

Florida SHOTS™
**ASSESSING IMMUNIZATION
COVERAGE LEVELS**

Contact Information

www.flshots.com

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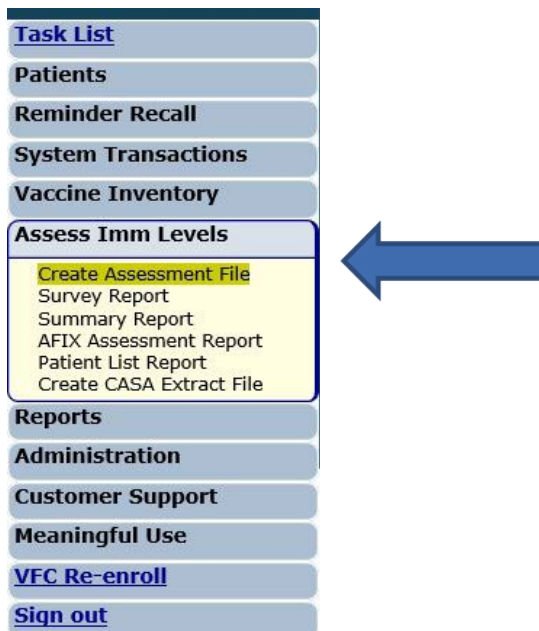
Monday - Friday, 8 A.M. to 5 P.M. Eastern

ASSESSING IMMUNIZATION COVERAGE LEVELS

To help keep your patients up-to-date for all necessary childhood and adolescent vaccines, Florida SHOTS includes customizable immunization coverage reports. This short guide will give you the step-by-step instructions to create an assessment file and run several reports to assess your immunization levels.

STEP 1: Log into Florida SHOTS.

STEP 2: Select “Assess Imm Levels” from the Florida SHOTS menu.



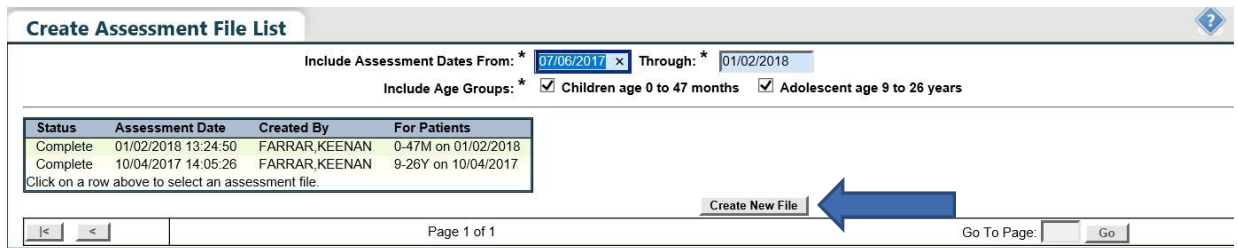
The screenshot shows a vertical menu with the following items: Task List, Patients, Reminder Recall, System Transactions, Vaccine Inventory, Assess Imm Levels (highlighted in yellow with a blue arrow pointing to it), Reports, Administration, Customer Support, Meaningful Use, VFC Re-enroll, and Sign out. Under 'Assess Imm Levels', there is a sub-menu with the following items: Create Assessment File (highlighted in yellow), Survey Report, Summary Report, AFIX Assessment Report, Patient List Report, and Create CASA Extract File.

STEP 3: Create an assessment file.

This is the starting point for all assessment activities. This takes a “snapshot” of all of your patients within a selected age group by the compliance age or the assessment date.

An assessment file must be created prior to using any of the other reporting functions.

To do this, click on **“Create Assessment File.”** All previous assessments will be displayed. To create a new assessment you will click on **“Create New File.”**



The screenshot shows the 'Create Assessment File List' interface. At the top, there is a search bar with 'Include Assessment Dates From: * 07/08/2017 x Through: * 01/02/2018' and 'Include Age Groups: * Children age 0 to 47 months Adolescent age 9 to 26 years'. Below this is a table with the following data:

Status	Assessment Date	Created By	For Patients
Complete	01/02/2018 13:24:50	FARRAR,KEENAN	0-47M on 01/02/2018
Complete	10/04/2017 14:05:26	FARRAR,KEENAN	9-26Y on 10/04/2017

Below the table, there is a 'Create New File' button with a blue arrow pointing to it. At the bottom, there are navigation buttons: '<', '<<', 'Page 1 of 1', 'Go To Page: [] Go', and a help icon (?) in the top right corner.

