

# CoCASA Version 14.X

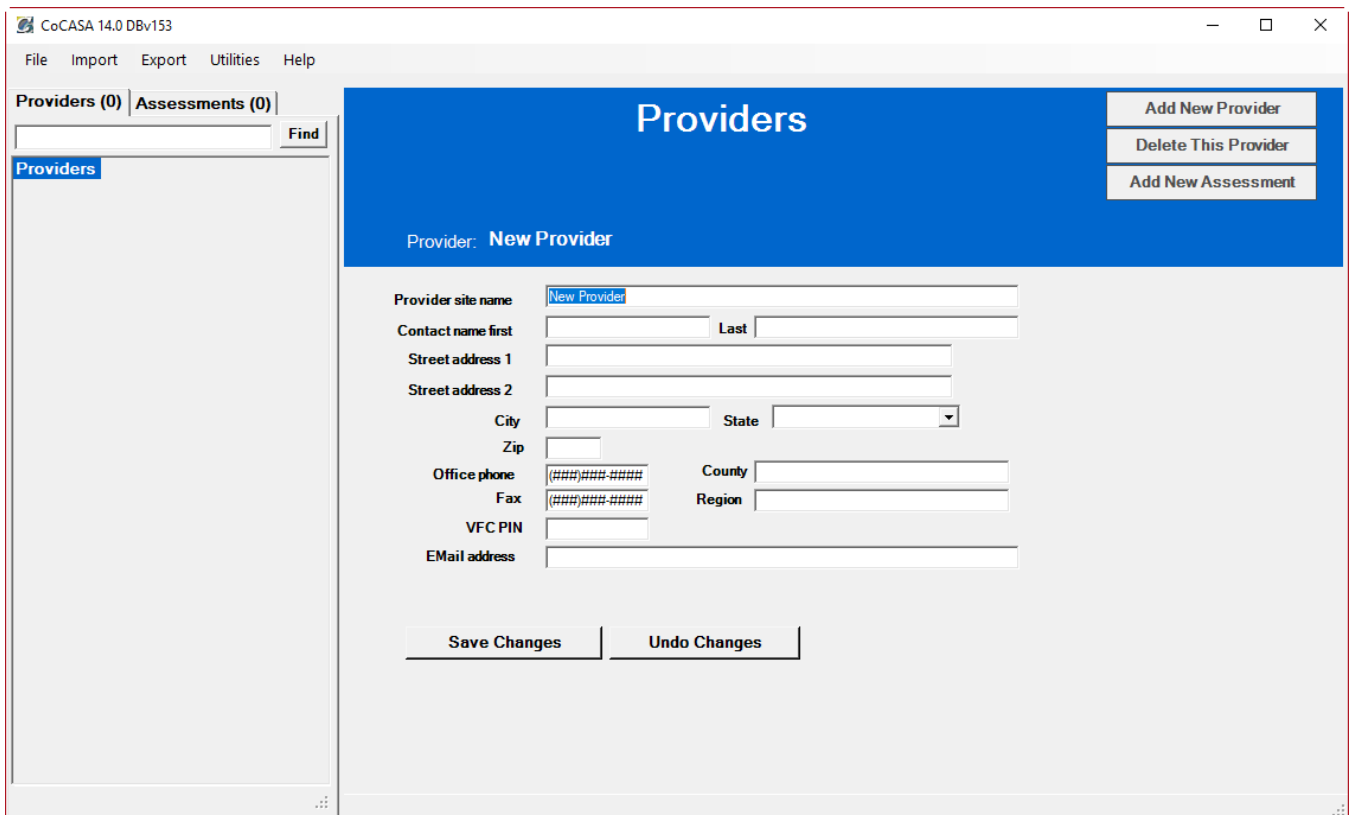
## Getting Started

CoCASA Version 14 introduces an entirely new look and feel, although most of the behind the scenes functions are still the same. If you are upgrading CoCASA from a previous release, before installing CoCASA 14.X we strongly suggest that you copy your existing database to a safe location in case you need to downgrade back to your previous version. Unless you have moved it, the database usually resides at C:\Users\Public\CDC\CoCASA\CoCASA.mdb.

