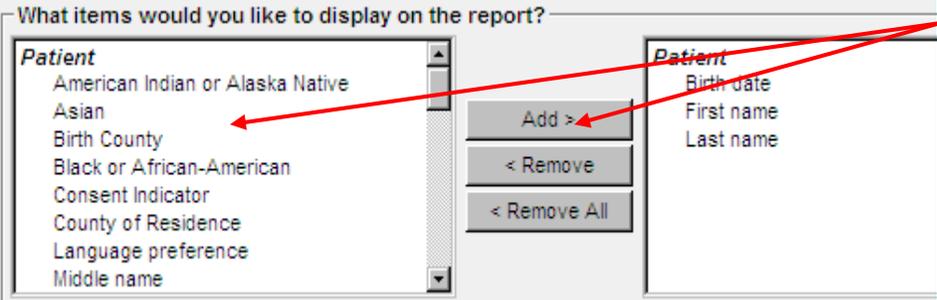


## Manage your Active Patient List in ALERT IIS

Manage your patient population by running a list of patients who are active with your clinic, reviewing the list, and marking patients who no longer receive care at your clinic as inactive in ALERT IIS.

Run an ALERT IIS ad hoc report to create a list of active patients

1. Select “ad hoc list report” from the blue bar along the left-hand column of the ALERT screen.
2. Select the fields you want to display on the report.
  - For a patient list, include these three fields: birth date, last name, and first name.



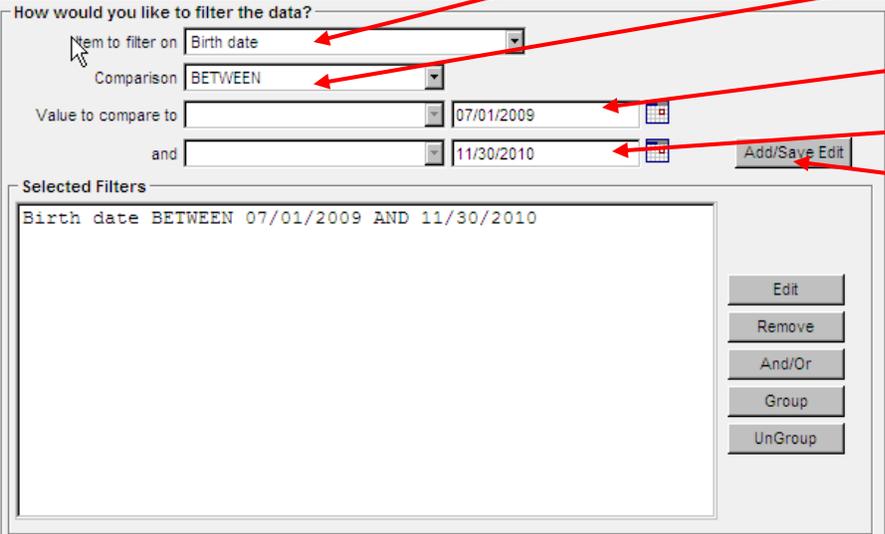
Click on the field you want to include in the report in the left-hand box. Then click “Add.”

Repeat this for all fields you want to include.

Fields in the right-hand box will be included on the report.

3. Set a filter for birth dates. Below are some examples of how to calculate date of birth ranges.

- Active 24-35 month olds, as of December 31, 2012: 1/1/2010-12/31/2010
- Active 4-6 year olds, as of March 1, 2013: 3/2/2006-3/1/2009
- Active 11-18 year olds, as of Jan 1, 2013: 1/2/1994-1/1/2002



Select “Birth Date” from drop down list.

Select “Between” from drop down list.

Enter beginning birth date.

Enter ending birth date.

Click “Add/Save Edit.”

4. Click “Generate” at the bottom of the page to run the report.
5. You will be taken to the Ad Hoc Report Status page. The report may take a few minutes to generate, and during this time you can do other things in ALERT like enter immunizations, manage your inventory, or run other reports. Click “ad hoc report status” to return to this page.
6. Click “refresh” periodically.
7. When the report has generated, it will become a blue hyperlink. Click on the hyperlink to view the list of active patients who are within the date of birth range that you selected.
8. From here, you may export this patient list to excel or PDF.

**Review your list of active patients to determine whether any patients should be marked as inactive in ALERT IIS**

Use the criteria, below, to determine whether a patient meets the criteria to be marked as inactive in ALERT IIS

<b>Patient status</b>	<b>Use the criteria, below, to determine the appropriate patient status</b>
Active	A patient who: <ol style="list-style-type: none"> <li>1. Has received an immunization at your clinic, or</li> <li>2. Has had demographic information updated by your clinic, or</li> <li>3. Their record has been actively searched by your clinic, or</li> <li>4. Has otherwise been identified as active by your clinic.</li> </ol>
Inactive - Lost to Follow Up	Attempts to contact the patient have been made and are documented, but there is no documented response from the patient.  Contact attempts may be made by telephone, letter, email, or other method, or the patient has not provided adequate contact information.  Your clinic will define the number of attempts that are made and documented before a patient is inactivated.
Inactive - MOGE	There is documentation that one of the following has occurred: <ol style="list-style-type: none"> <li>1. The patient has moved out of the immediate area</li> <li>2. The patient is receiving immunization services at another clinic</li> <li>3. Your clinic has signed a release of records</li> <li>4. The patient has moved with no forwarding address.</li> </ol>
Inactive - One Time Only	The patient is not a regular patient of your clinic and is not expected to return to your clinic for services.
Inactive - Other	Clinic users are discouraged from using this inactive status.  This status should only be used if the clinic cannot provide appropriate documentation to meet one of the above criteria.

Inactive - MOOSA	This status should only be used at the jurisdictional level; clinics should use MOGE instead.
Inactive – permanently (deceased)	Clinic users will only use this inactive status when they have confirmation that a patient is deceased.
Inactive - Unknown	Patient status cannot be derived. Clinic users may use this status when submitting historical data to ALERT.

## Change patient status to inactive in ALERT IIS

1. Click “manage patient” from the blue bar along the left-hand column of the ALERT screen.
2. Search by patient or patient id.
3. On the “manage patient” screen, select patient status in the “Organization Information” section

Last Updated by AMJEN MEDICAL CLINIC on 04/01/2013

Patient AKA (0) ▼

**Organization Information ▲**

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Status: ACTIVE ▼      Allow Reminder and Recall Contact? Yes ▼

Provider- PCP: [ ] ▼      Last Notice: [ ]

\* Tracking Schedule: ACIP ▼

**Patient Identifiers**

Remove Identifier	Patient Identifier	Primary
No Patient Identifiers have been added for this patient.		

[Add Patient Identifier](#)

Patient Identifier: [ ]      [Add Patient Identifier](#)

Click on the triangle to open the “Organization Information” section

Select the correct inactive status reason in the “Status” drop down list

4. Click “save.”