Organizational Reports User Guide

Revised: 07/11/2023

The purpose of this guide is to provide instructions on how to use the following CAIR2 organization-level reports:

- **Ad Hoc Reports**
- **Assessment Reports**
- **Benchmark Reports**
- **Group Patients Report**

For additional support, the following resources are available:

Local CAIR Representatives (LCRs): (go.cdph.ca.gov/cair-lcr)

CAIR Help Desk:
Phone: 800-578-7889
Email: CAIRHelpDesk@cdph.ca.gov
CAIR2 Website: (cdph.ca.gov/cair)

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Section 1: Ad Hoc Reports

The Ad Hoc reports function in CAIR2 allows users to create one-time customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; the Ad Hoc List report produces lists with information about selected patients, and the Ad Hoc Count report produces counts, either of patients or immunizations.

Note: Patients whose information is added or changed in CAIR2 on the day the report is run will appear in the results at most 30 minutes after the addition/change.

Ad Hoc reports run against all patients associated with your organization. To disassociate/inactivate a patient from your organization, you must change their 'Status' field in the 'Organization Information' tab of the patient's record. If you need to inactivate multiple patients from your organization, use the CAIR2 Manage Patient Status feature. For more detailed information on the Manage Patient Status feature, refer to the CAIR2 Guide to Using the Manage Patient Status Feature found on the CAIR2 User Guides Page.

A. Ad Hoc List Report

To produce a list of information about selected patients:

1. Click the **ad hoc list report** link under the 'Reports' header of the left blue menu panel.
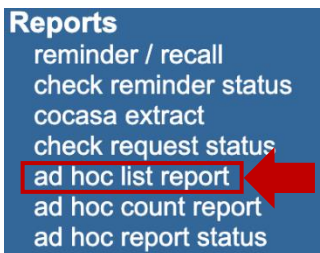
2. The 'Create a Customized List Report' screen will display (see screenshot below). Each section on this screen is described in further detail below.

Create a Customized List Report

What items would you like to display on the report?

Patient
- American Indian or Alaska Native
- Asian
- Birth County
- Birth date
- Black or African-American
- County of Residence
- First name
- Language preference

[Add >]
[< Remove]
[< Remove All]

How would you like the report to be sorted?

Item to sort on: (not sorted)

Sort Order
- ○ First-to-Last ○ Last-to-First
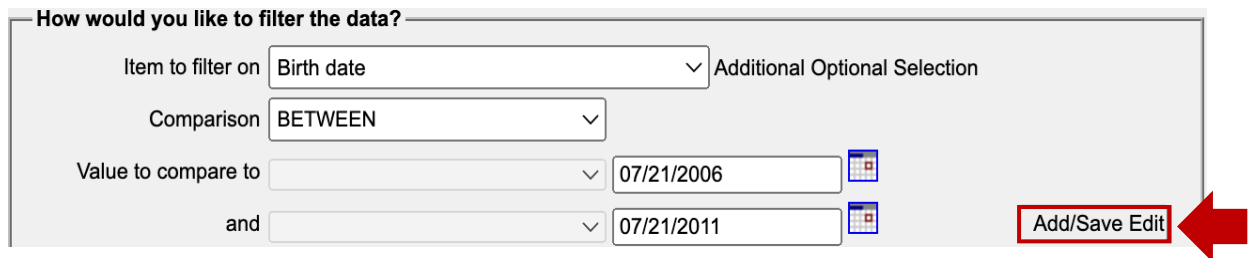
A report takes longer to run if you want it to be sorted.

How would you like to filter the data?

Item to filter on: (no filters)   Additional Optional Selection

Comparison: [ ]

Value to compare to: [ ] [ ]

and: [ ] [ ]   [Add/Save Edit]

Selected Filters

[Edit]
[Remove]
[And/Or]
[Group]
[UnGroup]

[Generate] [Cancel]

a) What items would you like to display on the report?

Select the items you want to display on the report by double-clicking the desired items from the left column (e.g., patient's last name) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column and add it to your report.

Create a Customized List Report

What items would you like to display on the report?

