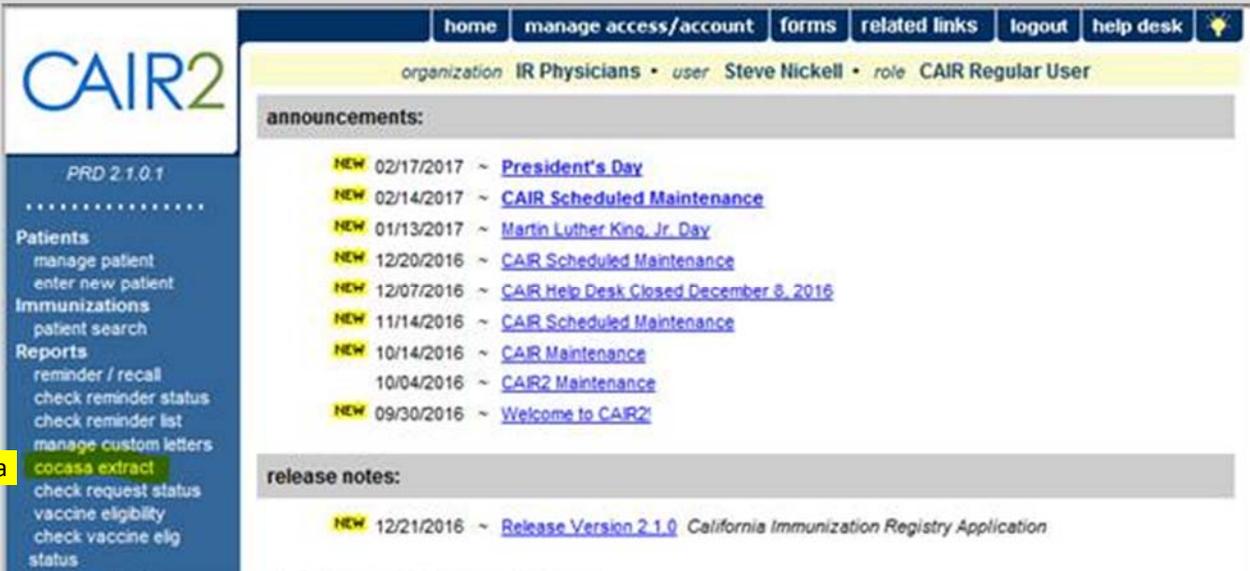


The Comprehensive Clinic Assessment Software Application (CoCASA) is a tool for assessing immunization practices within a clinic, private practice, or any other environment where immunizations are provided. CoCASA has data entry and import capabilities. After immunization data have been entered (or uploaded) into CoCASA, data analysis capabilities can be utilized to pinpoint strengths and areas of improvement for an individual immunization provider/clinic. The instructions below will walk you through the process of obtaining the data needed for the CQNIZ project.

STEP 1: Navigate to the CAIR2 CoCASA extract page.

- a) Once logged in to CAIR2, go to left navigation panel – choose “cocasa extract.”



