – Vaccine Reports



Aggregate Administered Doses

Purpose

The Aggregate Administered Doses report is used by clinics with an HL7 interface with CT WiZ to list their total doses administered over a specified period of time. This report is intended to help providers reconcile their on-hand inventory in CT WiZ. Clinics must regularly perform vaccine inventory reconciliations to report doses administered and physical inventory counts in order for doses on-hand in CT WiZ (system inventory) to match doses on-hand at the clinic (physical inventory). This report can also be helpful to those responsible for monitoring data quality. The report output can help users identify missing data elements and data reporting issues or inconsistencies between their EMR/EHR and CT WiZ.

Results can be viewed as a PDF or exported into an or extract (i.e., flat file) for sorting or additional manipulation. A patient listing by ID number is available when choosing the extract option.

This report can be used in conjunction with other Inventory Management reports (i.e., [Inventory On-Hand](#) and [Inventory Transaction Inquiry](#) reports) to reconcile vaccine inventory.

Intended Audience

Clinic staff who:

- Enter patients and vaccinations
- Manage inventory
- Monitor the HL7 interface
- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Inventory Management-Vaccine section, locate the Aggregate Administered Doses report.
- Click on the name of the report to open the report parameters page.

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- IZ History/Risk/Recommendations
- Official Immunization Record
- Patient Administrative Record
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Forms / Informational Documents

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- ACIP Adult Immunization Schedule
- Clinic Contact Listing
- Product Listing
- Vaccine Information Statements (VIS)

CT Forms and Resources

- Training Materials
- Technical Support

Inventory Management - Vaccine

- Count Sheet
- Inventory Transactions By Reconciliation Bucket
- Daily Vaccinations Report
- Aggregate Administered Doses**
- Inventory Adjustment Inquiry
- Inventory On-Hand
- Inventory Pending Transfers
- Inventory Reconciliation Worksheet
- Inventory Summary By Funding Source
- Inventory Transaction Inquiry
- Inventory Transfer Inquiry
- Monthly Immunization Report (VFC and State)
- Possible Duplicate Inventory Report
- Unaccounted For Doses

Parameters

Enter information into the report selection criteria.

Aggregate Administered Doses

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. i

Report Selection Criteria

Provider *
 COMMUNITY VACCINATORS

Clinic *
 405X : COMMUNITY PEDIATRICS


Vaccination Date Range *
 From: 06/01/2019 📅 Through: 02/27/2020 📅 - 2.

Funding Source
 (ALL) - 3.

Vaccine
 (ALL) - 4.

Output Type PDF EXTRACT - Delimiter: | - 5.

6. Run Report Cancel


1. Verify that the correct provider and clinic are displayed on the screen.
2. Enter Vaccination Date Range to filter results by the date on which the vaccine was administered. These dates should also match the timeframe of your reconciliation.
3. Select a Funding Source to filter results by BLENDED PUBLIC CVP or PRIVATE. Leave the default selection of ALL FUNDING SOURCES to include both options.
4. Select a Vaccine to filter results by vaccine. Leave the default selection of ALL to include all vaccines.
5. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF or a delimited flat file extract.
 -  If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.
6. Click Run Report.

Results

The report provides a list of total doses administered for each vaccine lot number for the selected clinic/provider over a specified date range. Results include Vaccination, Manufacturer, NDC Number, Lot Number, Expiration Date, Funding Source, and the aggregate doses administered per line item.



The Excel output contains additional details not included on the PDF, including Patient ID, Vaccination Date, and Create Date/Time.

