



Assessment, Feedback, Incentives and Exchange (AFIX) Project for Ohio

Introduction

In 2001, the Centers for Disease Control and Prevention (CDC) reported that a majority of children in the United States received at least one childhood vaccination in a private healthcare setting. Initiatives such as the Vaccines for Children (VFC) program, the State Children's Health Insurance Program (SCHIP) and the growth of the managed care industry have led to the shift of immunization delivery from public clinics to private providers.

According to the CDC's National Immunization Survey data from 2011 the estimated vaccination coverage in Ohio among children 19-35 months of age is 76.4 percent with 4 DTaP, 3 Polio, 1 MMR, 3 Hib, 3 Hepatitis B and 1 Varicella and 4 Prevnar (4:3:1:3:3:1:4). Ohio's goal is to have 90 percent of all children appropriately immunized by age two.

AFIX as a quality improvement tool consists of **A**ssessment of immunization coverage levels; **F**eedback of information to physicians and staff; **I**ncentives to recognize and reward outstanding and improved performance; and **eX**change of best practices. This quality assurance strategy is a proven and reliable tool for improving vaccination coverage levels in provider offices. Routine assessment and feedback of vaccination rates for individual providers or provider sites is one of the most effective strategies for achieving high, sustainable vaccine coverage (MMWR, March 15, 1996 Vol.45, No. 10). Also, recently, the Task Force on Community Prevention Services backed the recommendation of assessment and feedback based on strong evidence of effectiveness found through a recent and comprehensive literature review on assessment and feedback (AFIX) for immunizations. (<http://www.thecommunityguide.org/vaccines/universally/RRproviderassessment.html>)

Recently, the CDC has developed 2 levels of AFIX standards to assist state health agencies to consistently and accurately implement written protocols and procedures. Level 1 standards focus primarily on the systematic protocols included in a successful AFIX program. Level 2 standards focus on achieving and maintaining program objectives and conducting evaluation activities to further improve the AFIX process. This manual is an outcome of these standards.

The Ohio Department of Health, Immunization Program developed this policy and procedure manual for those public health practitioners implementing AFIX in both the public and private sector. ODH continues to value the work and commitment to raising immunization levels among Ohio's children in order to prevent vaccine-preventable diseases.

The current manual is divided into six sections: Overview, Assessment, Feedback, Incentives, Exchange, Forms

Core Competencies

The Ohio Department of Health (ODH) Immunization Program has developed a list of Core Competencies for those conducting AFIX. These competencies are the minimum skills necessary for an individual to be successful at conducting AFIX. It is expected that those assigned to conduct AFIX have these skills.

Knowledge of computers including:

- Experience using desktop and laptop computers
- Experience using disks, CD, and/or flash drives to save and transfer data
- Experience using printers
- Experience using Word, email, and other basic applications
- Experience using the internet

Knowledge of the Immunization Schedule including:

- Current ACIP schedule
- Familiarity with concepts including minimum intervals, minimum ages, catch-up schedules, invalid doses, etc.

Knowledge of strategies for improving immunization rates including:

- Reminder systems
- Recall systems
- Simultaneous administration
- Impact SIIIS

Ability to speak in front of and with groups of people, including physicians, nurses and other office staff

Ability to travel to ODH AFIX trainings and to conduct AFIXs

Confidentiality

The AFIX Project for Ohio considers confidentiality an important part of the project. Following are measures implemented to address confidentiality.

- Be prepared to discuss concerns providers have with the issue of confidentiality.
- All AFIX assessors and other staff reviewing the data are required to complete a “Data Collection Confidentiality Agreement,” a copy of which needs to be on file with the Ohio Department of Health, Immunization Program before any assessments are conducted. Participating local health districts must submit a list of AFIX assessors and other staff who will be reviewing the data by January 31 of each year. In addition, copies of the “Data Collection Confidentiality Agreement” must be **signed and submitted annually to ODH in January of each calendar year**. New staff can be added to the list at any time during the year by completing the “Data Collection Confidentiality Agreement.” Participating local health districts must maintain a current list with ODH of all individuals with access to data including notification of any individuals who no longer have access. (See Forms section for a copy of the Data Collection Confidentiality Agreement)
- All participating local health districts AFIX programs must designate a local “project manager.” Only the “project manager” may authorize access to the data.
- Provide the practice with a copy of Ohio’s procedures for distribution, handling and disposal of confidential information - “Statement of Confidentiality” for the AFIX Project. (See Forms section for a copy of the Statement of Confidentiality)
- Practices may ask for a Business Associate Agreement before the first AFIX in that practice is conducted. The AFIX Agreement is the AFIX Project for Ohio’s Business Associate Agreement. This must be printed on letterhead of the local health district conducting the AFIX and signed by the practice and the designated “project manager.” This form is then kept on file at the appropriate local health district. For AFIXs conducted by ODH staff, the AFIX Coordinator or Immunization Program Manager is to sign the AFIX Agreement and a copy will be filled with the AFIX Coordinator. (See Forms section for a copy of the AFIX Agreement)
- Unless specifically requested by the practice, the only data to be collected from patient charts will be: **patient name, date of birth, immunization history and history of any vaccine-preventable diseases.**
- The patient-specific data collected during the assessment, which is entered into the Comprehensive Clinic Assessment Software Application (CoCASA) system must be destroyed by June 30 of the year following the year of the assessment.

