

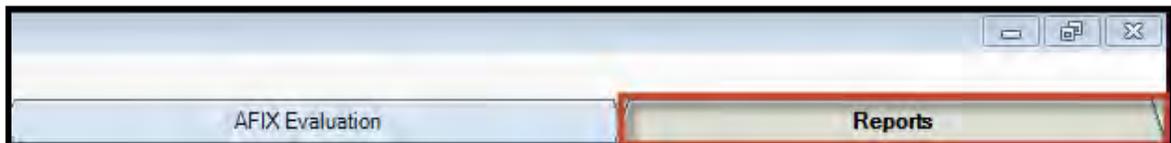
## Step Three: Running CoCASA Reports

### Complete these steps before you run reports:

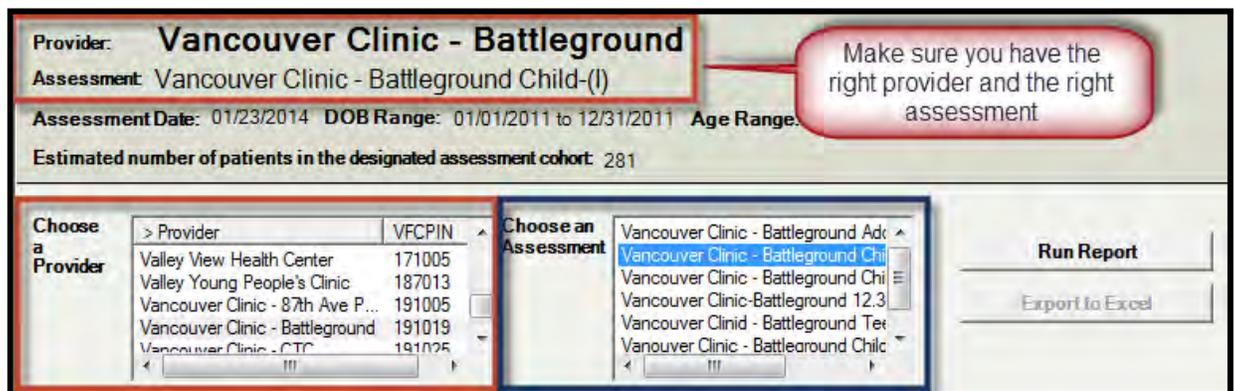
- [Step One: Export Records from the Washington State Immunization Information System \(IIS\).](#)
- [Step Two: Import records from the IIS into CoCASA.](#)

### Getting Started

1. Click on the **Reports** tab in CoCASA.



2. The provider name and assessment name are listed at the top of the **Reports** screen. Make sure you selected the right provider and right assessment before running reports.
  - If you see the wrong provider or assessment, select the provider and assessment you want from the **Choose a Provider and Choose an Assessment** box.



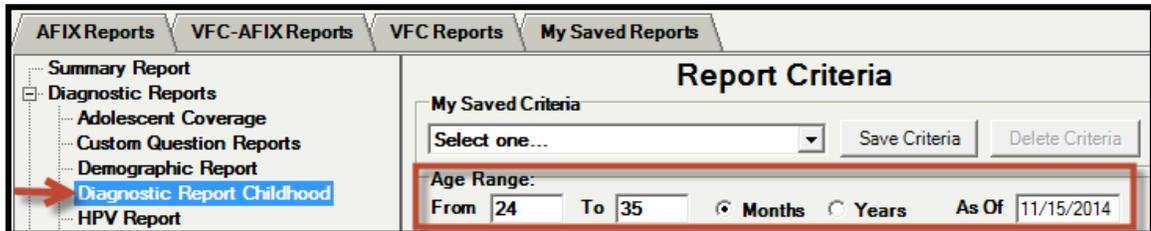
### Running Childhood AFIX Visit Reports

These instructions show how to run the three reports required for AFIX visits focused on the childhood age range (ages 24 – 35 months):

- Diagnostic report childhood.
- Single antigen report childhood.
- Invalid doses report.

## Diagnostic Report Childhood

1. Click on the “+” next to **Diagnostic Reports**. This expands the reports menu.
2. Choose **Diagnostic Report Childhood**.
3. Find the **Report Criteria** section on the right side of the screen. This is where you set up the report.
4. Make sure the **Age Range** says **from 24 to 35 months as of your assessment date** (e.g. 11/15/2014).