Patient
- Asian
- Birth County
- Black or African-American
- County of Residence
- First name
- Language preference
- **Last name**
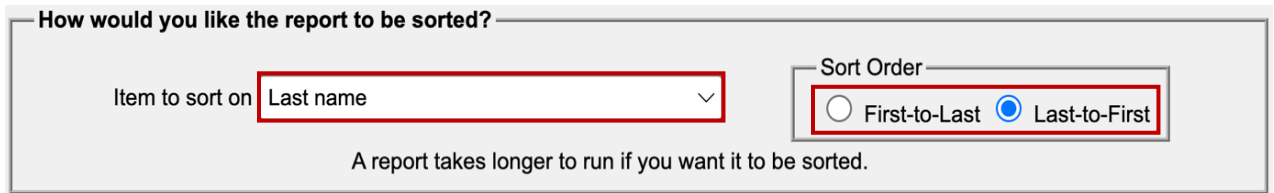- Middle name

➡ [Add >]
[< Remove]
[< Remove All]

Patient
- American Indian or Alaska Native
- Birth date

b) How would you like the report to be sorted?

Note: Sorting the report will increase the time it takes to process it. If you want the report sorted, follow the bullet points below. If not, proceed to the information in the next section.

- **Item to sort on:** Select the single item you would like to have the report sorted from the dropdown. **Note:** Options in this dropdown will be based on the items selected in the 'What items would you like to display on the report?' section mentioned above.
- **Sort Order:** Select either the **First-to-Last** or **Last-to-First** radio button based on your desired order.

c) How would you like to filter the data?

Filters in CAIR2 are used to narrow the information down so that it answers a user's query. There are two portions to this section, each explained below.

The first portion is below the 'How would you like to filter the data?' title.

Select the filtering criteria for the report and then click the **Add/Save Edit** button:
- **Item to filter on:** Select an item that you would like to add as a filter using the dropdown list. For example, a birth date range could be an item used as a filter.
- **Comparison:** Select a word from the dropdown list that best describes the type of comparison you wish to make; for example, 'BETWEEN'.
- **Value to compare to:** Select a value from the dropdown list in the left field and/or enter a date in the right field.
- **And:** If applicable, select a value from the dropdown list in the left field or enter the ending date in the right field.

Note: You can select multiple filtering criteria just remember to click the **Add/Save Edit** button each time.

The second portion of this section is titled 'Selected Filters' (see screenshot below). This portion will show the filters added/saved from the first portion mentioned above.
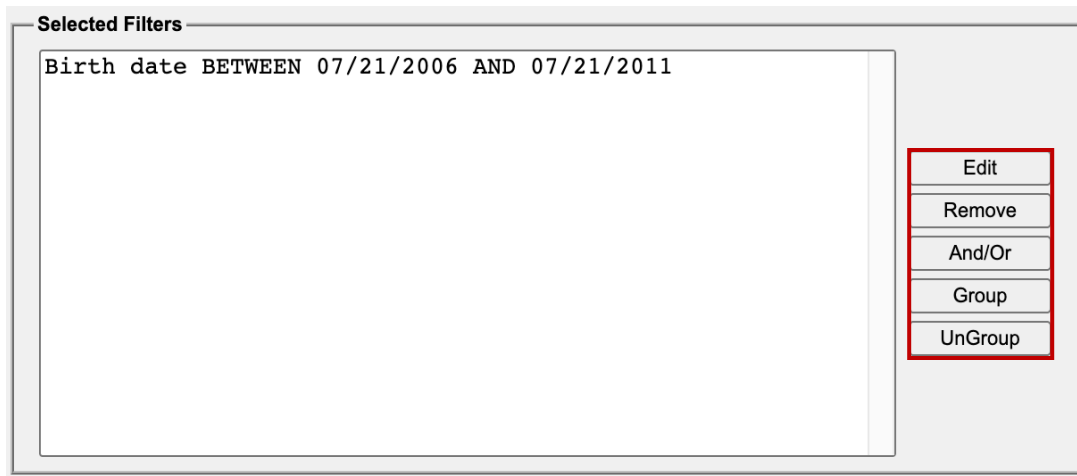
You can do multiple actions in this portion based on the provided buttons on the right-hand side:

