

USIIS User Documentation

Clinic Reports & Batch Processes - Reports



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The **Reports** screen displays showing all reports created by facility users, not previously deleted.

- Reports list in the order they were created, most recent at the top.
- Click a column heading to sort the reports list by that column.

Logout

Clinical Reports and Batch Processes

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Reports

Provider: USIIS PROGRAM - 801
 User: Nancy McConnell

Create New Report: Choose One

Filter by
 user who requested the report: All Users | report type: All Report Types | batch list: All Batch Lists

ID	Report Name	Status	User	Report Time	Records Included		
3207	Reminder Recall Report	Retrieved	Aliz Deppe	01/04/2017 2:19:41 PM	25	Delete	
3206	Batch Forecast Report	Removed	Aliz Deppe	01/04/2017 2:19:13 PM	25	Delete	
3205	CASA Export	Retrieved	Aliz Deppe	01/04/2017 2:10:50 PM	43	Delete	
3204	CASA Export	Retrieved	Aliz Deppe	01/04/2017 2:10:37 PM	14007	Delete	
3203	Batch Forecast Report	Queued	Aliz Deppe	01/04/2017 2:10:10 PM		87 %	Update Status
3202	Reminder Recall Report	Ready	Aliz Deppe	01/04/2017 2:06:43 PM	862	Delete	Retrieve
3275	Clinic History Report	Retrieved	Aliz Deppe	01/04/2017 1:49:26 PM	406	Delete	

Functionality

Create New Report - Choose One	
Batch List Reports	<ul style="list-style-type: none"> • Select for reports and processes that use a Batch List: <ul style="list-style-type: none"> ▪ Reminder Recall ▪ Batch Forecast ▪ CASA Export ▪ End Clinic Affiliation • When selected, the Batch Lists screen displays so the list of patients for the desired report or process can be selected or created.
Clinic History Reports	Displays the Clinic History Report screen for the user to specify report criteria.
Batch Forecast Report by Patient ID	Displays the Batch Forecast by Patient ID screen for the user to enter Patient IDs.

Filter by	
user who requested the report	Lists only reports created by “All Users” or a particular facility user.
report type	Lists only reports by type—e.g., Batch Forecast, CASA Export, Clinic History, or “All Report Types”.
batch list	Lists only reports created from a particular Batch List or “All Batch Lists”.
List of reports	
Report Name	<ul style="list-style-type: none"> Click on the blue underlined report name to view: <ul style="list-style-type: none"> Report type Name of the Batch List from which the report was run Criteria the user specified---for Clinic History and Reminder Recall reports Click on the report name again to hide the criteria.
Status	<p><u>Ready</u>: report started by the user, completed by USIIS, and ready to be retrieved/viewed by the user.</p> <p><u>Retrieved</u>: report started by the user, completed by USIIS, and has been retrieved/viewed by the user.</p> <p>Important note: you can retrieve a report only once. Print or save reports to your computer if you want to view a report again.</p> <p><u>Running</u>: report started by the user and USIIS is still creating the report.</p> <p>Note: % complete will display in another column.</p> <p><u>Queued</u>: report waiting to run if USIIS has not finish creating the Batch List.</p> <p><u>Failed</u>: contact Customer Support.</p>
User	Name of facility user who created the report.
Report Time	Date and time the report creation was completed.
Records Included	Number of patients included in the report.
Buttons	
Delete or % Complete	<ul style="list-style-type: none"> <u>Delete</u>: Delete the report from the list. <ul style="list-style-type: none"> Note: if the report was created from a Batch List, the Batch List will not be deleted. <u>%</u> (87% in the above screen example): if the report is still running, this value is the % complete.
Update Status or Retrieve	<p><u>Update Status</u>: Report is still running; press this button to update % complete value.</p> <p><u>Retrieve</u>: The report has not yet been retrieved/viewed since it was created. Press to retrieve/view the report.</p> <p>Important note: you can retrieve a report only once. Print or save reports to your computer if you want to view a report again.</p>

The **Clinic History Report** screen displays when selected from **Create New Report** on the **Reports** menu.

- Enter the criteria to be used to create a **Clinic History Report**.

Functionality

Report name	<ul style="list-style-type: none"> • Optional. • Enter a name for the report that will list on the Reports menu. • If a name is not entered, the report will display on the Reports list with Report Name “Clinic History Report”, distinguishable from others by the User who created it and Report Date/Time.
Generate this report for immunizations which were given:	<ul style="list-style-type: none"> • Enter From and To dates to specify the date range of immunizations administered by the facility to be included in the Clinic History Report.
With lot number	<ul style="list-style-type: none"> • Lot Number: only immunizations with the specified Lot Number will be included in the report. Select from pick-list or enter manually.
Sort Results By	<p>Report will be sorted by selected option. Options include:</p> <ul style="list-style-type: none"> • Immunization Date: sorts by immunization date, earliest date first. • Vaccine Type: Report sorts by Vaccine Series, alphabetically. • Patient Name: Report sorts alphabetically by Patient first name.

Buttons

Run	<ul style="list-style-type: none"> • Runs the report for the specified set-up conditions. • When the report is completed, the Reports screen displays with the completed Clinic History Report listed by Report Name. <ul style="list-style-type: none"> ▪ To view and save the report, press the Retrieve button. ▪ See the Reports section above for details about the functionality of that screen.
Reset	Clears entered report set-up conditions.

The **Batch Forecast by Patient ID** screen displays when selected from **Create New Report** on the **Reports** menu.

- Enter the Patient IDs of the persons for which a **Recommended Patient Forecast** is wanted.
 - Use **Tab** keyboard key to move between fields.
- Press the **Run** button.
- The **Reports** screen displays.
- The **Batch List by Patient ID** will display in the list of reports where it can be viewed/printed by pressing the **Retrieve** button.

Note: Each night USIIS will run a process to delete all Batch List by Patient ID reports that have been retrieved.

The screenshot shows a web application interface for 'Clinical Reports and Batch Processes'. At the top right, there is a navigation menu with links for 'Reports', 'Batch Lists', 'Help', and 'Links'. The main heading is 'Batch Forecast by Patient ID'. Below this, a grey box displays the current session information: 'Provider: USIIS PROGRAM - 001' and 'User: Nancy Meconnell'. The primary input area is labeled 'Enter Patient ID's Below:' and contains a 3x15 grid of empty text input fields for entering patient IDs. At the bottom left of the form area, there is a blue 'Run' button.