Creating a Patient List Report for GSK immunizations in Epic EHR

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 Epic 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 the patient 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 Epic 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 Epic EHR version 2020. 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

A **Patient List Report** in Epic EHR is a report that identifies all patients meeting certain criteria. Available criteria can include diagnosis, current and prior medications, immunizations, and other clinical or patient demographic information.

A **Patient List Report** may be created in Epic EHR to identify patients who have a deficiency in their Immunization Schedule; for example, not completing a multi-dose series.

Create a Patient List Report for an Immunization:

Configuration of a **Patient List Report** is typically managed by the health system IT Staff. When making an IT request to set up the **Patient List Report**, consider including the following information to ensure that the **Patient List Report** is appropriately configured:

- Name for the list, such as Incomplete Product X Immunization

- Owner of patient list; for example, a specific HCP or practice

- The information to be included in the **Patient List Report** such as MRN, Name, Age, Sex, Birthdate, Current Immunizations, Doses, etc

- Criteria to identify which patients should be listed on the **Patient List Report**; for example, patients who have had a Product X Immunization and are overdue for the second dose or third dose in the series, who do not have an appointment scheduled

Below is an example of what a **Patient List Report** with Immunization Deficiency might look like:

Patients with Immunization Deficiency - Product X 2nd Dose		?	Resize	Close X

| Filters | Options | Chart | Encounter ▾ | Bulk Orders | Communication ▾ | HM Modifiers | Add to List | Questionnaire Series ▾ |

| Results loaded: 10 of 10 | Results shown: 4 of 10 | Reload | Select All | Show All |

MRN	Patient	DOB	Age	Sex	PCP	Number of doses	Needs dose
11111	John Smith	12/01/2019	6 mths	Male	Dr Good	1	2 doses
22222	John Jones	11/26/2019	7 mths	Male	Dr Good	2	1 doses
33333	John Adams	06/06/2019	12 mths	Male	Dr Good	1	2 doses
44444	John Doe	01/01/2018	18 mths	Male	Dr Good	1	2 doses

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