- **Edit:** To make changes to a statement, select the statement and click the **Edit** button. Make the necessary changes to the statement in the filtering portion (first portion mentioned above) and click the **Add/Save Edit** button.
- **Remove:** Select a statement and click the **Remove** button to remove it from the 'Selected Filters'.
- **And/Or:** If you have more than one statement listed, you can change the word 'AND' between the statements to 'OR' (see example below). Select 'AND' and click the **And/Or** button, and 'Or' should now display. Following the same process if you want to switch 'OR' back to 'AND'.
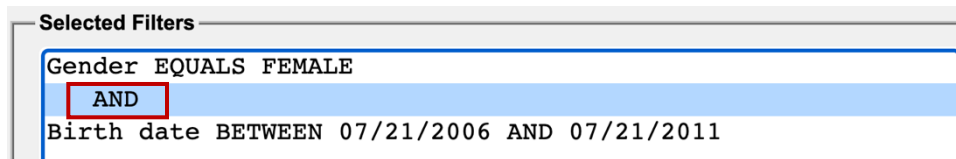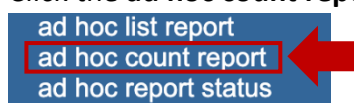

- **Group:** To group two filter statements, select/highlight the statements and click the **Group** button. This groups the filters together in the report.
- **UnGroup:** To ungroup a grouped statement, select the grouped statement and click the **UnGroup** button. This removes the filters from being grouped in the report.

3. Click the **Generate** button at the bottom of the screen. The 'Ad Hoc Report Status' screen will display (see the Ad Hoc Report Status section for more information).

B. Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click the **ad hoc count report** link under the 'Reports' header of the left blue menu panel.

2. The 'Create a Customized Count Report' screen will display. Each section on this screen is described in further detail below.

a) **Would you like to count Patients or Immunizations?**
Select whether **Patients** (the default) or **Immunizations** will be counted by clicking the appropriate radio button.

b) **What factors would you like to use to group the counts on the report?**
Select the factors you would like to use to group the counts on the report by double-clicking the desired factors from the left column (e.g., Vaccine group) or by highlighting the factor and clicking the **Add** button. This will copy the factor to the right column and add it to your report.

Note: You can choose a maximum of three factors.

c) **How would you like to filter the data?**

How to complete information in the section is described on page 4. Refer to **c) How would you like to filter the data?** for more information.

3. Click the **Generate** button at the bottom of the screen. The 'Ad Hoc Report Status' screen will display (see the for more information).

C. Ad Hoc Report Status

The 'Ad Hoc Report Status' screen will display after you click the **Generate** button on the 'Create a Customized List Report' or 'Create a Customized Count Report' screen. The status screen will display the 'Report Type' (i.e., Count or List), the date and time the report was 'Started' and 'Completed', the 'Status' of the report, and the 'Row Count'.

Note: You can also access the status screen by clicking on the **ad hoc report status** link under the 'Reports' header of the left blue menu panel.
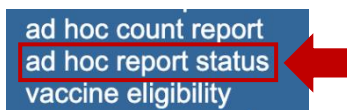
To view the results of a report in the 'Ad Hoc Report Status' screen:

1. Click the **Refresh** button until the 'Status' of the report displays as 'DONE'. The 'Report Type' will then be hyperlinked. Click on the hyperlinked report, and it will display directly on this screen.

2. The 'Ad Hoc Report Results' section will display. If you wish to export or print the report, you can click on one of the following options shown in the screenshot below:

- Click the **Export as Text** hyperlink to display the report in text file format.
- Click the **Export as a Spreadsheet** hyperlink to display the report in a spreadsheet format.
- Click the **Display as a PDF** hyperlink to display the report in Adobe® Reader.

Note: Ad hoc reports are retained for 72 hours per organization. CAIR2 will retain one 'Count' report and one 'List' report for that period. If a new report of the same type is generated, the new report will replace

the existing report.

