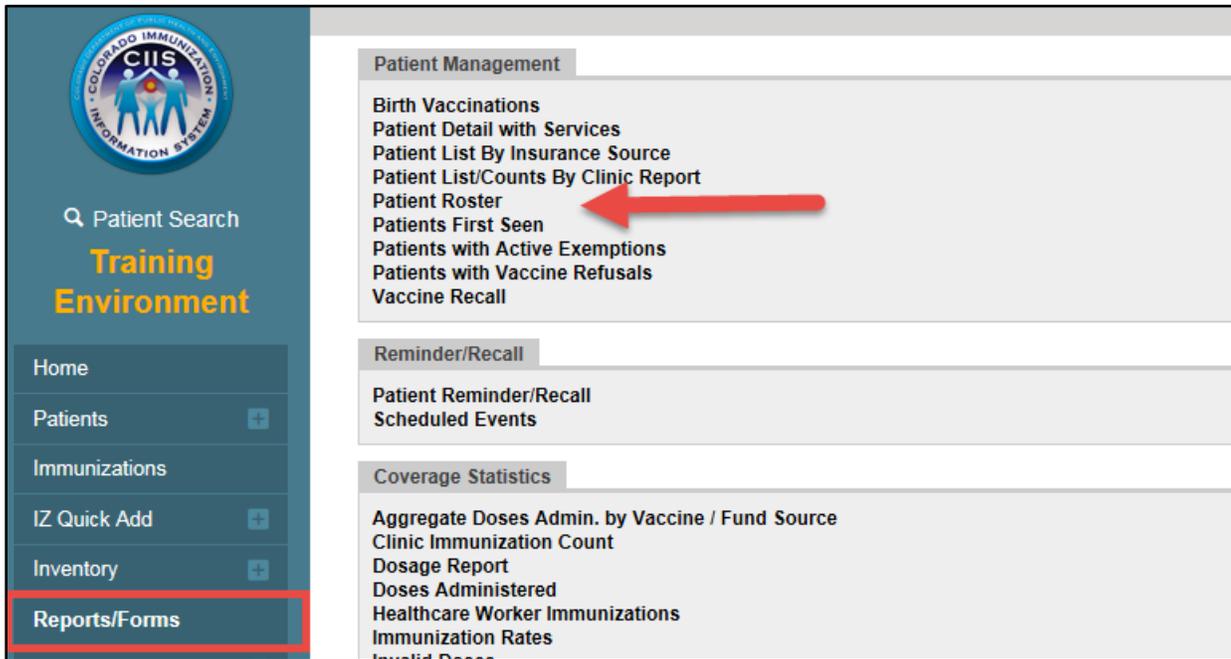


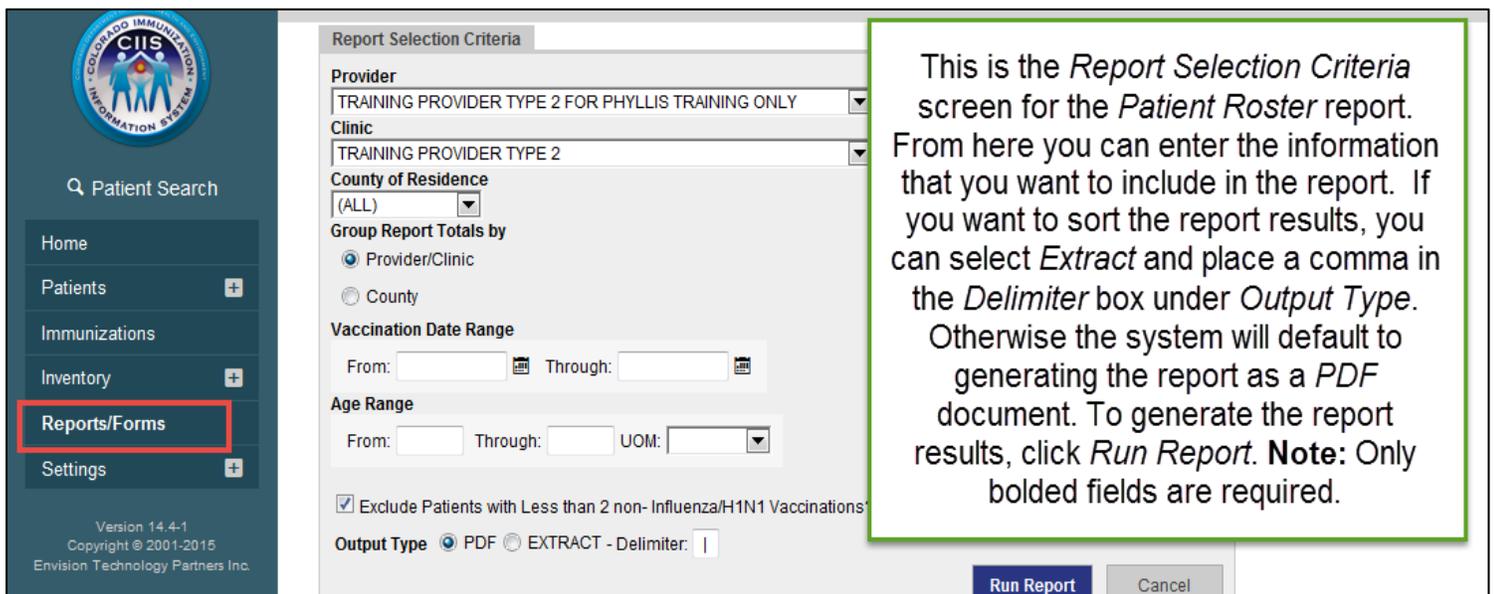
How to Run the Patient Roster Report

From the CIIS *Reports/Forms* module, you will see several categories of reports (e.g. *Patient Management, Coverage Statistics, etc.