

# Ad Hoc Reports

## Purpose of this document

Background: The Ad Hoc List and Ad Hoc Count reports are used to create customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, site, vaccine group, ethnicity, and other factors. City and county public health departments may include in their reports clients associated with their departments or those living within the same city or county.

There are two types of reports:

- Ad Hoc List – produces lists with details about selected clients (detailed list)
- Ad Hoc Count – produces counts of clients or immunizations (summary count)
- Access to the **Ad Hoc List** and **Ad Hoc Count** reports is not available to all users. It is role specific and typically only available to user roles such as IR Administrator

Topics Covered:

- Ad Hoc List Reports
- Ad Hoc Count Reports
- Additional Notes for City and County Public Health Departments
- Filters and Filter Groups
- Practical Examples

After reviewing this document, you should be able to:

- Understand the purpose and information included on the ad hoc reports.
- Run an Ad Hoc List report.
- Run an Ad Hoc Count report.
- Understand AND/OR statements, filters, and filter groups.


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## The reports section

Once you log into WIR, one of two things will be displayed:

- A user with only one organization will see this screen. The Reports section will be on the left menu panel.



Training Region 12.9.0

**Maintenance**

- manage schools
- manage physicians
- manage sites
- manage clinicians
- manage schedules

**Inventory**

- barcode reports
- manage inventory
- manage orders
- manage transfers
- shipping documents
- transaction summary
- trans summ status
- vaccine usage

**Clients**

- manage client
- enter new client
- find lead results

**Immunizations**

- manage immunizations

**Reports**

- reminder / recall
- check reminder status
- request callback
- check request status
- vfc report
- assessment report
- check assessment
- benchmark report
- check benchmark
- ad hoc list report
- ad hoc count report
- ad hoc report status
- manage custom letters
- report to lhd
- check lhd report
- summary from lhd
- provider report cards

r/r home manage access/account forms related links logout help desk training

organization **Central City Hospital** • user [redacted] • role **IR Administrator**

**announcements:**

12/12/2023 ~ [WIR Scheduled TRN/PRD Maintenance Sunday December 17, 2023](#)

11/20/2023 ~ [Vaccine Expiration Date Change](#)

10/30/2023 ~ [WIR Scheduled TRN/PRD Maintenance Sunday November 5, 2023](#)

10/16/2023 ~ [COVID 19 dose level eligibility codes](#)

09/14/2023 ~ [Vaccine Overages](#)

[more announcements](#)

**release notes:**

10/23/2023 ~ [Release Version 12.9.0](#) Official WIR Record/HL7 2.5.1 r1.5 improvements

[more release notes](#)

**Vaccine Order/Transfer Notification ...**

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	No Order Notification		
Transfer(s)	0	1	2

**Order List**

User	Submit Date	Order ID	Status
Suzie Kostuchowski	12/06/2023	44094	IN PROGRESS
Alex Admin	10/18/2023	43495	IN PROGRESS
Suzie Kostuchowski	10/04/2023	43294	IN PROGRESS

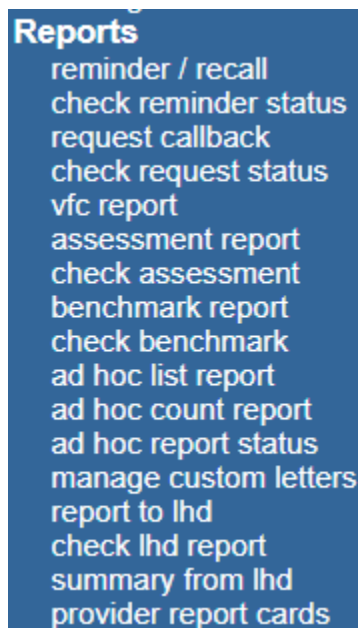
**Active Inventory that is Going to Expire ...**

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
Central City - COVID-19	BabyBIG	TEST123	1	N	01/11/2024
Central City - COVID-19	DECAVAC	5963-7845	75	N	02/01/2024
Central City - COVID-19	Moderna COVID-19 Vaccine	123456	56.5	Y	12/31/2023
Central City - COVID-19	Pfizer COVID-19 tris 12+	PF123	25	Y	12/31/2023
Central City Hospital	ACAM2000	4567test	20	N	12/31/2023
Central City Hospital	AFLURIA	12345 test	5	N	12/31/2023
Central City Hospital	Fluzone Quadrivalent, P-Free	FAKELOT	5	Y	12/31/2023
Central City Hospital	Gardasil 9	521424	7	N	12/31/2023
Central City Hospital	MMR II	KH5678	10	Y	12/31/2023
Pediatrics - 2nd Floor	Fluzone Quadrivalent, P-Free	FAKELOT	3	Y	12/31/2023

- b. A user with more than one organization will select WIR under **Applications** on left panel, and then select the organization name from the list.



Once there, you will find the **Reports** section on the left menu panel.



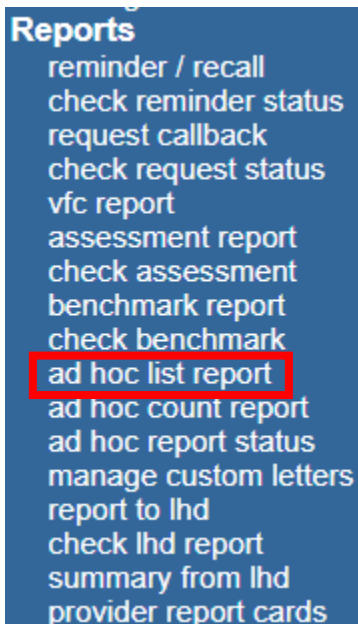
## What clients are included in ad hoc reports?

- Providers will see results for clients meeting the report criteria who also show an “active” association to the organization.
  - Not included: Clients who have been marked Moved or gone elsewhere, Permanently inactive-deceased, or Inactive.
- City and county public health departments may run reports that include clients showing an “active” association to their organization, *and/or* those residing within their jurisdiction.