Section 2: Assessment Reports
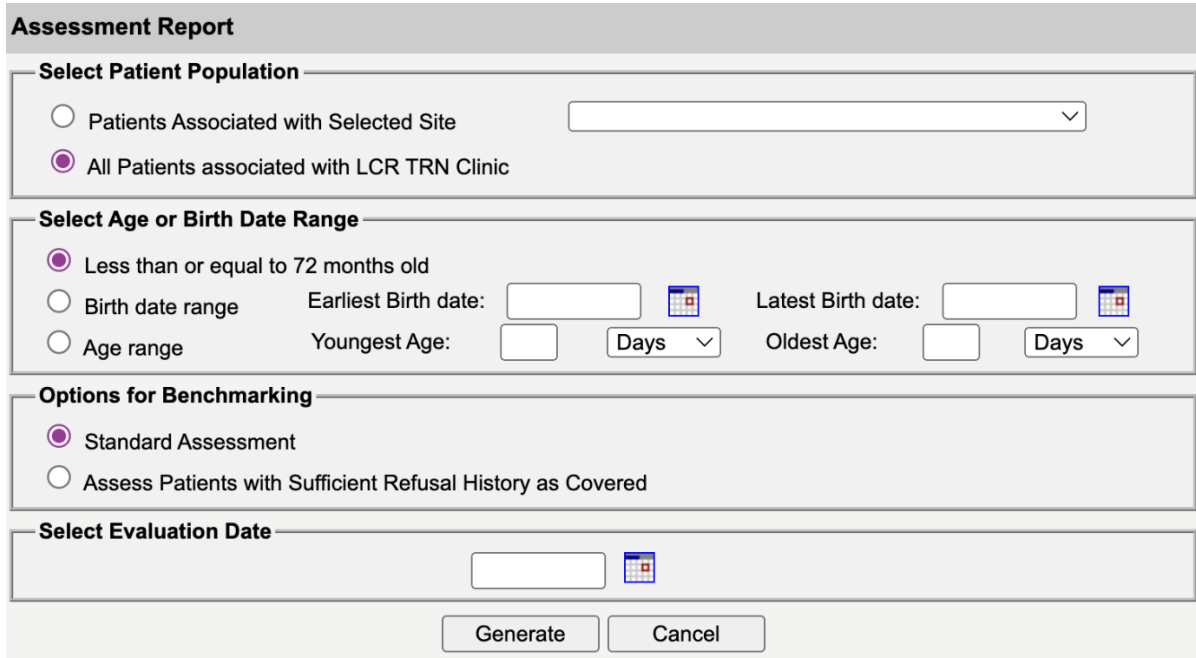
The 'Assessment Report' feature in CAIR2 analyzes an organization's immunization coverage rates. The following briefly overviews the data returned when running an 'Assessment Report'. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

To run the report:

1. Click the **assessment report** link under the 'Reports' header of the left blue menu panel.
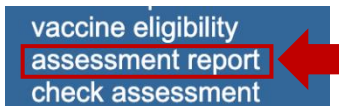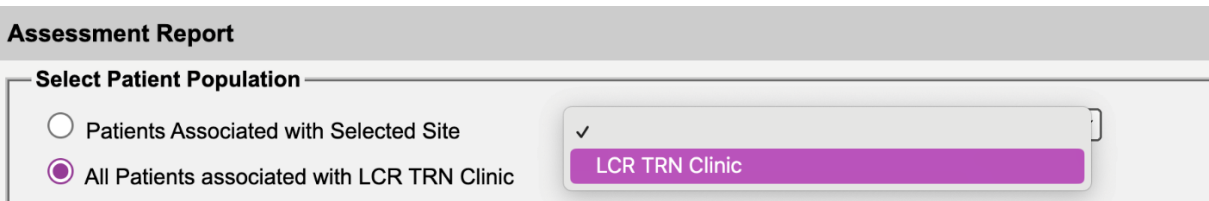
2. The 'Assessment Report' screen will display. Each section on this screen is described in further detail below.

a) **Select Patient Population**

Select the patient population to be assessed by selecting one of the following radio buttons:

- **Patients Associated with Selected Site:** Select this option to see immunization data on all patients associated with the site selected from the dropdown list. **Note:** Only the site under which you are currently logged in will display in the dropdown. It is recommended to just leave the defaulted radio button as it will provide the same patient population as this one.

