

Assessing Immunization Coverage Levels

MAY 18, 2020



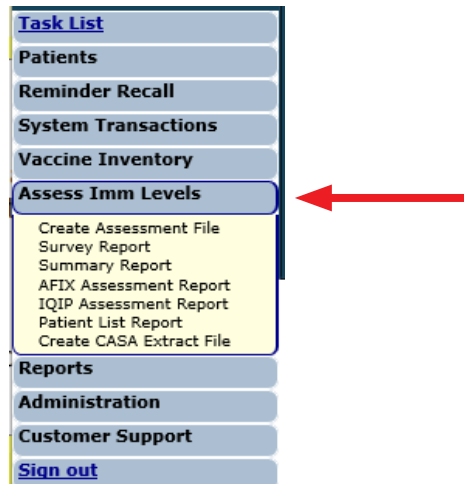
To help keep your patients up to date for all necessary childhood and adolescent vaccines, Florida SHOTS includes customizable immunization coverage reports. This short guide will give you the step-by-step instructions to create an assessment file and run several reports to assess your immunization levels.

STEP 1

Log into Florida SHOTS.

STEP 2

Select **“Assess Imm Levels”** from the Florida SHOTS menu.

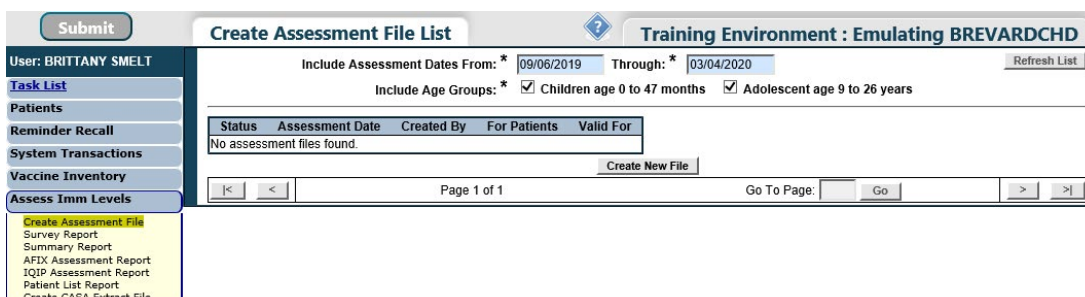


STEP 3

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

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

Click on **“Create Assessment File”** from the drop-down menu under **“Assess Imm Levels”**. All previous assessments will be displayed, if applicable. To create a new assessment, you will need to click on **“Create New File”**.



The page will display the assessment file criteria.

Create Assessment File Criteria Training Environment : Emulating BREVARDCHD

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): * 03/04/2020

Compliance By (Evaluate At): * Age: * 24 Months of age
 Date:

* Asterisk indicates a required field

Create Assessment File

STEP 4

Fill in the assessment file criteria. Select one of the two “**For Age Group**” options to distinguish the age range of clients to include in the assessment.

Fill in the “**As of Date (Compute Age On)**” section. This region controls which patients are included in the assessment file. Only patients within the specified age group on the “**As of Date**” will be included in the assessment file.

NOTE: The default “**As of Date**” is set to the date you are creating the assessment, i.e. today’s date. The “**As of Date**” cannot be a date in the future.

Enter a specific age or date in the “**Compliance By (Evaluate At)**” section. This region allows you to assess how many of your patients have received the recommended vaccines by that age or date.

NOTE: Only vaccinations received on or before the “**Compliance By**” age or date, will be considered to compute the coverage metrics.

Click “**Create Assessment File**” once all the criteria has been entered. The system will then gather all the information you requested.