ASSESSING IMMUNIZATION COVERAGE LEVELS

The page will display the assessment file criteria.

Create Assessment File Criteria

Create an Assess Immunization Levels file for the following criteria.

For Age Group: * Children age 0 to 47 months of age
 Adolescent age 9 to 26 years of age

As of Date (Compute Age On): *

Compliance By (Evaluate At): * Age: * Months of age
 Date:

* Asterisk indicates a required field

Select the **age group** of clients to include in the assessment.

The **“As of Date”** controls which patients are included in the assessment file. Only patients who are within the specified age group on the **“As of Date”** will be included in the assessment file. The default **“As of Date”** value is today’s date. The **“As of Date”** cannot be a date in the future. For AFIX evaluation purposes, assessments are only valid when the **“As of Date”** is within the last 14 days.

The **“Compliance By”** value allows you to assess how many of your patients have received the recommended vaccines by that age or by a specific date. Only vaccinations received on or before this **“Compliance By”** age or date will be considered to compute the coverage metrics.

Select **“Create Assessment File”**.

The system will then gather all of the information you requested.

You will receive the following message when your file is complete:

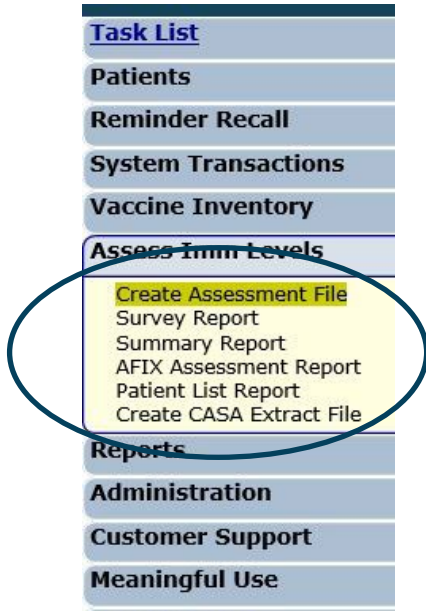
Create Assessment File Status

Search Status: Complete
Started By: FARRAR,KEENAN
For Patients: 0-47M on 01/03/2018
Compliance By: 12 MOA, 24 MOA
Includes AFIX Metrics: Yes
Number of Clients Examined: 46 of 46
File Started: 01/03/2018 11:26:54
Elapsed Time: 0:00:04

ASSESSING IMMUNIZATION COVERAGE LEVELS

STEP 4: Create Assessment Reports

All the assessment reports are accessible from the “Assess Imm Levels” sub-menu.



When you select a report from the menu, the first page you will see is the list of assessment files that have been created, similar to the “Create Assessment File” screen. Before creating a report, a completed assessment file must be chosen on which to base the report.

The age range for each assessment is displayed under “For Patients”.

The image shows a screenshot of the 'Survey Report List' page. At the top, there are filters for 'Include Assessment Dates From' (07/07/2017) and 'Through' (01/03/2018). Below that, there are checkboxes for 'Include Age Groups' with 'Children age 0 to 47 months' and 'Adolescent age 9 to 26 years' both checked. The main part of the page is a table with the following data:

Status	Assessment Date	Created By	For Patients
Complete	01/03/2018 11:26:54	FARRAR,KEENAN	0-47M on 01/03/2018
Complete	01/02/2018 13:24:50	FARRAR,KEENAN	0-47M on 01/02/2018
Complete	10/04/2017 14:05:26	FARRAR,KEENAN	9-26Y on 10/04/2017

Below the table, there is a note: 'Click on a row above to select an assessment file.' At the bottom of the page, there are navigation buttons for '<|<' and '>|>', and a 'Go To Page:' field with a 'Go' button. The page number 'Page 1 of 1' is also visible.

