

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 NextGen 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 NextGen 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 NextGen EHR version 5.8 UD3. 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

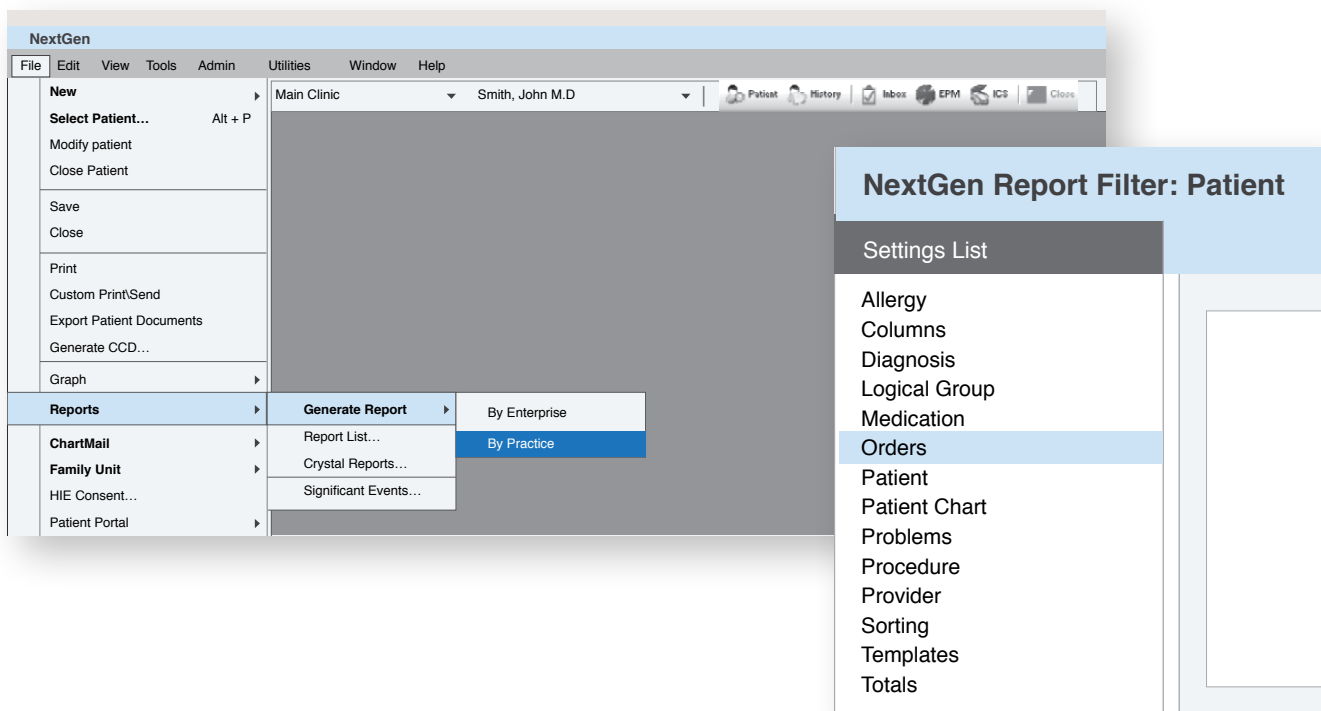
NextGen EHR provides multiple tools to monitor patient compliance, and a common method is by generating **Patient List Reports**. Immunization compliance is a common use of these **Patient List Reports**.

In NextGen 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

- From **File Menu**: Select **Reports > Generate Report > By Practice**
- From the **NextGen Report Filter: Patient** screen, select **Orders**



Creating a Patient List Report for GSK immunizations in NextGen EHR



- In the **Orders Report Filter: Patient** screen, complete the following
 - Select **Immunizations** from the **Select Order Type** dropdown
 - Choose the desired immunization in the **Select Vaccine** dropdown or click the ellipse (...) to search for an immunization
 - Select criteria in the **Include Patients** section to filter for appropriate patients
 - Add additional criteria to filter the **Patient List Report** as appropriate

- Select **OK** to save criteria

Creating a Patient List Report for GSK immunizations in NextGen EHR



- The **Memorize Report** screen displays, name the report in the **Save As** textbox
- Select the **Report Type**, such as **Patient List Report**
- And select **OK** to create the **Patient List Report**

Memorize Report

Save As

Product X Patient List

Report Type

Patient List Report

Allowed to Run

Allowed to Modify

Allowed to Save

Save results for notification

OK Cancel

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