		CT WiZ		February 27, 2020		
Aggregate Administered Doses						
<small>Provider = COMMUNITY VACCINATORS, Clinic = 405X : COMMUNITY PEDIATRICS, Dose Administered From Date = 06/01/2019, Dose Administered Through Date = 02/27/2020, Funding Source = (ALL), Vaccine = (ALL)</small>						
C0006P405X - COMMUNITY PEDIATRICS - 405X						
Vaccination	Manufacturer	NDC Number	Lot Number	Expiration Date	Funding Source	Doses
DTaP-HepB-IPV			2HC47	12/13/2020		1
DTaP-HepB-IPV		58160-0811-52			BLENDED PUBLIC CVP	1
DTaP-HepB-IPV		58160-0811-52	2HC47			2
DTaP-HepB-IPV		58160-0811-52	2HC47		BLENDED PUBLIC CVP	1
DTaP-HepB-IPV	SKB		2DPL8	03/27/2020	BLENDED PUBLIC CVP	1
DTaP-HepB-IPV	SKB		2HC47	12/13/2020		1
DTaP-HepB-IPV	SKB		2HC47	12/13/2020	BLENDED PUBLIC CVP	9
DTaP-HepB-IPV	SKB		4ZH95	10/30/2020	BLENDED PUBLIC CVP	1
DTaP-HepB-IPV	SKB	58160-0811-41	2HC47	12/13/2020	PRIVATE	2
DTaP-HepB-IPV	SKB	58160-0811-52	2DPL8	03/27/2020	BLENDED PUBLIC CVP	1
DTaP-HepB-IPV	SKB	58160-0811-52	2HC47	12/13/2020	BLENDED PUBLIC CVP	6
DTaP-HepB-IPV	SKB	58160-0811-52	2HC47	12/13/2020	PRIVATE	2
Hib (PRP-T)	PMC		UI921AAA	11/10/2020	BLENDED PUBLIC CVP	1
Influenza Quad Inj P	IDB		49D73	06/30/2020	BLENDED PUBLIC CVP	3
Polio-IPV	PMC		MULTI1		PRIVATE	1
Polio-IPV	PMC		MULTI1	01/15/2020	PRIVATE	1
Polio-IPV	PMC		MULTI1	01/31/2020	PRIVATE	1
Rotavirus (Rotarix)						2

How to Use this Report

When completing a vaccine inventory reconciliation in CT WiZ, the Aggregate Administered Doses report can be used in conjunction with the [Inventory On-Hand](#) and [Inventory Transaction Inquiry](#) reports-to help account for any discrepancies between the on-hand calculation in CT WiZ (system inventory) and doses on-hand at the clinic (physical inventory).



View the extract file as an Excel document to sort these details by specific parameters (i.e., Vaccine, Lot Number, Expiration Date.).



Additional steps should be taken if discrepancies are found during reconciliation.

- If data entry/reporting errors are identified, these issues should be corrected in the EHR to trigger an updated message for providers with an HL7 interface.
- If it appears that doses in the EHR have not been reported to CT WiZ, contact the CT WiZ help desk so the interface can be examined.

Inventory On-Hand

Purpose

The Inventory On-Hand report provides a list of all available vaccine inventory on-hand in CT WiZ. The report is helpful to providers/clinics for inventory management and reconciliation. This report can be used in conjunction with other Inventory Management reports (i.e., [Aggregate Administered Doses](#) and [Inventory Transaction Inquiry](#) reports) to reconcile vaccine inventory.

Results can be viewed as a PDF or exported into an extract (i.e., flat file) for sorting or additional manipulation.

