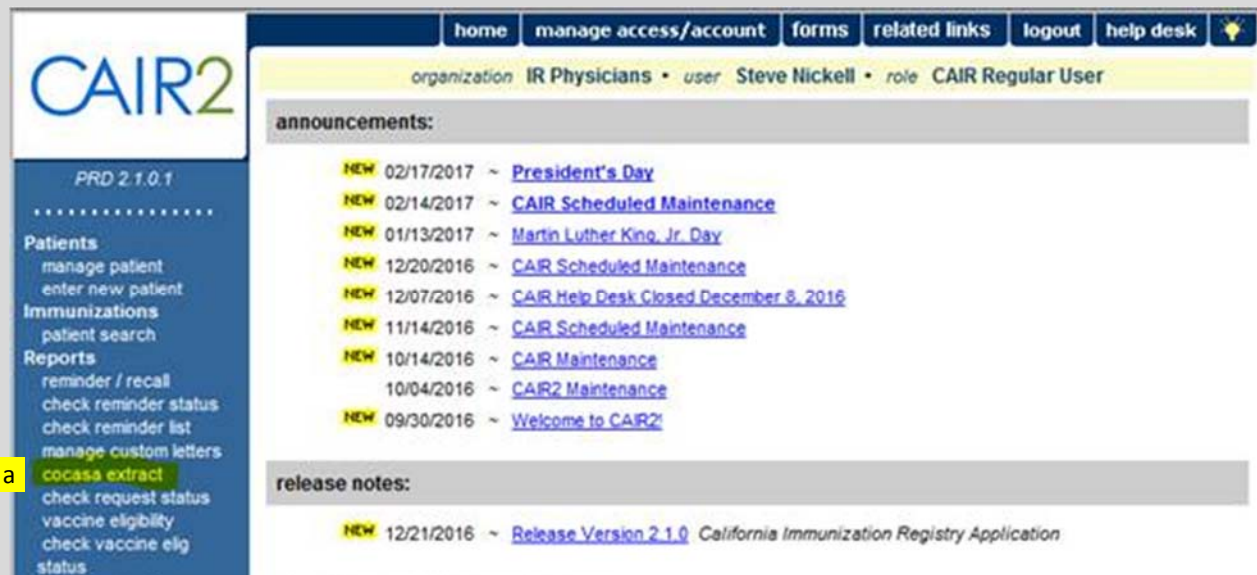


The Comprehensive Clinic Assessment Software Application (CoCASA) is a tool for assessing immunization practices within a clinic, private practice, or any other environment where immunizations are provided. CoCASA has data entry and import capabilities. After immunization data have been entered (or uploaded) 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.

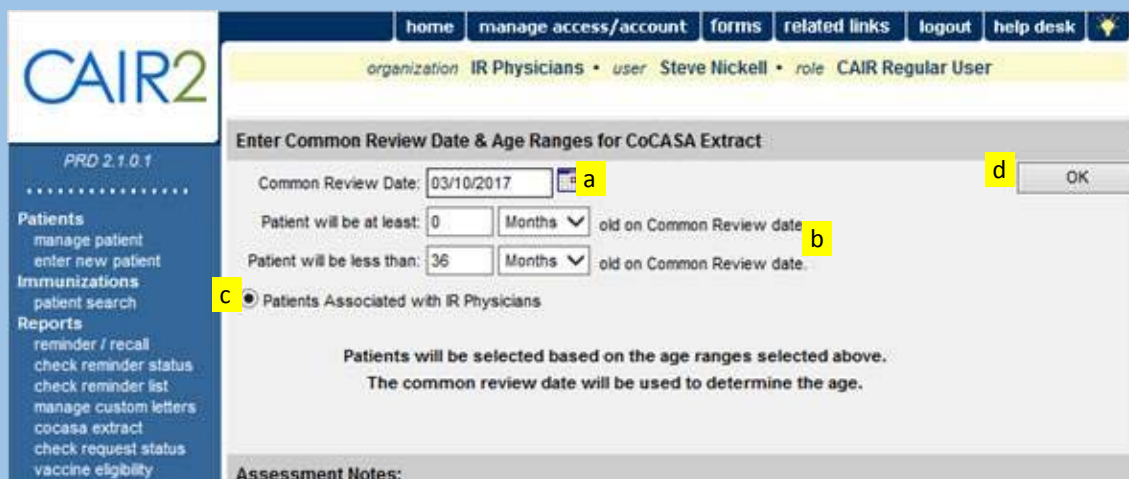
### STEP 1: Navigate to the CAIR2 CoCASA extract page.

