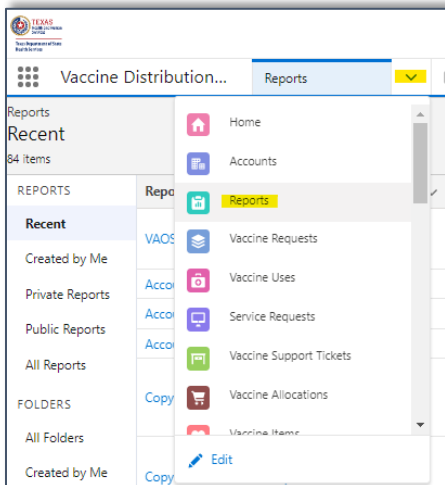


PHR-specific Prebook Report in VAOS

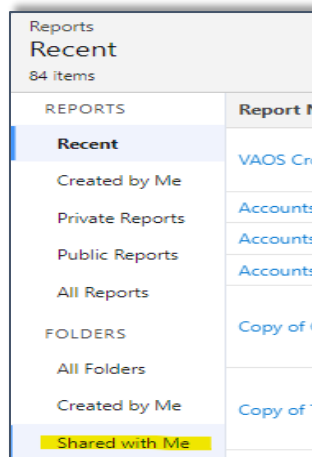
These instructions review how to use the “2023-2024 Provider Flu Prebook” Report(s) in VAOS to find prebook requests in your PHR for the upcoming Influenza Season now that the Prebooking Window has closed.

If you have questions, please email: TXVaccineOrders@dshs.texas.gov

1. Log in to VAOS using your Responsible Entity (RE) account.
2. Navigate to the **Reports** Object in the drop-down menu located towards the top-left of your screen:



3. Next, click the “Shared with Me” option located under “Folders” on the left side of the page:



4. The folders that you have access to will be listed on the screen. As an RE, you should have the "Regional User Reports" folder and the "Region _ RE Reports" folder.

a. In this example, Central Office Staff have access to all the Regional Folders.

Reports			
Shared with Me			
12 Items			
REPORTS	Name	Created By	Created On
Recent			
Created by Me			
Private Reports	Region 1 RE Reports	Ashley Underwood	1/5/2023, 2:02 PM
Public Reports	Region 11 RE Reports	Ashley Underwood	1/6/2023, 10:50 AM
All Reports	Region 2/3 RE Reports	Ashley Underwood	1/6/2023, 10:33 AM
FOLDERS	Region 4/SN RE Reports	Ashley Underwood	1/6/2023, 10:43 AM
All Folders	Region 6/5S and COH RE Reports	Ashley Underwood	1/6/2023, 10:44 AM
Created by Me	Region 7 RE Reports	Ashley Underwood	1/6/2023, 10:45 AM
Shared with Me	Region 8 and SAMHD RE Reports	Ashley Underwood	1/6/2023, 10:47 AM
FAVORITES	Region 9/10 RE Reports	Ashley Underwood	1/6/2023, 10:48 AM
All Favorites	Regional User Reports	Srinidhi Babu	4/14/2022, 1:34 PM
	Vaccine Ordering Reports	Sandeep Mahankali	10/31/2020, 9:25 PM

5. Next, click the Regional Folder that corresponds to your PHR. The following examples will use the Region 7 RE Reports folder.