To install CoCASA, download and run the program CoCASA\_Setup\_14\_X.exe as a system administrator and then follow the prompts. In some circumstances it may appear that the install program has frozen at one point, but it may just be displaying a dialog screen underneath the installation screen, waiting for your input. If this happens, just drag the installation screen to one side and respond to the dialog screen. At this point the install program will automatically upgrade your existing database.

After the installation, you should see the CoCASA shortcut on your Desktop. Run this program. If this is a new installation you should see a message stating that there is no database. If you want use a new blank database, click the Yes button. If you are upgrading CoCASA you shouldn't see this screen, as your previous database should have been upgraded during installation.

Next, you will be presented with the newly designed CoCASA screen:



The screenshot displays the CoCASA 14.0 DBv153 application window. The title bar reads "CoCASA 14.0 DBv153". The menu bar includes "File", "Import", "Export", "Utilities", and "Help". On the left, there are tabs for "Providers (0)" and "Assessments (0)". Below these is a search bar with a "Find" button. The main area is titled "Providers" and shows a form for adding a new provider. The form fields include: "Provider site name" (with a dropdown menu showing "New Provider"), "Contact name first" and "Last" (separate text boxes), "Street address 1" and "Street address 2" (separate text boxes), "City" and "State" (text box and dropdown menu), "Zip" (text box), "Office phone" and "County" (text boxes), "Fax" and "Region" (text boxes), "VFC PIN" (text box), and "Email address" (text box). At the bottom of the form are "Save Changes" and "Undo Changes" buttons. On the right side of the "Providers" header, there are three buttons: "Add New Provider", "Delete This Provider", and "Add New Assessment".

Just below the menus you will notice a tab for Providers and one for Assessments. On the Providers tab the tree displays each provider in alphabetical order, with that provider's associated assessments underneath in a sub-tree. On the Assessments tab the tree displays all of the assessments in assessment date order, regardless of the provider, with the latest assessment at the top. Click on a provider or assessment to view or edit the information for that provider or assessment on the right hand side of the screen.

To import data from your IIS, click the Import menu at the top of the screen. The Import process remains unchanged, so just follow the same procedures that you are used to using in the past.

Depending upon which tab you selected, on the left side of the screen will be an area that will contain a tree structure containing a list of Providers and/or Assessments. The right side of the screen will contain the data pertaining to whatever is selected in the tree. If you are using a brand new database, there will be no data, so you will first see the Add New Provider screen. Fill in the information on the right hand panel (Provider site name and VFC PIN are required) and then click the Save Changes button. The provider will be added to the tree on the left and a Record Saved message should appear.

CoCASA 14.0 DBv153

File Import Export Utilities Help

Providers (1) Assessments (0)

Find

Providers

Dr. Goodman (GA12345)

## Providers

Provider: Dr. Goodman (GA12345)

Provider site name: Dr. Goodman

Contact name first: Ima Last: Goodman

Street address 1: 123 Main Street

Street address 2:

City: Anytown State: Georgia

Zip: 30000

Office phone: (555)123-4567 County:

Fax: (555)765-4321 Region:

VFC PIN: GA12345

E-Mail address: drgoodman@anyemail.com

Save Changes Undo Changes

Record Saved

OK

Now that you have a provider, you can click the Add New Assessment button on the upper right of the provider panel. Then you will be presented with the Assessment panel where you can provide information regarding an assessment for the selected provider:

CoCASA 14.0 DBv153

File Import Export Utilities Help

Providers (1) Assessments (1) Find

Providers

- Dr. Goodman (GA12345)
  - First Assessment (01/07/2019)

## Assessments

Provider: Dr. Goodman (GA12345)  
Assessment: First Assessment (01/07/2019)

Add New Assessment  
Delete This Assessment

Assessment Date: 1/ 7/2019 Assessment Name: First Assessment

Age Range for this Assessment

From: 2 To: 35 ☒ Month(s) ☐ Year(s) As Of: 1/ 1/2019

Earliest Date of Birth: 1/ 2/2016 Latest Date of Birth: 11/ 1/2018

Antigens Assessed

- ☒ DTaP
- ☒ IPV
- ☒ MMR
- ☐ Hib
- ☒ HepB
- ☐ VAR
- ☐ PCV13
- ☐ IIV or LAIV
- ☐ HepA
- ☐ Tdap
- ☐ HPV
- ☐ MenACWY
- ☐ RV

Record Brand Names?