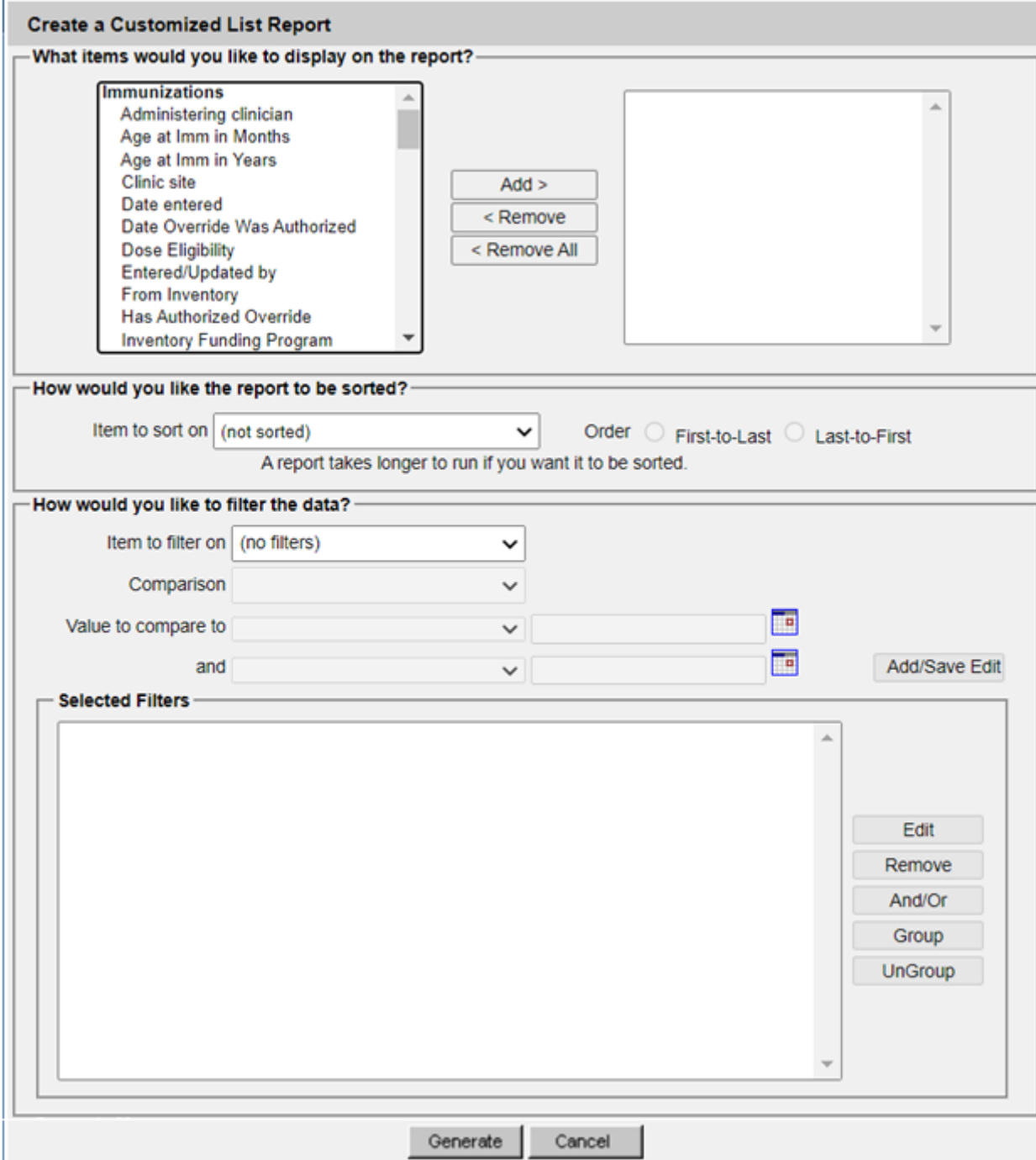
## Ad hoc list report

- Clients whose information is added or changed on the day the report is run will NOT appear in the results until the following day.
- **WIR will retain only one count and one list report at a time. If a new ad hoc list report is generated, the new report will replace the existing report.**
- **Ad hoc reports are guaranteed to be available for a minimum of 72 hours. As a form of best practice, we recommend that you export your results immediately and save the information you need.**
- Ad hoc reports are user specific, so each user can only view reports that they have created. The user will not be able to view in WIR reports that other users have created.

- 1) Select **Ad Hoc List Report** under the **Reports** section on the left menu panel.



2) The **Create a Customized List Report** screen will display.



**Create a Customized List Report**

What items would you like to display on the report?

Immunizations  
Administering clinician  
Age at Imm in Months  
Age at Imm in Years  
Clinic site  
Date entered  
Date Override Was Authorized  
Dose Eligibility  
Entered/Updated by  
From Inventory  
Has Authorized Override  
Inventory Funding Program

Add >  
< Remove  
< Remove All

How would you like the report to be sorted?

Item to sort on (not sorted) Order ☐ First-to-Last ☐ Last-to-First  
A report takes longer to run if you want it to be sorted.

How would you like to filter the data?

Item to filter on (no filters)  
Comparison  
Value to compare to  
and

Add/Save Edit

**Selected Filters**

Edit  
Remove  
And/Or  
Group  
UnGroup

Generate Cancel

3) On the **Create a Customized List Report** screen, select the items you would like to display on the report by double-clicking on the desired item from the left column, or by highlighting the item and selecting the **Add** button. This will move the item from the left column to the right column and add the item to your report.

- a. If you need to remove any of the items from the report, select the **Remove** or **Remove All** buttons.
- b. *Example:* Based on the items in the box on the right, this will display the client's birth date, first and last name, chart number, and vaccine group as the column headings on this report.

What items would you like to display on the report?

<b>Immunizations</b> Administering clinician Age at Imm in Months Age at Imm in Years Clinic site Date entered Date Override Was Authorized Dose Eligibility Entered/Updated by From Inventory Has Authorized Override Inventory Funding Program	<input type="button" value="Add &gt;"/> <input type="button" value=" &lt; Remove"/> <input type="button" value=" &lt; Remove All"/>	<b>Client</b> Birth date First name Last name <b>Other Items</b> Chart number <b>Immunizations</b> Vaccine group
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- 4) Select how you would like the report to be sorted from the dropdown list. You can only select a single item to sort by. Select the sort order (first-to-last or last-to-first).
  - a. Sorting the report will cause the report to take longer to generate. If possible, it is recommended you export the report results to Excel, for example, and then sort the results, instead of sorting in WIR. If that is the plan, leave this section blank.
  - b. *Example:* The report will be sorted by the client's last name, first-to-last.

How would you like the report to be sorted?

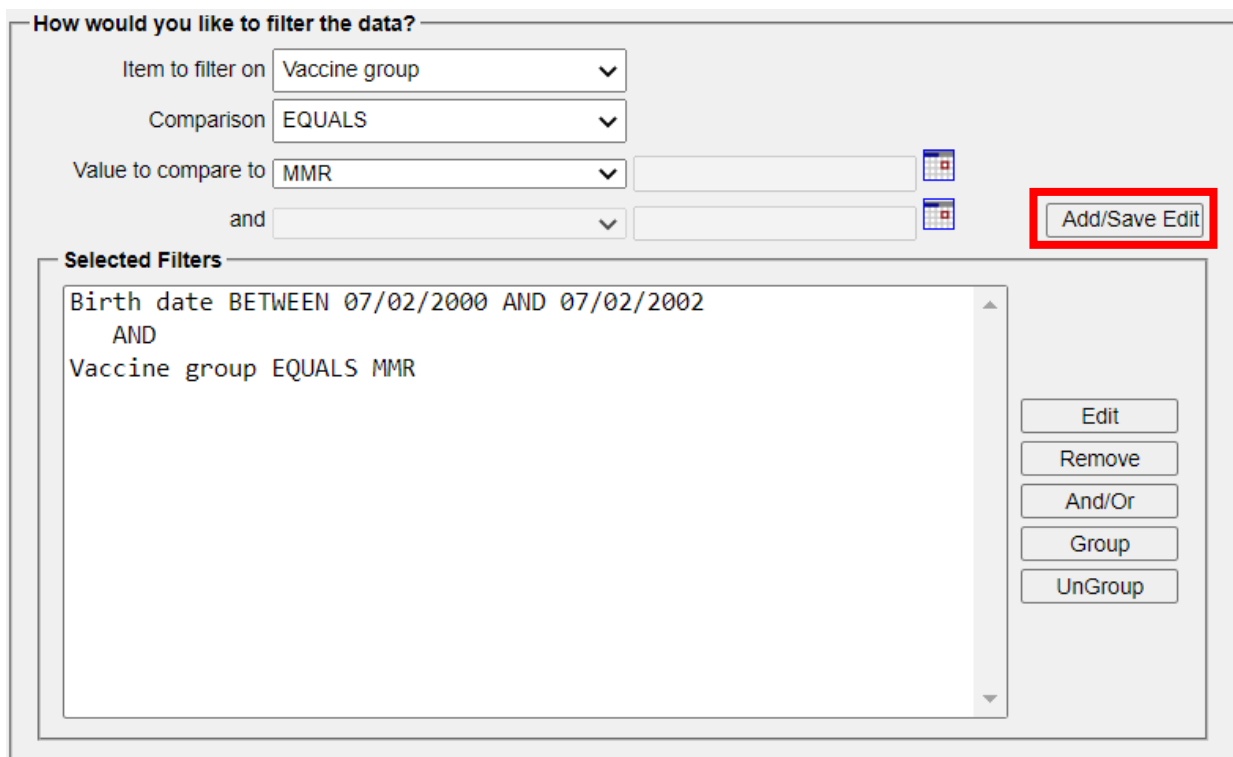
Item to sort on: Last name  Order: ☒ First-to-Last ☐ Last-to-First

A report takes longer to run if you want it to be sorted.

