

Patient List Reports for series completion

Helping ensure patients receive all doses in an immunization series

When providers have patients who have been prescribed an immunization with multiple doses in a series, they may encounter situations where patients may be delayed in receiving or have not received the subsequent doses in the series, due to varying reasons and, therefore, not complete their recommended dosing regimen. To help ensure patients receive all the required doses, it is paramount for providers to act to have the patient return for the remaining dose(s).

Benefits of Patient List Reports for immunization series completion

Patient Lists, called **Patient List Reports** in Allscripts Practice Fusion EHR, are a useful tool to identify patients who have a gap-in-care according to clinical guidelines. They may help improve quality health care, such as by increasing immunization rates. **Patient List Reports** can also be helpful in identifying patients who have not completed all required doses in an immunization series.

Considerations:

- The number of patients appearing on a **Patient List Report** may be impacted by the clinical data available in the EHR; for example, if an immunization was administered by another provider or in the pharmacy, it may not have been recorded in the EHR and patients will be included in the **Patient List Report**, indicating they need additional doses
- The **Patient List Report** criteria should consider active patients only (not deceased or inactive as determined by the practice)
- User privileges to configure and run **Patient List Reports** may be limited to select users with specific security privileges or subject to practice business policies

If you have further technical questions, consult your internal or external EHR support resources.

This guide provides a high-level overview of how to create Patient List Reports for an immunization series completion within Allscripts Practice Fusion EHR. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.

Please note that this guide was created based upon Allscripts Practice Fusion EHR version 3.7. Screens and features may change as new software versions are released.

This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.

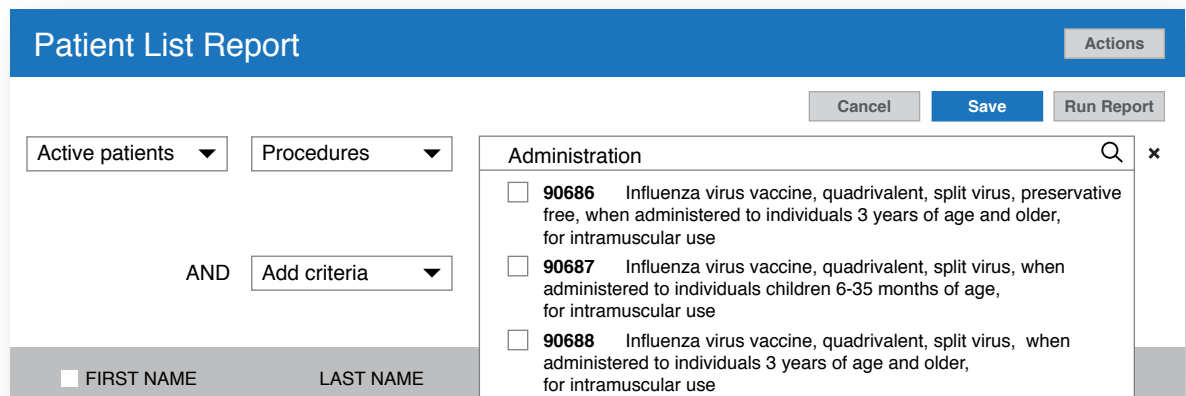
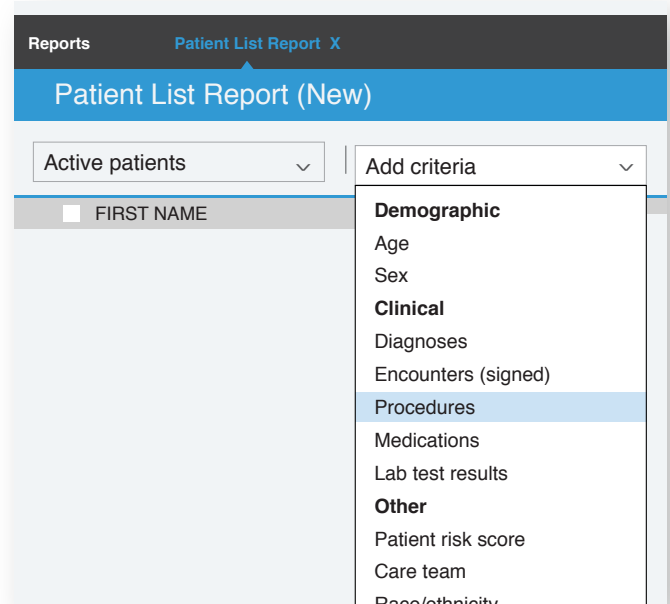
Create a Patient List Report for series completion of an immunization

Allscripts Practice Fusion EHR provides multiple tools to track patient compliance, and one frequently used tracking method is to generate **Patient List Reports**. Immunization series completion is a common use of these **Patient List Reports**.

The following steps illustrate how to create a **Patient List Report** to identify appropriate patients who may be candidates for a certain immunization.

Create a Patient List Report for an immunization

- Navigate to **Reports** and select **Patient List Report (New)**
- Select **Active patients**. From the **Add Criteria** dropdown, select **Procedures**
- In the **Patient List Report** window, search for and select desired immunization administration codes and select each to be included



Creating a Patient List Report for GSK immunizations in Allscripts Practice Fusion EHR



- Select **Add procedure dates (optional)**, as desired
- Select **Run Report** to view a list of patients who have had the specific immunizations

The screenshot shows the configuration and results of a Patient List Report. At the top right are buttons for 'Cancel', 'Save', and 'Run Report'. Below these are filters for 'Active patients' and 'Procedures'. The 'Procedures' filter includes a search bar with '90686 X', '90687 X', '7xxxxxxx X', and '90713 X'. A link for 'Add procedure dates (optional)' is visible. Below the filters is an 'AND' section with an 'Add criteria' dropdown. The main table displays patient information and procedure details.

<input checked="" type="checkbox"/>	FIRST NAME	LAST NAME	PATIENT ID	DOB	AGE	SEX	PREFERRED CONTACT	STATUS	COLLAPSE
<input checked="" type="checkbox"/>	Merry	Patient	PM495421	08/12/1965	55 yrs	F		Active	less
Procedure		Start 01/08/2018 to 7xxxxxxx(Administration of Product X immunization), Start 01/08/2020							

From the resulting **Patient List Report**, navigate to the patient chart for further review. The **Patient List Report** can be exported to a spreadsheet for further analysis.

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