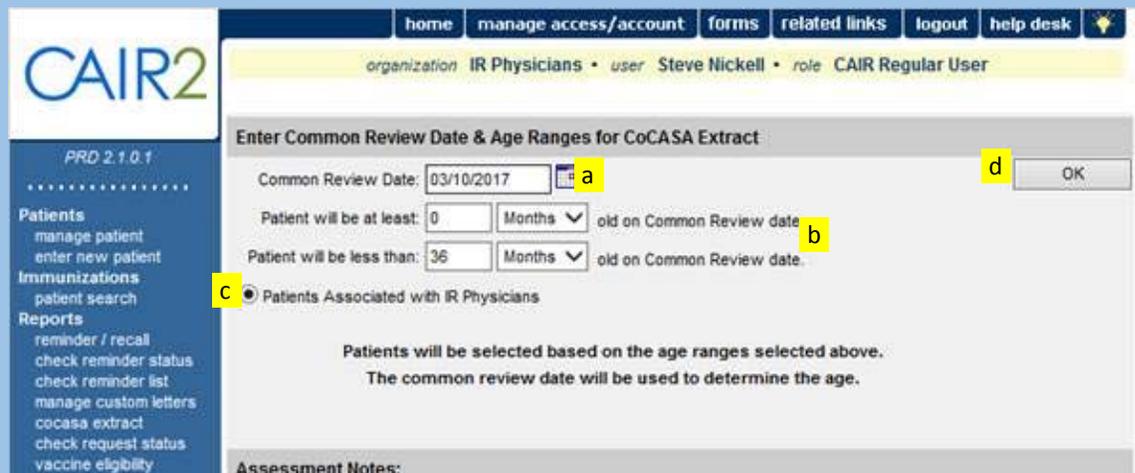
The screenshot shows the CAIR2 CoCASA interface. The left navigation panel is visible, with 'cocasa extract' highlighted in yellow and labeled 'a'. The main content area shows a navigation bar with 'home', 'manage access/account', 'forms', 'related links', 'logout', and 'help desk'. Below the navigation bar, the user information is displayed: 'organization IR Physicians • user Steve Nickell • role CAIR Regular User'. The 'announcements' section lists several dates and events, such as 'President's Day' and 'CAIR Scheduled Maintenance'. The 'release notes' section shows a note for 'Release Version 2.1.0 California Immunization Registry Application'.

STEP 2: Create a CAIR2 CoCASA extract file. (To be done each month)

- a) Once on the CAIR2 CoCASA extract page, select the last day of the previous month as the “Common Review Date.” For example, on 4/7/2017 you would enter “3/31/2017.”
- b) Enter the age range. For this project you will want the patient to be at least 19 months of age and less than 36 months of age.

- c) Click the radio button to ensure that you are only counting patients associated with your practice.

- d) Click “OK” and save the file once it downloads.



The screenshot shows the CAIR2 CoCASA interface with the 'Enter Common Review Date & Age Ranges for CoCASA Extract' form. The form has the following fields: 'Common Review Date' (03/10/2017) labeled 'a', 'Patient will be at least' (0) 'Months' labeled 'b', and 'Patient will be less than' (36) 'Months' labeled 'b'. There is a radio button labeled 'c' for 'Patients Associated with IR Physicians'. An 'OK' button is labeled 'd'. Below the form, it states: 'Patients will be selected based on the age ranges selected above. The common review date will be used to determine the age.'

STEP 3: If you do not already have CoCASA, install CoCASA V11.0 (Needs to be done once)

- Use the link at <http://cairweb.org/download-cocasa/> or go to <https://www.cdc.gov/vaccines/programs/cocasa/installation.html> to download CoCASA.
- Install CoCASA [download, run & use wizard].
- After installation is complete- the CoCasa Icon will appear on your desktop.

CoCASA (Comprehensive Clinic Assessment Software Application)

Download CoCASA

These software tools help clinical practices to assess their immunization coverage levels. [Learn more about CoCASA](#) (Comprehensive Clinic Assessment Software Application).

If you participate in California's Vaccines For Children (VFC) program, you can contact the [VFC program office](#) or your [local VFC representative](#) for more information. Otherwise, please contact the [CAIR Help Desk](#).

Ready to install the software?

[Download CoCASA](#) (Installation File)

Install CoCASA

Get Email Updates

Download CoCASA

Version History

STEP 4: Create initial provider setup in Co-Casa (Needs to be done once for each user)

- Click the CoCASA icon on your home page.
- Go to the "Provider Setup" tab.
- Complete the form on the bottom half of the screen.
- Click the "Add" button on the top of the screen.