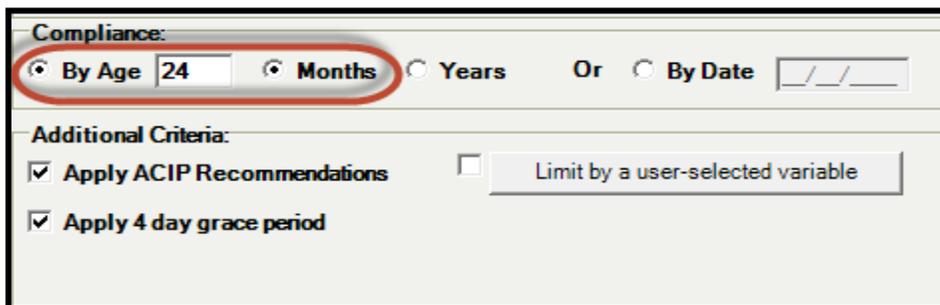
The screenshot shows the 'Report Criteria' section of the software. On the left, a tree view under 'Diagnostic Reports' has 'Diagnostic Report Childhood' selected and highlighted in blue, with a red arrow pointing to it. On the right, the 'Report Criteria' panel includes a 'My Saved Criteria' dropdown menu, 'Save Criteria' and 'Delete Criteria' buttons, and an 'Age Range' section. The 'Age Range' section is highlighted with a red box and contains the following fields: 'From' with the value '24', 'To' with the value '35', radio buttons for 'Months' (selected) and 'Years', and 'As Of' with the date '11/15/2014'.

5. Under **Antigens**, choose the **4:3:1:3:3:1:4** series from the drop down box.



The screenshot shows the 'Antigens' section. The 'Series' dropdown menu is highlighted with a red box and contains the value '4:3:1:3:3:1:4'. Below the dropdown, the text '4:3:1:3:3:1:4 (4DTaP, 3Polio, 1MMR, 3HIB, 3HepB, 1Var, 4PCV)' is displayed. There is also an 'Or' button and an 'Antigens' button.

6. Under **Compliance**, choose **By Age**, enter **24**, and click on the **months** radio button.
7. Leave the boxes under **Additional Criteria** checked to **Apply Advisory Committee on Immunization Practices Recommendations** and **Apply the 4-Day Grace Period**.



The screenshot shows the 'Compliance' and 'Additional Criteria' sections. In the 'Compliance' section, the 'By Age' radio button is selected, the '24' field is highlighted with a red box, and the 'Months' radio button is also highlighted with a red box. In the 'Additional Criteria' section, the checkboxes for 'Apply ACIP Recommendations' and 'Apply 4 day grace period' are checked. There is also a 'Limit by a user-selected variable' button.

8. Click the **Run Report** button toward the top of the screen.



The screenshot shows two buttons: 'Run Report' and 'Export to Excel'. The 'Run Report' button is highlighted with a red oval.

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9. The report opens in a new screen. Click on **Export Report** to save it as a PDF.

10. Click on **Close Report** to return to the main **Reports** screen.

**COMPREHENSIVE CASA** Report Title: **DIAGNOSTIC REPORT (CHILDHOOD)** Date Generated: 12/30/2014

**REPORT CRITERIA** Assessment date: 12/30/2014

Provider site name: Vancouver Clinic - Battleground (191019)

Age range: From  to  months as of

Selected series/antigens: 4:3:1:3:3:1:4 (4DTaP, 3Polio, 1MMR, 3HIB, 3HepB, 1Var, 4PCV)

Compliance:  By age:  months  By date:

Additional criteria:  Apply ACIP Recommendations (valid doses only)  Apply four-day grace period  
 Limited by

Missed opportunities are defined as:

312 # of patient records selected

0 # of patients moved or gone elsewhere (MOGE)  
(minus)

312 Total # of Patient Records Assessed

**Total # of Patient Records Assessed** 312

**SECTION I (based on user-selected criteria)**

**Vaccinations Coverage: Who is up-to-date?**

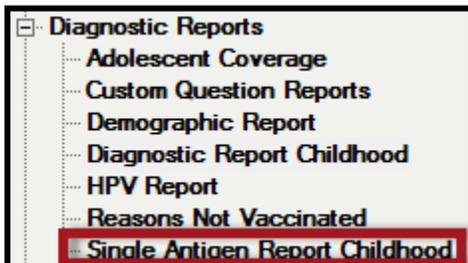
	Selected Series / Antigens	By: 24 months of age	
		# of patients up-to-date	% of patients up-to-date
1	DTaP4 Polio3 MMR1 HIB3 HepB3 Var1 PCV4	148	47%
2	DTaP4	185	59%
3	Polio3	270	87%
4	MMR1	271	87%
5	HIB3	284	91%
6	HepB3	262	84%
7	Var1	263	84%
8	PCV4	234	75%

