

## 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 athenaClinicals 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 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 athenaClinicals 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 athenaClinicals EHR version 19. 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

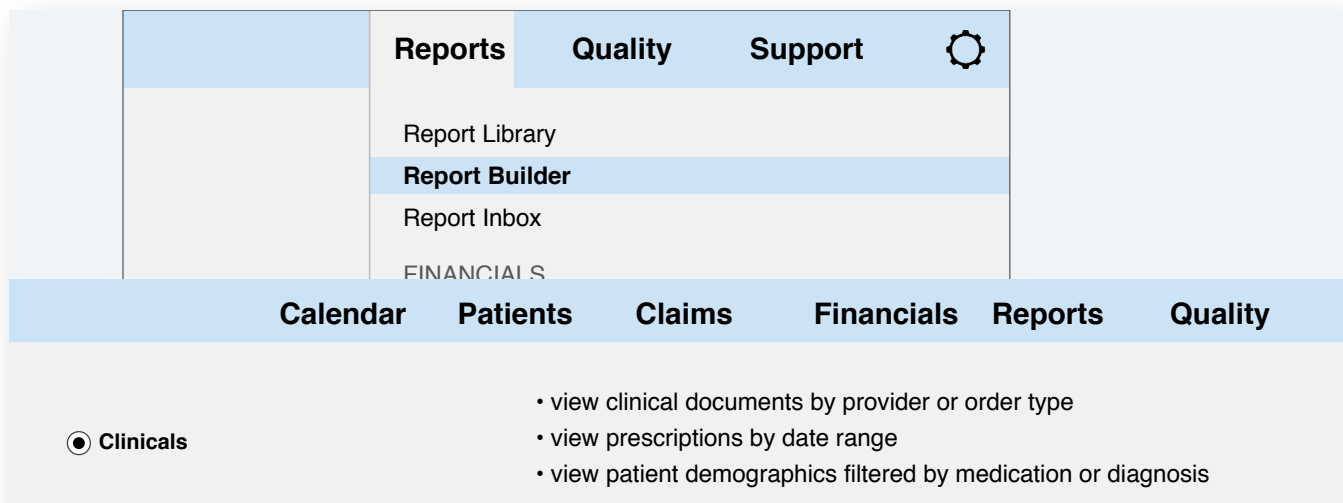
athenaClinicals EHR provides multiple tools to track patient compliance, and one frequently used tracking method is to generate **Patient List Reports**. Immunization series completion is a common use of these **Patient List Reports**.

In athenaClinicals EHR, a **Patient List Report** can be created to identify a list of patients who have a deficiency in their Immunization Schedule; for example, not completing a multi-dose series.

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:

- Select **Reports, Report Builder**, then select **Clinicals**



- Select the columns to be displayed in the **Patient List Report**, such as: Patient Last Name, Patient First Name, Clinical Order Description, etc.
- Select **Choose & Set Filters**

# Creating a Patient List Report for GSK immunizations in athenaClinicals EHR



- From the **Filters**, expand **Clinical Order**, and select **Clinical Order**
- Search for appropriate immunization, such as Product X
- Add other filters as desired, such as **Vaccine Admin Date** range or **Clinical Order Status**
- Choose **Run Report**
- Choose the report format from the **Choose Report Format** window. Select **OK**

**Choose Report Format**

XML results display in web browser and can be resorted  
 Comma Delimited Text (CSV) results download to file that can be viewed in Microsoft Excel  
 Custom results download to a file that can be viewed in a text editor

Show Totals  
 Deidentify Patient Data  
 Show Reporting Restricted Patients  
 Show in Small Print  
 Hide Line Numbers

OK Cancel

- The **Patient List Report** displays in the **View Results** tab. From the view, the **Patient List Report** can be modified, sorted, or patient charts accessed

This **Patient List Report** will show all patients who have received Product X. Patients who have received two doses of Product X will be listed twice. Patients who have received only one dose of Product X are the targets.

Report Builder

Choose Report Type Choose Display Columns Choose & Set Filters Preview Report Schedule Report View Results

Report Results (Report Generated: 09/28/2020 06:41 PM)

[Show Filter Criteria](#)

Modify Display Columns Modify Filters Save Report Save & Schedule

	patient name	order name	order date
1	LastName, FirstName	Product X	06/17/2020

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