Create Assessment File Criteria Training Environment : Emulating BREVARDCHD

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

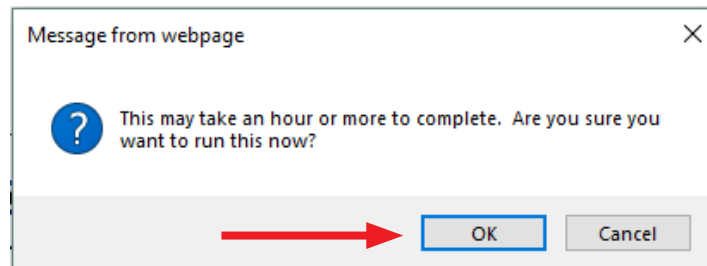
As of Date (Compute Age On): * 03/04/2020

Compliance By (Evaluate At): * Age: * 24 Months of age
 Date:

* Asterisk indicates a required field

Create Assessment File

NOTE: The pop-up message will appear upon selecting **“Create Assessment File”**. Click **“OK”** to continue.

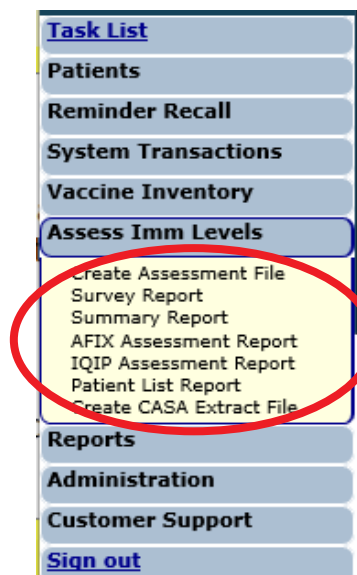


You will receive the following message, once the file is complete.

| Create Assessment File Status | |
|-------------------------------|---------------------|
| Search Status: | Complete |
| Started By: | SMELT,BRITTANY |
| For Patients: | 0-47M on 03/04/2020 |
| Compliance By: | 12 MOA, 24 MOA |
| Includes AFIX Metrics: | Yes |
| Includes IQIP Metrics: | Yes |
| Number of Clients Examined: | 1,026 of 1,026 |
| File Started: | 03/04/2020 09:42:25 |
| Elapsed Time: | 0:00:01 |

STEP 5

Creating Assessment Reports. All the assessment reports are accessible from the **“Assess Imm Levels”** drop-down menu.



When you select a report from the menu, the first page you will see is similar to the **“Create Assessment File”** screen, it lists the assessment files that have previously been created. The age range for each assessment is displayed under **“For Patients”** (see image below).

NOTE: Before creating a report, a completed assessment file must be chosen on which to base the report.

| Status | Assessment Date | Created By | For Patients | Valid For |
|----------|---------------------|-----------------------------|---------------------|--------------------|
| Complete | 03/04/2020 10:18:33 | SMELT,BRITTANY | 0-47M on 03/04/2020 | AFIX, IQIP, Custom |
| Complete | 09/06/2019 16:06:36 | RICHBOURG,RYAN SUPERUSER | 9-26Y on 09/06/2019 | IQIP, Custom |

1. SURVEY REPORT

Allows you to create an assessment report showing coverage levels for compliance with recommended age-appropriate vaccinations.

Click on the assessment file you want to base your report on.

After selecting the desired file, you will be brought to the **“Survey Report Criteria”** page. You can specify the information you want to include in your report by selecting from the field options listed below.

Survey Report Criteria

Assessment file created on 03/04/2020 for patients 0-47 months old as of 03/04/2020
Compliance with metrics computed at 12 months and 24 months.
Assessment file includes all service sites for BREVARD CHD.

Include: * All Service Sites
 Selected Sites: BREV ADU ONLY (Pin: 700064)
 BREV BOTH (Pin: 700056)
 BREV CANT ORDER (Pin: 700052)
 BREV CENTRAL OFF (Pin: 700050)

One VFC Pin:

Assessment Type: * AFIX Standard
 IQIP Standard
 Custom Assessment

Report Format: * Browser
 Excel File - downloaded

Asterisk indicates a required field

Include:

“All Service Sites” allows you to include patients from all other sites within your organization.

“Selected Sites” allows you to specify which site you want to pull patient information from by selecting one or more of the service sites.

“One VFC PIN” allows you to include patients from a specific VFC provider by entering the PIN of the VFC provider.

NOTE: To select more than one service site, hold the [Ctrl] key down while clicking on the service site name.