☒ Yes ☐ No

Save Changes Undo Changes

Record Saved  
OK

Fill in the information on this panel, and check off whichever Antigens you wish to assess. Click the Save Changes button to save this assessment.

At the top of the screen, click on the Patients tab. If there are no patients yet, you will see the Add New Patient screen:

The screenshot shows the CoCASA 14.0 DBv153 application window. The top menu bar includes File, Import, Export, Utilities, and Help. The sidebar on the left has tabs for Providers (1), Assessments (1), Assessment, Patients (0), and Reports. The main content area is titled 'Patients' and displays information for a selected patient: Provider: Dr. Goodman (GA12345), Assessment: First Assessment (01/07/2019), and Patient: New Patient. There are buttons for 'Add New Patient' and 'Delete This Patient'. Below this, the 'Demographic Information' section contains fields for Last Name (Smith), First Name (John), Middle Initial (J), Date of Birth (1/1/2002), Gender (Male), Ethnicity (Not Hispanic or La), Race (White), MOGE (Yes), and Identifier (6789). The 'Doses' section has a table for recording vaccine doses. The table has columns for Antigen, Dose 1, Dose 2, Dose 3, Dose 4, Dose 5, Dose 6, and Dose 7. The rows are for DTaP, IPV, MMR, and HepB. There are buttons for 'XA - Age Non-Compliant', 'XI - Interval Non-Compliant', 'Edit Doses', 'Save Changes', and 'Undo Changes'.

Antigen	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5	Dose 6	Dose 7
DTaP							
IPV							
MMR							
HepB							

Fill in any of the fields at the top (either the patient name or a patient identifier are required), then click the Edit Doses button. This will put the doses section into Edit mode to allow you to add or change the dose dates for this patient.

DTaP	<input checked="" type="checkbox"/> 1/ 2/2002	<input checked="" type="checkbox"/> 1/ 8/2018	+				
Brand	Adacel	Kinrix					
IPV	<input checked="" type="checkbox"/> 12/25/2005	+					
Brand	Hexavac						
MMR	+						
Brand							
HepB	+						
Brand							

<
>

Save Changes
Undo Changes

To add a dose date, click the plus sign (+) button next to the antigen name. A date box appears and you can either type in the date, or use the drop down button to choose a date from a calendar (it is probably quicker and easier to just type in the date). Click the plus sign again to add another date. To delete a date, uncheck the checkbox in the date field and the date will disappear. If you chose to use brand names when you added the assessment, you can select a corresponding brand name beneath each dose date. If you don't know the brand or if there is no brand, just leave this field blank. When you are finished editing the doses and the other patient information, click the Save Changes button at the bottom of the patient panel.

CoCASA 14.0 DBv153

File Import Export Utilities Help

Providers (1) | Assessments (1) | Patients (1) | Reports

Find Find

**Providers**

- Dr. Goodman (GA12345)
  - First Assessment (01/07/2019)

**Assessment Patients (1) Reports**

Smith, John J (01/01/2002)

**Patients**

Provider: Dr. Goodman (GA12345)  
 Assessment: First Assessment (01/07/2019)  
 Patient: Smith, John J (01/01/2002)

Add New Patient  
 Delete This Patient

**Demographic Information**

Last Name: Smith First Name: John Middle Initial: J  
 Date of Birth: 1/ 1/2002 Gender: Male  
 Ethnicity: Not-Hispanic or La Race: White  
 MOGE: Yes 8/14/2018 Identifier: 6789

Record Saved  
 OK

**Doses**

XA = Age Non-Compliant XI = Interval Non-Compliant Edit Doses

Antigen	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5	Dose 6	Dose 7
DTaP	01/02/2002 [XA]	01/08/2018					
Adacel		Kinrix					
IPV	12/25/2005						
Hexavac							
MMR							
HepB							

Save Changes Undo Changes

After you save the dose dates, you will see them listed at the bottom of the right hand panel. If CoCASA considers a particular dose to be invalid, it will display [XA] next to the date if the dose was given at a non-compliant age, or [XI] if there is a non-compliant interval, or both. This will provide you with a quick way to determine why a patient might be incomplete.