*). The *Patient Roster* report is located within the *Patient Management* section.

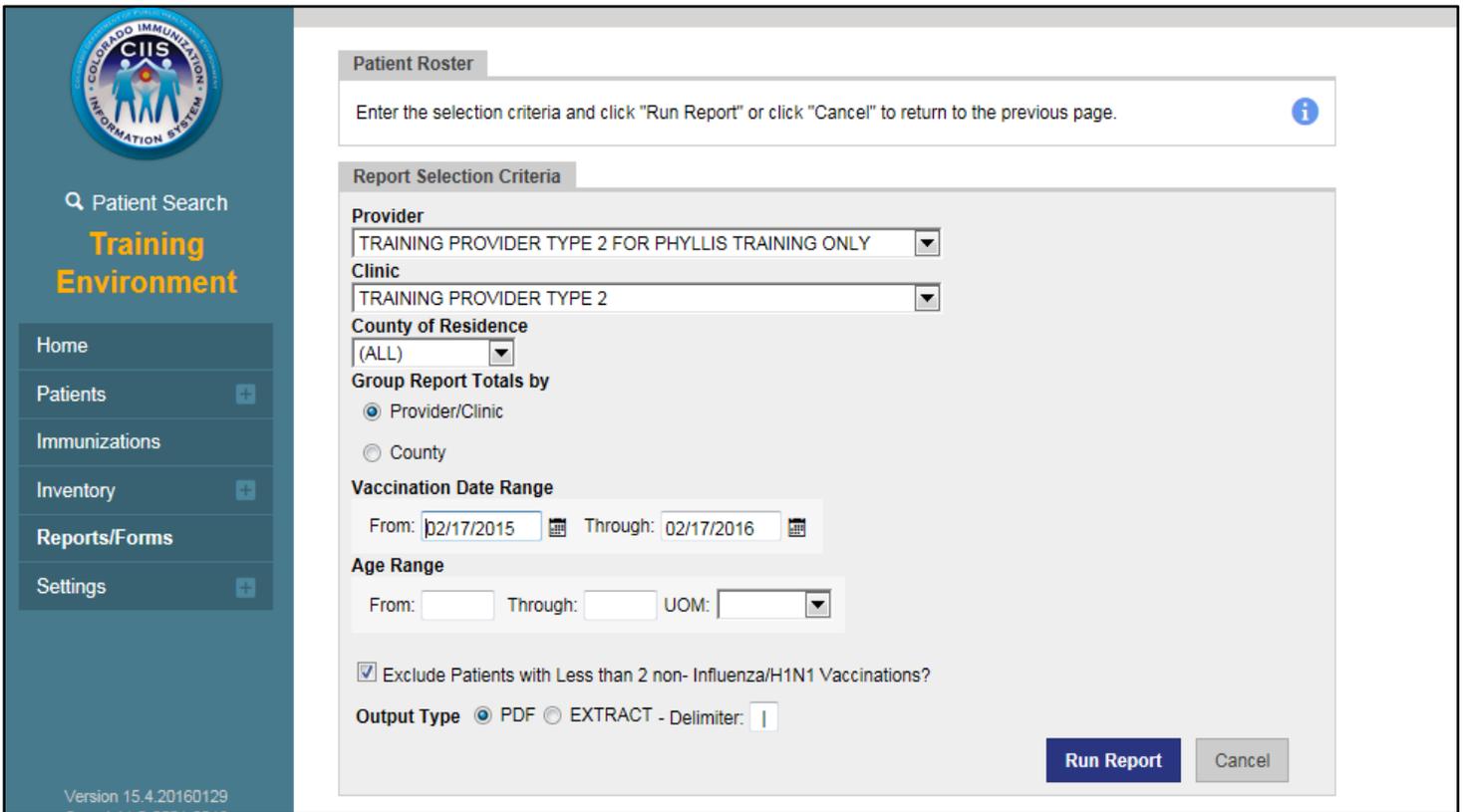
Step 1. Click on the *Patient Roster* link, and you will be navigated to the *Report Selection Criteria* screen.