Quality Assurance for Conducting AFIX

Quality assurance is an important part of Ohio's AFIX project. Implementing quality assurance measures assures that all ODH and local health district staff are using similar methods and following AFIX policies and procedures for AFIXs conducted throughout the state. Information gained from quality assurance efforts will also enable ODH to provide adequate ongoing training for AFIX staff throughout the state. Quality assurance efforts are outlined below.

Quality assurance for ODH AFIX staff:

- All ODH AFIX staff will be observed conducting an AFIX feedback by an ODH Immunization Program supervisor at least once per year. The AFIX feedback observed does not need to be in the same provider office as the AFIX assessment observed.

Quality assurance for local health district AFIX staff will occur annually:

- AFIX staff from each local health district will be observed conducting an AFIX feedback in a provider office by the ODH Immunization Consultant or AFIX Coordinator. The AFIX Coordinator will contact the LHD staff to coordinate the QA visit.
- ODH Immunization Consultants will review the AFIX Assessment Analysis and Feedback Reports from the local health district self-assessments, when they are submitted as part of the Immunization Action Plan (IAP) semi-annual progress reports. Immunization Consultants will follow up, as needed, via telephone or person visits.

An evaluation tool (check-list) will be utilized during the observations. The tool will be reviewed by the appropriate ODH Immunization Program supervisor and reviewed by the AFIX Coordinator to determine training needs. The tool will then be filed in the appropriate IAP or ODH file.

Due Dates and Reporting Information

The AFIX Project in Ohio is funded through a grant from the CDC to ODH. ODH then funds local health districts through Immunization Action Plan (IAP) subgrants to complete AFIX activities. In order to provide adequate and timely progress reports to the CDC on AFIX activities in Ohio, it is crucial for ODH to receive timely and complete information from all ODH and local health district AFIX staff.

What is due:

Email or fax the required AFIX Notification and Demographic form to the ODH AFIX Coordinator as soon as an AFIX is scheduled. (See Forms section for a copy of the AFIX Notification and Demographic form)

Within forty five (45) days of the completion of the AFIX feedback session the following forms must be turned in to the ODH AFIX Coordinator. If the AFIX Follow-up cannot be completed by December 31, then all the other reports and forms are to be turned into the ODH AFIX Coordinator by January 15 with a date as to when the AFIX Feedback Report will be completed with the follow-up information.

AFIX Packet contains:

1. AFIX Notification and Demographic Form (submitted again to help ODH identify forms)
2. AFIX Assessment Analysis
3. AFIX Feedback Report (with follow-up documentation)
4. Summary Report – 4:3:1:3:3:1 (page one)
5. Summary Report – 4:3:1:3:3:1:4 (page one)
6. Diagnostic Report – 4:3:1:3:3:1:4

These forms can be emailed as attachments or printed and faxed or mailed to the ODH AFIX Coordinator.

Where to send the information:

Alex Thornton
Ohio Department of Health, Immunization Program
35 E Chestnut Street, 6th Floor
Columbus, OH 43215
Phone: (614) 466-0249
Fax: (614) 728-4279
Alexandra.Thornton@odh.ohio.gov

Basic Guideline Due Dates and Reporting Checksheet

Before AFIX

- Schedule AFIX and Feedback with provider
- Send AFIX Notification and Demographic Form to ODH AFIX Coordinator*
* To be sent with all ODH AFIX submissions to help with form and agency identification.

During Assessment

- Review files for children 24 – 35 months as of January 1 – enter data into CoCASA

As soon as possible after Assessment

- Print Reports and Conduct Feedback at provider office
- Complete Feedback Report

30 – 45 Days after Feedback

- Conduct Follow-up with provider
- Complete Feedback Report with Follow-up information
- Send to ODH AFIX Coordinator
 1. Completed AFIX Notification and Demographic Form
 2. AFIX Assessment Analysis
 3. AFIX Feedback Report (with follow-up documentation)
 4. Summary Report – 4:3:1:3:3:1
 5. Summary Report – 4:3:1:3:3:1:4 (page 1)
 6. Diagnostic Report – 4:3:1:3:3:1:4

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The AFIX Process

A Detailed Check List

Provider Selection:

- Prioritize the recruitment of practices with the largest patient populations
- Prioritize the recruitment of practices w/o an AFIX in the last 2 years
- Early in the year, IAP grantees and ODH Consultant Staff discuss and determine who will target specific practices during the year

