USIIS User Documentation Clinic Reports & Batch Processes – Batch Lists

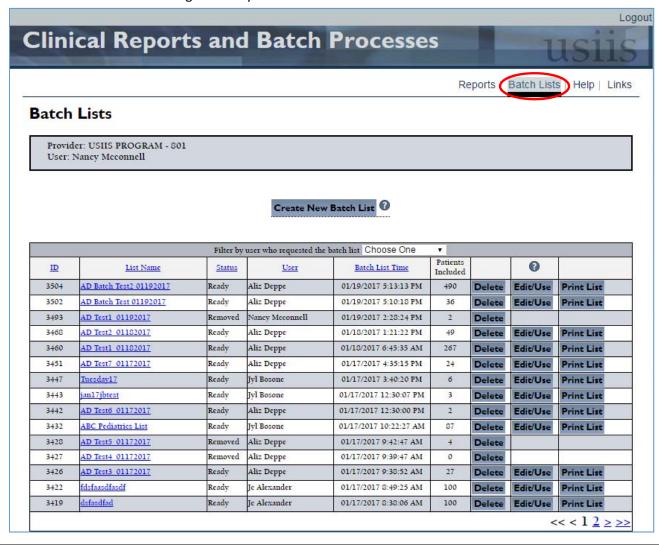


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The Batch Lists screen displays all Batch Lists that facility users have created and not previously deleted.

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

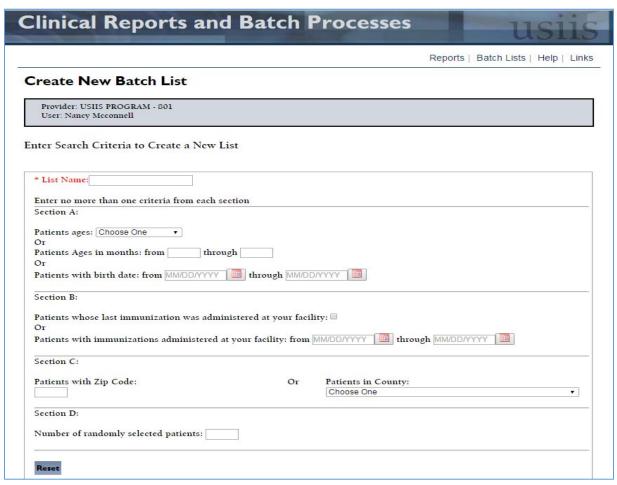


Functionality – Batch Lists

Navigation [bottom of list]				
If your facility has more than one page of lists, use $<<<12\ge>>>$ 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 <u>blue underlined</u> 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.			
	<u>Failed</u> : contact Customer Support.			
User	Name of facility user who created the batch list.			
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	<u>Delete</u> : Delete the batch list.			
% Complete	% <#>: Batch list is still being created and <#> value is the % complete.			
Edit/Use or	<u>Update Status</u> : Batch list is still being created. Press this button to update the %			
Update Status	complete value.			
	Edit/Use: 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.



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 immunizati	ion Check box.			
was administered at your facil	ity			
Patients with immunizations	Enter from and through immunization dates.			
administered at your facility	_			
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	Enter specific number of patients you want returned from a random			
selected patients	selection of the facility's patients.			

Buttons

Reset	Clears entered batch list criteria.
Run	Press to start creating the batch list.

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 - 801 User: Nancy Mcconnell List name (# in list): Tuesday17 (6) List Id: 3447 Run Report on List: Perform Action on List: **Print List** Delete List **End Clinic Affiliation** Reminder Recall Batch Forecast CASA Export **Edit List** Enter a patient id to add a patient to this list: Patient ID First Name Middle Name Last Name DOB 11/11/2011 Remove From List **End Clinic Affiliation** buma789456 MADISON JADE BURNELL Remove From List **End Clinic Affiliation** FOUR MONTHS 02/01/2013 Remove From List **End Clinic Affiliation** 4mos NINE MONTHS 09/01/2012 Remove From List **End Clinic Affiliation** test1.nov16.12 NOVSIXTEEN 01/01/2012 Remove From List End Clinic Affiliation **End Clinic Affiliation** test1.nov6.12 FANCY RAT 01/01/2012 Remove From List << < l > >>

Functionality - View and Run Batch List

Enter a patient ID to	Enter Patient ID and press Search to find and add patient to the list.	
add a patient to this 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 there.	
End Clinic Affiliation	Removes all persons in the batch list as patients of the facility.	