6. With the PHR-specific folder open, scroll through until you find the "PHR _ 2023-2024 Provider Flu Prebook" Report.

Reports			
Shared with Me > Region 7 RE Reports			
24 Items			
REPORTS	Name	Description	Folder
Recent		doses passing inspection upon receipt for particular vaccines and lot numbers. Excludes COVID-19.	
Created by Me	Dual COVID-19 & TVFC Providers PHR 7	View providers enrolled in both TVFC and COVID-19 programs.	Region 7 RE Reports
Private Reports	FLU (Allocated vs Accepted) PHR 7		Region 7 RE Reports
Public Reports	MSL History (COVID-19) PHR 7	View Maximum Stock Level history for COVID-19 Providers from the previous year to today's date.	Region 7 RE Reports
All Reports	Maximum Stock Level History PHR 7	View Maximum Stock Level history for TVFC/ASN/FLU Providers from the previous year to today's date.	Region 7 RE Reports
FOLDERS	Maximum Stock Levels (COVID-19) PHR 7	View this month's Maximum Stock Levels for COVID-19 Providers.	Region 7 RE Reports
All Folders	Maximum Stock Levels (TVFC/ASN) PHR 7	View this month's Maximum Stock Levels for TVFC/ASN/FLU Providers.	Region 7 RE Reports
Created by Me	Outstanding Vaccine Requests PHR 7	View Provider Vaccine Requests in Pending or On Hold Status.	Region 7 RE Reports
Shared with Me	Provider Vaccine Activity Report PHR 7	Qty Shipped, Starting Inventory, Doses Administered (Qty Consumed), Qty Wasted and Qty on hand by provider	Region 7 RE Reports
FAVORITES	Short-Dated Inventory PHR 7	View Non-COVID provider inventory expiring within the next 90 days.	Region 7 RE Reports
All Favorites	TVFC Transfer Export PHR 7	Transfer details including transferring provider org code, receiving provider PIN, quantity to transfer, vaccine type, status, created date, created by (used to populate priority transfer excel file)	Region 7 RE Reports
	TVFC/ASN Doses Administered - PHR 7	View Doses Administered data for TVFC/ASN/FLU for the current month.	Region 7 RE Reports
	TVFC/ASN Ordered/Shipped/Received PHR 7	Excludes flu allocations	Region 7 RE Reports
	TVFC/ASN Vaccine Loss PHR 7	Vaccine Loss reported by providers (excluding Flu).	Region 7 RE Reports
	Vaccine Loss - Flu Only PHR 7	Vaccine Loss reported by providers, excluding all vaccine except Influenza.	Region 7 RE Reports
	Vaccines Near Expiration PHR 7	View TVFC/ASN/FLU provider inventory expiring within the next 120 days.	Region 7 RE Reports
	PHR 7 2023-2024 Provider Flu Prebook	View Provider 23-24 Flu PreBook Vaccine Requests in Ordering, Not Ordering, Survey Not Completed, or Received Statuses for PHR 7	Region 7 RE Reports

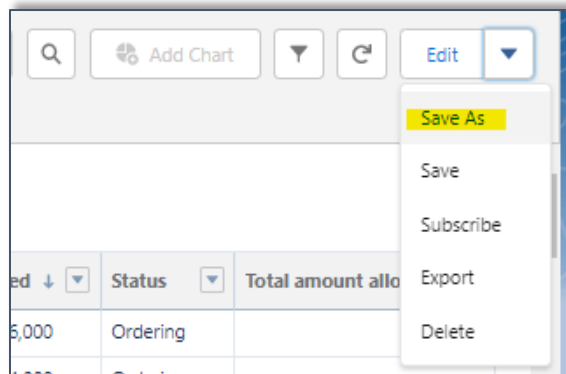
7. Click the Report's Name to open it in a new window of VAOS.

8. The "2023-2024 Provider Flu Prebook" Report is shown below:

Provider PIN	Account Name: Account Name	Region	Sub-region	Master Order Number	Vaccine Request Start Date	Vaccine Request Number	Vaccine: Vaccine Name	Vaccine Program	Quantity requested	Status	Total amount allocated
070582	Carouel Springsdale	REGION 7	Austin HHS Division (city off)	00330710	1/04/2023	00330710	FluLaval Quad PPS, Pre: 2023-2024	FLU	6,000	Ordering	-
070225	People's Community Clinic - Austin 2	REGION 7	Austin HHS Division (city off)	00333084	1/30/2023	00333084	FluLaval Quad PPS, Pre: 2023-2024	FLU	4,000	Ordering	-
070460	Baylor Scott And White McCombs Children Clinic	REGION 7	Bell County Public Health District	00332914	1/30/2023	00332914	FluLaval Quad PPS, Pre: 2023-2024	FLU	3,250	Ordering	-
070907	Carouel Southbrook	REGION 7	Austin HHS Division (city off)	00330402	1/30/2023	00330402	FluLaval Quad PPS, Pre: 2023-2024	FLU	2,800	Ordering	-
070693	Communitycare South East Health And Wellness Clinic	REGION 7	Austin HHS Division (city off)	00334657	1/10/2023	00334657	FluLaval Quad PPS, Pre: 2023-2024	FLU	2,500	Ordering	-
070737	Carouel Pediatrics Riverside	REGION 7	Austin HHS Division (city off)	00324571	1/10/2023	00324571	FluLaval Quad PPS, Pre: 2023-2024	FLU	2,500	Ordering	-
070917	Kyle Communicare Health Center	REGION 7	Hays County Health Department	00333023	1/30/2023	00333023	Fluzone Quad PPS, Pre: 2023-2024	FLU	2,500	Ordering	-
070951	Communitycare North Central	REGION 7	Austin HHS Division (city off)	00325528	1/11/2023	00325528	FluLaval Quad PPS, Pre: 2023-2024	FLU	2,000	Ordering	-
070271	Round Rock Health Clinic	REGION 7	Williamson CO & Cities PH Dist	00334749	1/10/2023	00334749	Fluzone Quad PPS, Pre: 2023-2024	FLU	2,000	Ordering	-
070545	Lone Star Circle Care Lake Ains Ped	REGION 7	Williamson CO & Cities PH Dist	00334572	1/10/2023	00334572	Fluzone Quad PPS, Pre: 2023-2024	FLU	2,000	Ordering	-

9. There are several components to the report, each of which will be covered in more detail as well as what an RE can do with the report to find specific information.

