Manage Population Quick Reference Guide

Note: users can access a quick view of the patients their clinic currently owns (by ownership) or patients their clinic owned previously but may not be the current owner (by service).

Questions about patient ownership? Refer to the Facility Ownership and Patient Status resource located HERE.

Steps to Follow:

1. Login to imMTrax.
2. Select Manage Population located under the Patient panel.
3. Limit report by:
   a. Ownership = Search for patients currently owned by my Organization/Facility.
   b. Service = Search for all patients that I have vaccinated.
4. Option to limit by:
   a. Organizational Status (Active or Inactive)
      a. The Montana Immunization Program recommends limiting Patient Status to Active.
   b. Patient Birth Date Range
   c. Vaccination Date Range
5. Select Search
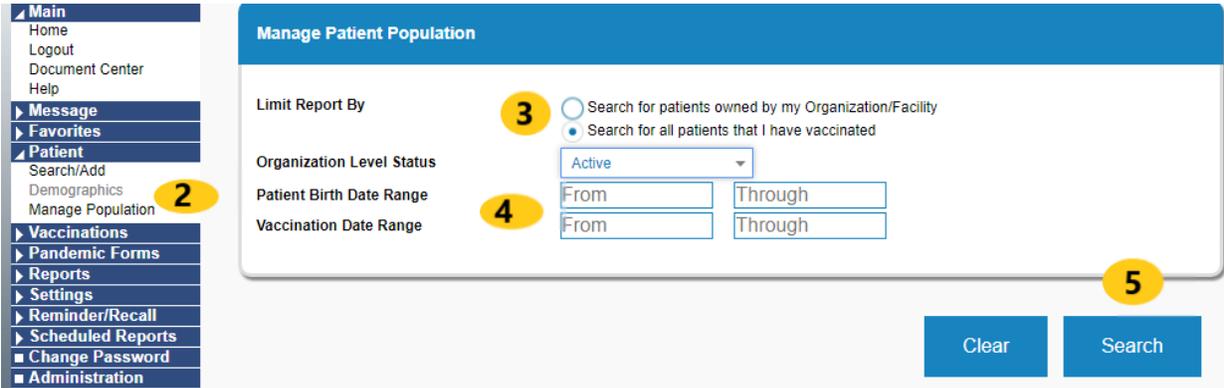
6. Patient Population Results display.

Please note that users have the ability to alter the **Organizational Level Status** field. See next page for best practices to edit this field.

Status field: The Organizational Level status field has two primary purposes:

1. Updates and displays the relationship between the facility the user is logged in under:

    a. Active (current facility owner and active patient in facility's population)

    b. Inactive (not the current facility owner or this patient is inactive in the facility's population)

<div align="center">

-OR-

</div>

2. Displays the patient's vital status as DECEASED.

- **<u>Best practice if changing the drop-down value:</u>**

  o The status field should only be changed from Active to Inactive if you are certain this patient is no longer seeking immunization care from your clinic. This action is the most similar to MOGED (moved or gone elsewhere) in the old imMTrax.

  o The status field should be changed from Inactive to Active if your clinic is beginning or already starting to see this patient, and you will be providing immunization services to this patient.

Patient Population Results

Show 100 ▼ entries   Search: [_____]

Patient ID	Patient Name	Patient DOB	Last Vaccination Date	Owning Organization	Owning Facility	Organization Level Status
1310545	ARTHUR WEASLEY	05/30/1972		ABCD	TRAINING CLINIC ▼	Active ▼
1310542	FRED WEASLEY	04/01/2001		ABCD	TRAINING CLINIC ▼	Active ▼
1310543	GEORGE WEASLEY	04/01/2001		ABCD	TRAINING CLINIC ▼	Active ▼
1306221	GINNY WEASLEY	08/11/2010		ABCD	TRAINING CLINIC ▼	Active ▼
1310541	LUCIUS MALFOY	10/10/1980		ABCD	TRAINING CLINIC ▼	Inactive ▼
						Active
1310544	MOLLY WEASLEY	03/13/1973		ABCD	TRAINING CLINIC ▼	Inactive
						Deceased
1306204	RONALD WEASLEY	03/01/2009		ABCD	TRAINING CLINIC ▼	Active ▼

Showing 1 to 7 of 7 entries   ◄ ►

[Reset]   [Save]