CoCASA 9.3.137 - Welcome Joann Jablonski

File Assessment Tools Library Utilities 2013 AFIX/Pre-2013 VFC-AFIX Evaluation Help

Provider Setup **b**

Choose a Provider:

Provider	VFCPIN	Add d	Notes
✓	↓	Delete	Search
✓	↓	Copy	
✗ Sample 8/7/14	123456	Cancel	

Provider site name: test provider uat 7-2015

Contact name first: li Last: mc **c**

Street address 1: 50 park place

Street address 2:

City: newark State: New Jersey

Zip: 07102 <- Required

Office phone: (###)###-#### County:

Fax: (###)###-#### Region:

VFC number: 12345 <- Required

E-mail address:

Provider type: Private practice, including solo, group, HMO <- Required

Specify:

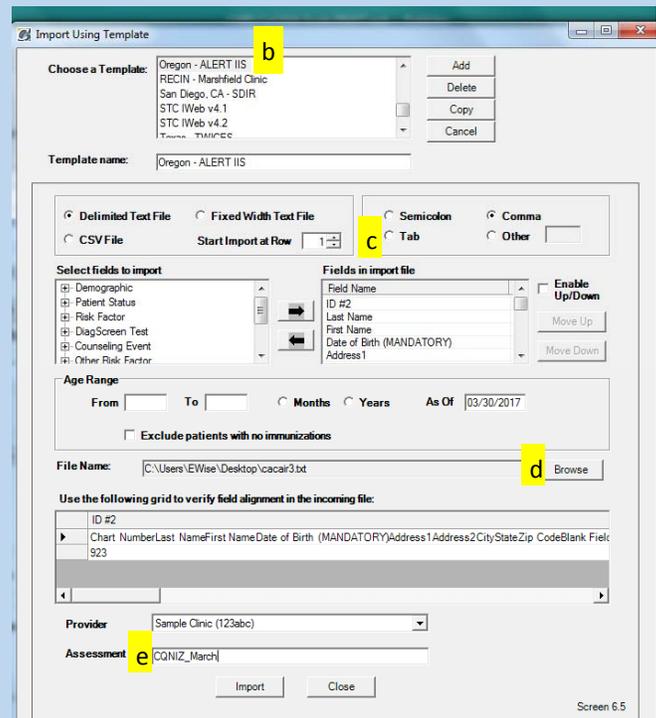
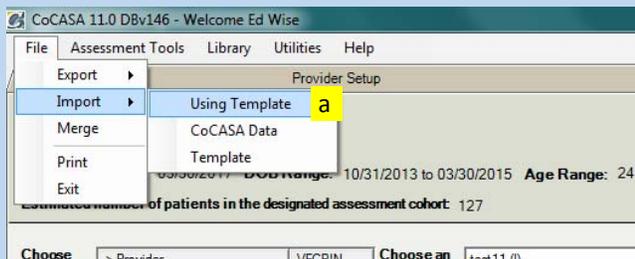
Provider does not supply all ACIP vaccines (pharmacy or specialty clinic)