- a. First, let's cover how to **Clone the Report** for Personal Use.
 - i. Use the "Save As" button, located in the drop-down menu at the top-right, to save the report in your Private Folder.
 - ii. This allows the report to be modified, filtered, and edited without disrupting the template for other users in the PHR Folder.



The image shows a 'Save Report As' dialog box. It has the following fields:

- Report Name:** Copy_of_2023-2024 Provider Flu Prebook
- Report Unique Name:** Copy_of_20232024_Provider_Flu_Prebook_fw2
- Report Description:** View Provider 23-24 Flu PreBook Vaccine Requests in Ordering, Not Ordering, Survey Not Completed, or Received Statuses for PHR 7
- Folder:** Private Reports (highlighted in yellow)

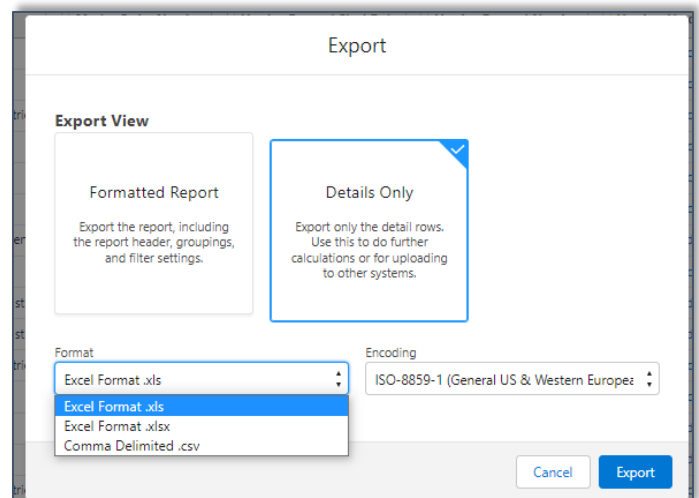
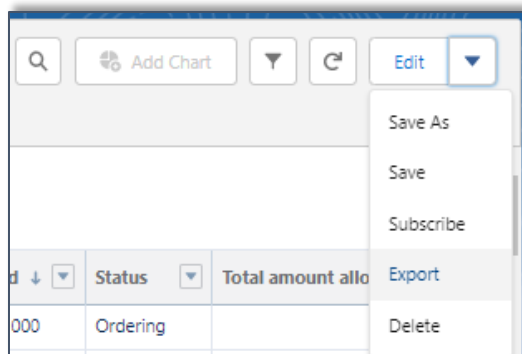
At the bottom right, there are 'Cancel' and 'Save' buttons.

10. After the report is saved in your Private Folder it can be edited and filtered as necessary.

11. Fields of Interest include:

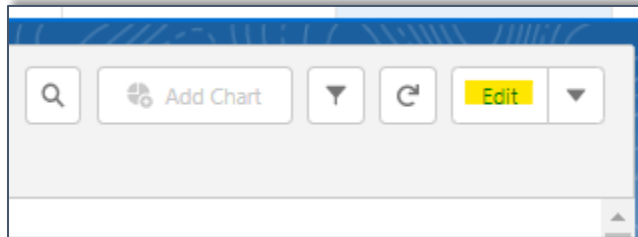
- a. PIN/Account Name
- b. Vaccine Name (that was prebooked)
- c. Quantity Requested (prebooked amount)
- d. Status
 - i. **Ordering**: Prebook Module was submitted and a request for a 2023-2024 Presentation was generated.
 - ii. **Not Ordering**: Prebook Module was submitted but the provider chose not to prebook for the 2023-2024 season.
 - iii. **Survey Not Completed**: The provider did not interact with the prebook module and has no prebook on file.
- e. Created Date

12. To Export the report into a .xlsx, .xls, or .csv File, click the drop-down arrow at the top-right and click "Export". The file format can be selected when "Details Only" is chosen:



13. If you're using a copy in your Private Folder, you may add fields or adjust the filter options after clicking "Edit" from the top-right of the page:

- a. The report builder menu appears after Edit is clicked.



REPORT ▾
 PHR7 2023-2024 Provider Flu Prebook ✎ Vaccine Requests with Facility

Previewing a limited number of records. Run the report to see all records.