Assessment Type:

AFIX Standard has been replaced by the **"IQIP Standard Assessment"**. AFIX will temporarily still appear but should be avoided via selection.

IQIP Standard is designed to promote and support the implementation of provider-level QI (Quality Improvement) strategies to increase vaccine uptake among children and adolescents.

IQIP Standard for Pediatric Populations (assessment file created with patients 0 to 47 months of age):

- Patients 24 – 35 months of age
- Bases completion of the 4:3:1:3:3:1:4 series
- Compliance by 2nd birthday
- As of assessment date
- Includes only patients with an Active status

IQIP Standard for Adolescent Populations (assessment file created with patients 9 to 26 years of age):

- Bases completion of 1 Tdap, 1 MCV4, and complete HPV
- Compliance by 13th birthday
- As of assessment date
- Includes only patients with an "Active" status

To customize the patients included in the report select **"Custom Assessment"**

Assessment Type: * AFIX Standard
 IQIP Standard
 Custom Assessment

Custom Assessment Criteria

Age range from: * 24 to * 35 months old as of: 03/04/2020

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.

Report Format:

"Browser" opens the report in a separate window within the web browser you are currently using (i.e. Google Chrome, Internet Explorer, etc.).

"Excel File – downloaded" opens the report in Microsoft Excel on our desktop.

NOTE: If you choose the Excel option, you may see a confirmation window appear with the message, "The file format and extension don't match. Do you want to open it anyway?" Answer **"Yes"** to download the file.

Once you have entered the desired specifications, click the **“Generate Report”** button (grey box) to build the report.

The **Immunization Survey Report** will then be displayed.

| IMMUNIZATION SURVEY REPORT | | | | | | | | | | | | |
|--|--------|---------|--------|-------|-------|-------|-------|--------|--------|--------|---------------|----------------|
| Organizations: BREVARD CHD | | | | | | | | | | | | |
| Service Sites: All | | | | | | | | | | | | |
| Assessment Type: IQIP 24-35 months old on 03/04/2020 | | | | | | | | | | | | |
| Assessment Date: 03/04/2020 | | | | | | | | | | | | |
| Compliance By: 24M | | | | | | | | | | | | |
| Age group cohort: 1 | | | | | | | | | | | | |
| Total patients assessed: 1 | | | | | | | | | | | | |
| Organization/Service Site | 4 DTap | 3 Polio | 3 HepB | 1 MMR | 4 PCV | 3 Hib | 1 VZV | 2-3 RV | 1 Flu | 2 HepA | 4:3:1:3:3:1:4 | Total Patients |
| BREVARD CHD | - | - | - | - | - | - | - | - | 100.0% | - | - | 1 |
| BREV ADU ONLY (VFC Pin: 700064) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV BOTH (VFC Pin: 700056) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV CANT ORDER (VFC Pin: 700052) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV CENTRAL OFF (VFC Pin: 700050) | - | - | - | - | - | - | - | - | 100.0% | - | - | 1 |
| BREV DIRECT ONLY (VFC Pin: 700051) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV END DATE (VFC Pin: 700073) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV HEPB ONLY (VFC Pin: 700065) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV NO START DATE (VFC Pin: 700074) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV NON VFC | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV NONDIR ONLY (VFC Pin: 700054) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV NONE (VFC Pin: 700075) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV VFC INACTIVE (VFC Pin: 700053) | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV VFC PENDING | - | - | - | - | - | - | - | - | - | - | - | - |
| BREV VFC TERMINAT | - | - | - | - | - | - | - | - | - | - | - | - |
| MV FINAL TEST 1 | - | - | - | - | - | - | - | - | - | - | - | - |
| MV TERMINATED | - | - | - | - | - | - | - | - | - | - | - | - |
| TEST ONLY (VFC Pin: 700040) | - | - | - | - | - | - | - | - | - | - | - | - |

NOTE: Flu is based on the previous completed season.

2. SUMMARY REPORT

Allows you to create an assessment report providing the coverage levels for compliance with each of the recommended age-appropriate vaccination series and combination of vaccination series.

From the **“Summary Report List”** page, click on the assessment file you want to base your report.