- 5) Add filters. Filtering is important. If you do not add filters, the report will display results for *all* clients and immunizations.
  - a. Under "Item to filter on," select an item you would like to add as a filter from the dropdown list. There are several items you can filter on and it is not limited to items you have chosen to display on the report.
    - i. *Example:* "Birth Date" could be an item used as a filter to have the report only include clients with a birthdate within a specified range.
  - b. Under "Comparison," select an operator from the dropdown list that best describes the type of comparison you wish to make.
    - i. *Example:* "Between" is one comparison operator. Between is inclusive – it includes the beginning and end dates that you have specified.
  - c. Under "Value to compare to," either choose a value from the dropdown list in the left field or enter a beginning date in the right field.
    - i. *Example:* Since the goal is to filter for a specified birthdate range, the first field should contain the earliest date of birth.

- d. Under "and," select another value from the dropdown list in the left field or enter an ending date in the right field, if applicable.
  - i. *Example:* The second field should have the latest date of birth for the range. Using a DOB range such as this will give someone a specific age cohort to filter on.
- e. Select the **Add/Save Edit** button. This will move the filter into the "Selected Filters" list/box.
- f. Repeat steps 5a-5e for each item you wish to use as a filter.
- g. **Important: It is important to carefully consider each filter to drill down on the data and get the expected outcome. Ad hoc reports may take some trial and error to get desired results.**

In the figure below, this report will include only MMR immunizations for clients in the organization's population whose birth date is between July 2, 2000, and July 2, 2002.



How would you like to filter the data?

Item to filter on: Vaccine group

Comparison: EQUALS

Value to compare to: MMR

and

**Add/Save Edit**

**Selected Filters**

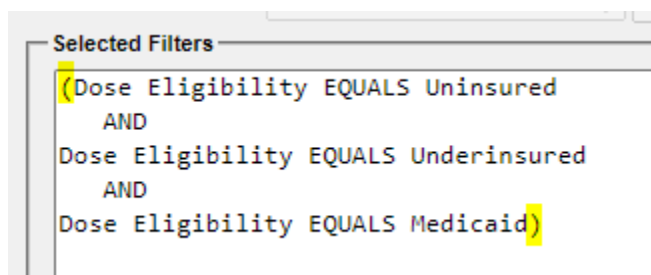
Birth date BETWEEN 07/02/2000 AND 07/02/2002  
AND  
Vaccine group EQUALS MMR

Edit  
Remove  
And/Or  
Group  
UnGroup

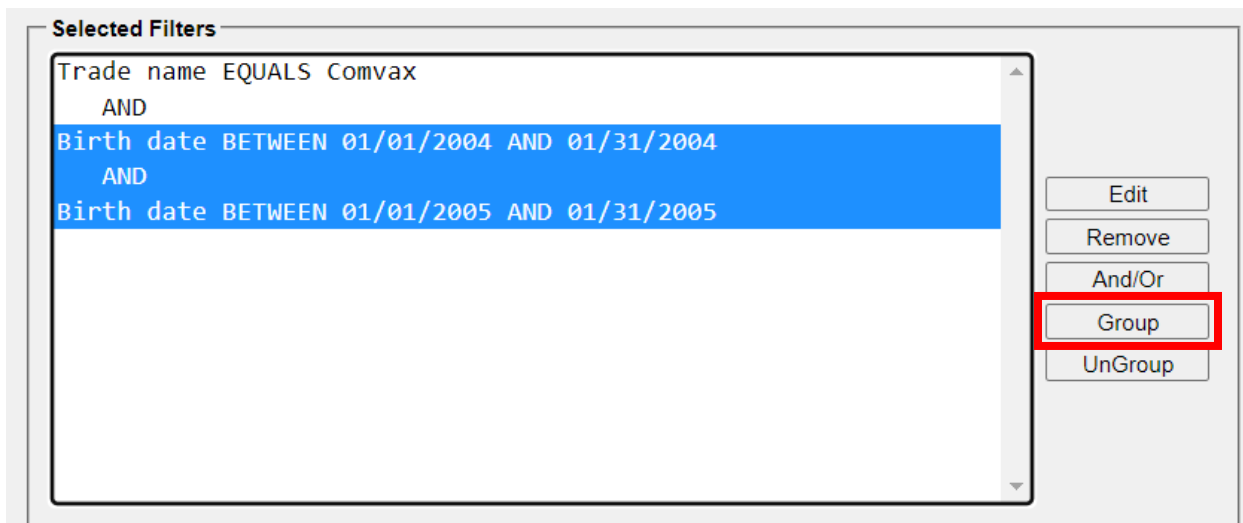
- 6) Change filters and grouping.
  - a. Highlight the filter you wish to change in the "Selected Filters" list. Select one of the following buttons.
    - i. **Edit** – will move the selected filter back up to the "Item to filter on" field. You can change the item, comparison, and value to compare to, then select the **Add/Save Edit** button to save the changes.
    - ii. **Remove** – will remove the filter from the "Selected Filters" list.
    - iii. **And/Or** – will change a selected AND operator to an OR operator, and vice versa.



- iv. **Group** –There are times when filters should be evaluated together rather than individually. To do this, the filters need to be grouped.
- v. To group filters, select two or more filters to be grouped together:
  - 1. Hold down the Shift key on your keyboard and highlight the filters to be grouped in the Selected Filters box, or
  - 2. Click and drag the mouse to highlight and select the filters to be grouped.
  - 3. Select “Group” to the right side of the Selected Filters box,
  - 4. Parentheses will appear around the selected filters.



- vi. **UnGroup** – highlighting the filters and selecting ungroup will remove the parentheses around the selected filter group.
- b. Grouping is needed when two or more filters should be evaluated as a whole.
- i. For example, if you want the Birth date cohort of 01/01/2004-01/31/2004 AND Birth date cohort of 01/01/2005-01/31/2005 to be evaluated together, and not treated as separate filters, then the two Birth date filters should be grouped together as follows. Highlight both lines and select “Group”.





**Selected Filters**

Trade name EQUALS Comvax

AND

(Birth date BETWEEN 01/01/2004 AND 01/31/2004

OR

Birth date BETWEEN 01/01/2005 AND 01/31/2005)

Edit

Remove

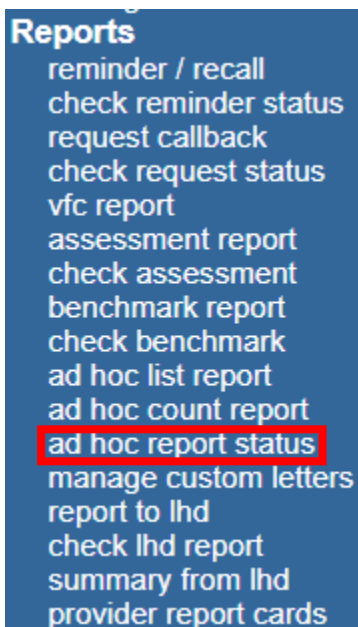
And/Or

Group

UnGroup

- ii. In this example above, it is also necessary to change the AND to OR between the two birth dates, as it is not possible for someone to be in the 2004 birth cohort AND the 2005 birth cohort.
    - 1. To change AND to OR, highlight the word AND between the two birthdate lines, and select the "And/Or" button. The AND will switch to OR as shown above.
  - iii. Without grouping, the system will evaluate the selected filters one at a time, top to bottom.
    - 1. Clients with a Comvax immunization AND were born in January 2004.
    - 2. OR any clients born in January 2005.
  - iv. If the parentheses are added to Group the Birth date filters together, the system evaluates the selected filters in this order:
    - 1. Clients with a Comvax immunization
    - 2. AND were born in either January 2004 or January 2005.
  - v. For more information, refer to the [Filters and filter groups](#) section later in this guide.
- 7) Select the **Generate** button at the bottom of the screen to generate the report.
- 8) The **Ad Hoc Report Status** screen will display.
- a. Select the **Refresh** button periodically to check on the progress of the report. You may work in other areas of WIR or log out of WIR while waiting for the ad hoc report to complete. **You can only run one report of each kind at a time.**

- b. You may go back to check the status of the report by selecting **Ad Hoc Report Status** under the **Reports** section.



