

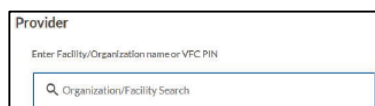
## Create a Custom Patient List

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.

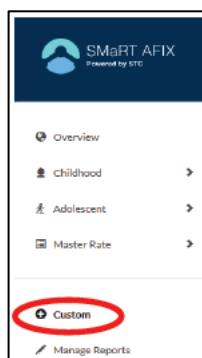
### Create a Custom Patient List

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.



Provider  
Enter Facility/Organization name or VFC PIN  
Organization/Facility Search



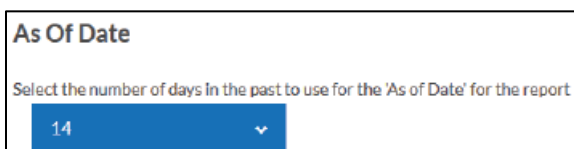
SMaRT AFIX  
Powered by STC

- Overview
- Childhood >
- Adolescent >
- Master Rate >
- Custom**
- Manage Reports

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.



As Of Date  
Select the number of days in the past to use for the 'As of Date' for the report.  
14

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.



Age as of 02/18/2020

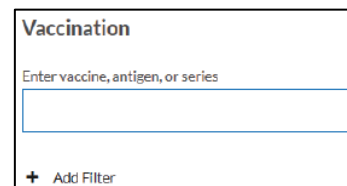
- AFIX Childhood: from 24 to 35 months
- AFIX Adolescent: 13 years
- Select Custom Range (Current: from 11 to 19 years)

Select Custom Age Range

From	To	<input type="radio"/> months	<input checked="" type="radio"/> years
11	19		
0 - 19	11 - 19		

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.



Vaccination  
Enter vaccine, antigen, or series  
+ Add Filter

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.



VFC Eligibility Status  
Select Eligibility Status Filter  
All Statuses (Default) v  
All Statuses (Default)  
Not VFC Eligible-Underinsured  
VFC Eligible - State Specific Eligibility  
Local-Specific Eligibility  
Not VFC Eligible  
American Indian/Alaska Native  
Uninsured  
Federally Qualified Health Center patient  
Medicaid

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

**Patient Demographics**

Select Gender Filter  
All Genders (Default) ▼

Select Race Filter  
All Races (Default) ▼

Select Ethnicity Filter  
All Ethnicities (Default) ▼

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



- 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**.

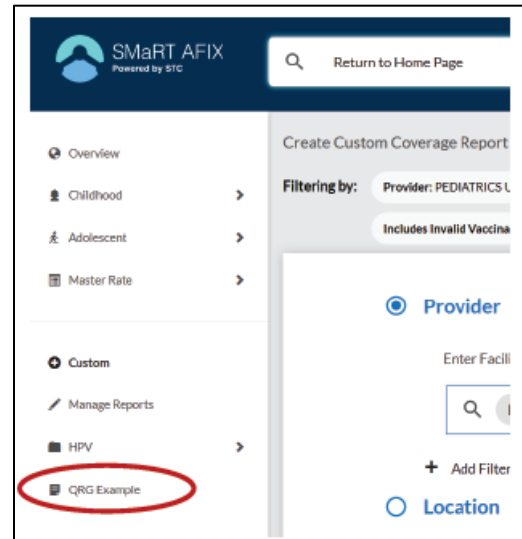
SAVE CUSTOM REPORT

Name Your Report

QRG Example

SAVE

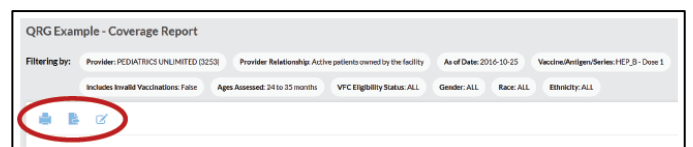
- Saved report templates appear on the left-hand navigation menu under **Manage Reports**.



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.