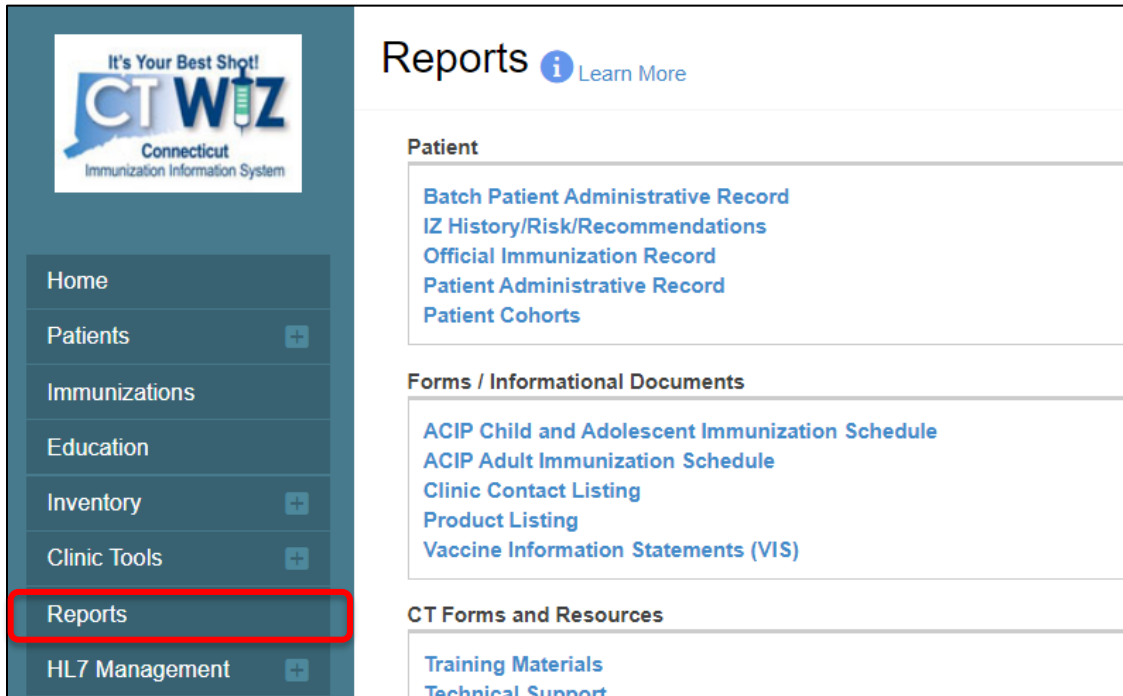
Intended Audience

Clinic staff who:

- Manage inventory

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Inventory Management - Vaccine section, locate the Inventory On-Hand report.
- Click on the name of the report to open the report parameters page.






Parameters

Enter information into the report selection criteria.


The screenshot shows the "Inventory On-Hand" report selection criteria form. The form includes the following fields and options:

- Provider ***: Dropdown menu showing "COMMUNITY VACCINATORS" (labeled 1).
- Inventory Location**: Dropdown menu showing "(ALL)" (labeled 2).
- Vaccine**: Dropdown menu (empty) (labeled 3).
- NDC #**: Text input field (empty).
- Funding Source**: Dropdown menu (empty).
- Manufacturer**: Dropdown menu (empty).
- Lot Number**: Dropdown menu (empty).
- Include Expired?**: Checkbox (unchecked).
- Expiration Date Range**: "From: MM/DD/YYYY" and "Through: MM/DD/YYYY" (labeled 4).
- Output Type**: Radio buttons for "PDF" (selected) and "EXTRACT - Delimiter: |" (labeled 5).
- Run Report** and **Cancel** buttons (labeled 6).


1. Verify that the correct provider is displayed on the screen.
2. Leave Inventory Location set to ALL.
3. Select parameters, if desired, to include in inventory report:
 - Vaccine. Provides a list of active vaccines defined in CT WiZ.


- NDC #. Indicates the National Drug Code to narrow down results to those that match exactly.
 - Funding Source. Select a Funding Source to filter results by BLENDED PUBLIC CVP or PRIVATE. Leave the default selection of ALL FUNDING SOURCES to include both options.
 - Manufacturer. Provides a list of all manufacturers defined in CT WiZ.
 - Lot Number. Provides a list of all vaccine lot numbers defined in CT WiZ.
-  Lot numbers listed here may have been used by inventory locations other than the inventory location chosen.
- Include Expired? Use the checkbox to include expired vaccines in the report output.

4. Enter an Expiration Date Range to filter results to only include vaccine inventory with expiration dates within the specified range, otherwise leave blank to include all vaccines in inventory.

 Use this field to view inventory that is due to expire in the next 30 or 60 days.

5. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file or a delimited flat file extract.

 If selecting an extract, specify character preference in the Delimiter field. Enter “,” to generate the file format for Excel.

 The PDF option is the best choice for printing the report.

6. Click Run Report.

Results

The report provides a breakdown of available vaccine inventory as calculated by CT WiZ. The output details Vaccine, Manufacturer, NDC #, Lot #, Funding Source, Expiration Date, and Doses On Hand for each line item. Total Doses at Inventory Location, Total Doses at Provider, and Total Doses for all Providers are available at the bottom of the report.



