USIIS User Documentation Clinic Reports & Batch Processes - Reports



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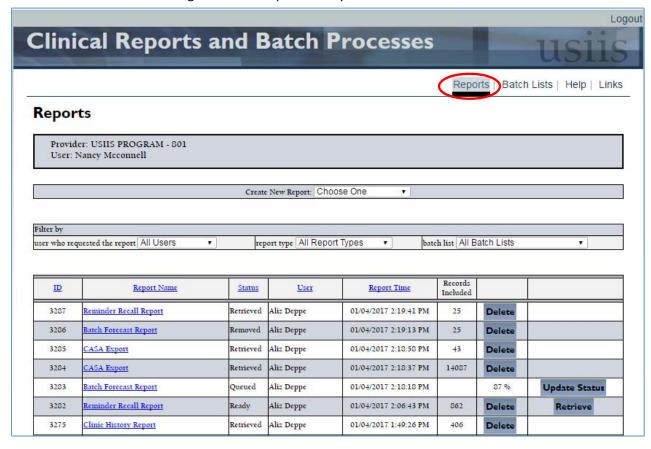
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The **Reports** screen displays showing all reports created by facility users, not previously deleted.

- 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.



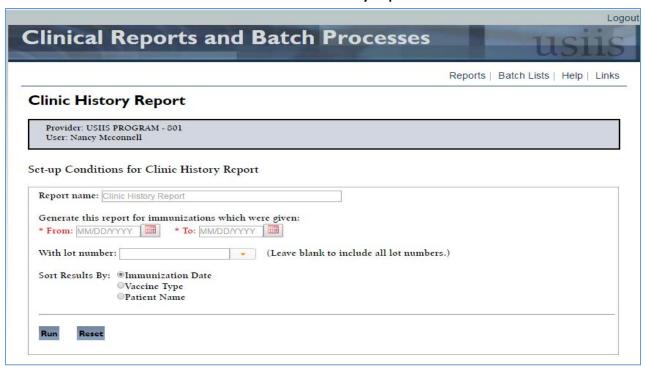
Functionality

Create New Report - Choose One		
Batch List Reports	 Select for reports and processes that use a Batch List: 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	 Click on the <u>blue underlined</u> report name to view: Report type Name of the Batch List from which the report was run Criteria the user specifiedfor Clinic History and Reminder Recall reports
Ctatus	Click on the report name again to hide the criteria.
Status	Ready: report started by the user, completed by USIIS, and ready to be retrieved/viewed by the user.
	Retrieved: report started by the user, completed by USIIS, and has been retrieved/viewed by the user.
	Important note: you can retrieve a report only once. Print or save reports to your computer if you want to view a report again.
	Running: report started by the user and USIIS is still creating the report.
	Note: % complete will display in another column.
	Queued: report waiting to run if USIIS has not finish creating the Batch List.
	Failed: contact Customer Support.
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 <i>or</i> % Complete	Delete: Delete the report from the list. Delete: Delete the report from the list.
	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 <i>or</i> Retrieve	<u>Update Status</u> : Report is still running; press this button to update % complete value.
	Retrieve: The report has not yet been retrieved/viewed since it was created.
	Press to retrieve/view the report.
	Important note: you can retrieve a report only once. Print or save reports to your computer if you want to view a report again.

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	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	Enter From and To dates to specify the date range of immunizations
for immunizations	administered by the facility to be included in the Clinic History Report.
which were given:	
With lot number	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	Report will be sorted by selected option. Options include:
	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	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 .	
	 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.