After selecting the desired file, you will be brought to the **“Summary Report Criteria”** page. You can specify the information you want to include in your report by selecting from the field options listed below.

Summary Report Criteria

Assessment file created on 03/04/2020 for patients 0-47 months old as of 03/04/2020

Compliance with metrics computed at 12 months and 24 months.

Assessment file includes all service sites for BREVARD CHD.

Include: * All Service Sites

Selected Sites:

BREV ADU ONLY (Pin: 700064)
 BREV BOTH (Pin: 700056)
 BREV CANT ORDER (Pin: 700052)
 BREV CENTRAL OFF (Pin: 700050)

One VFC Pin:

Assessment Type: * AFIX Standard

IQIP Standard

Custom

Base Complete on: *

2-3 RV
 1 Flu
 2 HepA
 4:3:1:3:3:1:4

Report Format: * Browser

Excel File - downloaded

* Asterisk indicates a required field

Generate Report

NOTE: Refer to previous explanation of **criteria field(s)** found on pages 5–7 under **Survey Report**.

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

NOTE: As a reminder, choosing the Excel download option results in a confirmation window appearing (previously mentioned on page 7 under Report Format). Click **“Yes”** to download the file.

Once you have entered the desired specifications, click the **“Generate Report”** button (grey box) to build the report.

The **Immunization Summary Report** will then be displayed.

IMMUNIZATION SUMMARY REPORT

Organizations: BREVARD CHD
 Service Sites: All
 Assessment Type: Custom 24-35 months old on 03/04/2020
 Assessment Date: 03/04/2020
 Compliance By: 24M
 Base Complete On: 4:3:1:3:3:1:4
 Include Status Values: ACTIVE, INACTIVE-DOCUMENTED MOVE, INACTIVE-UNABLE TO LOCATE/NO RESPONSE, INACTIVE AT CONVERSION
 Age group cohort: 1
 Total patients assessed: 1

| | Complete by 24 months | | Late up-to-date | | Complete by assessment date | |
|------------------------|-----------------------|---------------|-----------------|---------------|-----------------------------|---------------|
| | # of patients | % of patients | # of patients | % of patients | # of patients | % of patients |
| Received 4 DTaP | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 3 Polio | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 3 HepB | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 1 MMR | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4 PCV | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 3 HIB | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 1 VZV | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 2-3 RV | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 1 Flu | 1 | 100% | 0 | 0% | 1 | 100% |
| Received 2 HepA | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4:3:1 | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4:3:1:3 | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4:3:1:3:3 | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4:3:1:3:3:1 | 0 | 0% | 0 | 0% | 0 | 0% |
| Received 4:3:1:3:3:1:4 | 0 | 0% | 0 | 0% | 0 | 0% |

Of incomplete patients, # of patients who could be up-to-date for 4:3:1:3:3:1:4 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 based on the previous completed season.

3. IQIP ASSESSMENT REPORT

The **“IQIP Assessment Report”** serves as a basis for communicating immunization coverage rates and opportunities to improve workflow practices. IQIP focuses on administering on-time vaccinations, adhering to ACIP-recommended vaccination schedules, and protection against vaccine preventable diseases.

The IQIP report displays missed opportunities data. This information is important for discussing with provider staff during an IQIP site visit ways to decrease missed opportunities.

NOTE: A missed opportunity means a patient received one or more vaccines on a certain day and could have received additional vaccinations to become up to date.

After selecting the desired file, you will be brought to the “IQIP Assessment Report Criteria” page.

IQIP Assessment Report Criteria

Assessment file created on 03/04/2020 for patients 0-47 months old as of 03/04/2020
 Compliance with metrics computed at Assessment file created on 03/04/2020 for patients 0-47 months old as of 03/04/2020
 Assessment file includes all service sites for BREVARD CHD.

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

BREV ADU ONLY (Pin: 700064)
 BREV BOTH (Pin: 700056)
 BREV CANT ORDER (Pin: 700052)
 BREV CENTRAL OFF (Pin: 700050)

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

NOTE: Refer to previous explanation of **criteria field(s)** found on pages 5–7 under **Survey Report**.

