

Manage Population Quick Reference Guide



Note: users can access a quick view on the patients their clinic currently own (by ownership) or patients that their clinic owned at some point, 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. Patient 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, users have the ability to alter the **Status** field. See next page for best practices to edit this field.

Status field: The patient status field has two major 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 facility's population)

-OR-

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

• **Best practice if changing the drop-down value:**

- 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 most similar to MOGED (moved or gone elsewhere) in the old imMTrax.
- The status field should be changed from Inactive to Active if your clinic is beginning or already starting see this patient and will be providing some or all immunization services to this patient.

Patient Population Results

Show entries

Search:

Patient ID	Patient Name	Patient DOB	Last Vaccination Date	Owning Organization	Owning Facility	Status
161449	CHE RIV	01/01/2002	01/11/2019	ABCD	TRAINING CLINIC	Active
414278	CREAM ICE	10/02/2015	02/02/2019	ABCD	TRAINING CLINIC	Inactive Deceased
15351	DUCK DONALD	01/01/2001		ABCD	TRAINING CLINIC	Active
286458	FREDDY PRINCESS	04/04/2004		ABCD	TRAINING CLINIC	Active
414288	GRACE SALLY	02/03/2002		ABCD	TRAINING CLINIC	Active