Quick Reference

How to Manage HRM COVID-19 Historical Reports through HRM

Video: The HRM COVID-19 Immunization Reporting Tool

This Quick Reference gives step-by-step instructions covered in the video for the **HRM COVID-19 Immunization Reporting Tool.**

The HRM COVID-19 Immunization Reporting Tool allows you to create lists of patients based on their immunization status. These reports are based entirely on the HRM COVID-19 Immunization Reports that have been posted to the charts. This is helpful because these reports <u>do not</u> depend on whether the immunizations have been entered into the CPP.

Once the backlog of HRM Reports have been received, this will produce **accurate and current immunization status reports** for all of a clinician's patients who have received their shots in Ontario.

An overview of the Report Settings:

When the **HRM COVID-19 Immunization Report** button (contained within the HRM COVID-19 Immunization Toolbar) is clicked, a new **COVID HRM Extracts** window is displayed.

1. The **COVID HRM Extracts** window includes the following options:

   - **Target patients:** Select 'all patients,' or restrict results to 'active only' or patients within a particular 'cohort'. You can also 'exclude' certain cohorts from the list.

     Note: This video does not cover the 'cohort' function. For more support on this, contact OntarioMD at support@ontariomd.com.

- **by Primary MD:** Select which practices to include in the list. Options include 'all' physicians, or 'Only' a list which you choose. You may also include patients who do not have a particular physician assigned to them ('no MRP').

- **Constraints:** Set a 'Minimum Age' and 'Minimum weeks between shots'.

- **Column options:** Choose what information to show about each patient in the Reports. Options include 'patient contact', 'health number', 'primary MD', 'vaccine info', 'demographics', 'postal code', 'roster status', and 'additional fields'.

- **Settings:** This link is mainly used when installing the tool.

Once you have set the parameters, you are ready to run the reports:

2. In the same **COVID HRM Extracts** window, once the parameters have been set, you can **run several reports** by clicking on the following report option buttons:
   - **All reports**
   - **Needs 1st shot**
   - **Needs 2nd shot**
   - **Had 2 shots**
   - **HRM reports not in CPP:** Generates a list of patients who have not had the immunization entered into the CPP. From this list, you can update each of these charts using the 'Update CPP' button on the Toolbar (See **Video: HRM COVID-19 Immunization Toolbar**).

   Example shown in video:

   - **'Needs 2nd shot' button selected**
     i. This creates a report of patients who have had one shot, and are due for their second shot.

ii. Double-click on any specific patient in the report to open their demographics. From here, to view the patient's chart:
   a) Within the **Patients** window, select 'View' from the top menu bar.
   b) Click 'View Patient Records' (or Ctrl +[).

Finally, you can also create cohorts of patients based on the results of these reports:

3. In the same **COVID HRM Extracts** window, click 'Save search results to cohort' (located under the report option buttons).

   Cohorts like this can be used to send emails or messages to these patients. *Note: This video does not cover the 'cohort' function. For more support on this, contact OntarioMD at* [support@ontariomd.com.](support@ontariomd.com)

NOTICE – UPDATE FOR THIRD SHOTS:

There is an update that includes options for third shots, but this was not posted at the time this video was produced. Updates will be announced in the Release Notes and posted in the Custom Forms Library.

For questions or additional support, please contact OntarioMD at [support@ontariomd.com.](support@ontariomd.com)