How many providers are practicing at this site? 1

Is the provider enrolled in the VFC Program? Yes No

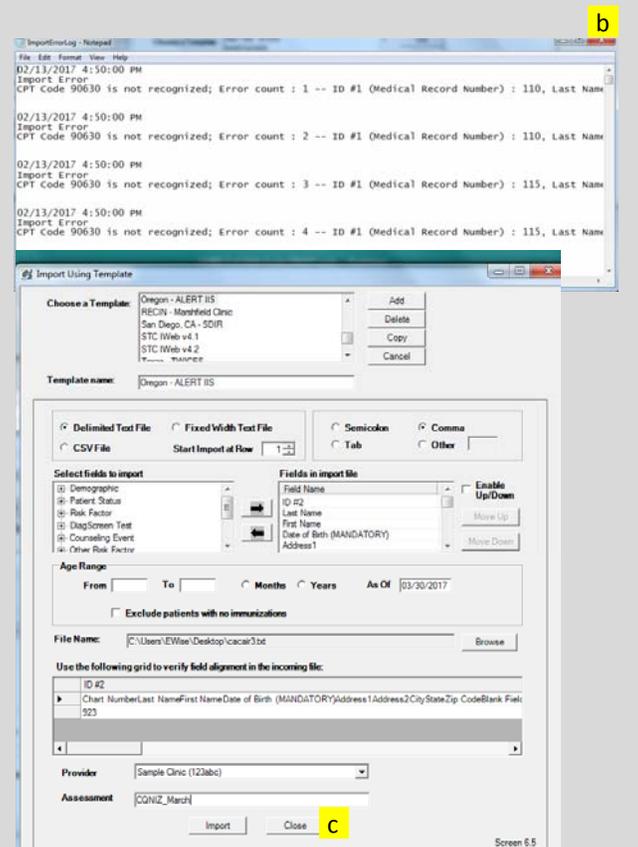
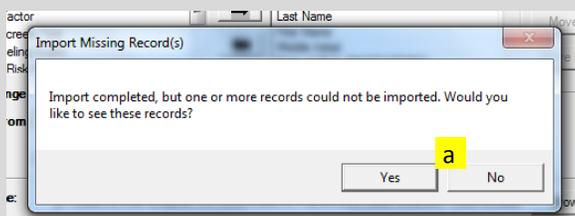
STEP 5: Begin CoCASA import (To be done each month)

- Click on File> Import > Using Template. This will bring up the import form.
- Select "Oregon - Alert IIS" from the "Choose a Template" menu.
- Click the "Tab" radio button.
- Click the "Browse" button and find the file you saved in step 2.
- Name the assessment and click import.



Step 6: Complete import of CAIR2 data file (To be done each month)

- Some imports will include errors. Click "Yes" to view errors, "No" to ignore. Clicking "Yes" will show you records that may not have been uploaded. For example, CPT codes not recognized by CoCASA will not be uploaded.
- Review the report as needed and close the error report.
- Click "Close" to close the import screen.



STEP 7: CHOOSE REPORTS TAB (To be done each month)

- Find the "Reports" tab at the top of the screen.
- Select the file uploaded in step 5 from the "Choose an Assessment" List.
- For CQNIZ, choose the "Diagnostic Report Childhood" report.
- Ensure age range is 19 to 35 months.
- Select the "4:3:1:3:3:1:4" series as shown below.
- Click the "Run Report" button.

File Assessment Tools Library Utilities Help

Provider Setup AFIX Evaluation Reports **a**

Provider: **Sample Clinic**
Assessment: CQN Dec-(I)
Assessment Date: 12/05/2016 DOB Range: 11/06/2013 to 05/05/2015 Age Range: 19 - 36 months as of 12/05/2016
Estimated number of patients in the designated assessment cohort: 165

CoCASA 11.0 DBv146 - Welcome Ed Wise

File Assessment Tools Library Utilities Help

Provider Setup AFIX Eval

Provider: **Sample Clinic**
Assessment: CQN Dec-(I)
Assessment Date: 12/05/2016 DOB Range: 11/06/2013 to 05/05/2015 Age Range: 19 - 36 months as of 12/05/2016
Estimated number of patients in the designated assessment cohort: 165

Choose a Provider: > Provider VFCPIN
Sample Clinic 123abc

Choose an Assessment: CQN Dec-(I) **b**
CQNIZ_March-(I)
Feb19-25-(I)
Feb2-(I)
Name-(I)
Name3-(I)

Run Report **f**
Export to Excel

AFIX Reports VFC-AFIX Reports VFC Reports My Saved Reports

Diagnostic Report Childhood **c**

Report Criteria

My Saved Criteria: Select one... Save Criteria Delete Criteria

Age Range: From 19 To 35 **d** Months Years As Of 12/05/2016

Antigens: Series Or Antigens
3:3:2:2
3:2:2:2
4:3:1
4:3:1:3
4:3:1:3:3
4:3:1:3:3:1
4:3:1:3:3:1:3
4:3:1:3:3:1:4 **e**

Compliance: By Age By Date 12/05/2016

Additional Criteria:
 Apply ACIP Recommendations Limit by a user-selected variable
 Apply 4 day grace period