1. SURVEY REPORT

This allows you to create a coverage assessment report showing coverage levels for compliance with recommended age-appropriate vaccinations.

After selecting the assessment file, you will be brought to the “Survey Report Criteria” page.

ASSESSING IMMUNIZATION COVERAGE LEVELS

Survey Report Criteria

Assessment file created on 01/02/2018 for patients 0-47 months old as of 01/02/2018
Compliance with metrics computed at 12 months and 24 months.
Assessment file includes all service sites for TAMPA FAMILY HEALTH CENTERS.

Include: * All Service Sites
 Selected Sites: CHARLES BOTTOM HC (Pin: 700273)
NORTH TAMPA HEALTH CENTER (Pin: 291069)
OSBORNE CENTER (Pin: 291006)
TAMPA FAM - FLETCHER
 One VFC Pin:

Assessment Type: * AFIX Standard
 Custom Assessment

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

[Generate Report](#)

Select the “All Service Sites” option to include patients from all the service sites of the organization in the report. To include only specific site(s), choose the “Selected Sites” option and select one or more service sites. To select more than one service site hold the [Ctrl] key down while clicking on the service site name. To include patients from a specific VFC provider, select the “One VFC Pin” option and enter the VFC pin of the provider.

Select the Assessment Type. You will have the option to select either “**AFIX Standard**” assessments or “**Custom Assessment.**”

“**AFIX Standard for Pediatrics**” (assessment files created with patient 0–47 months) includes:

- Patients 24–35 months of age
- Bases completion on the 4:3:1:3:3:1:4
- Includes only Patients with an “**Active**” status

“**AFIX Standard for Adolescents**” (assessment files created with patient 11–18 years) includes:

- Patients 13–17 years of age on the assessment date
- Includes only patients with an “**Active**” status

ASSESSING IMMUNIZATION COVERAGE LEVELS

To customize the patients included in the report select **“Custom Assessment”**.

Assessment Type: * AFIX Standard
 Custom Assessment

Custom Assessment Criteria

Age range from: * to * months old as of: 01/03/2018

Compliance Age: * 12 months
 24 months

Exclude: Patients without a WIC Id
 Patients with a religious exemption
 Patients with a MOGE date on or before the compliance age/date

Include Status Values: * ACTIVE
 INACTIVE-DOCUMENTED MOVE
 INACTIVE-UNABLE TO LOCATE/NO RESPONSE
 INACTIVE AT CONVERSION
 INACTIVE-WIC/PRIVATE PROVIDER RECALL
 INACTIVE-WIC/PRIVATE PROVIDER NO RECALL

NOTE: For County Health Departments, select the criteria as shown above to generate coverage levels based on the current state requirements.

Choose to open the report in your browser or download as an Excel file by selecting the **“Report Format”** option.

NOTE: If you choose the Excel download option, you may see a confirmation window indicating, **“The file format and extension don’t match. Do you want to open it anyway?”** You should answer **“Yes”** to download the file.

Click on the **“Generate Report”** button to build the report.

The Immunization Survey Report will be displayed.

IMMUNIZATION SURVEY REPORT

Organizations: PHYSICIAN ASSOCIATES OF FL
 Service Sites: 1MTL - MAITLAND CENTER (VFC Pin: 481046)
 Assessment Type: AFIX 24-35 months old on 01/22/2016
 Assessment Date: 01/22/2016
 Compliance By: 24M
 Age group cohort: 1
 Total patients assessed: 1

Organization/Service Site	4 DTaP	3 Polio	1 MMR	3 Hib	3 HepB	1 VZV	4 PCV	2-3 RV	1 Flu	2 HepA	4:3:1:3:3:1:4	Total Patients
PHYSICIAN ASSOCIATES OF FL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	-	-	100.0%	1
1MTL - MAITLAND CENTER (VFC Pin: 481046)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	-	-	100.0%	1

NOTE: Flu metric is measured based on the previous completed season.

