

USIIS User Documentation:

Clinic Reports & Batch Processes – Batch Lists

The Batch Lists screen displays all Batch Lists that facility users have created and not previously deleted.

- Lists are sorted in the order created, most recent at the top.
- Click a column heading to sort by that column.

Logout

Clinical Reports and Batch Processes

Reports **Batch Lists** Help | Links

Batch Lists

Provider: USIIS PROGRAM - 001
User: Nancy McConnell

Create New Batch List ?

Filter by user who requested the batch list Choose One

ID	List Name	Status	User	Batch List Time	Patients Included			
3504	AD Batch Test2 01192017	Ready	Aliz Deppe	01/19/2017 5:13:13 PM	490	Delete	Edit/Use	Print List
3502	AD Batch Test 01192017	Ready	Aliz Deppe	01/19/2017 5:10:10 PM	36	Delete	Edit/Use	Print List
3493	AD Test1 01192017	Removed	Nancy McConnell	01/19/2017 2:20:24 PM	2	Delete		
3460	AD Test2 01192017	Ready	Aliz Deppe	01/19/2017 1:21:22 PM	49	Delete	Edit/Use	Print List
3460	AD Test1 01192017	Ready	Aliz Deppe	01/19/2017 6:45:55 AM	267	Delete	Edit/Use	Print List
3451	AD Test7 01172017	Ready	Aliz Deppe	01/17/2017 4:35:15 PM	24	Delete	Edit/Use	Print List
3447	Tuesday17	Ready	Jyl Bosone	01/17/2017 3:40:20 PM	6	Delete	Edit/Use	Print List
3443	jml7jtest	Ready	Jyl Bosone	01/17/2017 12:30:07 PM	3	Delete	Edit/Use	Print List
3442	AD Test6 01172017	Ready	Aliz Deppe	01/17/2017 12:30:00 PM	2	Delete	Edit/Use	Print List
3432	ABC Pediatrics List	Ready	Jyl Bosone	01/17/2017 10:22:37 AM	87	Delete	Edit/Use	Print List
3428	AD Test5 01172017	Removed	Aliz Deppe	01/17/2017 9:42:47 AM	4	Delete		
3427	AD Test4 01172017	Removed	Aliz Deppe	01/17/2017 9:39:47 AM	0	Delete		
3426	AD Test3 01172017	Ready	Aliz Deppe	01/17/2017 9:30:52 AM	27	Delete	Edit/Use	Print List
3422	fd-fsdfsd	Ready	Jc Alexander	01/17/2017 8:49:15 AM	100	Delete	Edit/Use	Print List
3419	dfsdffsd	Ready	Jc Alexander	01/17/2017 8:30:06 AM	100	Delete	Edit/Use	Print List

<< < 1 2 > >>

Functionality – Batch Lists

Navigation [bottom of list]

If your facility has more than one page of lists, use [<< < 1 2 > >>](#) to navigate between pages.

Create New Batch List

Displays the Create New Batch List screen so criteria can be entered and a new batch list created.

Filter by user who requested the batch list

Displays only reports created by the specified facility user.

List of Batch Lists

List Name

- Click on the [blue underlined](#) list name to view the criteria used to create the list.
- Click on the list name again to hide the criteria.

Status

Ready: list creation started by a user, completed by USIIS, and ready for edit/use. **Running:** list creation started by a user and USIIS is still creating the report.

Queued: list is waiting for another Batch List to be created before starts.

Removed: The batch list was deleted from the Batch List Edit/Use screen.

- The list remains on this list so the criteria used to create the list can be viewed.
- Press the Delete button (on the Batch Lists screen) if this history is not needed.

Failed: contact Customer Support.

User

Name of facility user who created the batch list.

USIIS User Documentation:

Clinic Reports & Batch Processes – Batch Lists

Batch List Time	Date and time the batch list creation was completed—or started, if not yet complete.
Patients Included	Number of patients included in the batch list.
Buttons	
Delete or % Complete	<u>Delete</u> : Delete the batch list. <u>% <#></u> : Batch list is still being created and <#> value is the % complete.
Edit/Use or Update Status	<u>Update Status</u> : Batch list is still being created. Press this button to update the % complete value. <u>Edit/Use</u> : The list is complete. Press this button to view the Batch List Edit/Use screen where the patients included in the list display—and can be modified and used for a report or action.
Print List	Print the list of patients in the specific batch list.