Outline Filters 6

Groups

GROUP ROWS

Add group...

Columns

Add column...

- Provider PIN x
- Account Name: Account Name x
- Region x
- Sub-region x
- Master Order Number x
- Vaccine Request Start Date x
- Vaccine Request Number x
- Vaccine: Vaccine Name x
- Vaccine Program x
- # Quantity requested x
- Status x
- # Total amount allocated x
- Created Date x
- Created By: Full Name x
- Last Modified Date x

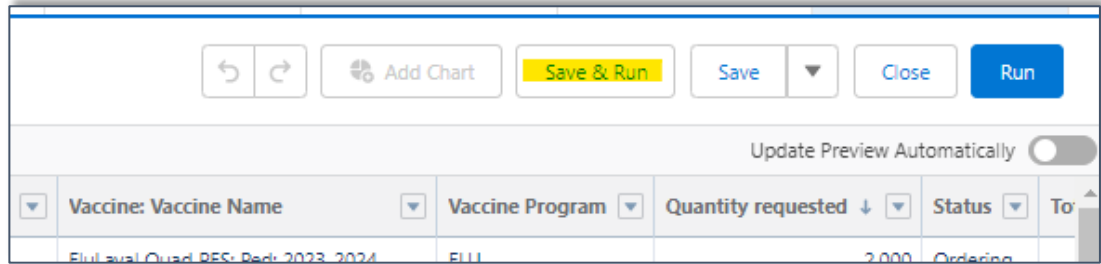
	Provider PIN ▾	Account Name: Account Name
1	070951	Communitycare North Central
2	071080	Health Hero America
3	070052	Shots For Tots Far South
4	070027	Lhd Waco-Mclennan Co Phealth Dis
5	071119	LSCC Pediatrics at Mopac North
6	070135	Killeen Pediatric Care Clinic Pa
7	070187	Health Point Clinic Caldwell
8	071066	Banks Pediatrics
9	070967	Coryell Health Medical Clinic
10	071096	Austin Regional Clinic - Georgetow
11	070700	Shl Care A Van
12	070240	DCMG Pediatrics Mueller
13	070285	Ut Austin School of Nursing Childre
14	070029	Lhd Bell County Public Health Distri
15	070609	Waco Family Medicine - Elm Ave
16	070959	River Ridge Pediatrics
17	071085	Lone Star Circle Of Care At Cedar Pa
18	071122	Aurora Concepts Madisonville
19	070932	Waco Family Medicine - MCC
20	070041	Communitycare- Manor Health Cen
21	071096	Austin Regional Clinic - Georgetow
22	070552	Brenham Family Practice and Obste
23	071003	Austin Regional Clinic - Health Cent

- b. The “Outline” tab allows fields to be added/removed.
- c. The “Filters” tab allows the conditions of the report to be modified. In this example for PHR 7, the filters shown do the following:
 - i. **Created Date**: when the prebook record was created.
 - ii. **Status**: The three statuses mentioned above plus Received, Sent to VTrcks, and Shipped are included to appear in the report.
 - iii. **Record Type**: should remain “Pre-Booking”.
 - iv. **Account Name**: filters out the test facility ZZ Test Data Purge. Can be modified to filter by a facility of interest in your region.
 - v. **Region**: equal to your PHR.
 - vi. **Provider PIN**: not equal to “” removes Blank PINs from the report. Can be modified to “equal to: XXXXXX” to filter by a particular PIN# in your region.

The screenshot shows a software interface for a report titled "PHR7 2023-2024 Provider Flu Prebook". The interface includes a "REPORT" dropdown, a "Vaccine Requests with Facility" button, and a "Filters" sidebar with 6 active filters. The main table displays a list of records with columns for "Provider PIN" and "Account Name".

	Provider PIN	Account Name
1	070951	Community
2	071080	Health Hero
3	070052	Shots For To
4	070027	Lhd Waco-M
5	071119	LSCC Pediatr
6	070135	Killeen Pedia
7	070187	Health Point
8	071066	Banks Pedia
9	070967	Coryell Healt
10	071096	Austin Regio
11	070700	Shl Care A Va
12	070240	DCMG Pedia
13	070285	Ut Austin Sch
14	070029	Lhd Bell Cou
15	070609	Waco Family
16	070959	River Ridge P
17	071085	Lone Star Cir
18	071122	Aurora Conc

d. Once adjustments have been made, click "Save and Run":



This completes the in-depth look at the Prebook Reports available to REs. If there are additional questions about a topic covered in this document, please email us at: TXVaccineOrders@dshs.texas.gov