Save Report    **Export Report**    **Close Report**

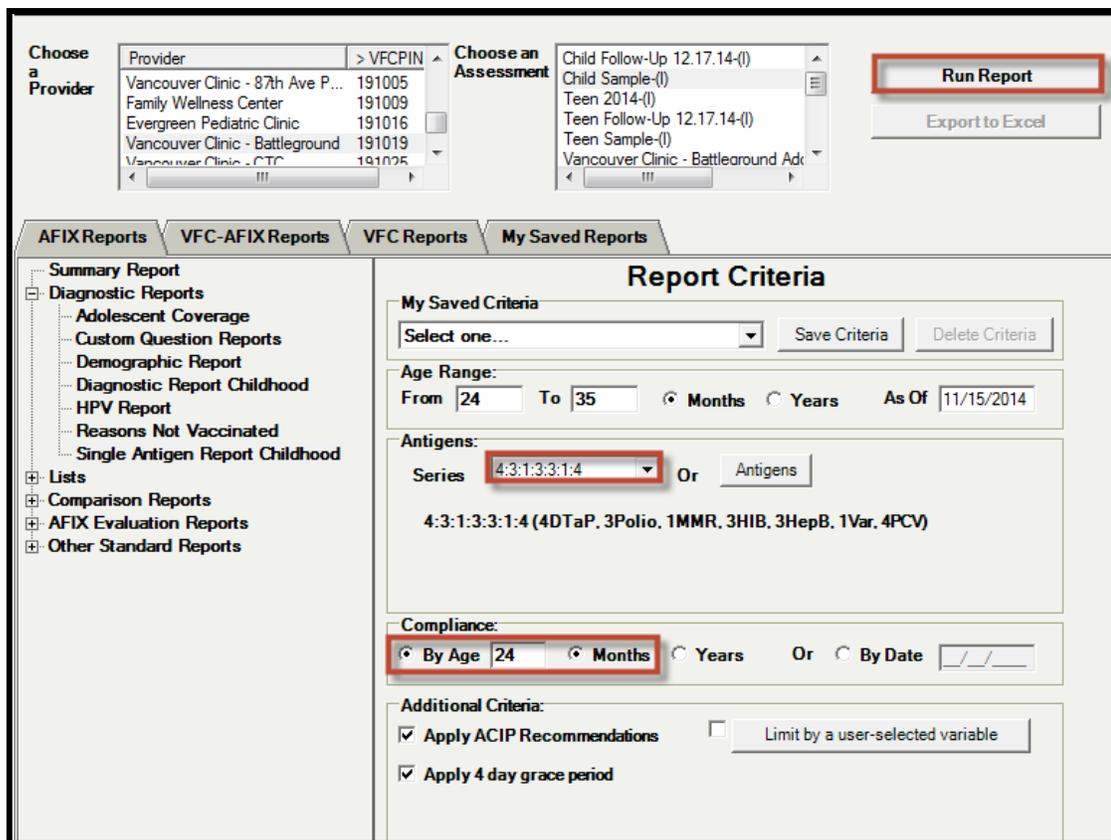
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## Single Antigen Report Childhood

1. Click on the “+” next to **Diagnostic Reports**.
2. Click on the **Single Antigen Report Childhood**.



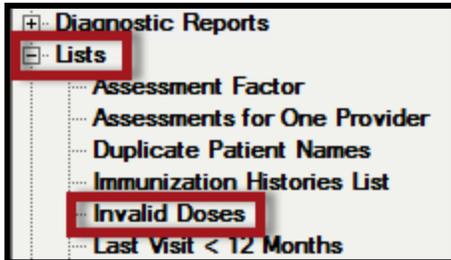
3. Use the same report criteria you used to run the Diagnostic Report Childhood.
  - Under **Antigens**, choose the **4:3:1:3:3:1:4** series from the drop down box.
  - Under **Compliance**, choose **By Age**, enter **24**, and click on the **months** radio button.
4. Click the **Run Report** button. When the report opens, click the **Export Report** button to save it as a PDF.