ASSESSING IMMUNIZATION COVERAGE LEVELS

2. SUMMARY REPORT

The “**Summary Report**” is a coverage assessment report that provides the coverage levels for compliance with each of the recommended age-appropriate vaccination series and combination of vaccination series.

Select your assessment file from the assessment file list to be taken to the “**Summary Report Criteria**” page.

Summary Report Criteria

Assessment file created on 10/04/2017 for patients 9-26 years old as of 10/04/2017
Compliance with metrics computed as of 10/04/2017.
Assessment file includes all service sites for TAMPA FAMILY HEALTH CENTERS.

Include: * All Service Sites
 Selected Sites: CHARLES BOTTOM HC (Pin: 700273)
NORTH TAMPA HEALTH CENTER (Pin: 291069)
OSBORNE CENTER (Pin: 291006)
TAMPA FAM - FLETCHER

One VFC Pin:

Assessment Type: * AFIX Standard
 Custom

Custom Assessment Criteria

Age range from: * 13 to * 17 years old as of: 10/04/2017

Exclude: Patients without a WIC Id
 Patients with a religious exemption
 Patients with a MOGE date on or before the compliance age/date

Include Status Values: * ACTIVE
 INACTIVE-DOCUMENTED MOVE
 INACTIVE-UNABLE TO LOCATE/NO RESPONSE
 INACTIVE AT CONVERSION
 INACTIVE-WIC/PRIVATE PROVIDER RECALL
 INACTIVE-WIC/PRIVATE PROVIDER NO RECALL

Base Complete on: * 2 HepA
4 Polio
1 Tdap, 1 MCV4, 3 HPV

Select the “**All Service Sites**” option to include patients from all the service sites of the organization in the report. To include only specific site(s), choose the “**Selected Sites**” option, and select one or more service sites. To select more than one service site hold the [Ctrl] key down while clicking on the service site name. To include patients from a specific VFC provider, select the “**One VFC Pin**” option and enter the VFC pin of the provider.

Select the Assessment Type. You will have the option to select either “AFIX Standard” assessments or “Custom Assessment” for either pediatric or adolescent patients.

“**AFIX Standard for Pediatrics**” (assessment files created with patients 0–47 months) includes:

- Patients 24-35 months of age
- Bases completion on the 4:3:1:3:3:1:4
- Includes only patients with an “**Active**” status.

ASSESSING IMMUNIZATION COVERAGE LEVELS

“AFIX Standard for Adolescents” (assessment files created with patients 11–18 years) includes:

- Patients 13–17 years of age on the assessment date
- Includes only patients with an “Active” status

To customize the patients included in the report select “Custom Assessment”.

Custom Assessment Criteria

Age range from: * 13 to * 17 years old as of: 01/22/2016

Exclude: Patients without a WIC Id
 Patients with a religious exemption
 Patients with a MOGE date on or before the compliance age/date

Include Status Values: * ACTIVE
 INACTIVE-DOCUMENTED MOVE
 INACTIVE-UNABLE TO LOCATE/NO RESPONSE
 INACTIVE AT CONVERSION
 INACTIVE-WIC/PRIVATE PROVIDER RECALL
 INACTIVE-WIC/PRIVATE PROVIDER NO RECALL

Base Complete on: *

2 HepA
4 Polio
1 Tdap, 1 MCV4, 3 HPV
1 Tdap, 2 MCV4, 3 HPV

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

Choose to open the report in your browser or download as an Excel file by selecting the “Report Format” option.

NOTE: If you choose the Excel download option, you may see a confirmation window indicating, “The file format and extension don’t match. Do you want to open it anyway?” You should answer “Yes” to download the file.

Click on the “Generate Report” button to build the report.

