Generating the Client Benchmark Report

Welcome to the ImmTrac2 Training Video: Generating the Client Benchmark Report

The objectives of this video are to demonstrate how to configure and generate the Client Benchmark Report

Generate Reports

ImmTrac2 offers different client and immunization reports that can be generated by users in their organization throughout the application.

The Generate Reports menu option, offers additional report options to all user except the View Only – Non Provider users, which can be configured by the user in different ways to meet the needs of their organization.

In this video we will cover the Client Benchmark Report.

NOTE: *For information on all the Generate Report options, please review the ImmTrac2 User Manual.*

Client Benchmark Report

The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.

This report assess clients who are, or are not, up to date on their vaccines based on specific benchmarks for a specific age or birth date range for clients within their organization.

This report will only return clients that are in an "Active" status in your organization.

If you have patients that are no longer receiving care from your organization, it is important that they are marked "inactive" to generate accurate report results.

NOTE: *Immunizations administered on today's date will not be included in the report until the following day.*

To configure the report, click the **Client Benchmark Report** link.

Client Benchmark Report Screen

For this report, let's generate a benchmark report to assess all clients who are less than or equal to 2 years of age who did not meet the 24 months benchmark.

Select Client Population: The '**All Clients associated with Training**' options will be auto selected for most users and cannot be unchecked. This selection defines which client population is being assessed in the report. In this example, the entire 'Training' organization is the client population.

NOTE: *Users associated to a Parent organization will have more options available for filtering in the top potion of this section.*

Next, select one of the following 3 client population options:

- **Clients who did NOT meet the benchmark**: This is the report default and will include clients who did not meet the benchmark(s) defined in the Select Benchmark table below.
- **Clients who DID meet the benchmark**: This option will include clients who did meet the benchmark(s) defined in the Select Benchmark table below.

- **All Clients, regardless of whether they met the benchmark or not:** This option will include all clients who did or did not have all the age specific immunization at the benchmark defined in the table below.

For this example let's use the default option, '**Client who did NOT meet the benchmark**.'

Select Age or Birth Date Range: This section allows users to filter the clients based on an age criteria. Select one of the following options:

- **Less than or equal to 72 months old:** Choose this option to return all patients who are 72 months old or younger.
- **Birth Date Range:** Choose this option to enter a range of birth dates that you wish to include in the report.
- **Age Range:** Choose this option to enter the client age range.

For our example, let's select the Age Range. To filter by clients 24 months or younger, enter 0 'Days' in the **Youngest** field and 24 'Months' in the **Oldest** fields. Use the drop arrow list to select the **Months** option.

Options for Benchmarking: This section provides two variations for using the standard benchmark assessment to measure client outcomes.
- **Standard Assessment** – This is the default option and generates the report using the selected benchmark in the table at the bottom of the screen.
- **Assess Clients with Sufficient Refusal History as Covered –** This option generates the report using the immunization benchmark selected in the table below, but it also count clients with sufficient refusal comments as being considered up-to-date.

For this example, let's use the default option.

Select the Evaluation Date: This field allows the user to establish a fixed date which the client's immunization records are evaluated.

The report will not include vaccines administered after the evaluation date.

Use the calendar icon to select a date. The calendar pop-up box will open with today's date selected. After a date is selected, click **OK**.

Select Benchmark: This selection is used to select the benchmark that will be used to assess the clients the meet the report criteria.

To select all benchmarks in a row, click on an Age field. To select one or more vaccine specific benchmarks, click an individual cell to evaluate.

Users may select more than one vaccine benchmark in the same age group. For our example, we'll select the **@24 months** benchmark option.

Under the **Aggregate Outcomes** options, users can click one individual cell to evaluate a specific age benchmark for a vaccine series.

Click the **Clear Selection** button to clear selected options. Now that all the report criteria has been selected, click the **Generate** button.

Users are redirected to the **Client Benchmark Report Status** screen.

Benchmark Report Status Screen

Click the Refresh button until the report has completed generating. Once the status is **Done**, the report name becomes a hyperlink.

This screen displays the following information:
- **Report Type**: A link used to review the report results.
- **Stated**: Displays the date and time the report started generating.
- **Completed**: Displays the date and time the report completed processing.
- **Status**: Displays the percent complete of the report. Currently running reports will have a percent less than 100.
- **Row Count**: Displays the number of clients that meet the report criteria.

Click the hyperlink to view the report results.

The reports results will display at the bottom of the screen in the **Benchmark Report Results** section.

What would you like to do with this report? This section allows users to exports results to a text file, spreadsheet or PDF.

Filter conditions used for this report: This section lists all the criteria used to generate the report.

The results display at the bottom of the screen and list each client who meet the report criteria. These are the client who did **NOT** meet all of the 24 month benchmark requirements.

If the client successfully met an immunization benchmark, a '**Y**' displays for that specific vaccine.

If the client did not met an immunization benchmark, an '**N**' displays.

As previously mentioned, the report results can be export to **Text**, an **Excel Spreadsheet**, or a **PDF** file. For this example, let's view the results in a PDF file. Results open in a separate browser window.

The PDF displays the filter conditions at the top of the page. The client and benchmark information is listed in alphabetical order by last name.

To return to the ImmTrac2 registry, close to browser window.

For more detailed information regarding any of these topics, see **the Online User Manual** located on the **Related** Links tab.

Please review the other ImmTrac2 videos at https://immtrac.dshs.texas.gov at your convenience.