- **All Patients Associated with <Organization Name>:** This is the default and will display immunization data on all patients associated with your organization.

b) **Select Age or Birth Date Range**
   Select the age, birth date range, or age range of the patients by selecting one of the following radio buttons:

   ┌─ Select Age or Birth Date Range ──┐
   │ ⦿ Less than or equal to 72 months old   │
   │ ○ Birth date range   Earliest Birth date: [_____] 📅   Latest Birth date: [_____] 📅 │
   │ ○ Age range   Youngest Age: [____] [Days ▾]   Oldest Age: [____] [Days ▾] │
   └──┘

   - **Less than or equal to 72 months old:** This is the default, and this option will return all patients who are 72 months or younger.
   - **Birth date range:** Select this option to enter a range of birth dates. Enter a birth date in the 'Earliest Birth date' and 'Latest Birth date' fields in MM/DD/YYYY format. Alternatively, use the calendar icons beside each field to enter the birth dates.
   - **Age range:** Select this option to enter an age range. Enter an age in the 'Youngest Age' field and select whether it is based on 'Days', 'Months', or 'Years' from the dropdown. Then in the 'Oldest Age' field, enter an age and select whether it is based on 'Days', 'Months', or 'Years' from the dropdown.

   Note: If you select the 'Birth date range' or 'Age range' options, you cannot search for patients older than 72 months.

c) **Options for Benchmarking**
   Select one of the following radio buttons:

   ┌─ Options for Benchmarking ───┐
   │ ⦿ Standard Assessment   │
   │ ○ Assess Patients with Sufficient Refusal History as Covered   │
   └──┘

   - **Standard Assessment:** This is the default and will provide a standard assessment.
   - **Assess Patients with Sufficient Refusal History as Covered:** Select this option to view an assessment report that counts patients with sufficient refusal comments as being up to date. **Note:** If this option is selected when the assessment report is run, patients who fall short of needed/valid doses but have sufficient refusals in CAIR2 to meet the benchmark are included within the count as if they received the needed doses.

d) **Select Evaluation Date**
   Enter the assessment report evaluation date in the field provided in MM/DD/YYYY format or use the calendar icon to enter the date. **Note:** No immunizations administered after the evaluation date will be included in the report.

   ┌─ Select Evaluation Date ───┐
   │   [05/23/2023] 📅   │
   └──┘

3. Click the **Generate** button at the bottom of the screen.

4. The 'Assessment Report Status' screen will display. Various reports will be displayed on this screen, and the number of reports automatically generated will vary based on the age range of patients assessed. Further information is provided below.

Note: Click the **Refresh** button occasionally to check on the progress of the reports. When the reports are ready, the job names will be hyperlinked, and the status will display as 'COMPLETE'.

Assessment Report Status

Assessment of Patients With At Least One Missing Age Specific Benchmark

[3 Months ▾]   [Generate]   [Refresh] [Cancel]

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE
(Missed Opps Clients) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE

Records Meeting Criteria

Age Range - Evaluation Date	Number of Clients in Age Range	Started	Status
< 12 Months of Age - 05/23/2023	2	07/05/2023 01:05 PM	COMPLETE
12 - 23 Months of Age - 05/23/2023	0	07/05/2023 01:05 PM	COMPLETE
24 - 35 Months of Age - 05/23/2023	1	07/05/2023 01:05 PM	COMPLETE
36 - 72 Months of Age - 05/23/2023	4	07/05/2023 01:05 PM	COMPLETE
All Age Ranges - 05/23/2023	7	07/05/2023 01:05 PM	COMPLETE

5. Once the reports are complete, you may view the reports that are automatically generated by clicking on the hyperlinked job name. The reports are displayed in two sections below 'Assessment Report Output Options':