A screenshot of the 'Report Criteria' configuration page in a web application. The page is divided into several sections. At the top, there are two dropdown menus: 'Choose a Provider' and 'Choose an Assessment'. Below these are tabs for 'AFIX Reports', 'VFC-AFIX Reports', 'VFC Reports', and 'My Saved Reports'. The main content area is titled 'Report Criteria' and contains several sections: 'My Saved Criteria' with a dropdown and 'Save Criteria'/'Delete Criteria' buttons; 'Age Range' with 'From' and 'To' fields (set to 24 and 35), radio buttons for 'Months' and 'Years', and an 'As Of' date field; 'Antigens' section with a 'Series' dropdown (set to '4:3:1:3:3:1:4') and an 'Or Antigens' button; 'Compliance' section with radio buttons for 'By Age' (selected), 'Months', and 'Years', and a 'By Date' option; and 'Additional Criteria' section with checkboxes for 'Apply ACIP Recommendations' and 'Apply 4 day grace period'. A 'Run Report' button is visible in the top right corner, and an 'Export to Excel' button is below it.

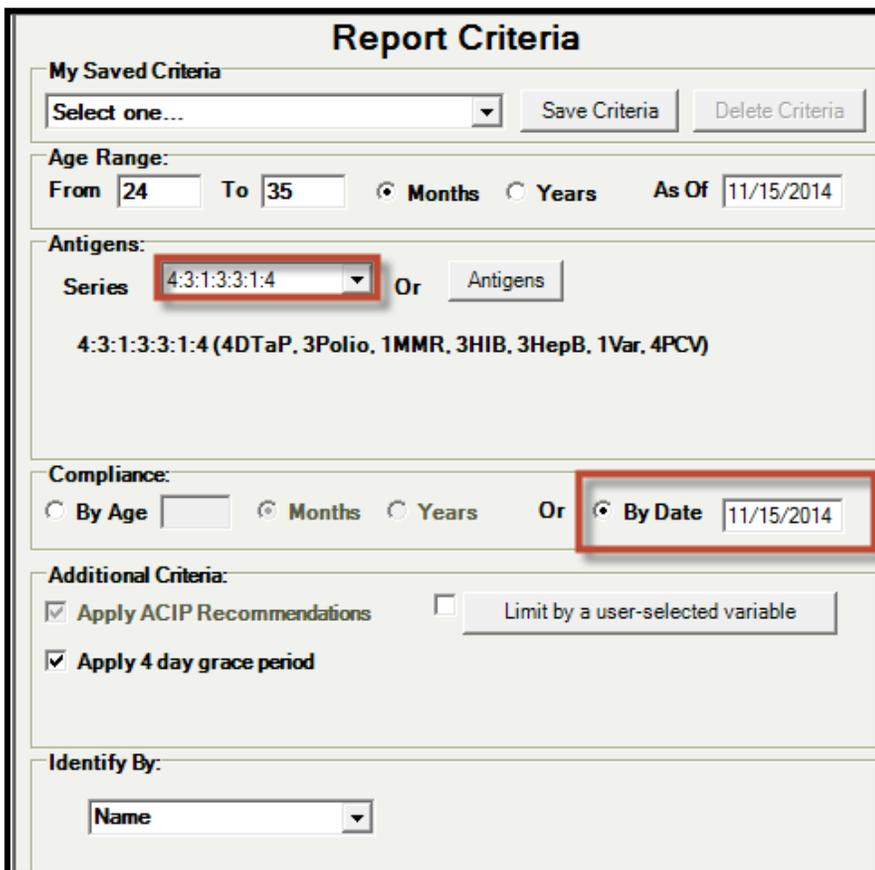
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## Invalid Doses Report

1. Click on the “+” next to **Lists**.
2. Click on **Invalid Doses**.



3. Make sure the age range is **From 24 to 35 months as of the date you run the assessment**.
4. Choose the **4313314** series from the **Antigens** drop down box.
5. Under the **Compliance** section, choose **By Date** and enter the date of your assessment in the box.

A screenshot of a 'Report Criteria' form. The form has several sections: 'My Saved Criteria' with a dropdown menu and 'Save Criteria' and 'Delete Criteria' buttons; 'Age Range:' with 'From' and 'To' input boxes (24 and 35), radio buttons for 'Months' and 'Years', and an 'As Of' date box (11/15/2014); 'Antigens:' with a 'Series' dropdown menu (4:3:1:3:3:1:4) and an 'Antigens' button; 'Compliance:' with radio buttons for 'By Age', 'Months', 'Years', and 'By Date', and a date box (11/15/2014); 'Additional Criteria:' with checkboxes for 'Apply ACIP Recommendations', 'Apply 4 day grace period', and 'Limit by a user-selected variable'; and 'Identify By:' with a dropdown menu (Name). The 'Series' dropdown, the 'By Date' radio button, and the date box are highlighted with red boxes.

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6. Click the **Run Report** button near the top of the screen and save it by following the steps provided in the Diagnostic Report Childhood or Single Antigen Report Childhood instructions.