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



### 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.



### 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.

The screenshot shows the CoCASA (Comprehensive Clinic Assessment Software Application) website. On the left, there's a CAIR logo and a section titled "Download CoCASA" with instructions and a "Download CoCASA (Installation File)" link. On the right, there's a sidebar with navigation links like "CoCASA Home", "Install CoCASA", "Questions & Answers", "Training Resources", and "Reports". The main content area on the right is titled "Install CoCASA" and includes social media links, a "Get Email Updates" form, and a "Download CoCASA" section with a link to "Install CoCASA Version 12.0 [97.7 MB] Updated MAR 2017". Below that is a "Version History" section listing updates from 2015 to 2017.

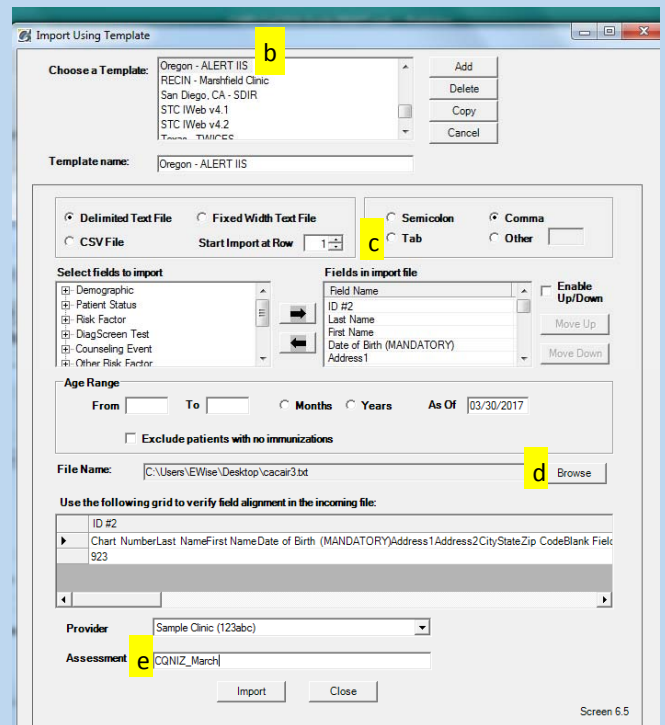
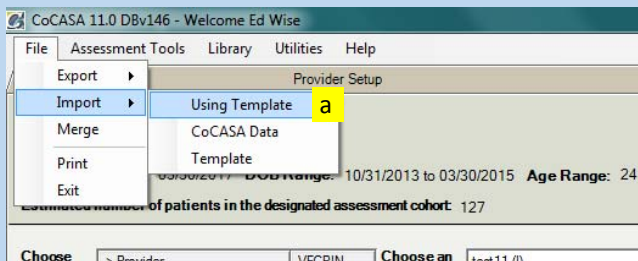
### STEP 4: Create initial provider setup in Co-Casa (Needs to be done once for each user)

- 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.

The screenshot shows the CoCASA 9.3.137 software interface. At the top, there's a menu bar with "File", "Assessment Tools", "Library", "Utilities", "2013 AFIX/Pre-2013 VFC-AFIX Evaluation", and "Help". Below the menu bar, there's a "Provider Setup" tab (labeled 'b') and a "VFC Evaluation" tab. The "Provider Setup" form is divided into two main sections. The top section, "Choose a Provider:", has a table with columns "Provider", "VFCPIN", and "Add" (labeled 'd'). The table lists "Sample 8/7/14" with VFCPIN "123456". The bottom section is a form for "Provider site name" and "Contact name first/last". It includes fields for "Street address 1", "Street address 2", "City", "State" (New Jersey), "Zip" (07102), "Office phone", "Fax", "VFC number" (12345), "E-Mail address", "Provider type" (Private practice, including solo, group, HMO), and "Specify". There are also checkboxes for "Provider does not supply all ACIP vaccines (pharmacy or specialty clinic)", "How many providers are practicing at this site?" (1), and "Is the provider enrolled in the VFC Program?" (Yes/No).