CT WiZ Inventory On-Hand

March 04, 2020

Inventory Location = (ALL)

4803 FREEZER 1

Vaccine	Manufacturer	NDC #	Lot #	Fund Src	Expiration Date	Doses On Hand
Hep B, ped/adol	Merck & Co, Inc.	00006-4981-00	ABC123	BLENDED	04/17/2020	5
Varicella	Merck & Co, Inc.	00006-4827-00	R023735	BLENDED	08/20/2020	9

Total Doses at Inventory Location: 14

4803 REFRIGERATOR 1

Vaccine	Manufacturer	NDC #	Lot #	Fund Src	Expiration Date	Doses On Hand
Hep A, ped/adol, 2D	GlaxoSmithKline (formerly SmithKline Beecham)	58160-0825-52	279H2	BLENDED	01/31/2021	4
HPV9	Merck & Co, Inc.	00006-4121-02	KJHH	BLENDED	02/02/2022	5
HPV9	Merck & Co, Inc.	00006-4121-02	LKFL	BLENDED	10/15/2026	5
HPV9	Merck & Co, Inc.	00006-4121-02	LLKKJH	BLENDED	10/12/2022	5
HPV9	Merck & Co, Inc.	00006-4119-03	R002345	BLENDED	11/16/2020	3
MCV4 (Menactra)	Sanofi Pasteur (Formerly Aventis Pasteur)	49281-0589-05	FF	BLENDED	11/02/2020	10
MCV4 (Menactra)	Sanofi Pasteur (Formerly Aventis Pasteur)	49281-0589-05	FGFG	BLENDED	09/02/2022	10
MCV4 (Menactra)	Sanofi Pasteur (Formerly Aventis Pasteur)	49281-0589-05	KJJHH	BLENDED	03/19/2026	5
MCV4 (Menactra)	Sanofi Pasteur (Formerly Aventis Pasteur)	49281-0589-05	U6153AA	BLENDED	03/21/2020	5
MMR	Merck & Co, Inc.	00006-4681-00	DDD	BLENDED	10/02/2023	5
MMR	Merck & Co, Inc.	00006-4681-00	DDDD	BLENDED	10/02/2020	10
MMR	Merck & Co, Inc.	00006-4681-00	DFDD	BLENDED	10/02/2020	5
MMR	Merck & Co, Inc.	00006-4681-00	R010474	BLENDED	04/10/2020	5
MMR	Merck & Co, Inc.	00006-4681-00	TRE	BLENDED	04/05/2026	5
PCV13	Pfizer, Inc. (includes Wyeth, Lederle, and Praxis)	00005-1971-02	DD	BLENDED	10/20/2020	5

Td (adult), adsorbed	Grifols	13533-0131-01	A105B	BLENDED	03/08/2020	2
Tdap, Adsorbed	Sanofi Pasteur (Formerly Aventis Pasteur)	49281-0400-10	C5519BA	BLENDED	09/12/2020	9

Total Doses at Inventory Location: 133

Total Doses at Provider: 147

Total Doses for all Providers: 147

How to Use this Report

Results from the Inventory On-Hand report can be used to help reconcile vaccine inventory. Clinics do this by comparing doses on-hand in CT WiZ (system inventory) with doses on-hand at the clinic (physical inventory).



View the extract file as an Excel document to sort these details by specific parameters (i.e., Vaccine, Lot Number, Expiration Date.).



Additional steps should be taken if discrepancies are found during reconciliation.

- Recount physical inventory to ensure boxes and individual doses were counted accurately.
- Talk to those responsible for entering doses administered or monitoring your HL7 interface to make sure all doses were reported and reported correctly to CT WiZ.
- If data entry/reporting errors are identified, these issues should be corrected in the EHR to trigger an update message for providers with an HL7 interface.
- If it appears that doses in the EHR have not been reported to CT WiZ, contact the CT WiZ help desk so the interface can be examined.



Clinics may want to use the [Aggregate Administered Doses](#) and [Inventory Transaction Inquiry](#) reports in conjunction with the Inventory On-Hand report while completing inventory reconciliation.

Inventory Transaction Inquiry

Purpose

The Inventory Transaction Inquiry report allows users to find or validate all inventory transactions that have been made in CT WiZ for their respective clinic. This is useful for inventory management and reconciliation, or when resolving a problematic inventory item. This report can be used in conjunction with other Inventory Management reports (i.e., [Aggregate Administered Doses](#) and [Inventory On-Hand](#) reports) to reconcile vaccine inventory.

Results can be viewed as a PDF file, HTML display, or exported into an Excel spreadsheet or extract (i.e., flat file) for sorting or additional manipulation.