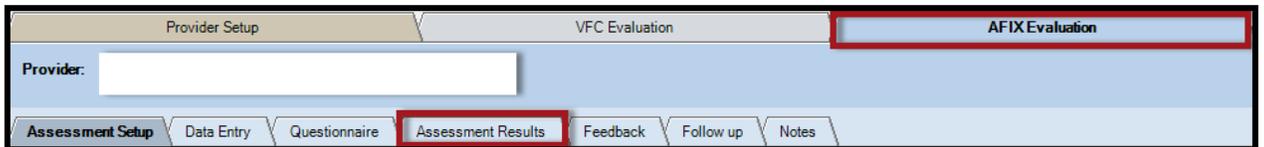
## Running Adolescent AFIX Visit Reports

These instructions show how to calculate missed opportunities for each adolescent vaccine and how to run the three reports required for AFIX visits focused on the adolescent age range (ages 13-17 years):

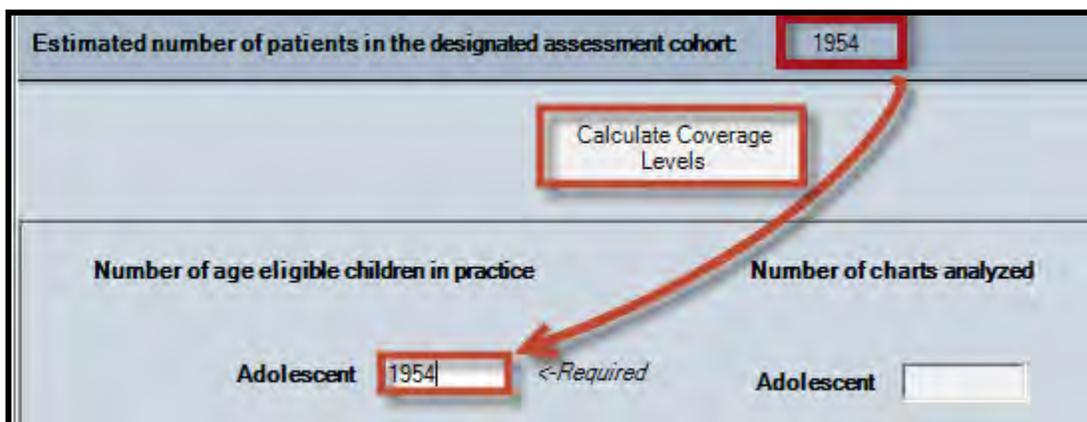
- Adolescent coverage report
- HPV report
- Invalid doses report

## Missed Opportunities Rates

1. Click on the **AFIX Evaluation** tab in CoCASA.
2. Click on the **Assessment Results** tab near the top of the screen. This opens the area where you calculate missed opportunities rates.



3. Enter the **number of age eligible children in the practice**. Find this number right above the **calculate coverage levels** button, where it says **estimated number of patients in the designated assessment cohort**.
4. Click the **calculate coverage levels** button.



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- When you click the **Calculate Coverage Levels** button, a pop-up asks you to define how you want to run the calculations for this assessment.
- Make sure the **Age Range** matches the assessment you imported (e.g. 13-17 years as of 11/15/2014) and **Compliance** is by the date of your assessment (e.g. 11/15/2014).
- Click the **Yes** button to calculate the adolescent coverage and missed opportunity rates.

**Please provide the following criteria:**

**Adolescent**

**Age Range:**  
 From  To   Months  Years **As Of**

**Compliance:**  
 By Age   Months  Years **Or**  By Date

**Apply 4 Day Grace Period**

**Use these settings for all subsequent assessments**

- The coverage levels and missed opportunities automatically populate as shown below.

<b>Adolescent Assessment Outcome Measures</b>		
<b>Adolescent Individual Antigens (13-18 Years)</b>		
	<b>Coverage Level</b>	<b>Missed Opportunities</b>
1 Td/Tdap *	<input type="text" value="93.30 %"/>	<input type="text" value="3.58 %"/>
1 MCV4 *	<input type="text" value="60.18 %"/>	<input type="text" value="33.78 %"/>
3 HPV *	<input type="text" value="16.73 %"/>	<input type="text" value="73.90 %"/>
3 Hep B	<input type="text" value="66.79 %"/>	<input type="text" value="32.40 %"/>
2 MMR	<input type="text" value="68.17 %"/>	<input type="text" value="30.81 %"/>
2 Varicella	<input type="text" value="50.72 %"/>	<input type="text" value="47.70 %"/>

If you have a disability and need this document in a different format, please call 1-800-525-0127 (TDD/TTY 1-800-833-6388).