Since almost all of the reports are run against assessments, the Reports tab is located at the top of the Assessments section. Most of the reports have been carried over from the previous version of CoCASA, although they are now presented in a different order and organization. To run a report, click on the report in the tree on the left, fill out the criteria on the right, then click the Run Report button.

CoCASA 14.0 DBv153

File Import Export Utilities Help

Providers (1) Assessments (1) Assessment Patients (1) Reports

Find

Providers

- Dr. Goodman (GA12345)
  - First Assessment (01/07/2019)

## Reports

Provider: Dr. Goodman (GA12345)  
Assessment: First Assessment (01/07/2019)

Run Report  
Export

### Report List

- Provider Reports
  - Assessments for One Provider
  - List Of All Assessments
- Assessment Reports
  - Adolescent Coverage
  - Demographic Report
  - Diagnostic Report Childhood
  - Duplicate Patient Names
  - HPV Report
  - Immunization Histories List
  - Invalid Doses
  - Last Visit < 12 Months
  - Last Visit >= 12 Months
  - Late Up-To-Date
  - Mailing Addresses
  - Missed Opportunities
  - Missing Immunizations
  - Moved/Gone Elsewhere
  - Need One Dose
  - No Immunization History
  - Not Eligible For Vaccine
  - Not Up-To-Date
  - Patient Data Listing
  - Patient List
  - Provider Mailing Addresses
  - Quick Count Report
  - Reasons Not Vaccinated
  - Single Antigen Report Childhood
  - Summary Report
  - Up-To-Date
- Patient Reports
  - Individual Immunization History

### Report Criteria

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

Age Range:  
From 2 To 35 Months Years As Of 1/ 1/2019

Antigens:  
Series 4:3:1:3:3:1:4 Antigens  
4:3:1:3:3:1:4 (4DTaP, 3IPV, 1MMR, 3Hib, 3HepB, 1VAR, 4PCV13)

Compliance:  
By Age Months Years Or By 1/ 7/2019

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

Immunization Opportunity Missed  
On LAST immunization visit

CoCASA 14.0 DBv153

File Import Export Utilities Help

Providers (1) Assessments (1) Assessment Patients (1) Reports

First Find

Assessments

First Assessment (01/07/2019)

Assessments

Provider: Dr. Goodman (GA12345)  
Assessment: FirstAssessment (01/07/2019)

Add New Assessment  
Delete This Assessment

Assessment Date 1/ 7/2019 Assessment Name FirstAssessment

Age Range for this Assessment

From 2 To 35 ☒ Month(s) ☐ Year(s) As Of 1/ 1/2019

Earliest Date of Birth 1/ 2/2016 Latest Date of Birth 11/ 1/2018

Antigens Assessed

- ☒ DTaP
- ☒ IPV
- ☒ MMR
- ☐ Hib
- ☒ HepB
- ☐ VAR
- ☐ PCV13
- ☐ IIV or LAIV
- ☐ HepA
- ☐ Tdap
- ☐ HPV
- ☐ MenACWY
- ☐ RV

Record Brand Names?

☒ Yes  
☐ No

Save Changes Undo Changes

Reached Beginning

There is a search field at the top of the provider tree, the assessment tree, and the patient tree. To find an item, just type all or part of the name you are searching for in that tree and click the Find button. If there is a match, CoCASA will position the tree to that match. To keep searching, just click the Find button again. If it can't find a match, CoCASA will loop back to the top of the tree and stop at the point where it started and display a message at the bottom, "Reached Beginning".

We are hoping that you will find the new look and feel of CoCASA to be more streamlined and easier to use. If you have any comments or questions or if you encounter any bugs, please send an email to the CoCASA Help Desk at [nipcocasa.cdc.gov](mailto:nipcocasa.cdc.gov) or call (800) 803-5212.