ASSESSING IMMUNIZATION COVERAGE LEVELS

IMMUNIZATION SUMMARY REPORT			
Organizations: POLK CHD			
Service Sites: All			
Assessment Type: Custom 13-17 years old on 01/19/2016			
Assessment Date: 01/19/2016			
Compliance By: 01/19/2016			
Base Complete On: 1 Tdap, 1 MCV4, 3 HPV			
Include Status Values: ACTIVE, INACTIVE-DOCUMENTED MOVE, INACTIVE-UNABLE TO LOCATE/NO RESPONSE, INACTIVE AT CONVERSION			
Age group cohort: 5			
Total patients assessed: 5			
		Complete	
	# of patients		% of patients
Received 3 HepB	5		100%
Received 2 MMR	5		100%
Received 2 VZV	4		80%
Received 1 Tdap	5		100%
Received 2 MEN	0		0%
Received 1 MCV4	4		80%
Received 2 MCV4	0		0%
Received 1 HPV	5		100%
Received 2 HPV	4		80%
Received 3 HPV	2		40%
Received 1 Flu	0		0%
Received 2 HepA	2		40%
Received 4 Polio	5		100%
Received 1 Tdap, 1 MCV4, 3 HPV	2		40%
Received 1 Tdap, 2 MCV4, 3 HPV	0		0%
Of incomplete patients, # of patients who could be up-to-date for 1 Tdap, 1 MCV4, 3 HPV with 1 additional visit:			
Immunizations Needed	# of patients	% of patients assessed	
1	0	0%	
2	0	0%	
3	0	0%	
4+	0	0%	
Total patients up-to-date with 1 visit	0	0%	

NOTE: Flu is measured on the previous completed season.

3. AFIX ASSESSMENT FOR VFC PROVIDERS

The “**AFIX Assessment**” report is primarily used for VFC providers and provides coverage metrics that will be reported to CDC for the purpose of AFIX assessment. This report will also display “**Missed Opportunities.**”

“**AFIX Standard for Pediatrics**” (assessment files created with patients 0–47 months) includes:

- Patients 24–35 months of age
- Bases completion on the 4:3:1:3:3:1:4
- Includes only Patients with an “Active” status

“**AFIX Standard for Adolescents**” (assessment files created with patients 11–18 years) includes:

- Pacientes de entre 13–17 años de edad hasta la fecha de evaluación
- Solamente a pacientes en estado tipo “Active”

Select your assessment from the assessment list to be taken to the “**Summary Report Criteria**” page.

ASSESSING IMMUNIZATION COVERAGE LEVELS

AFIX Assessment Report Criteria

Assessment file created on 01/03/2018 for patients 0-47 months old as of 01/03/2018
 Include active patients with DOB between 01/04/2015 and 01/03/2016
 Compliance with metrics computed at 24 months old.
 Assessment file includes all service sites for TAMPA FAMILY HEALTH CENTERS.

Include: * One VFC Pin: *
 All Service Sites/Pins
 Selected Sites:

TAMPA FAM NEBRASKA (Pin: 700031)
 TAMPA FAMILY - SLIGH
 TAMPA FAMILY CAUSE (Pin: 700181)
 TAMPA FAMILY HEALTH 22ND AVE (Pin: 291189)

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

[Generate Report](#)

Select the **“All Service Sites”** option to include patients from all the service sites of the organization in the report. To include only specific site(s), choose the **“Selected Sites”** option, and select one or more service sites. To select more than one service site hold the [Ctrl] key down while clicking on the service site name To include patients from a specific VFC provider, select the **“One VFC Pin”** option and enter the VFC pin of the provider.

Choose to open the report in your browser or download as an Excel file by selecting the **“Report Format”** option.

NOTE: If you choose the Excel download option, you may see a confirmation window indicating, **“The file format and extension don’t match. Do you want to open it anyway?”** You should answer **“Yes”** to download the file.

Click on the **“Generate Report”** button to build the report.