- c. When the report is ready, the Status will change to DONE and LIST will become a hyperlink. Select **LIST** to display the results.

Ad Hoc Report Status					Refresh	Cancel
Report Type	Started	Completed	Status	Row Count		
<a href="#">LIST</a>	05/18/2022 08:54 AM	05/18/2022 08:55 AM	DONE	1		

- d. The report results will be displayed, as well as links at the top to Export as Text .txt), Export as a Spreadsheet (.xls), or Display as a PDF (.pdf) file. When originally setting up the report, the items added to the box on the top right, "items selected for display", are the report's column headings.



**Ad Hoc Report Results**

What would you like to do with this report?
 

[Export as Text](#)
[Export as a Spreadsheet](#)
[Display as a PDF](#)

**Report 131204**

Wisconsin Immunization Registry  
 Report generated on 05/18/2022  
 Report generated by [REDACTED]  
 WIR Physicians

**Filter conditions used for this report:**

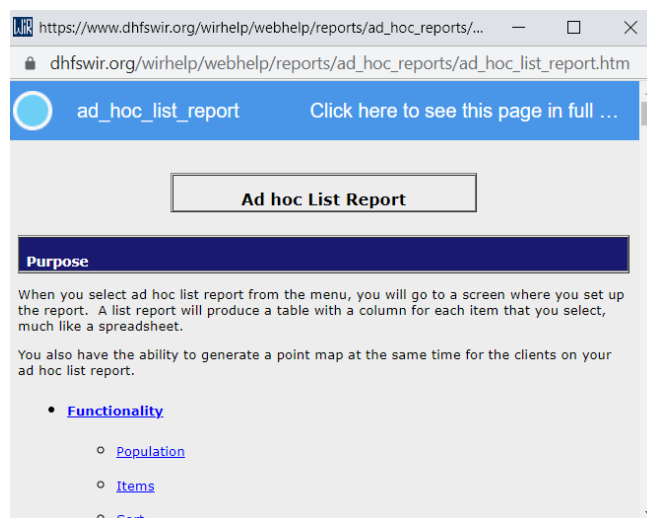
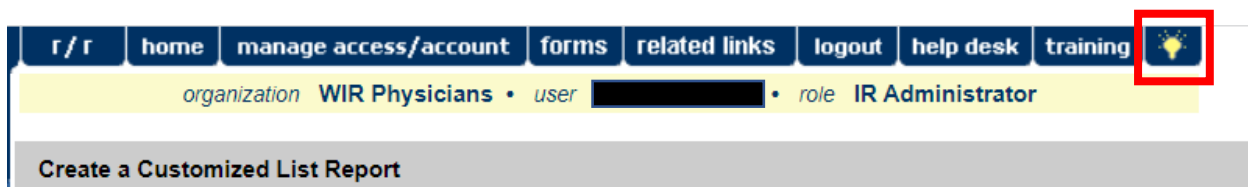
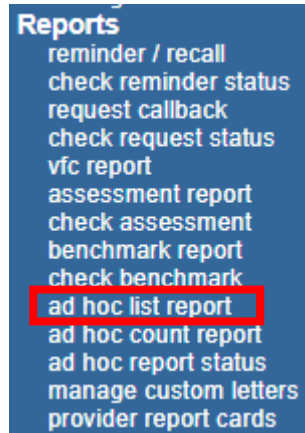
Clients Associated with WIR Physicians  
 Trade name EQUALS Comvax  
 AND  
 (Birth date BETWEEN 01/01/2004 AND 01/31/2004  
 OR  
 Birth date BETWEEN 01/01/2005 AND 01/31/2005)

**Report 131204; Results 1 - 1 of 1**

No	First name	Last name	Birth date	Street	Other address	PO box	City	State	Zipcode
1	SUSIE	SNAKE	01/01/2004	75 SLINKY LANE			BOSCOBEL	WI	53805

## Detailed example

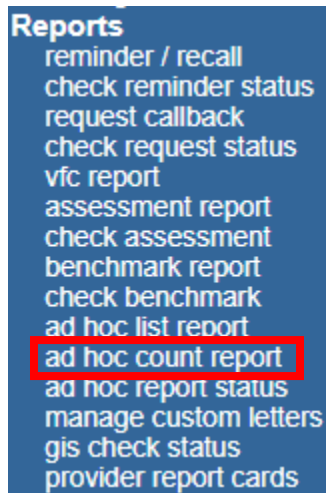
To view a detailed, step-by-step example of an Ad Hoc List report, select **Ad Hoc List Report** under the **Reports** section on the left-hand menu panel. On the **Create a Customized List Report** screen, select the lightbulb icon on the top menu to open the WIR Help Screen for the Ad Hoc List report. The lightbulb icon pulls up a page specific Help Screen giving more detail about the page you are currently on in a separate popup window.



## Ad hoc count report

- Clients whose information is added or changed on the day the report is run will NOT appear in the results until the following day.
- **WIR will retain only one count and one list report at a time. If a new ad hoc count report is generated, the new report will replace the existing report.**
- **Ad hoc reports are guaranteed to be available for a minimum of 72 hours. As a form of best practice, we recommend that you export your results immediately and save the information you need.**
- Ad hoc reports are user specific, so each user can only view reports that they have created. The user will not be able to view in WIR reports that other users have created.

1) Select **Ad Hoc Count Report** under the **Reports** section on the left menu panel.



2) The **Create a Customized Count Report** screen will display.

Create a Customized Count Report

Would you like to count Clients or Immunizations?

☒ Clients
 ☐ Immunizations

What factors would you like to use to group the counts on the report?

Immunization Factors

Age at Imm in Months  
 Age at Imm in Years  
 Clinic site  
 Date entered  
 Date Override Was Authorized  
 Dose Eligibility  
 From Inventory  
 Has Authorized Override

Add >

< Remove

< Remove All

You may select a maximum of three factors to group the counts

How would you like to filter the data?

Item to filter on (no filters)

Comparison

Value to compare to

and

Add/Save Edit

Selected Filters

Edit

Remove

And/Or

Group

UnGroup

Generate

Cancel

3) On the **Create a Customized Count Report** screen, select whether you would like to count Clients or Immunizations by selecting the appropriate radio button.