11. Enter the **coverage levels** and **missed opportunities** rates for Td/Tdap, MCV4, and HPV vaccines in the AFIX Online Tool **Assessment Results** screen.
12. You can also enter the coverage levels and missed opportunities rates for Hep B, MMR, and Varicella vaccines in the AFIX Online Tool, but these are optional

### CoCASA Assessment Results Screen

Adolescent Assessment Outcome Measures		
Adolescent Individual Antigens (13-18 Years)		
	Coverage Level	Missed Opportunities
1 Td/Tdap*	93.30 %	3.58 %
1 MCV4*	60.18 %	33.78 %
3 HPV*	16.73 %	73.90 %
3 Hep B	66.79 %	32.40 %
2 MMR	68.17 %	30.81 %
2 Varicella	50.72 %	47.70 %

### AFIX Online Tool Assessment Results Screen

General Site Visit Info	Questionnaire	Assessment Results	Feedback	Exchange	Summary
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**ASSESSMENT RESULTS (COVERAGE RATES AND MISSED OPPORTUNITIES)**

**Assessment Outcome Measures**

\* INDICATES A REQ

**Assessment Outcome Measures**

Adolescent Vaccine Coverage Level Results (single antigens (13-18 years))	Percentage
1 Tdap	93*
1 MCV4	60*
3 HPV	17*
1 HPV	
3 HepB	
2 MMR	
2 VAR	
1 Flu	

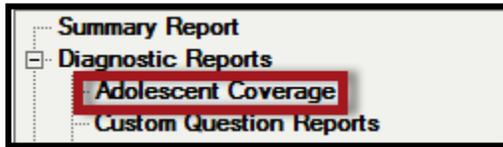
**Missed Opportunities Outcome Measures**

Adolescent Missed Opportunities Results (series (13-18 years))	Percentage
1 Tdap	4*
1 MCV4	34*
3 HPV	74*
1 HPV	
3 HepB	
2 MMR	
2 VAR	
1 Flu	

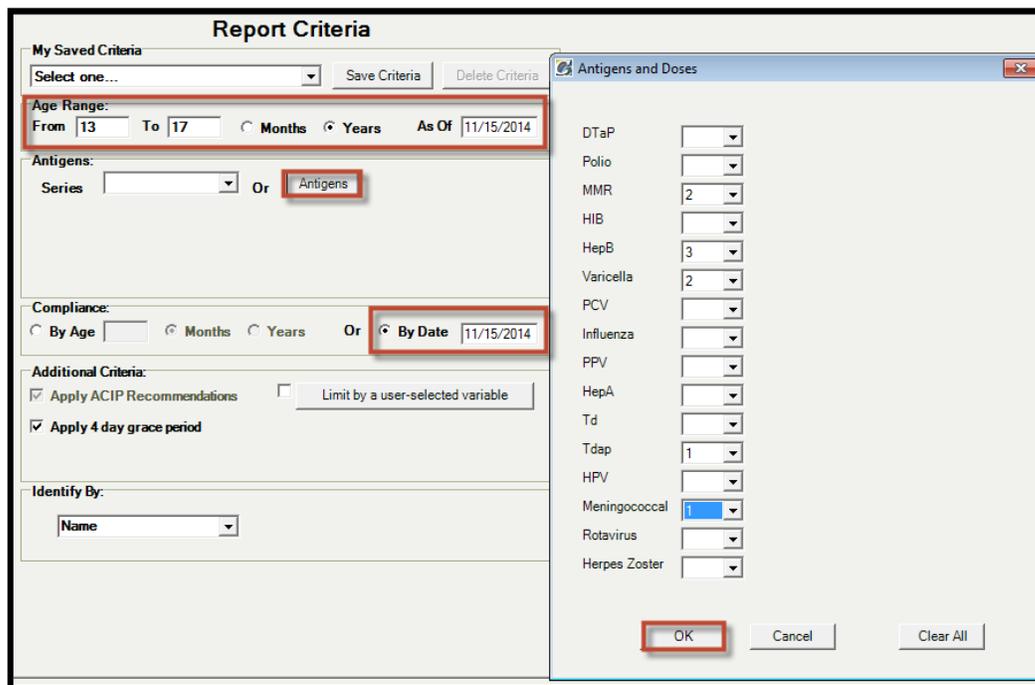
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## Adolescent Coverage Report

1. Click on the “+” next to **Diagnostic Reports**.
2. Click on **Adolescent Coverage**.



3. Make sure the **Age Range** is **From 13 to 17 years as of your assessment date** (e.g. 13-17 years as of 11/15/2014).
4. In the **Antigens** section, click on the **Antigens** button. This opens a pop-up box. Choose the following vaccines and number of doses from the drop down boxes, then click **OK**:
  - 2 MMR
  - 3 Hep B
  - 2 Varicella
  - 1 Tdap
  - 1 Meningococcal
5. Under **Compliance**, click on **By Date**. CoCASA defaults to the date you run the assessment. Do not change any other report criteria.