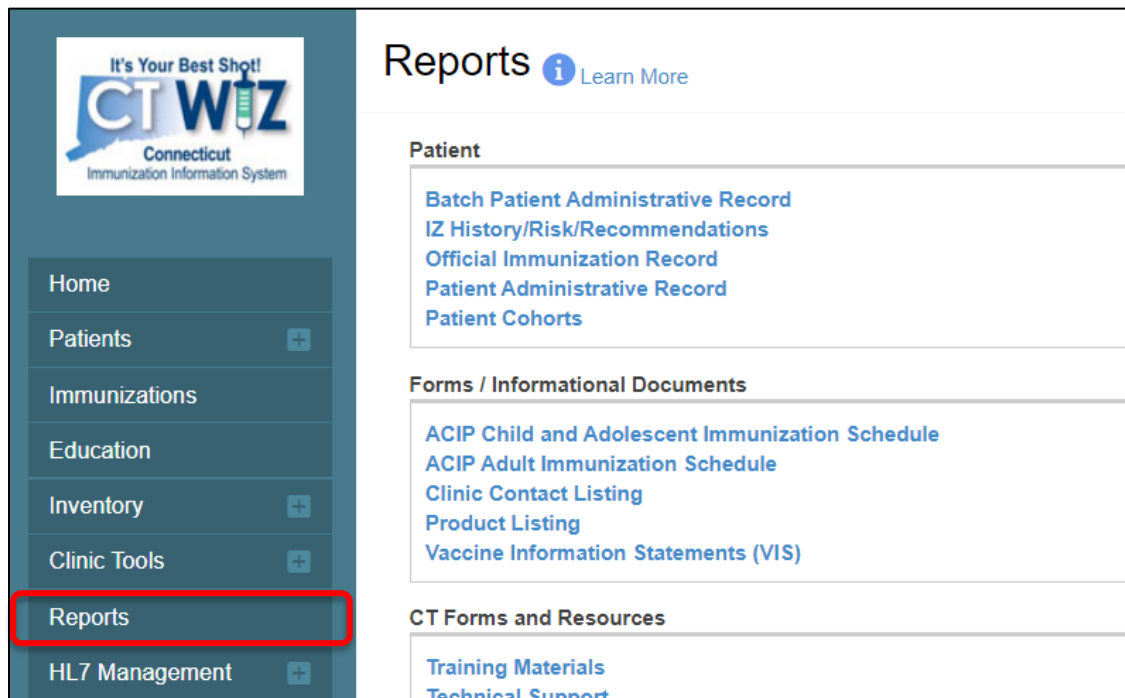
Intended Audience

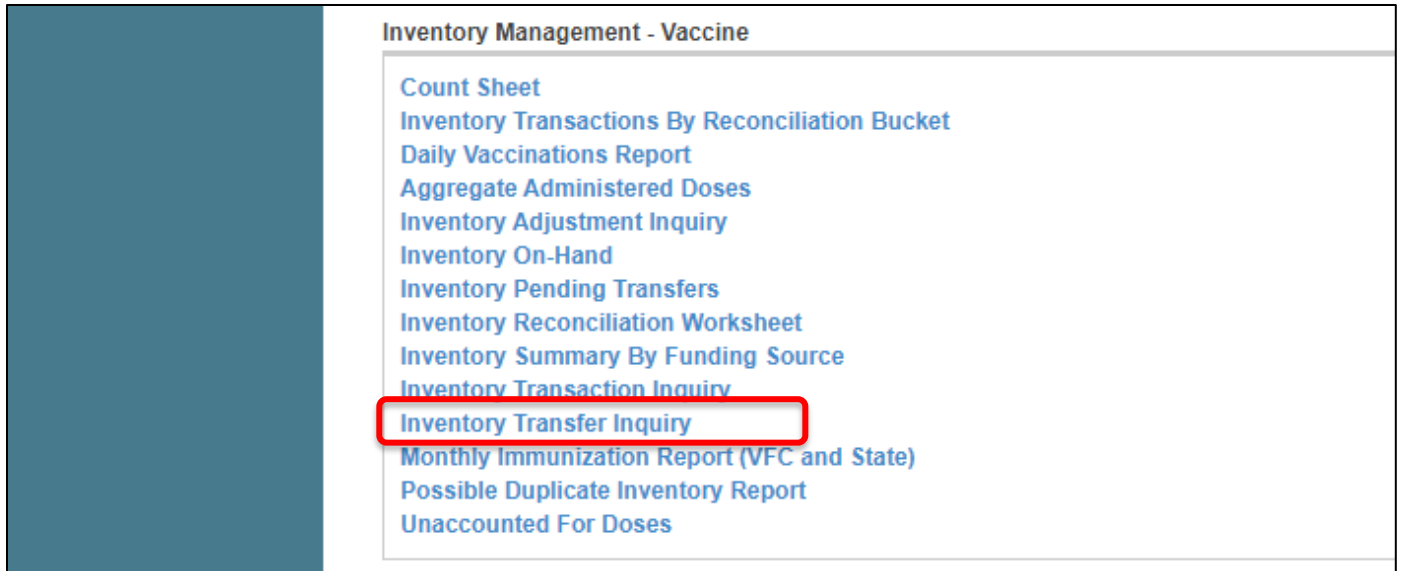
Clinic staff who:

- Manage inventory

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Inventory Management-Vaccine section, locate the Inventory Transaction Inquiry report.
- Click on the name of the report to open the report parameters page.





Parameters

Enter information into the report selection criteria.

Inventory Transaction Inquiry [Learn More](#) Cancel Run Report **7.**

Report Selection Criteria

Provider * - 1.

Inventory Location - 2.

Vaccine Funding Source

Manufacturer

Lot Number - 3.

Expiration Date Range - 4. From: Through:

Transaction Date Range - 5. From: Through:

Output Type PDF HTML EXCEL EXTRACT - Delimiter: - 6.

1. Verify that the correct provider is displayed on the screen.
2. Leave Inventory Location set to ALL.
3. Specify at least one of the following fields:

- Vaccine. Provides a list of active vaccines defined in CT WiZ.
- Funding Source. Select a Funding Source to filter results by BLENDED PUBLIC CVP or PRIVATE. Leave the default selection of ALL FUNDING SOURCES to include both options.
- Manufacturer. Provides a list of all manufacturers defined in CT WiZ.
- Lot Number. Provides a list of all vaccine lot numbers defined in CT WiZ.



Lot numbers listed here may have been used by inventory locations other than the inventory location chosen.

4. Enter an Expiration Date Range to filter results to only vaccine inventory with expiration dates within the specified range.
5. Enter a Transaction Date Range to filter results to only inventory transaction dates that fall within the specified range.



Vaccine, lot number, and/or transaction date range are the best optional sort criteria to use when running this report.

6. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF file, HTML display, Excel file, or a delimited flat file extract.



The PDF option is the best choice for printing the report.



If the user only wishes to view the report (i.e., no printed copy needed), select the HTML screen format.



If selecting an extract, specify character preference in the Delimiter field.

7. Click Run Report.

Results

The report provides individual inventory transactions that correspond to the criteria selected. Results are listed alphabetically by vaccine type and include Transaction Date, Vaccine, Manufacturer, Lot Number, NDC, Expiration Date, Doses, and Net Change in inventory count.



**CT WIZ
Inventory Transaction Inquiry**

March 10, 2020

Provider = COMMUNITY VACCINATORS, Inventory Location = (All), From Trans Date = 12/01/2019, Through Trans Date = 03/10/2020

Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg NDC	Lot No	Fund Src	Exp Date	Type	Doses	Net Change
4388	COMMUNITY HEALTH SERVICES INC.		12/05/2019	DTaP	SKB 58160-0810-11 T79X3		BLENDED	03/08/2020	ADJ	0	0
Reversal ID:			11:58:00 PM			Adjustment Reason: Aggregate Doses Admin'd					
Created By: LORETTA RIVERA on 12/06/2019 11:33:25			Comments: AGGREGATE ADMINISTERED VACCINATIONS FROM THE RECONCILIATION SCREEN.								
Updated By: LORETTA RIVERA on 12/06/2019 11:33:25											
4389	COMMUNITY HEALTH SERVICES INC.		12/05/2019	DTaP	SKB 58160-0810-11 YK9ET		BLENDED	03/08/2020	ADJ	0	0
Reversal ID:			11:58:00 PM			Adjustment Reason: Aggregate Doses Admin'd					
Created By: LORETTA RIVERA on 12/06/2019 11:33:25			Comments: AGGREGATE ADMINISTERED VACCINATIONS FROM THE RECONCILIATION SCREEN.								
Updated By: LORETTA RIVERA on 12/06/2019 11:33:25											
4419	COMMUNITY HEALTH SERVICES INC.		12/05/2019	DTaP (Daptacel)	PMC 49281-0286-10 123XYZ		PRIVATE	10/10/2019	ADJ	0	0
Reversal ID:			11:58:00 PM			Adjustment Reason: Aggregate Doses Admin'd					
Created By: LORETTA RIVERA on 12/06/2019 11:33:25			Comments: AGGREGATE ADMINISTERED VACCINATIONS FROM THE RECONCILIATION SCREEN.								
Updated By: LORETTA RIVERA on 12/06/2019 11:33:25											
5555	COMMUNITY HEALTH SERVICES INC.		12/01/2019	DTaP-HepB-IPV	SKB 58160-0811-52 2HC47		BLENDED	12/13/2020	ADJ	(30)	(30)
Reversal ID:			10:48:00 AM			Adjustment Reason: CVP - OTHER					
Created By: BETH GAMBLE on 12/30/2019 10:48:58			Comments: TESTING								
Updated By: BETH GAMBLE on 12/30/2019 10:48:58											
5556	COMMUNITY HEALTH SERVICES INC.		12/01/2019	DTaP-HepB-IPV	SKB 58160-0811-52 2HC47		BLENDED	12/01/2020	ADJ	10	(20)
Reversal ID:			10:49:00 AM			Adjustment Reason: Add Initial Inventory					
Created By: BETH GAMBLE on 12/30/2019 10:49:41			Comments:								
Updated By: BETH GAMBLE on 12/30/2019 10:49:41											
4481	COMMUNITY HEALTH SERVICES INC.		12/01/2019	DTaP-HepB-IPV	SKB 58160-0811-41 2HC47		PRIVATE	12/13/2020	ADJ	2	(18)
Reversal ID:			12:00:00 PM			Adjustment Reason: Add Initial Inventory					

Transaction type totals are listed at the bottom of the report.

Transaction Type Totals	
INV ADJ	
Add Initial Inventory	158
Aggregate Doses Administered	(9)
CVP - OTHER	(64)
	<hr/>
	85
VACCINATION	
	<hr/>
	(18)
	<hr/>
Total Net Change	67

How to Use this Report

Results from the Inventory Transaction Inquiry report can be used to investigate discrepancies discovered during vaccine reconciliation. When numbers for a vaccine inventory line item do not add up as expected, this report can be used to view a complete history of transactions against a selected vaccine type or even a specific lot number. The report can be used to help identify errors in data entry, which administrative users can correct or use as a training opportunity.



Use the Excel output to sort these details by specific parameters (i.e., Vaccine Type, Lot Number, Transaction Date).



Compare transactions against those recorded in the EHR to confirm whether all doses administered were reported to the IIS. Additional steps should be taken if discrepancies are found during reconciliation.

- If data entry/reporting errors are identified, these issues should be corrected in CT WiZ for those providers reporting directly through the user interface or in the EHR to trigger an update message for providers with an HL7 interface.
- If it appears that doses in the EHR have not been reported to CT WiZ, contact the CT WiZ help desk so the interface can be examined.



Clinics may want to use the [Aggregate Administered Doses](#) and [Inventory On-Hand](#) reports in conjunction with the Inventory On-Hand report while completing inventory reconciliation.

Interface Activity Reports



HL7 Activity

Purpose

The HL7 Activity report provides a summary of HL7 activity for the selected provider/clinic. The report is helpful in determining the proportion of HL7 messages sent to and received from CT WiZ that are transmitted successfully or contain errors. The report can also be used to identify gaps in data transmission between the clinic and CT WiZ.

Intended Audience

Clinic staff who:

- Monitor the HL7 interface
- Monitor data quality

Location

- Click on Reports from the left-hand navigation menu in CT WiZ.
- In the Interface Activity – Clinic section, locate the HL7 Activity report.



- Clinics should disregard the other similar report listed in this section (i.e., HL7 Activity – Datamart).
- Click on the name of the report to open the report parameters page.