Step 2: Verify your *Provider* and *Clinic* and enter the report criteria (the information you want included in your report results). **Note:** Only the bolded fields on this screen are required. For example, the *Vaccination Date Range* and *Age Range* fields are optional. **Output Type:** This report allows you to sort the results in a spreadsheet format by selecting *Extract* and placing a comma in the *Delimiter* box next to *Output Type*. Otherwise the system will default to generating the report as a *PDF* document. To generate the report results, click *Run Report*.



In the example below, I wanted to view a list of all patients who have received a vaccination from my clinic between February 17, 2015 through February 17, 2016. The system defaults to excluding patients with less than 2-non-influenza/H1N1 vaccinations; however, you can deselect this if you choose.



CIIS COLORADO IMMUNIZATION INFORMATION SYSTEM

🔍 Patient Search
Training Environment

- Home
- Patients +
- Immunizations
- Inventory +
- Reports/Forms
- Settings +

Version 15.4.20160129

Patient Roster

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. ⓘ

Report Selection Criteria

Provider
TRAINING PROVIDER TYPE 2 FOR PHYLLIS TRAINING ONLY ▼

Clinic
TRAINING PROVIDER TYPE 2 ▼

County of Residence
(ALL) ▼

Group Report Totals by

- Provider/Clinic
- County

Vaccination Date Range
From: 02/17/2015 📅 Through: 02/17/2016 📅

Age Range
From: Through: UOM: ▼

Exclude Patients with Less than 2 non- Influenza/H1N1 Vaccinations?

Output Type PDF EXTRACT - Delimiter: |

Run Report Cancel

Example of Report Results:

This report generates a list of patients who are active at my clinic and were vaccinated between 2/17/15 and 2/17/16. Notice the last patient on the list. Because I changed his status in CIIS to *Moved Out of the Immediate Area*, he is now **Inactive** and is no longer a patient at my clinic. This patient would not be counted in my *Immunization Rates* report nor would he appear in my *CIIS Reminder/Recall* report.



Patient Roster

April 20, 2016

Provider - TRAINING PROVIDER TYPE 2 FOR PHYLLIS TRAINING ONLY, Clinic - TRAINING PROVIDER TYPE 2, County - (ALL), Group By - Provider/Clinic, Vaccination Date From - 02/17/2015, Vaccination Date Through - 02/17/2016, Exclude - Y

Provider/Clinic: TRAINING PROVIDER TYPE 2 FOR PHYLLIS TRAINING ONLY / TRAINING PROVIDER TYPE 2

Patient ID	Last Name	First Name	Age	Date of Birth	Last Vac Date	Status	Open Date	Close Date	Close Reason
3574211	BOURASSA	OLLIE	4Y 6M 30D	09/21/2011	06/11/2015	ACTIVE	11/15/2012		
3856679	TEST	KADEN	6Y 6M 27D	09/24/2009	01/19/2016	ACTIVE	05/15/2014		
3856680	TEST	KAITLIN	7Y 6M 27D	09/24/2008	02/11/2016	ACTIVE	06/17/2014		
3574382	TESTING	KARA	24Y 3M 17D	01/03/1992	12/15/2015	ACTIVE	02/08/2013		
3938124	SUPER	MAN	82Y 10M 18D	06/04/1933	06/04/2015	INACTIVE	06/04/2015	02/16/2016	MOGE-MOVED OUT OF IMMEDIATE AREA