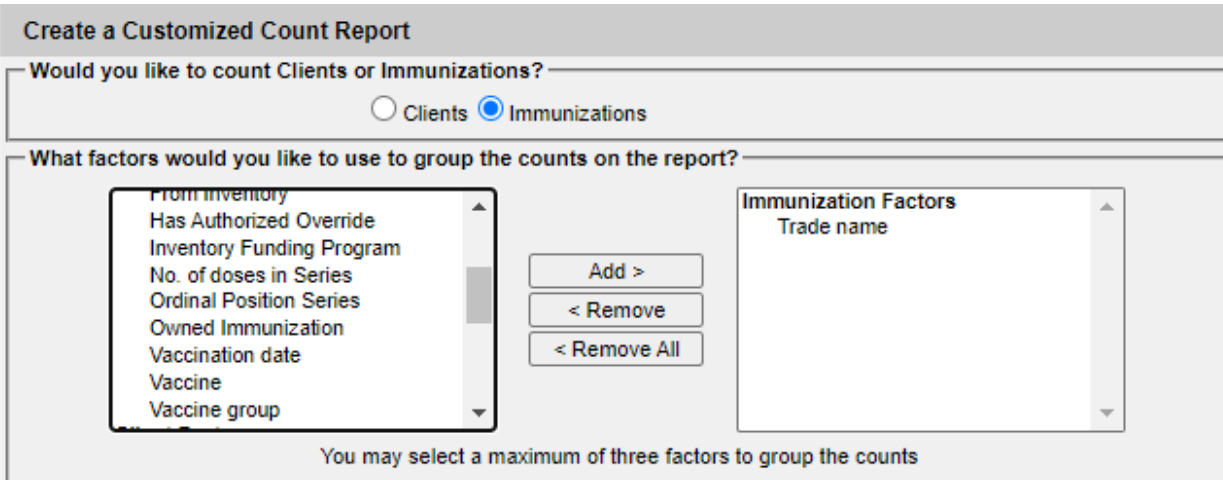
Would you like to count Clients or Immunizations?

☐ Clients
 ☒ Immunizations

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March 8, 2024

- 4) Select the factors you would like to use to group the counts on the report by double-clicking on the desired factor from the left column, or by highlighting the factor and selecting the **Add** button. This will move the factor from the box on the left to the box on the right and add the factor to your report.
  - a. You may select a maximum of three factors to group the counts.
  - b. If you need to remove any of the factors from the report, highlight the factors you want to remove, and select the **Remove** or **Remove All** buttons.
  - c. *Example:* This ad hoc count report will count the number of Gardasil-9 vaccines administered in the fourth quarter of 2023. A provider may want to know this for ordering purposes, for example. Therefore, the factor used to group the count at the top of the screen is trade name, as the report will be counting the number of Gardasil-9 immunizations.



- 5) Add filters.
  - a. Under "Item to filter on" in the box on the bottom of the screen, select an item you would like to add as a filter from the dropdown list. Since the report will be counting Trade Name vaccines, the Item to Filter On would be Trade Name.
  - b. Next, in the "Comparison" field, select an operator from the dropdown list that best describes the type of comparison you wish to make. In this instance, "Equals" is best choice.
  - c. Under "Value to compare to," in this example choose the desired trade name from the dropdown list, Gardasil 9. There are also two fields for beginning and end dates when filtering for a specific time frame, date range, or birth cohort.
  - d. Select the **Add/Save Edit** button. This will move the filter into the "Selected Filters" box at the bottom of the screen.
  - e. Repeat steps 5a-5d for each item you wish to use as a filter.
    - i. The second filter, vaccination date, used the comparison "Between" and then used the two date fields to designate a start and end date to find the vaccinations administered during the fourth quarter of 2023.





- f. Note: You should narrow down the timeframe for the report. The larger the client population or timeframe, the longer it will take for the report to generate.
- g. Select Generate once all the filters have been set up.

How would you like to filter the data?

Item to filter on

Comparison

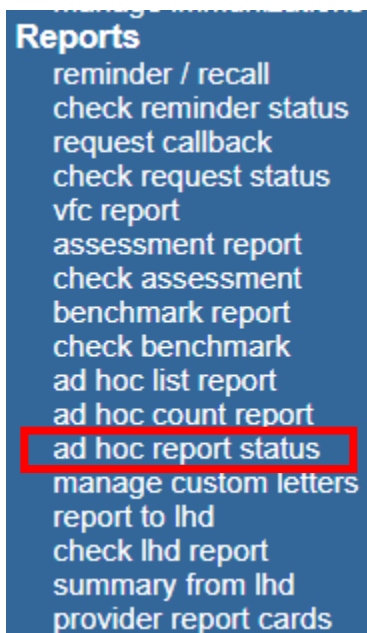
Value to compare to  

and  

Selected Filters

Trade name EQUALS Gardasil 9  
AND  
Vaccination date BETWEEN 09/01/2023 AND 12/31/2023

- 6) The **Ad Hoc Report Status** screen will display.
- Select the **Refresh** button periodically to check on the progress of the report. You may work in other areas of WIR or log out of WIR while waiting for the ad hoc report to complete. **You can only run one report of each kind at a time, regardless of filters.**
  - You may go back to check the status of the report by selecting **Ad Hoc Report Status** under the **Reports** section.



- When the report is ready, the Status will change to DONE and COUNT will become a hyperlink. Select **COUNT** to display the results.

Ad Hoc Report Status					Refresh	Cancel
Report Type	Started	Completed	Status	Row Count		
<a href="#">COUNT</a>	01/05/2024 03:41 PM	01/05/2024 03:41 PM	DONE	1		

The report results will be displayed, as well as options to Export as Text (.txt), Export as a spreadsheet (.xls), or Display as a PDF (.pdf) file.

- The results are presented as a table of client counts broken down by the selected factors, rather than a detailed list of client information.
- Changing the order of the factors selected at the top of the screen will determine how the information is displayed on the report.

### Ad Hoc Report Results

What would you like to do with this report?

[Export as Text](#)
[Export as a Spreadsheet](#)
[Display as a PDF](#)

Report 136224

Wisconsin Immunization Registry  
Report generated on 01/05/2024  
Report generated by [REDACTED]  
KCW TEST

Filter conditions used for this report:

Clients Associated with KCW TEST

Trade name EQUALS Gardasil 9

AND

Vaccination date BETWEEN 09/01/2023 AND 12/31/2023

	COUNT
Gardasil 9	57
Total	57

To view a detailed, step-by-step example of an Ad Hoc Count report, select **Ad Hoc Count Report**, under **Reports** on the left menu panel. WIR will display the **Create a Customized Count Report** screen.

### Create a Customized Count Report

Would you like to count Clients or Immunizations?

☒ Clients ☐ Immunizations

What factors would you like to use to group the counts on the report?

**Immunization Factors**

- Age at Imm in Months
- Age at Imm in Years
- Clinic site
- Date entered
- Date Override Was Authorized
- Dose Eligibility
- From Inventory
- Has Authorized Override

Add >

< Remove

< Remove All

You may select a maximum of three factors to group the counts



How would you like to filter the data?

Item to filter on (no filters) ▼

Comparison ▼

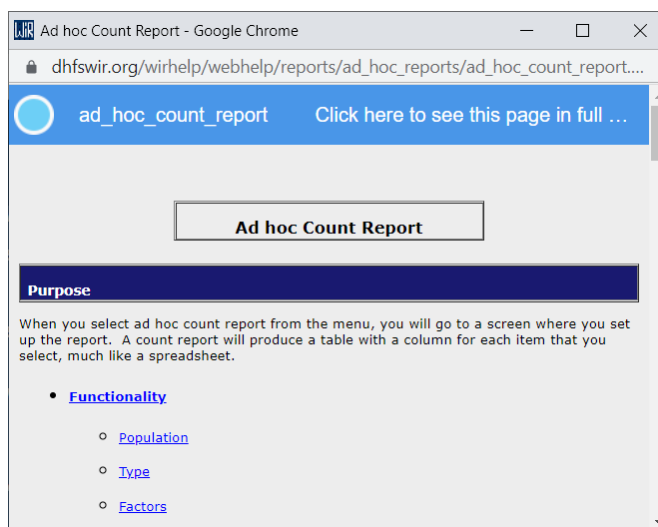
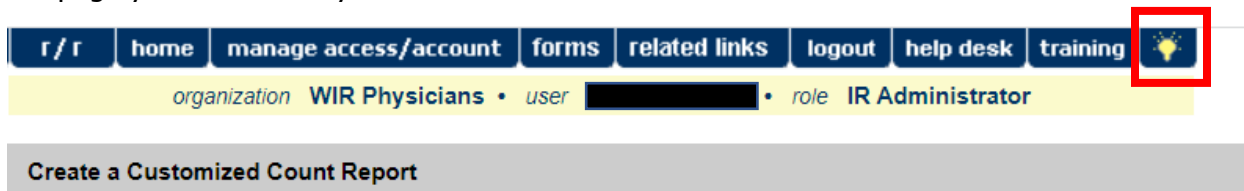
Value to compare to ▼

