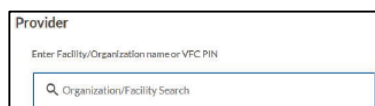With a Custom Patient List, you can select the provider, age range, VFC eligibility status, immunization compliance, gender, race, and/or ethnicity. The report can then be generated, printed, and exported, and the report template can be saved for later re-use.
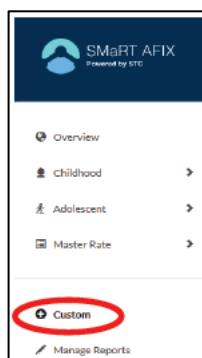
Create a Custom Patient List

1. Click the **Custom** link in the navigation menu.

2. Select a provider by entering an organization/ facility or VFC PIN in the Search Bar and pressing Enter.
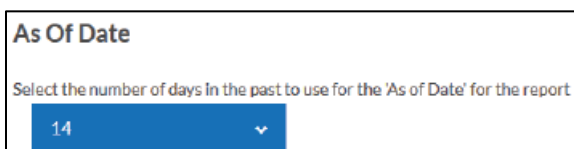
3. For the **Provider Relationship**, select whether to run the report for:

   - **All active patients** – All patients with an active states with the provider, whether or not they are owned by the provider

   - **Active patients owned by the facility** – All patients with an active status who are also owned by the provider

4. Select an **As of Date** for up to 14 days in the past.

   Note that selecting a prior As of Date provides more accurate information about patients if providers have a delay in posting UTD vaccination information.

5. Select an **Age** range. You can select the standard CDC age groupings for Childhood and Adolescent cohorts, or you can select a custom age range.
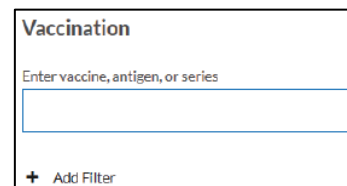
6. For a custom age range, select the **Select Custom Range** option, then enter the **From** and **To** age range and select either **Months** or **Years**. The age range in the parenthesis after **Select Custom Range** changes to match the age range you entered.

7. Enter vaccines, antigens, or series names in the **Vaccination** box and press Enter or scroll through the list and select one. To add additional vaccines, click the **Add Filter** (+) icon.

8. Select the **VFC Eligibility Status** from the drop-down list. By default, all VFC Statuses is selected. However, the options available in the drop-down list allow users to run reports by different eligibility status types.

9. Select the demographic information from the **Gender, Race, and Ethnicity** drop-down lists.

10. Click the icons on the right to **Reset Filters**, **Preview Report**, and **Save Report**.

11. When saving the report, the report is being saved as a template. After clicking **Save Report**, a pop-up window prompts you to name the report and click **Save**.
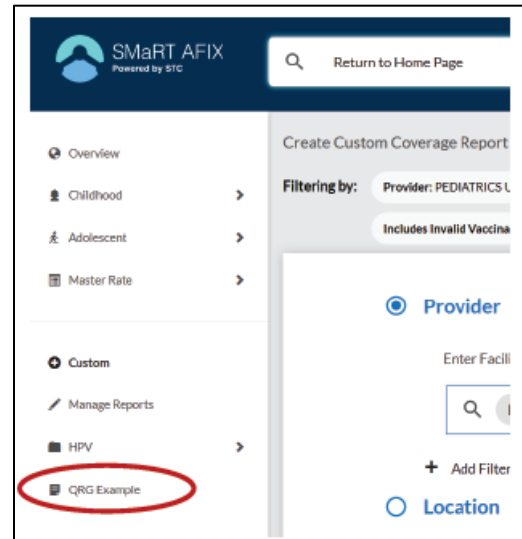

12. Saved report templates appear on the left-hand navigation menu under **Manage Reports**.

For more information on how to manage reports and report groups, see the *Manage Report Templates and Groups* QRG.

Print, Export, or Edit a Custom Patient List

After a report template is saved, it can be run again by clicking the link (the name of the saved report template) in the left-hand menu. To print, export, or edit a custom Patient List, click the appropriate icon located toward the top left-hand side of the page.
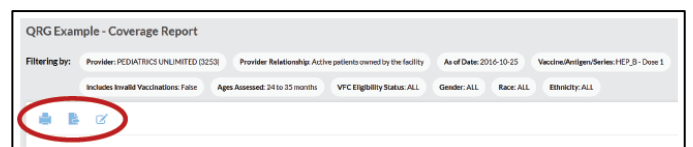
NOTE: The report filters (parameters) also display at the top of the page.