AFIX Assessment Report

AFIX ASSESSMENT REPORT

For Organization: TAMPA FAMILY HEALTH CENTERS
 Assessment created 01/02/2018 for patients 24-35M as of 01/02/2018
 Include active patients with DOB between 01/03/2015 and 01/02/2016
 Compute coverage levels and missed Opportunities at compliance age 24M

For Service Site: TAMPA FAM NEBRASKA
 VFC Pin: 700031
 Records Assessed: 1

Metric	Coverage Levels		Missed Opportunities	
	#	%	#	%
4 DTaP	0	0.0%	0	0.0%
3 Polio	0	0.0%	1	100.0%
1 MMR	0	0.0%	1	100.0%
3 Hib	0	0.0%	1	100.0%
3 HepB	0	0.0%	1	100.0%
1 VZV	0	0.0%	1	100.0%
4 PCV	0	0.0%	1	100.0%
2-3 RV	0	0.0%	0	0.0%
1 Flu	0	0.0%	1	100.0%
2 HepA	0	0.0%	1	100.0%
4:3:1:3:3:1:4	0	0.0%	1	100.0%

NOTE: Flu is measured on the previous completed season.

ASSESSING IMMUNIZATION COVERAGE LEVELS

You also see here “Missed Opportunities.” A missed opportunity means that a patient received one or more vaccines on a certain day and could have received additional vaccinations to become up-to-date.

4. PATIENT LIST REPORT

The “**Patient List Report**” displays a customized list of all patients who were included in an assessment file.

Select an assessment file from the assessment file list, and you will be taken to the “**Patient List Report Criteria**” page.

The screenshot shows the 'Patient List Report Criteria' form. At the top, it states: 'Assessment file created on 01/03/2018 for patients 0-47 months old as of 01/03/2018. Compliance with metrics computed at 12 months and 24 months. Assessment file includes all service sites for TAMPA FAMILY HEALTH CENTERS.' The form has several sections: 'Include:' with options for 'All Service Sites' (selected), 'Selected Sites' (with a dropdown menu showing 'CHARLES BOTTOM HC (Pin: 700273)', 'NORTH TAMPA HEALTH CENTER (Pin: 291069)', 'OSBORNE CENTER (Pin: 291036)', and 'TAMPA FAM - FLETCHER'), and 'One VFC Pin:' (with an empty text box). 'Assessment Type:' has 'AFIX Standard' selected and 'Custom Assessment' as an option. 'Include Patient Data:' includes checkboxes for 'City', 'Perm Contra', 'Status', 'Sex', 'Race', 'VFC', 'Medicaid', 'Religious Exemption', 'WIC Id', 'MOGE Date', 'State Imm Id', and 'Zip Code'. 'Include Patient Groups:' has 'All patients (assessment cohort)' selected, along with several other options for filtering patients based on immunization status and missed opportunities. 'Report Format:' has 'Browser' selected and 'Excel File - downloaded' as an option. A note at the bottom left states: '* Asterisk indicates a required field'.

Select the “All Service Sites” option to include patients from all the service sites of the organization in the report. To include only specific site(s), choose the “Selected Sites” option, and select one or more service sites. To select more than one service site hold the [Ctrl] key down while clicking on the service site name. To include patients from a specific VFC provider, select the “One VFC Pin” option and enter the VFC pin of the provider.

Select the “**Assessment Type**”.

“**AFIX Standard for Pediatrics**” (assessment files created with patients 0–47 months) includes:

- Patients 24-35 months of age
- Bases completion on the 4:3:1:3:3:1:4
- Includes only patients with an “**Active**” status

ASSESSING IMMUNIZATION COVERAGE LEVELS

“**AFIX Standard for Adolescents**” (assessment files created with patients 11–18 years) includes:

- Patients 13-17 years of age on the assessment date
- Includes only patients with an “**Active**” status

To customize the patients included in the report select “**Custom Assessment**”.

Custom Assessment Criteria

Age range from: * 24 to * 35 months old as of: 01/22/2016

Exclude: Patients without a WIC Id
 Patients with a religious exemption
 Patients with a MOGE date on or before the compliance age/date

Include Status Values: * ACTIVE
 INACTIVE-DOCUMENTED MOVE
 INACTIVE-UNABLE TO LOCATE/NO RESPONSE
 INACTIVE AT CONVERSION
 INACTIVE-WIC/PRIVATE PROVIDER RECALL
 INACTIVE-WIC/PRIVATE PROVIDER NO RECALL

The “**Include Patient Data**” checkboxes control which data columns are included in your report. This report is relatively wide; you should only check the columns you need to see on your report.