and ▼

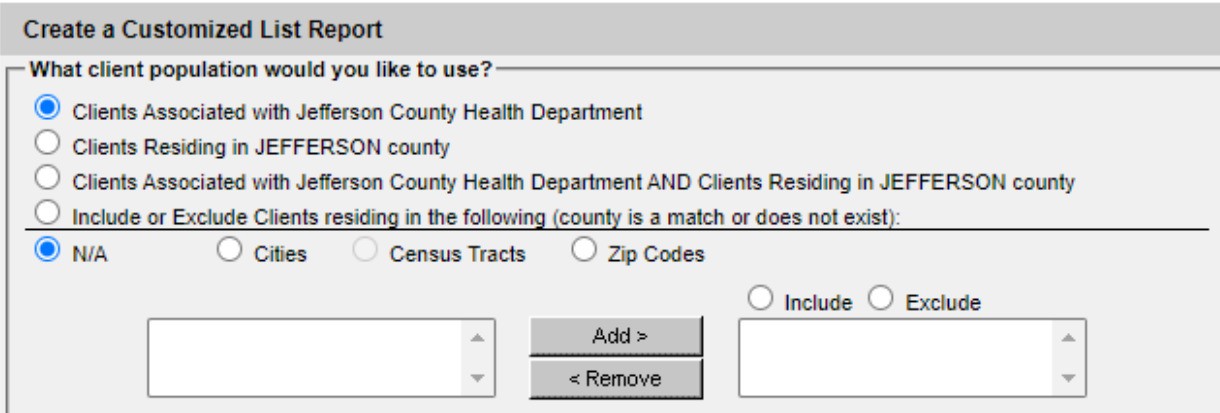
Add/Save Edit

In the upper right-hand corner of the screen, select the lightbulb icon on the top menu to open the WIR Help Screen for the Ad Hoc Count report. The help screen will open in a separate popup window. The lightbulb icon pulls up a page specific Help Screen giving more detail about the page you are currently on.



## Additional notes for city and county public health departments

- City and county public health departments may include in their reports clients associated with their health departments or those residing within their jurisdiction.
- The population section ("What client population would you like to use?") at the top of the ad hoc report screen is **only** available to city and county public health organizations. It appears the same on both the **Create a Customized List Report** and **Create a Customized Count Report** screens.



- The population section is used to determine the initial client base to use for the ad hoc report. The choices are as follows:
  - Clients Associated with [local health department (LHD)]: a client is selected if he or she is "associated" to the LHD. If the provider has previously immunized an individual, that person is considered to be associated to the organization. Please note, an individual can be associated to more than one organization.
  - Clients residing in [county/city]: Depending upon whether the organization is a county or city health department, everyone who lives in the jurisdiction would be included in the report when this choice is selected. This choice only considers residency and has nothing to do with an association to the LHD.
  - Clients associated with [Organization] AND clients residing in [county/city]: To qualify for this category, a client must be associated with this health department AND reside within the jurisdiction.
  - Include or Exclude Clients residing in the following: The final choice is to either include or exclude individuals based on cities, census tracts, or zip codes within the jurisdiction.
    - To do this, click the radio button of the desired category, for example, cities.
    - A list of cities will show in the box on the left.
    - Highlight one or more cities to either *include* or *exclude* from the report.
    - Once highlighted, click Add to move it to the box on the right.

- Click Include or Exclude depending upon your reporting needs.
- Once the population is selected, the rest of the report functions the same as an ad hoc report for any other provider.

## Filters and filter groups: Practical examples for providers

Filter groups are used to make sure the report is focusing on the intended population. Following are examples of correctly using the AND/OR statements as well as filter groups to create accurate reports.

**Scenario 1:** Staff would like to review the number of influenza and COVID-19 vaccines administered during the 2022 – 2023 flu season to get an estimate of how many vaccines to order for the upcoming season. This can be achieved by running an ad hoc count report to see how many doses of each vaccine were administered.

**Report Output:** Run Ad Hoc count report to show vaccination data from August 1, 2022, through June 30, 2023, and the vaccine groups of influenza or COVID-19.

- First, the provider must decide which items are to be counted. Up to three items can be counted and added to the box at the top right of the screen. Rather than counting the number of vaccines in the vaccine group, counting by each trade name will make it easier to estimate how many of each trade name to order for the upcoming season.
- When adding the items to filter on, WIR will default to an "AND" statement, indicating that the report will focus on counting clients who received an influenza *and* COVID-19 vaccine. If you want to focus on which clients received a COVID-19 vaccine *or* a flu vaccine, the ad hoc report allows the AND to be changed to OR once it is in the selected filters box.
- To change the filter to vaccine group equals influenza OR vaccine group equals COVID-19, highlight the "AND" statement you'd like to update, then select the **And/Or** button to the right. This will change the "AND" statement to an "OR" statement.

### Create a Customized Count Report

Would you like to count Clients or Immunizations?

☐ Clients
 ☒ Immunizations

What factors would you like to use to group the counts on the report?

Birth date  
 Funding Program  
 Has School Entered Imms Y/N  
 Insurer  
 School  
 School Release Status Y/N  
 Ethnicity  
 Gender  
 Race

Add >  
 < Remove  
 < Remove All

Immunization Factors  
 Trade name

You may select a maximum of three factors to group the counts

How would you like to filter the data?

Item to filter on Vaccine group

Comparison EQUALS

Value to compare to COVID-19

and

Add/Save Edit

Selected Filters

Vaccination date BETWEEN 08/01/2022 AND 06/30/2023  
 AND  
 Vaccine group EQUALS Influenza  
 AND  
 Vaccine group EQUALS COVID-19

Edit  
 Remove  
 And/Or  
 Group  
 UnGroup

Generate
Cancel



- These filters may look like they are focusing on the correct client population, but they are not.
  - Right now, the "OR" statement is separating the filters in the red and blue boxes.
  - What WIR will return in this report is any influenza immunizations administered between 8/1/22 – 6/30/23 (red box), and then it will ALSO return any COVID-19 immunizations that are associated to this organization (blue box), regardless of the timeframe, which is not the desired outcome of this report.
    - Having an "OR" statement without grouping the filters properly will cause WIR to treat this as two separate sets of filters, and users will **not** get the results they are looking for.

How would you like to filter the data?

Item to filter on

Comparison

Value to compare to

and

Selected Filters

Vaccination date BETWEEN 08/01/2022 AND 06/30/2023  
AND  
Vaccine group EQUALS Influenza

OR

Vaccine group EQUALS COVID-19

- To correctly focus the report on the vaccines of interest, you need to group the two vaccine groups together.
  - Highlight the filter items that should be grouped together.
  - Select the **Group** button to update the "Selected Filters" box.
  - Notice both Vaccine Group lines now have parentheses around them, showing that this part of the selected filters needs to be processed first, and the result of the filter criteria should be applied to all results.
  - Select Generate to run the report.

How would you like to filter the data?