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE
(Missed Opps Clients) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE

Records Meeting Criteria

Age Range - Evaluation Date	Number of Clients in Age Range	Started	Status
< 12 Months of Age - 05/23/2023	2	07/05/2023 01:05 PM	COMPLETE
12 - 23 Months of Age - 05/23/2023	0	07/05/2023 01:05 PM	COMPLETE
24 - 35 Months of Age - 05/23/2023	1	07/05/2023 01:05 PM	COMPLETE
36 - 72 Months of Age - 05/23/2023	4	07/05/2023 01:05 PM	COMPLETE
All Age Ranges - 05/23/2023	7	07/05/2023 01:05 PM	COMPLETE

- **Job Name - Evaluation Date:** Will list two reports – The assessment report will be called **(Assessment Report) <Organization Name> - <Evaluation Date>**, and the report listing all patients who have missed a vaccination opportunity will be called **(Missed Opps Clients) <Organization Name> - <Evaluation Date>**.
- **Age Range - Evaluation Date:** Will list the reports by specific age ranges. You can click an underlined age range to view a listing of patients returned that fall within the specified range. To view patients for all age ranges that meet the criteria, click the **All Age Ranges - <Evaluation Date>** hyperlink.

These reports will provide the name, phone number, and address of all patients meeting the record criteria.

6. You may also create an assessment report listing patients for an age-specific benchmark by selecting an age from the 'Assessment of Patients With At Least One Missing Age Specific Benchmark' dropdown list at the top of the screen and clicking the **Generate** button. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient would show on the report if they missed at least one age-specific benchmark.

Assessment Report Status

		Refresh
Assessment of Patients With At Least One Missing Age Specific Benchmark		Cancel

| 3 Months ⌄	Generate	⬅

7. The report will be listed in the 'Job Name – Evaluation Date' section as **(Benchmark Client Listing) <Organization Name> - <Benchmark Age> - <Evaluation Date>**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient would show on the report if they missed at least one age-specific benchmark.

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Benchmark Client Listing) LCR TRN Clinic - 72 Months - 05/23/2023 ◀	7/05/2023 03:13 PM	COMPLETE
(Assessment Report) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE
(Missed Opps Clients) LCR TRN Clinic - 05/23/2023	07/05/2023 01:05 PM	COMPLETE

8. All reports will display as an Adobe® PDF file. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the print dialog box.

9. If you need to return to the 'Assessment Report Status' screen to view/print a report, click the **check assessment** link under the 'Reports' header of the left blue menu panel.

> assessment report
> **check assessment** ⬅
> benchmark report
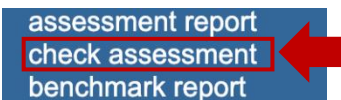
Section 3: Benchmark Reports

Benchmark reports allow CAIR2 users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in CAIR2, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click the **benchmark report** link under the 'Reports' header of the left blue menu panel.

> check assessment
> **benchmark report** ⬅
> check benchmark
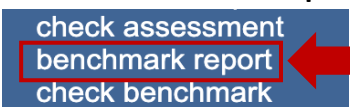
2. The 'Benchmark Report' screen will display (see screenshot below). Each section on this screen is described in further detail below.

Benchmark Report

Select Patient Population

- ○ Patients Associated with Selected Site [dropdown ⌄]
- ◉ All Patients associated with LCR TRN Clinic
- ◉ Patients who did NOT meet the benchmark
- ○ Patients who DID meet the benchmark
- ○ All Patients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

- ◉ Less than or equal to 72 months old
- ○ Birth date range   Earliest Birth date: [ ] 📅   Latest Birth date: [ ] 📅
- ○ Age range   Youngest Age: [ ] [Days ⌄]   Oldest Age: [ ] [Days ⌄]

Options for Benchmarking

- ◉ Standard Assessment
- ○ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

[ ] 📅

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

[Clear Selection]

[Generate]   [Cancel]

a) **Select Patient Population**

Select the patient population to be assessed by selecting one of the following radio buttons:

- **Patients Associated with Selected Site:** Select this option to see immunization data on all patients associated with the site selected from the dropdown list. **Note:** Only the site under which you are currently logged in will display in the dropdown. It is recommended to just leave

the defaulted radio button as it will provide the same patient population as this one.