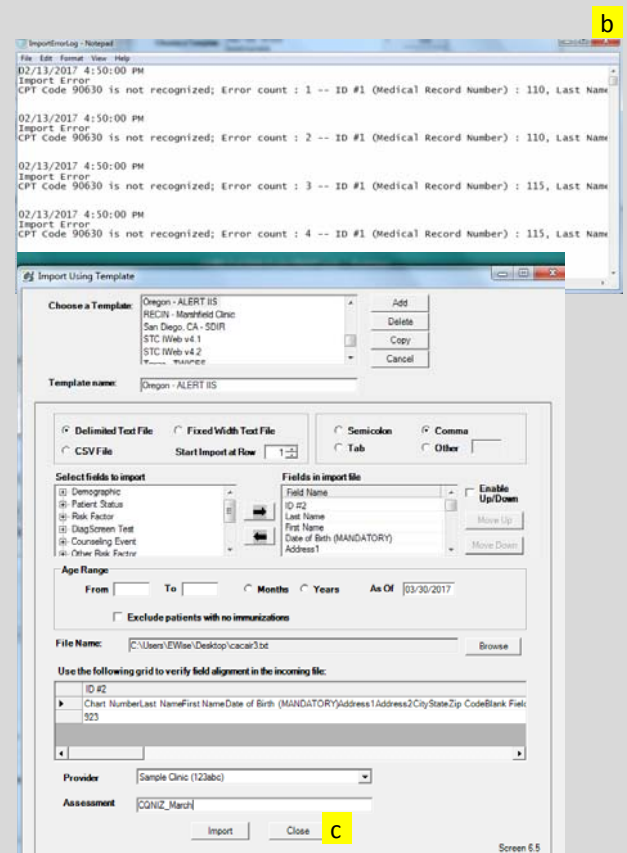
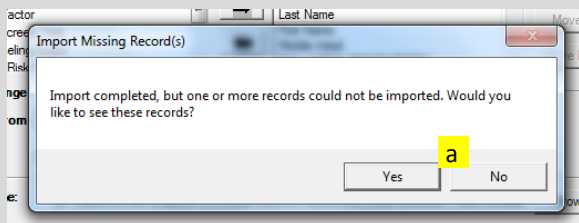
## STEP 5: Begin CoCASA import (To be done each month)

- 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 Evaluation

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)
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

Summary Report

- Diagnostic Reports
  - Adolescent Coverage
  - Custom Question Reports
  - Demographic Report
  - Diagnostic Report Childhood** **c**
  - HPV Report
  - Reasons Not Vaccinated
  - Single Antigen Report Childhood
- Lists
- Comparison Reports
- AFIX Evaluation Reports
- Other Standard Reports

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
<b>4:3:1:3:3:1:4</b> <b>e</b>

Compliance

By Age Months Years Or 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**

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: 1 Charts

- Of the patients included in response to the leading question, how many are up-to-date on all of the immunizations listed below? (1<sup>st</sup> 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 DTaP vaccine? (2<sup>nd</sup> 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? (3<sup>rd</sup> 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? (4<sup>th</sup> 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? (5<sup>th</sup> 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? (6<sup>th</sup> 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."

**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 Povell					
Judith Dolins					
<b>PRACTICE DATA</b>	CQN IZ Coverage Rate Form	1 In Progress	0	2/10/2017	<a href="#">Enter Data</a>
	Missed Opportunities Data Collection Form	15 Closed	0	4/2/2017	<a href="#">Enter Data</a> <a href="#">Analyze</a>

**b**

**CQN IZ Coverage Rate Form**

Cycle Status

Charts Entered: 0

Close Data Cycle **f**

Chart # 1-1

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.) **d** Charts

- Of the patients included in response to the leading question, how many are up-to-date on all of the immunizations listed below? (1<sup>st</sup> 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 DTaP vaccine? (2<sup>nd</sup> 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? (3<sup>rd</sup> 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? (4<sup>th</sup> 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? (5<sup>th</sup> 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? (6<sup>th</sup> 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 like the one showed 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.

**Report Criteria**

Choose a Provider: Sample Clinic  
Choose an Assessment: 123abc

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

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

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

**Missing Immunizations - Overdue** Date Generated: 02/20/2017

REPORT CRITERIA: Provider site name: Sample Clinic (123abc) Assessment date: 7/2/2017

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

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

Additional criteria: ☐ Auto ACIP Recommendations (and base only) ☒ Apply facility grace period ☐ Unlabeled by

**IMMUNIZATION MISSED** Based on recommended intervals

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, Hib 2
...	01/30/2015	DTaP 4, MMR 1, Varicella 1, PCV 4
...	02/10/2015	HB 3, HepB 3, PCV 3
...	11/21/2014	DTaP 4, PCV 4
...	02/10/2015	PCV 2
...	05/23/2014	DTaP 3, Hib 2, PCV 2
...	02/21/2015	MMR 1, Hib 3, Varicella 1
...	03/07/2015	DTaP 4, MMR 1, Hib 3, Varicella 1, PCV 3
...	09/23/2014	DTaP 4, Polio 3, MMR 1, Varicella 1