Include Patient Data: City Medicaid MOGE Date Perm Contra
 Race Religious Exemption State Imm Id Status
 VFC WIC Id Zip Code

The “**Include Patient Groups**” checkboxes allow you to include or exclude certain groups from your report. Checking the “All patients” checkbox will include all records. If you check any of the complete, incomplete, or late up-to-date checkboxes you will be required to select the metric upon which the patient’s immunization status will be measured.

Include Patient Groups: * All patients (assessment cohort)
 Patients with no immunizations
 Patients with invalid doses (adds 'Invalid Doses' column)
 Patients with missed opportunities (adds 'Last Visit' and 'Missed Opportunities' columns)
 Patients that are complete (adds metric column)
 Patients that are incomplete (adds metric and 'Missing Series' columns)
 Patients that are late Up-To-Date (adds metric and 'Late Series' columns)

Select Metric

Base Complete on: *

ASSESSING IMMUNIZATION COVERAGE LEVELS

Custom Assessment Criteria

Age range from: * 24 to * 35 months old as of: 01/22/2016

Exclude: Patients without a WIC Id
 Patients with a religious exemption
 Patients with a MOGE date on or before the compliance age/date

Include Status Values: * ACTIVE
 INACTIVE-DOCUMENTED MOVE
 INACTIVE-UNABLE TO LOCATE/NO RESPONSE
 INACTIVE AT CONVERSION
 INACTIVE-WIC/PRIVATE PROVIDER RECALL
 INACTIVE-WIC/PRIVATE PROVIDER NO RECALL

The “**Include Patient Data**” checkboxes control which data columns are included in your report. This report is relatively wide; you should only check the columns you need to see on your report.

Include Patient Data: City Sex Medicaid MOGE Date
 Perm Contra Race Religious Exemption State Imm Id
 Status VFC WIC Id Zip Code

The “**Include Patient Groups**” checkboxes allow you to include or exclude certain groups from your report. Checking the “**All patients**” checkbox will include all records. If you check any of the complete, incomplete, or late up-to-date checkboxes you will be required to select the metric upon which the patient’s immunization status will be measured.

Include Patient Groups: * All patients (assessment cohort)
 Patients with no immunizations
 Patients with invalid doses (adds 'Invalid Doses' column)
 Patients with missed opportunities (adds 'Last Visit' and 'Missed Opportunities' columns)
 Patients that are complete (adds metric column)
 Patients that are incomplete (adds metric and 'Missing Series' columns)
 Patients that are late Up-To-Date (adds metric and 'Late Series' columns)

Select Metric

Compliance Age: * 12 months
 24 months

Base Complete on: *

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

ASSESSING IMMUNIZATION COVERAGE LEVELS

Choose to open the report in your browser or download as an Excel file by selecting the “Report Format” option.

NOTE: If you choose the Excel download option, you may see a confirmation window indicating, “The file format and extension don’t match. Do you want to open it anyway?” You should answer “Yes” to download the file.

Click on the “**Generate Report**” button to build the report.

Patient List Report									
IMMUNIZATION PATIENT LIST REPORT									
Organization: TAMPA FAMILY HEALTH CENTERS									
Service Sites: All									
Assessment Type: AFIX 24-35 months old on 01/02/2018									
Assessment Date: 01/02/2018									
Compliance By: 24M									
Base Complete On: 4:3:1:3:3:1:4									
Include Patient Groups: All patients, show incomplete for 4:3:1:3:3:1:4									
Age group cohort: 2									
Total patients assessed: 1									
Last Name	First Name	DOB Sex	MOGE Date Perm Contra	Religious Exemption	State Imm Id Status	VFC	4:3:1:3:3:1:4	Missing Series	
MILLER	SAMANTHA	08/02/2015 F			990114924 ACTIVE	Yes	Incomplete	3 DTaP, 3 Polio, 1 MMR, 3 Hib, 3 HepB, 1 VZV, 4 PCV	

NOTE: Flu is measured on the previous completed season.