You can choose to open the report in your browser or download as an Excel file by selecting the “**Report Format**” option. Once you have entered the desired specifications, click “**Generate Report**” to build the report.

The “**IQIP Assessment Report**” will then be displayed.

IQIP Assessment Report

IQIP ASSESSMENT REPORT

For Organization: BREVARD CHD
 Assessment created 03/04/2020 for patients 24-35M as of 03/04/2020
 Include active patients with DOB between 03/05/2017-03/04/2018
 Compute coverage levels and missed Opportunities at compliance age 24M

For Service Site: BREV ADU ONLY
 VFC Pin: 700064
 No patients found for this service site

For Service Site: BREV BOTH
 VFC Pin: 700056
 No patients found for this service site

For Service Site: BREV CANT ORDER
 VFC Pin: 700052
 No patients found for this service site

For Service Site: BREV CENTRAL OFF
 VFC Pin: 700050
 Records Assessed: 1

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

For Service Site: BREV DIRECT ONLY
 VFC Pin: 700051
 No patients found for this service site

For Service Site: BREV END DATE
 VFC Pin: 700073
 No patients found for this service site

For Service Site: BREV HEPB ONLY
 VFC Pin: 700065
 No patients found for this service site

NOTE: Flu is measured on the previous completed season.

4. PATIENT LIST REPORT

Allows you to create a customizable report of all patients who were included in an assessment file.

From the “**Patient List Report List**” page, select an assessment file you want to base your report.

After selecting the desired file, you will be brought to the “**Patient List Report Criteria**” page.

Patient List Report Criteria

Assessment file created on 03/04/2020 for patients 0-47 months old as of 03/04/2020
 Compliance with metrics computed at 12 months and 24 months.
 Assessment file includes all service sites for BREVARD CHD.

Include: * All Service Sites
 Selected Sites:

BREV ADU ONLY (Pin: 700064)
 BREV BOTH (Pin: 700056)
 BREV CANT ORDER (Pin: 700052)
 BREV CENTRAL OFF (Pin: 700050)

 One VFC Pin:

Assessment Type: * AFIX Standard
 IQIP Standard
 Custom Assessment

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

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)

Report Format: * Browser
 Excel File - downloaded

* Asterisk indicates a required field

[Generate Report](#)

NOTE: Refer to previous explanation of **criteria field(s)** found on pages 5–7 under **Survey Report**.

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

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

The “**Include Patient Groups**” field contains checkboxes that control which group of patients are included or excluded from your report (see image below).

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)

Checking the “**all patients**” checkbox will result in all records to be included your report.

NOTE: Checking any of the “**complete**”, “**incomplete**”, or “**late up-to-date**” checkboxes will require you to select the metric upon which the patient’s immunization status will be measured.

You can choose to open the report in your browser or download as an Excel file by selecting the “**Report Format**” option. Once you have entered the desired specifications, click “**Generate Report**” to build the report.

The “**Immunization Patient List Report**” will then be displayed.

| Patient List Report | | D02 : BREVARDCHD | |
|---|-------------------|-----------------------------|---|
| IMMUNIZATION PATIENT LIST REPORT | | | |
| Organization: BREVARD CHD Service Sites: All Assessment Type: IQIP 24-35 months old on 03/04/2020 Assessment Date: 03/04/2020 Compliance By: 24M Include Patient Groups: All patients Age group cohort: 1 Total patients assessed: 1 | | | |
| Last Name | First Name | DOB Sex City | Medicaid MOGE Date Perm Contra Race Religious Exemption State Imm Id Status VFC WIC Zip Code |
| BREVARD | FLU | 07/01/2017 M CAPE CANAVERAL | White 7000001989 ACTIVE 32920 |

NOTE: Flu is measured on the previous completed season.

Help Desk

Free Technical Support:

877-888-7468 (SHOT)

MONDAY – FRIDAY, 8 A.M. TO 5 P.M. EASTERN

Including:

- Merging duplicate patient records
- Adding account administrators
- Unlocking Florida SHOTS accounts
- Questions about any Florida SHOTS features
- Requesting Florida SHOTS materials