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Reports ⓘ Learn More

Patient

- Batch Patient Administrative Record
- IZ History/Risk/Recommendations
- Official Immunization Record
- Patient Administrative Record
- Patient Cohorts

Forms / Informational Documents

- ACIP Child and Adolescent Immunization Schedule
- ACIP Adult Immunization Schedule
- Clinic Contact Listing
- Product Listing
- Vaccine Information Statements (VIS)

CT Forms and Resources

- Training Materials

Interface Activity - Clinic

- HL7 Acknowledgement (ACK) Messages
- HL7 Activity**
- HL7 Activity - Datamart
- HL7 Facility Codes
- HL7 Message Count
- DQA Patient Vaccination Report
- HL7 Messages by ACK Message

Parameters

Enter information into the report selection criteria.

HL7 Activity

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page.



Report Selection Criteria

Provider * COMMUNITY VACCINATORS **Facility Code**

Clinic * COMMUNITY PEDIATRICS **1.**

User

EHR Vendor (ALL VENDORS) **2.**

EHR Product

Message Type (ALL) **3.**

From Date 03/30/2020 From Time 12:00 AM (HH:MM A/P) To Date 04/06/2020 To Time 11:59 PM (HH:MM A/P) **4. & 5.**

Output Type PDF EXTRACT - Delimiter: | **6.**

7. Run Report Cancel

1. Verify that the correct provider and clinic are displayed on the screen. The Facility Code will automatically match the selected clinic.
2. Leave User, EHR Vendor, and EHR Product fields blank as the report will automatically pull this information from the clinic profile.
3. Select the Message Type(s) to be included in the report. Leave the default selection as ALL to include all types of messages.
4. Enter a From Date and To Date to filter results by messages sent during a specified date range.
5. Enter a From Time and To Time to filter results by messages sent during a specific time. Leave default time as is unless looking at a very specific time range.
6. Use the radio buttons to select the desired output type. Report results can be displayed as a static PDF or a delimited flat file extract.



The extract is not a recommended output type for this report.

7. Click Run Report.

Results

The report output provides clinic and HL7 Facility Code information. Results include message type, whether the messages were sent or received by CT WiZ, number of messages, and date and time of first and last calls.

Acknowledgement codes are further broken down to include:

- AA – Application Accept. Message was accepted without error.
- AE – Application Error. Message was processed and errors were reported.
- AR – Application Reject. Message was rejected.

The PDF output includes totals by Message Type, for the selected Facility Code, Clinic, and Provider.

DPH		CT WiZ HL7 Activity			February 07, 2020	
Provider = COMMUNITY VACCINATORS, Clinic = COMMUNITY PEDIATRICS, HL7 Facility = (ALL FACILITIES), EHR Vendor = (ALL VENDORS), From Date = 12/01/2019, From Time = 12:00 AM, To Date = 01/31/2020, To Time = 11:59 PM						
COMMUNITY VACCINATORS (855)						
COMMUNITY PEDIATRICS (894) - C0006P405X						
HL7 Facility Code: <input type="text"/>		Username: HL7_ <input type="text"/>		EHR Vendor: <input type="text"/>		EHR Product: <input type="text"/>
Message Type	Log Type	# of Calls	First Call	Last Call		
VXQV01	Received	0				
VXRV03	Sent	0				
VXXV02	Sent	0				
VXUV04	Received	151	Dec 9 2019 2:54PM	Jan 9 2020 11:48AM		
QBPK11	Received	0				
QCKQ02	Sent	0				
RSPK11	Sent	0				
ORUR01	Received	0				
ACK - AA	Sent	42	Dec 9 2019 2:55PM	Dec 13 2019 1:17PM		
ACK - AE	Sent	109	Dec 9 2019 2:54PM	Jan 9 2020 11:48AM		
ACK - AR	Sent	0				
BATCH		0				
HL7 Facility Code <input type="text"/>		Total:	302			
Clinic COMMUNITY PEDIATRICS (894)		Total:	302			
Provider COMMUNITY VACCINATORS (855)		Total:	302			

How to Use this Report

Results from the HL7 Activity report can be used to assess the proportion of HL7 messages sent successfully (i.e., ACK – AA) versus those containing errors (i.e., ACK – AE) during a specified time period. The report also allows clinics to identify HL7 messages that were rejected (i.e., ACK – AR), as well as unintended gaps in HL7 activity.



Review First Call and Last Call details to ensure there were no gaps in activity during the selected date range.



If results show ACK – AE or ACK – AR messages, clinic should investigate errors and correct any issues before resubmitting the corrected version of the data.