Step 8: Save the Diagnostic Report and enter data into QIDA. (To be done each month)

- After completing step 6 your practice's childhood coverage rate report should appear as pictured below.
- The report can be saved as a PDF.
- Enter the coverage rate data from the report into the QIDA "IZ Coverage Rate Form."

a

CoCASA Report Title: **DIAGNOSTIC REPORT (CHILDHOOD)** Date Generated: 12/05/2016

REPORT CRITERIA Assessment date: 12/5/2016

Provider site name: Sample Clinic (123abc)

Age range: From 19 to 35 months as of 12/2/2016

Selected series/antigens: 4DTaP, 3HepB, 2HIB, 1MMR, 4PCV, 3Polio, 1Var

Compliance: By age 0 months By date 12/2/2016

Additional criteria: Apply AC/IP Recommendations (valid doses only) Apply four-day grace period

Missed opportunities are defined as: On LAST immunization visit

162 # of patient records selected
0 # of patients moved or gone elsewhere (MOGE)
162 Total # of Patient Records Assessed

SECTION I (based on user-selected criteria)

Vaccinations Coverage: Who is up-to-date?

Selected Series / Antigens	By: 12/02/2016	
	# of patients up-to-date	% of patients up-to-date
1 DTaP4 HepB3 Hib2 MMR1 PCV4 Polio3 Var1	69	43%
2 DTaP4	90	56%
3 HepB3	132	81%
4 Hib2	150	93%
5 MMR1	127	78%
6 PCV4	106	65%
7 Polio3	136	84%
8 Var1	121	75%

Instructions

C This form will be used to track coverage rates for childhood immunizations throughout the CQN IZ Project. Only practices in New Jersey and the national team will need to use this form.

Hide

To begin, enter the number of Charts you will be entering data from: Charts

- Of the patients included in response to the leading question, how many are up-to-date on all of the immunizations listed below? (1st row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to the leading question, how many are up-to-date on HepB vaccine? (2nd row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on HepB vaccine? (3rd row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on Hib vaccine? (4th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on MMR vaccine? (5th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on PCV vaccine? (6th row of the "Who is up-to-date?" table in the CoCASA report?) Patients

Step 9: Entering coverage rate data into QIDA.

- Log in to QIDA.
- Go to "My Groups"
- Click the "Enter Data" link in the coverage rate section of your group table.
- Once the form opens, enter the data from the CoCASA report. The first field asks about the number of patients. This data is just under the blue box in the CoCASA report and is labeled "# of patient records assessed." The other data are in the rows of the table in section 1 and in the same order as the form.
- After completing the fields, click "Submit."
- Then "Close Data Cycle."

b

Project Home Workspace My Groups Switch Project Chapter

My Groups

Print

AAP Staff Group

Administrator(s): Kristen Minaglia

Email Group Enter Practice Data Download Chart Data Download Measurements

Run Chart Report

Member	Collection Tool	Cycle	Entries	Last Updated	Actions
Katie Milewski					
Lori Morawski					
Edward Wise					
Kristen Minaglia					
Suzanne Emmer					
Kristie Marcelle					
Eunice Hong					
Jennifer Powell					
Judith Dolins					
PRACTICE DATA					
CQN IZ Coverage Rate Form	In Progress	1	0	2/10/2017	Enter Data C
Missed Opportunities Data Collection Form	Closed	15	0	4/2/2017	Enter Data Analyze

CQN IZ Coverage Rate Form

Cycle Status
Charts Entered: 0

f Close Data Cycle

Chart # 1-1

d

Instructions

This form will be used to track coverage rates for childhood immunizations throughout the CQN IZ Project. Only practices in New Jersey and the national team will need to use this form.