Item to filter on: Vaccine group

Comparison: EQUALS

Value to compare to: COVID-19

and

Add/Save Edit

Selected Filters

Vaccination date BETWEEN 08/01/2022 AND 06/30/2023  
AND  
(Vaccine group EQUALS Influenza  
OR  
Vaccine group EQUALS COVID-19)

Edit  
Remove  
And/Or  
**Group**  
UnGroup

**Generate** Cancel

- The report can be Exported as Text, Exported as a Spreadsheet, or Displayed as a PDF. Since the display count was by Trade Name, each trade name from the filtered vaccine groups that had an administered vaccine during the timeframe assessed is displayed. Each vaccine administered is counted.
- There are times an ad hoc count report will be a small grid with just one total number as demonstrated in the previous example on page 19. Other reports, such as this one may display several individual counts by a factor such as trade name.

### Ad Hoc Report Results

What would you like to do with this report?

[Export as Text](#)
[Export as a Spreadsheet](#)
[Display as a PDF](#)

Report 136297

Wisconsin Immunization Registry  
Report generated on 01/10/2024  
Report generated by [REDACTED]  
KCW TEST

Filter conditions used for this report:

Clients Associated with KCW TEST

Vaccination date BETWEEN 08/01/2022 AND 06/30/2023

AND

(Vaccine group EQUALS Influenza

OR

Vaccine group EQUALS COVID-19)

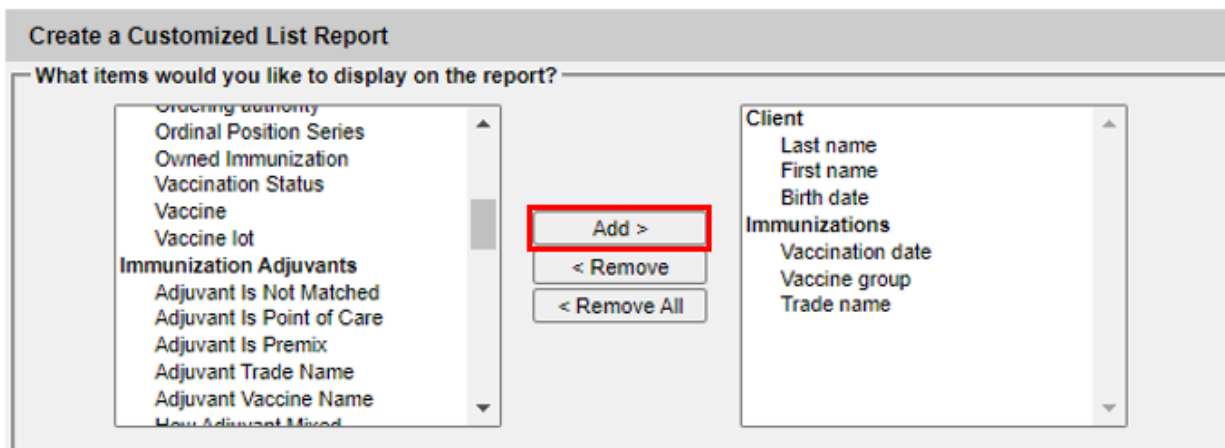
	COUNT
AFLURIA Quad, P-Free	1
Comirnaty	1
Flucelvax Quadrivalent, P-Free	3
Janssen COVID-19 Vaccine	1
Moderna (2023-24) 6M-11Y	1
Moderna BvIntBstr	16
Moderna BvIntBstr 6M-5Y	1
Moderna COVID-19 (6M-5Y)	4
Moderna COVID-19 Vaccine	5
Moderna6-11Y/ 18+BOOSTER	1
Novavax (2023-24) 12+	1
Novavax COVID-19 Vaccine	1
Pfizer BvIntBstr 12+	2
Pfizer BvIntBstr 5-11	7
Pfizer BvIntBstr 6M-4Y	14
Pfizer COVID-19 (5-11Y)	7
Pfizer COVID-19 (6M-4Y)	9
Pfizer COVID-19 Vaccine	2
Pfizer COVID-19 tris 12+	2
Total	79

**Scenario 2:** A provider wants to look for doses that show as NOT VALID in WIR. If a dose is Not Valid in WIR, it means that it does not comply with ACIP recommendations. It does not necessarily mean that it is an invalid dose as there may have been a valid reason outside of ACIP recommendations that a provider chose to administer the dose. A common example is that a child is immunocompromised and following a special schedule.

**Report Output:** Run an ad hoc list report showing the clients, specific vaccines, and vaccination dates of Not Valid doses.

To start, decide what items should be displayed on the report. In other words, what should the column headings be? In this instance, client name and vaccination information will be important to display.

- Select “ad hoc list report” from the blue menu bar on the left side of the screen.
- Highlight the item to be displayed on the report in the box on the left box at the top of the screen and select Add to move it to the box on the right.



- Once the items to be displayed have been selected, move to the bottom of the screen to choose the filters.
- First, the item to filter on is: Valid immunization.
- Next, the comparison should be: EQUALS.
- Finally, the value to compare to is: No.
- This report only uses one filter to get the required information.

How would you like to filter the data?

Item to filter on: Valid immunization

Comparison: EQUALS

Value to compare to: No

and

Add/Save Edit

Selected Filters

Valid immunization EQUALS No

Edit

Remove

And/Or

Group

UnGroup

Generate Cancel

- The report can be Exported as Text, Exported as a Spreadsheet, or Displayed as a PDF. The filters used are always listed on the results screen.
- Note that the display factors chosen are listed as the column headings.

### Ad Hoc Report Results

What would you like to do with this report?

[Export as Text](#)
[Export as a Spreadsheet](#)
[Display as a PDF](#)

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Report 136323

Wisconsin Immunization Registry  
Report generated on 01/11/2024  
Report generated by [REDACTED]  
KCW TEST

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Filter conditions used for this report:

Clients Associated with KCW TEST  
Valid immunization EQUALS No

---

Report 136323; Results 1 - 151 of 151

No	Last name	First name	Birth date	Vaccination date	Vaccine group	Trade name
1	HEPA	TESTD	04/08/2022	04/03/2023	HepA	
2	HEPA	TESTG	10/08/2021	04/03/2023	HepA	
3	HEPB	TESTO	03/16/2009	12/06/2022	HepB	Recombivax Peds
4	HEPB	TESTJJJ	10/21/2004	10/21/2022	HepB	Prehevbrio Hep B Adult
5	MMRTEST	CLIENT J	08/25/2021	10/20/2022	Varicella	Proquad
6	HPV	TESTO	06/01/2014	06/29/2023	HPV	Gardasil 9
7	HPV	TESTU	10/19/2012	11/16/2023	HPV	Gardasil 9
8	HPV	TESTZ	05/01/2000	11/01/2011	HPV	Gardasil 9
9	HPV	TESTEE	11/21/2014	11/16/2023	HPV	Gardasil 9
10	HPV	TESTGG	11/02/2014	11/16/2023	HPV	Gardasil 9
11	HPV	TESTKK	11/16/2014	11/10/2023	HPV	Gardasil 9
12	HPV	TESTXX	09/16/2000	11/20/2010	HPV	Gardasil 9
13	HPV	TESTVVV	03/16/2014	08/15/2023	HPV	Gardasil 9
14	ZOSTER	TESTG	11/18/1972	12/11/2022	Zoster	Shingrix
15	INFBVLNT	CLIENT T	12/16/2017	03/03/2023	COVID-19	Pfizer BvIntBstr 6M-4Y
16	RSVPREG	TESTB	01/01/2003	09/15/2023	RSV	Arexvy
17	HEPB	TESTUU	08/16/2022	11/04/2022	HepB	Pediarix
18	MMRTEST	CLIENTA	10/24/2021	10/19/2022	MMR	Priorix
19	MMRTEST	CLIENT H	08/25/2021	10/19/2022	MMR	Priorix
20	MMRTEST	CLIENT K	10/01/2021	10/19/2022	MMR	Proquad
21	HEPB	TESTZZ	10/11/2022	11/11/2022	Polio	Pediarix

- When exported as a spreadsheet, it is helpful to manipulate and sort the data to make it easier to understand.
- Below the data is sorted by DOB (oldest to newest).
  - Sorting by DOB allows the user to find any repeating birthdates.
  - This may indicate a person has more than one trade name that is not valid.
  - In the red box below, the test client with birthdate 8/3/89 shows two doses that are Not Valid. The first was a Moderna Bivalent booster on 2/1/23, and the second was Comirnaty (2023-2024) 12+ on 9/21/23.