- **All Patients Associated with <Organization Name>:** This is the default and will provide immunization data on all patients associated with your organization.

Also, select one of the following radio buttons to specify the patients to return on the report:

- **Patients who did NOT meet the benchmark:** This is the default and will provide a list of patients who did not meet the benchmark(s) defined in the 'Age Specific Immunization Benchmarks' table at the bottom of the screen.
- **Patients who DID meet the benchmark:** Select this option to see a list of patients who met the benchmark(s) defined in the 'Age Specific Immunization Benchmarks' table at the bottom of the screen.
- **All Patients, regardless of whether they met the benchmark or not:** Select this option to see a list of all patients meeting the criteria defined in the 'Age Specific Immunization Benchmarks' table at the bottom of the screen.

b) **Select Age or Birth Date Range**

Select the age, birth date range, or age range of the patients by selecting one of the following radio buttons:

- **Less than or equal to 72 months old:** This is the default, and this option will return all patients who are 72 months or younger.
- **Birth date range:** Select this option to enter a range of birth dates. Enter a birth date in the 'Earliest Birth date' and 'Latest Birth date' fields in MM/DD/YYYY format. Alternatively, use the calendar icons beside each field to enter the birth dates.
- **Age range:** Select this option to enter an age range. Enter an age in the 'Youngest Age' field and select whether it is based on 'Days', 'Months', or 'Years' from the dropdown. Then in the 'Oldest Age' field, enter an age and select whether it is based on 'Days', 'Months', or 'Years' from the dropdown.

Note: If you select the 'Birth date range' or 'Age range' options, you cannot search for patients older than 72 months.

c) **Options for Benchmarking**

Select one of the following radio buttons:

- **Standard Assessment:** This is the default and will provide a standard assessment.
- **Assess Patients with Sufficient Refusal History as Covered:** Select this option to view an

assessment and benchmark report that counts patients with sufficient refusal comments as being up to date. **Note:** If this option is selected when the benchmark report is run, patients who fall short of needed/valid doses but have sufficient refusals in CAIR2 to meet the benchmark are included within the count as if they received the needed doses.

d) Select Evaluation Date

Enter the benchmark report evaluation date in the field provided in MM/DD/YYYY format or use the calendar icon to enter the date. **Note:** No immunizations administered after the evaluation date will be included in the report.

```
┌─ Select Evaluation Date ──────────────────────────────────┐
│                                                           │
│                        05/23/2023    [📅]                  │
│                                                           │
└───────────────────────────────────────────────────────────┘
```

e) Select Benchmark

Select the benchmark(s) to be used on the report:

┌─ Select Benchmark ──┐

Age Specific Immunization Benchmarks							
Age	**DTaP**	**Hep B**	**Hib**	**MMR**	**Polio**	**Pneumo**	**Varicella**
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	**4**	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months		431	43133	431331			
@ 36 months		431	43133	431331			

Clear Selection

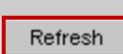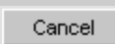└──┘

- To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, in the screenshot above, number **4** was selected where the 'DTaP' column and the '@ 16 months' row intersect and will include this benchmark in the report.
- To select all benchmarks for a specific age, click on the preferred age (e.g., @ 16 months) below the 'Age' column, and all the benchmarks for that age will be automatically selected.
- To select benchmarks in a predefined series, select one of the **431**, **43133**, or **431331** combinations at the bottom of the table.

3. Click the **Generate** button at the bottom of the screen.
4. The 'Benchmark Report Status' screen will display. Click on the **Refresh** button occasionally to check on the report's progress. When the report is ready, click on the **BENCHMARK** hyperlink.