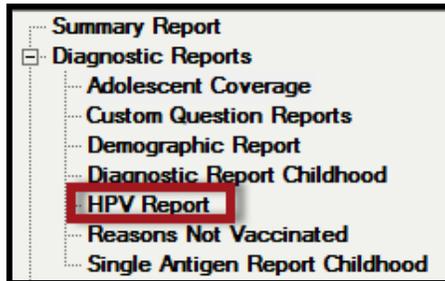
A screenshot of the 'Report Criteria' dialog box. The 'Age Range' section is set to 'From 13 To 17' with 'Years' selected and 'As Of' date '11/15/2014'. The 'Antigens' section has 'Antigens' selected. The 'Compliance' section has 'By Date' selected with the date '11/15/2014'. The 'Antigens and Doses' sub-dialog is open, showing a list of vaccines with their respective doses: DTaP (1), Polio (1), MMR (2), HIB (1), HepB (3), Varicella (2), PCV (1), Influenza (1), PPV (1), HepA (1), Td (1), Tdap (1), HPV (1), Meningococcal (1), Rotavirus (1), and Herpes Zoster (1). The 'OK' button is highlighted with a red box.

6. Run the report and save it as a PDF following the previous instructions.

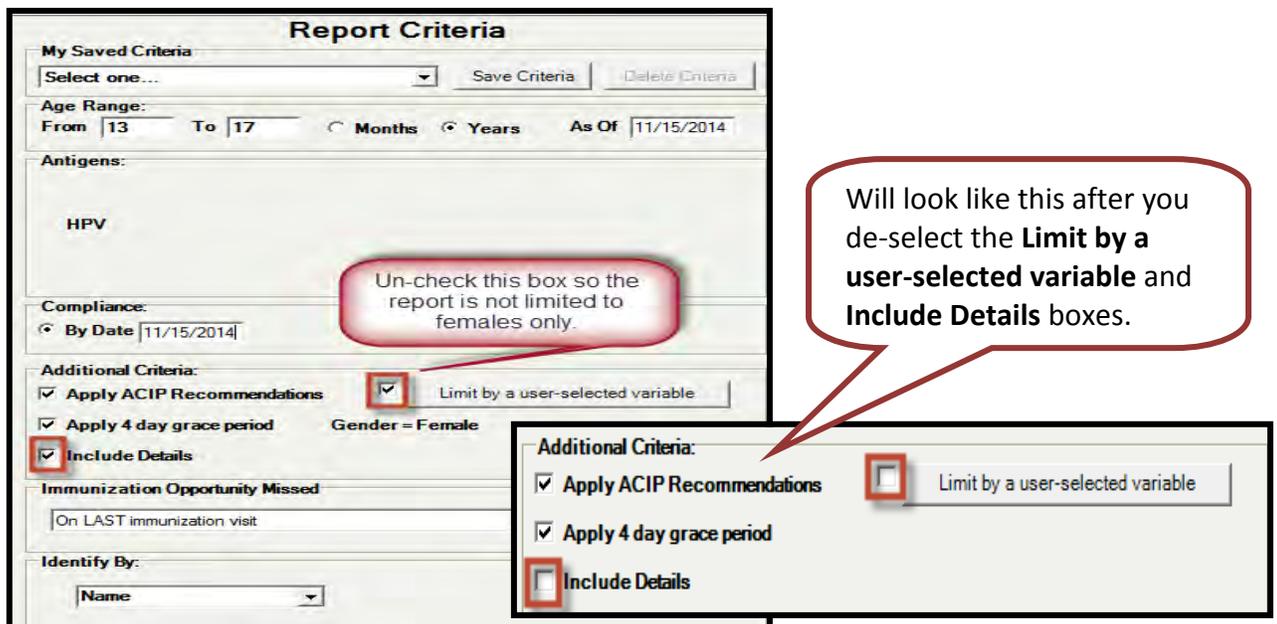
If you have a disability and need this document in a different format, please call 1-800-525-0127 (TDD/TTY 1-800-833-6388).