TRAINING PROVIDER TYPE 2 FOR
PHYLLIS TRAINING ONLY / TRAINING
PROVIDER TYPE 2

Patient Totals

Active: 4
Inactive: 1
Total: 5

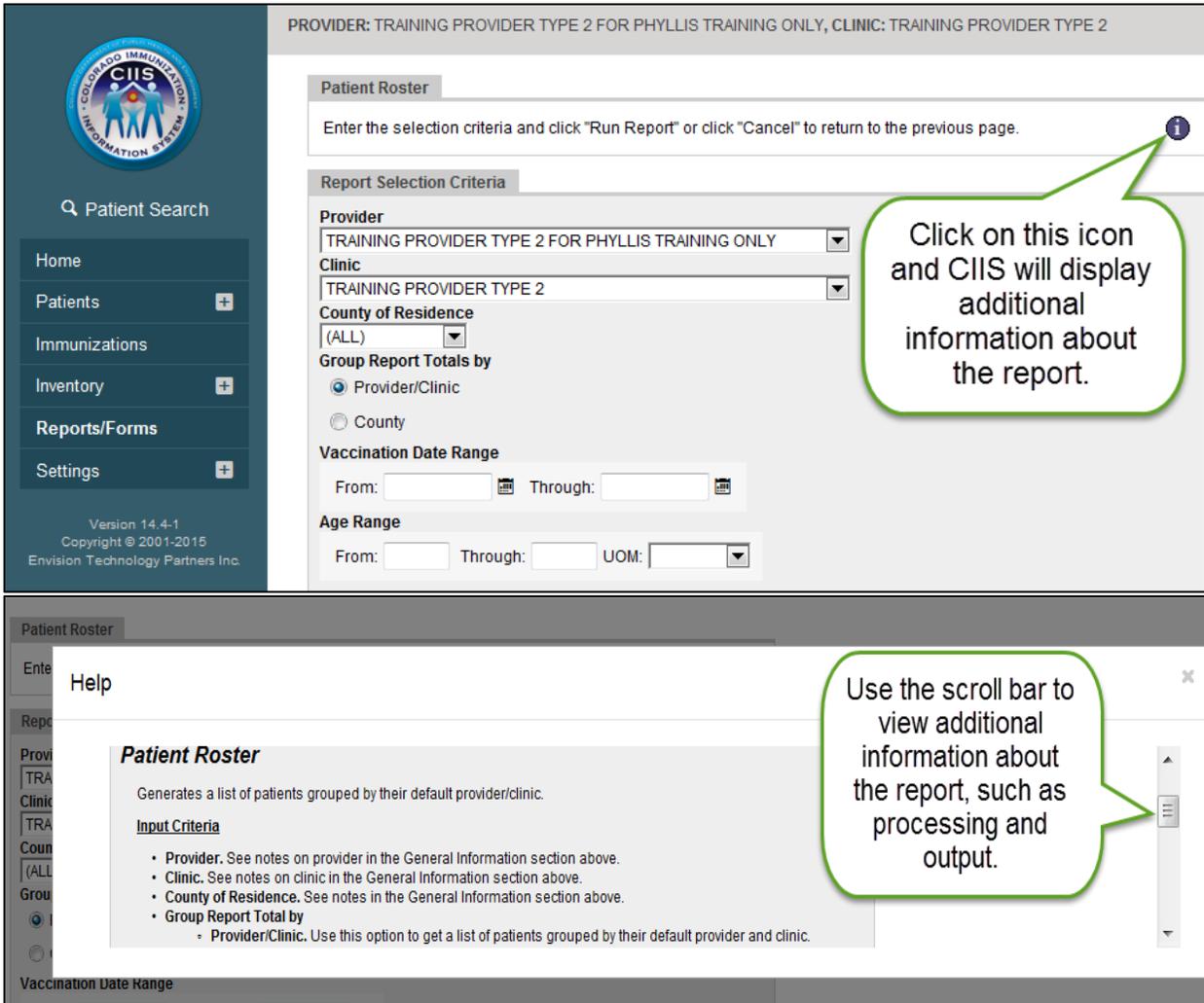
Report Patient Totals

Total Patients: 5
Total Active: 4

MOGE-MOVED OUT OF IMMEDIATE AREA 1
Total Inactive: 1

Additional Information about CIIS Reports:

There are many CIIS reports in the Reports/Forms module from which to choose. **TIP:** You will find this icon  on every screen. When you click on it, the system will display the online *Help* screen. Here's a sample of what you will see. This information will help you determine (1) whether this is a report that might be useful to your clinic and (2) the report criteria that you will need to enter when running the report.



The image shows two screenshots of the CIIS software interface. The top screenshot displays the 'Patient Roster' report configuration page. It includes a sidebar with navigation options like 'Home', 'Patients', 'Immunizations', 'Inventory', 'Reports/Forms', and 'Settings'. The main content area is titled 'PROVIDER: TRAINING PROVIDER TYPE 2 FOR PHYLLIS TRAINING ONLY, CLINIC: TRAINING PROVIDER TYPE 2'. Below this, there are sections for 'Report Selection Criteria' with dropdown menus for 'Provider', 'Clinic', and 'County of Residence'. There are also radio buttons for 'Group Report Totals by' (Provider/Clinic and County) and input fields for 'Vaccination Date Range' and 'Age Range'. A green callout bubble points to an information icon in the top right corner of the report configuration area, containing the text: 'Click on this icon and CIIS will display additional information about the report.'

The bottom screenshot shows the 'Help' screen for the 'Patient Roster' report. The title bar says 'Patient Roster Help'. The main content area is titled 'Patient Roster' and describes the report's function: 'Generates a list of patients grouped by their default provider/clinic.' It lists 'Input Criteria' with bullet points: 'Provider', 'Clinic', 'County of Residence', and 'Group Report Total by' (with a sub-bullet for 'Provider/Clinic'). A green callout bubble points to a scroll bar on the right side of the help content, containing the text: 'Use the scroll bar to view additional information about the report, such as processing and output.'