Benchmark Report Status

			Refresh	Cancel

Report Type	Started	Completed	Status	Row Count
BENCHMARK	05/23/2023 01:05 PM	05/23/2023 01:05 PM	DONE	5

5. Once this hyperlink is clicked, the 'Benchmark Report Results' will display at the bottom of the screen. It will list all patients who met the filter criteria specified when you set up the report and a count/percentage of how many patients met the criteria. It also lists patients by 'First Name', 'Last Name', 'Birth Date', 'Primary Phone Number', 'Street', 'City', 'State', and 'Zipcode'. The 'Y' or 'N' in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

Benchmark Report Status

			Refresh	Cancel

Report Type	Started	Completed	Status	Row Count
BENCHMARK	05/23/2023 01:05 PM	05/23/2023 01:05 PM	DONE	5

Benchmark Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet   Display as a PDF

Report 13902

CAIR, the California Immunization Registry
Report generated on 05/23/2023
Report generated by WILLOW SMITHTEST
LCR TRN Clinic - LCRCLINIC -

Filter conditions used for this report:

Patients Associated with Provider: LCR TRN Clinic

Patients who did NOT meet the selected benchmark(s)

Just consider immunizations as meeting the benchmark

Age less than or equal to 72 months

Evaluation date: 05/23/2023

Benchmark age @ 16 months

Selected benchmarks: DTaP (4)

Total patients: 5; 0 patients (0%) met all benchmark criteria, 5 patients did not

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No	First Name	Last Name	Birth Date	Primary Phone Number	Cell Phone Number	Street	City	State	Zipcode	DTaP (4)
1	CHIP	CHOCO	12/16/2019	(555) 555-5555		825 TEST	LIVERMORE	CA	94551	N
2	TIMMY	CHOCO	09/01/2022	(530) 555-5555		1355 MAIN STREET	REDDING	CA	96001	N
3	HEIDY	LAMAR	02/05/2021			345 HOLLYWOOD BLVD.	BEVERLY HILLS	CA	90210	N

6. If you wish to export or print the report, you can click on one of the following options shown in the screenshot above:
   - Click the **Export as Text** hyperlink to display the report in text file format.
   - Click the **Export as a Spreadsheet** hyperlink to display the report in a spreadsheet format.
   - Click the **Display as a PDF** hyperlink to display the report in Adobe® Reader.

7. If you need to return to the 'Benchmark Report Status' screen to view/print the report, click the **check benchmark** link under the 'Reports' header of the left blue menu panel.

benchmark report
check benchmark
manage custom letters
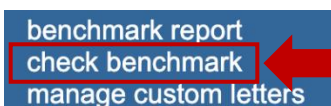
Section 4: Group Patients Report

The 'Group Patients Report' allows you to select a group of patients and view each patient's 'Immunization History Report' in the report.

To run the report:

1. Click the **group patients** link under the 'Reports' header of the left blue menu panel.

2. The 'Immunization History Report' screen will display. Enter/select the following report criteria:

   Note: You may combine any of the criteria below. The system only selects patients who fulfill all the criteria you specify.

   - **All patients within date of birth range:** This checkbox is selected by default. If you want to run the report for patients in a specific birth date range, enter a birth date range in MM/DD/YYYY format. Unselect the checkbox if you do not want to run the report based on a birth date range.
   - **All patients with immunization(s) administered by site:** Select the checkbox if you would like to limit the report to immunizations administered at your site.
   - **All patients who received immunization(s) within dates:** Select the checkbox if you would like to include patients who have an immunization in a specific date range. Enter a from and to date in MM/DD/YYYY format.

3. Once you have selected the criteria for the report, choose a sort order from the 'Sort By' dropdown. Your options are either by **Last Name, then by Age** (the default), or by **Age, then by Last Name**.

4. Click the **Generate** button at the bottom of the screen. **Note:** If you wish to start over, click the **Reset** button. The criteria selected will be cleared, and you may proceed to enter your criteria again.

5. The 'Group Client Reports Request Status' screen will display. Click the **Refresh** button periodically until the report name is hyperlinked. Click the **Immunization_History_Report** hyperlink to open the report.

6. The report will display as an Adobe® PDF file with each patient's Immunization History Report who meets

the criteria selections. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the print dialog box.