Hide

How many patients 19-35-month old in the previous reporting month are associated with your practice? (This will be the "Total # of Patient Record Assessed" on your CoCASA report.) Charts

- Of the patients included in response to the leading question, how many are up-to-date on all of the immunizations listed below? (1st row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on HepB vaccine? (2nd row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on HepB vaccine? (3rd row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on Hib vaccine? (4th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on MMR vaccine? (5th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on PCV vaccine? (6th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on Chicken Pox (Var) vaccine? (7th row of the "Who is up-to-date?" table in the CoCASA report?) Patients
- Of the patients included in response to answer 1, how many are up-to-date on PCV vaccine? (8th row of the "Who is up-to-date?" table in the CoCASA report?) Patients

e Submit Reset Cancel

Other Reporting:

There are a number of other reports in CoCASA that may be useful to your practice. Please take some time to look at the reports listed on the report tabs. Of particular interest is the “Missing Immunizations” report. This report will provide a list of patients that are not up-to-date in a specified age range. To run the report for 19-35 month old patients see the steps below.

- Expand the lists menu on the reporting tab
- Click “Missing Immunizations”
- Select the most recent assessment
- Click the first radio button “Overdue”...
- Enter the age range of interest (19-35 months for CQN)
- Select the series (4:3:1:3:1:4 for CQN)
- Click “Run Report”
- The resulting report will look like the one shown to the right. (The real report will provide patient names, this is just a sample.)
- This is one of the three reports provided on the “Missing Immunizations” report. Read the descriptions on the report screen to decide how the other reports would be helpful.

Choose a Provider: Sample Clinic (123abc) VCFPIN: 123abc

Choose an Assessment: Test NJHS-0 (Test 12.4.16-0) Test 12.5.16-0 Test 2.22-0 Test 2.22-0

Run Report Export to Excel

AFIX Reports VFC-AFIX Reports VFC Reports My Saved Reports

Report Criteria

Select one: [Dropdown]

Make a selection:

"Overdue" includes any patient that is NOT Complete AND is Eligible (as of the assessment date).

"Coming due" includes any patient that is NOT Complete and NOT Eligible as of the assessment date, but will become Eligible within 30 days AFTER the assessment date based upon ACIP recommended intervals or ACIP minimum ages and intervals.

"Missing any doses" includes any patient that is Overdue (NOT Complete and Eligible based upon ACIP recommended ages and intervals) or Coming Due (NOT Complete and NOT Eligible as of the assessment date) at any point in the future.

Age Range: From 19 To 35 Months Years As Of 02/20/2017

Series 4:3:1:3:1:4 Antigens 4:3:1:3:1:4 (4DTaP, 3Polio, 1MMR, 3HB, 1Var, 4PCV)

REPORT CRITERIA

Provider site name: Sample Clinic (123abc) Assessment date: 2/20/2017

Age range: From 19 to 35 months as of 2/20/2017

Selected series program: 4:3:1:3:1:4 (4DTaP, 3Polio, 1MMR, 3HB, 1Var, 4PCV)

Additional criteria: Apply ACIP Recommendations (and doses only) Apply Florida grace period

Antigens: 4:3:1:3:1:4

IMMUNIZATION MISSED (based on user-defined criteria)

List of Patients Overdue Based on Recommended Age

Total # of Patient Records: 75

"Overdue" in this case includes any patient that is NOT Complete AND is Eligible (as of the assessment date) based upon ACIP RECOMMENDED ages and intervals.

Patient Name (Last, First MI)	Date of Birth	Missing Immunizations
...	09/25/2014	Polio 3, HB 2
...	01/31/2015	DTaP 4, MMR 1, Varicella 1, PCV 4
...	02/12/2015	HB 3, HepB 3, PCV 3
...	11/21/2014	DTaP 4, PCV 4
...	02/12/2015	PCV 2
...	05/23/2014	DTaP 3, HB 2, PCV 2
...	02/21/2015	MMR 1, HB 3, Varicella 1
...	03/07/2015	DTaP 4, MMR 1, HB 3, Varicella 1, PCV 3
...	09/23/2014	DTaP 4, Polio 3, MMR 1, Varicella 1