## HPV Report

1. Click on the “+” next to **Diagnostic Reports**.
2. Click on the **HPV Report**.



3. In the **Report Criteria**, check to make sure the **age range** is **From 13 to 17 years as of your assessment date** (e.g. 11/15/2014).
4. In the **Additional Criteria** section, CoCASA defaults to assess HPV vaccination rates for females only. Click on the box next to the **Limit by a user-selected variable** button. This allows you to assess both male and female coverage rates.
5. In this same section, choose whether you want to **Include Details**. If you choose this option, the report includes a list of patients coming due or overdue for HPV vaccine. Choosing this option makes the report longer, but this may be helpful for the clinic.
7. You do not need to change any other report criteria. Run the report and save it as a PDF following the previous instructions.

A screenshot of the 'Report Criteria' form. The form has several sections: 'My Saved Criteria' with a dropdown and 'Save Criteria'/'Delete Criteria' buttons; 'Age Range' with 'From' (13), 'To' (17), 'Months'/'Years' radio buttons, and 'As Of' (11/15/2014); 'Antigens' with 'HPV'; 'Compliance' with 'By Date' (11/15/2014); 'Additional Criteria' with 'Apply ACIP Recommendations' (checked), 'Apply 4 day grace period' (checked), 'Gender = Female', 'Limit by a user-selected variable' (checked), and 'Include Details' (checked); and 'Immunization Opportunity Missed' with 'On LAST immunization visit'. A callout box points to the 'Limit by a user-selected variable' checkbox with the text: 'Un-check this box so the report is not limited to females only.' Another callout box points to the 'Limit by a user-selected variable' and 'Include Details' checkboxes with the text: 'Will look like this after you de-select the Limit by a user-selected variable and Include Details boxes.' A third callout box points to the 'Additional Criteria' section with the text: 'Additional Criteria: Apply ACIP Recommendations (checked), Apply 4 day grace period (checked), Include Details (unchecked), Limit by a user-selected variable (unchecked)'.

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## Invalid Doses Report

1. Follow the instructions showing how to run this report for childhood AFIX visits, but click on the **Antigens** button and choose the following vaccines and number of doses:
  - 2 MMR
  - 3 Hep B
  - 2 Varicella
  - 1 Tdap
  - 1 Meningococcal
  - 3 HPV
2. Un-check the **Limit by a user-selected variable** box.
3. You do not need to change any of the other report criteria. Run the report and save it as a PDF following the previous instructions.

**Report Criteria**

My Saved Criteria  
Select one... Save Criteria Delete Criteria

Age Range:  
From 13 To 17  Months  Years As Of 11/15/2014

Antigens:  
Series  Or Antigens  
1Tdap, 2MMR, 2Var, 1Meng, 3HepB, 3HPV

Compliance:  
 By Age   Months  Years Or  By Date 11/15/2014

Additional Criteria:  
 Apply ACIP Recommendations  Limit by a user-selected variable  
 Apply 4 day grace period Gender = Female

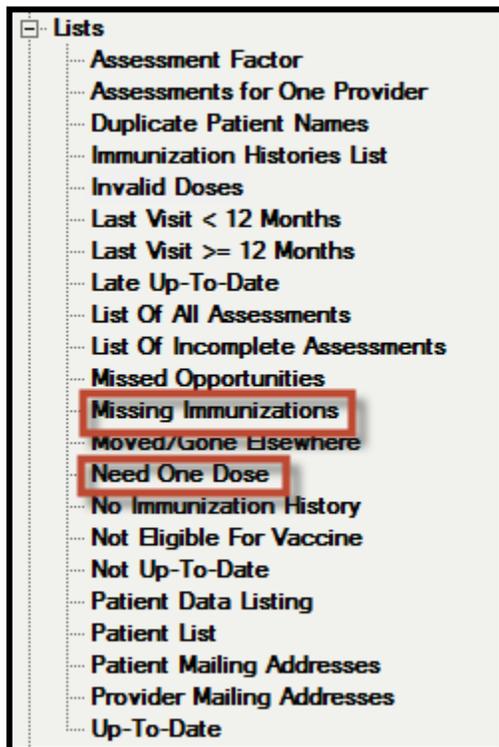
Identify By:  
Name

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## Running Other CoCASA Reports

You can run many other CoCASA reports to help providers understand their immunization coverage and identify areas to improve.

1. Click on the “+” next to **Lists** to see the full list of reports.
2. Select any of the reports, like the **Missing Immunizations Report**, **Need One Dose Report**, or others.



3. Setup the report criteria (or use one of your saved criteria sets).
4. Run the report and save it as a PDF following the previous instructions.