Create New Batch List screen.

Clinical Reports and Batch Processes
usiis

Reports | Batch Lists | Help | Links

Create New Batch List

Provider: USIIS PROGRAM - 801
User: Nancy McConnell

Enter Search Criteria to Create a New List

* List Name:

Enter no more than one criteria from each section

Section A:

Patients ages:

Or

Patients Ages in months: from through

Or

Patients with birth date: from through

Section B:

Patients whose last immunization was administered at your facility: ☐

Or

Patients with immunizations administered at your facility: from through

Section C:

Patients with Zip Code: Or Patients in County:

Section D:

Number of randomly selected patients:

USIIS User Documentation:

Clinic Reports & Batch Processes – Batch Lists

Functionality – Create New Batch List	
List Name	Required. Will display in the list of batch lists on the Batch Lists screen.
Section A – select no more than one criteria from this section	
Patients' ages	Pre-specified age ranges. Selections include: 0-6 months, 0-2 years, 4-6 years, 11-12 years, 13-15 years, 13-18 years, 19-26 years, 60 years and older, and 65 years and older.
Patients' Ages in months	Enter from and through months of age.
Patients with birth date	Enter from and through birth dates.
Section B – select no more than one criteria from this section	
Patients whose last immunization was administered at your facility	Check box.
Patients with immunizations administered at your facility	Enter from and through immunization dates.
Section C – select no more than one criteria from this section	
Patients with Zip Code	Enter one or more zip codes.
Patients in County	Select from pick-list.
Section D	
Number of randomly selected patients	Enter specific number of patients you want returned from a random selection of the facility's patients.
Buttons	
Reset	Clears entered batch list criteria.
Run	Press to start creating the batch list.

USIIS User Documentation:

Clinic Reports & Batch Processes – Batch Lists

Edit/Use Batch List screen displays patients in the specific list and the reports/processes that can be used

Clinical Reports and Batch Processes

Reports | Batch Lists | Help | Links

Batch List Edit/Use

Provider: USIIS PROGRAM - 001
User: Nancy McConnell

List name (# in list): Tuesday17 (6)
List Id: 3447

Run Report on List:

Reminder Recall
Batch Forecast
CASA Export

Perform Action on List:

Print List
Delete List
End Clinic Affiliation

Edit List

Enter a patient id to add a patient to this list:

Patient ID	First Name	Middle Name	Last Name	DOB		
aa	AA		AA	11/11/2011	Remove From List	End Clinic Affiliation
buma709456	MADISON	JADE	BURNELL	00/09/2011	Remove From List	End Clinic Affiliation
4mo:	FOUR		MONTHS	02/01/2013	Remove From List	End Clinic Affiliation
9mo:	NINE		MONTHS	09/01/2012	Remove From List	End Clinic Affiliation
test1.nov16.12	TEST	ONE	NOVSIXTEEN	01/01/2012	Remove From List	End Clinic Affiliation
test1.nov6.12	FANCY		RAT	01/01/2012	Remove From List	End Clinic Affiliation

<< < 1 > >>

Functionality – View and Run Batch List

Enter a patient ID to add a patient to this list

- Enter Patient ID and press Search to find and add patient to the list.
- If found, adds patient to list. If not found, message will display.

Patient List Buttons

Remove From List

Removes the patient from the batch list.

End Clinic Affiliation

Removes patient from the list and as a patient of the facility.

Run Report on List Buttons

Reminder Recall

- Creates a Reminder Recall Report for patients in the batch list.
- Displays the Reports screen where the report is available to Retrieve.

Batch Forecast

- Creates a Batch Forecast Report for patients in the batch list.
- Displays the Reports screen where the report is available to Retrieve.

CASA Export

- Creates a CoCASA Export file that includes all patients in the batch list.
- Displays the Reports screen where the export file is available to Retrieve.

Perform Action on List Buttons

Print List

Prints the batch list of patients.

Delete List

Deletes the batch list. Criteria can still be viewed on Batch Lists screen until Deleted/Removed from List.

End Clinic Affiliation

Removes all persons in the batch list as patients of the facility.