# Wisconsin Immunization Registry



WISCONSIN DEPARTMENT  
of HEALTH SERVICES

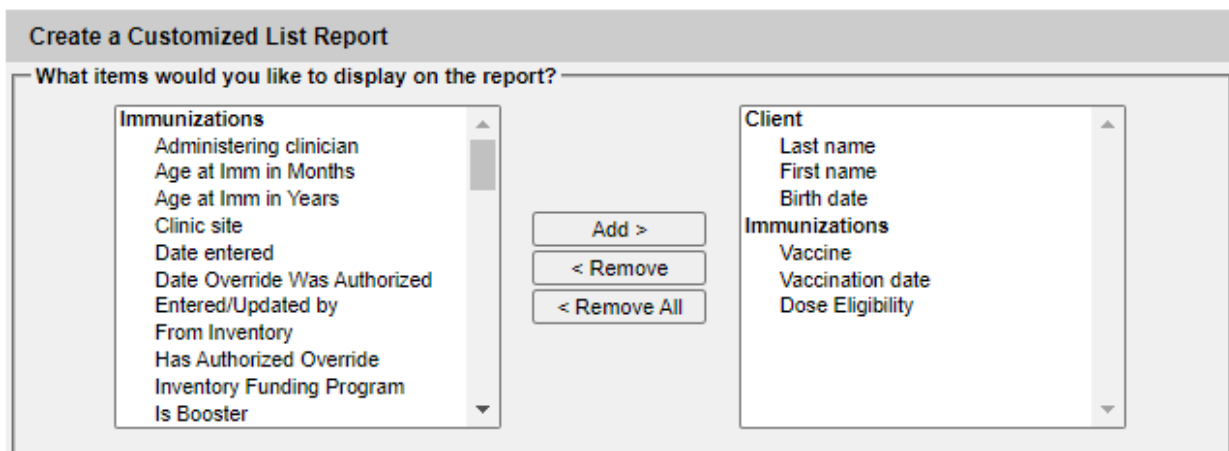
Filter: Valid Immunization = NO

Last name	First name	Birth date	Vaccination date	Vaccine group	Trade name
RSVADULT	TESTE	9/2/1963	8/28/2023	RSV	<u>Arexvy</u>
RSVPREG	TESTD	1/1/1966	9/15/2023	RSV	<u>Abrysvo</u>
ZOSTER	TESTN	11/19/1971	12/16/2022	Zoster	Zostavax
ZOSTER	TESTG	11/18/1972	12/11/2022	Zoster	Shingrix
NEWFORMULA	TESTJJ	2/20/1977	10/4/2023	COVID-19	Novavax (2023-24) 12+
RSVADULT	TESTD	1/12/1987	7/1/2023	RSV	<u>Arexvy</u>
NEWFORMULA	TESTII	8/3/1989	2/1/2023	COVID-19	Moderna <u>BvIntBstr</u>
NEWFORMULA	TESTII	8/3/1989	9/15/2023	COVID-19	Novavax (2023-24) 12+
NEWFORMULA	TESTBB	3/8/1995	9/21/2023	COVID-19	Comirnaty (2023-24) 12+

**Scenario 3:** A VFC clinic manager wants to make sure her staff are documenting dose level eligibility correctly as it is a requirement of the VFC program. VFC clients must be under the age of 19, and the clinic does not document dose level eligibility for adults. The clinic changed their workflow in June 2023, and the clinic manager is hoping it is being consistently documented now.

**Report Output:** Run an ad hoc report for clients under the age of 19 with a vaccination date between 6/1/2023 through 12/31/2023.

The display items for this report would be client information, vaccine name/date, and dose eligibility.



- Once the display items have been selected, move down to the filters.
- To filter for clients under the age of 19 (VFC eligible clients):
  - Item to filter on: Age at Imm in Years
  - Comparison: BEFORE
  - Value to compare to: 19
- Next, the provider needs to make sure that the doses appearing on the report are doses actually administered at the clinic. Historical doses would not be relevant as they would not qualify as VFC doses, nor would they need the doses eligibility documented. When an immunization is given from a clinic's own stock of vaccine, it is called an "owned immunization" in WIR.
  - Therefore, the Item to filter on: Owned Immunization
  - Comparison: EQUALS
  - Value to compare on: Yes.
- The final filter is the timeframe.
  - Item to filter on: Vaccination Date
  - Comparison: Between
  - Value to compare on: date range (6/1/23 – 12/31/23)
- Select generate to run the report.



How would you like to filter the data?

Item to filter on: Vaccination date ▼

Comparison: BETWEEN ▼

Value to compare to: 06/31/2023 [calendar icon]

and: 12/31/2023 [calendar icon]

Add/Save Edit

Selected Filters

Age at Imm in Years BEFORE 19  
AND  
Owned Immunization EQUALS Yes  
AND  
Vaccination date BETWEEN 06/31/2023 AND 12/31/2023

Edit  
Remove  
And/Or  
Group  
UnGroup

Generate Cancel

Once the report is complete, it can be exported to text, spreadsheet, or displayed as a pdf. Exporting as a spreadsheet is helpful when the data needs to be sorted in any way.

- Looking at the results, nine test clients were returned on this ad hoc list report.
- The column on the far-right side shows the dose eligibility for each client.
  - Based on the report, all the vaccinations administered had dose eligibility documented as well, which is what the clinic manager was looking for.
  - If dose eligibility was not documented in the client record in WIR, the field would be blank.



## Ad Hoc Report Results

What would you like to do with this report?

[Export as Text](#)

[Export as a Spreadsheet](#)

[Display as a PDF](#)

Report 136325

Wisconsin Immunization Registry  
Report generated on 01/11/2024  
Report generated by [REDACTED]  
WIR Physicians

Filter conditions used for this report:

Clients Associated with WIR Physicians

Age at Imm in Years BEFORE 19

AND

Owned Immunization EQUALS Yes

AND

Vaccination date BETWEEN 09/01/2023 AND 12/31/2023

Report 136325; Results 1 - 9 of 9

No	Last name	First name	Birth date	Vaccine	Vaccination date	Dose Eligibility
1	[REDACTED]	[REDACTED]	10/09/2012	RSV, mAb, nirsevimab, 50 mg/0.5mL	09/29/2023	Medicaid
2	[REDACTED]	[REDACTED]	10/09/2012	RSV, mAb, nirsevimab, 100 mg/1mL	09/29/2023	Medicaid
3	[REDACTED]	[REDACTED]	02/05/2021	Moderna COVID-19 (6M-5Y)	12/07/2023	Insured
4	[REDACTED]	[REDACTED]	01/01/2012	Influenza MDCK Quadrivalent P-Free	11/07/2023	AI/AN
5	[REDACTED]	[REDACTED]	01/01/2012	Tdap	11/07/2023	AI/AN
6	[REDACTED]	[REDACTED]	01/01/2012	Squalene Adjuvant	11/07/2023	AI/AN
7	[REDACTED]	[REDACTED]	01/01/2012	Moderna (2023-2024 Formula) 6M-11Y	11/14/2023	AI/AN
8	[REDACTED]	[REDACTED]	10/09/2012	RSV, mAb, nirsevimab, 100 mg/1mL	09/29/2023	Medicaid
9	[REDACTED]	[REDACTED]	10/09/2012	RSV, mAb, nirsevimab, 50 mg/0.5mL	09/29/2023	Medicaid