Initial Contact:

- Introduce and explain the importance of AFIX / quality assurance
- If necessary, remind the provider that the AFIX process is a required feature within the ODH VFC Agreement
- Review the Statement of Confidentiality for AFIX
- If necessary, review and process the Business Associate Agreement
- Schedule the Assessment (and if possible, the Feedback)
- Determine the main contact for the provider office & record their phone number
- Email/ fax **AFIX Notification and Demographic Form** to ODH AFIX Coordinator

Pre-Assessment Preparation:

- 1-2 weeks prior to the assessment:
 - Request a list of active patients 24-35 months of age as of **Jan. 1 the year of the assessment. Give the office the birthdate range for the children that you would like to assess. (If you are unsure of this, contact the ODH AFIX Coordinator).**
 - Confirm the appointment / provide a confirmation letter via fax or email (example in the AFIX binder) that informs the site what to expect on the day of the assessment
- At least one week prior to the AFIX assessment, practice should send a list of active patients 24-35 months as of Jan. 1 the year of the assessment
- The day before the assessment, call to verify that the visit is a “go” & that charts are pulled, etc.

The Assessment:

- Arrive on-time, dress professionally, and wear your ID badge
- Make sure there is a space large enough to plug in a laptop with adequate desk space for records
- Ask the office contact these questions regarding set up: Where is the location of the immunization record? How does the practice document a history of disease? How does the practice document a transfer of records?
- Review the list for inclusion of VFC and non-VFC kids
- Verify that the minimum number of records to be assessed is 10

- If the practice has over 100 in the birth cohort, use the **CoCASA Random Number Generator** for selection
- If the records are pulled manually – use the **CoCASA Random Number Generator** according to AFIX Manual, Section 2, page 2
- Discuss how the practice records will be pulled & re-filed
- Complete the **CoCASA Provider Setup** screen
- Complete the **CoCASA Assessment Setup / Set Up Criteria** screen
 - Age Range 24 -35 months as of Jan 1 the year of the assessment
 - Estimated number of patients served in the cohort
 - Daily use mode = no
- Complete the **CoCASA Assessment Setup / Assessment Factors** screen
 - **Demographics:** FName; LName (or chart number)
 - **Patient Status:** MOGE
 - **Vaccine Brand Names:** No
 - **Vaccine Manf. / Lot Numbers :**No
 - **Location of Dose Admin. :** No
- Complete the **CoCASA Assessment Setup / Custom Questions** screen
 - **Parent Refused All Vaccines**
- Complete the **CoCASA Assessment Setup / Antigens** screen
- Adjust the order of selected antigens to match the sites immunization records
- After all the data is entered, RUN the **Invalid Doses and Missing Immunizations** reports; compare the results to the actual immunization files for data entry errors
- If multiple machines are used for data entry, the assessments need to be merged
- Leave the practice with a good over-all impression
- Schedule / confirm a time to return to conduct the **Feedback Session**.

After the Assessment:

- Run / completed the following reports:
 - **AFIX Assessment Analysis**
 - **AFIX Feedback Report**
 - **Summary Report – 4:3:1:3:3:1**
 - **Summary Report – 4:3:1:3:3:1:4**
 - **Single Antigen Report – 4:3:1:3:3:1:4**
 - **Diagnostic Report – 4:3:1:3:3:1:4**
 - **Missing Immunization Report- “Missing any doses”**
 - **Invalid Doses Report**
 - **Notes Report if you type notes during the assessment**

The Feedback Session:

Prior to the meeting -

- Double check to confirm the time to meet for the feedback session
- Request the number of people expected to attend
- The following resources need to be prepared:
 - Most current ACIP Immunization Schedule (including Catch-up schedule w/ Min. Age Spacing)
 - Accelerated/Catch up Schedule

- Vaccine Information Statements
- The most current edition of “ The Pink Book” from the CDC
- Immunization Record cards for the charts
- Immunization Resources list
- Information on Impact SIIS and MOBI
- Provider Satisfaction Survey

During the Feedback Session

- Dress professionally
- Leave enough time for the presentation
- Thank the office for allowing the AFIX assessment and feedback
- Restate and redefine the overall purpose of AFIX
- Review the following Reports:
 - Summary Report- including the Flow chart and Pie Chart used to develop the AFIX Assessment Analysis form
 - 4:3:1:3:3:1
 - 4:3:1:3:3:1:4
 - Single Antigen Report
 - Diagnostic Report
 - Missing Immunizations
 - Invalid doses
 - Documented strengths of the practice and office observations on the AFIX Assessment
 - AFIX Feedback Report (to write the plan of improvement)
- Outline key data points
- List the strengths of the practice and data based on observation and data
- Discuss areas of possible improvement
- Ask the practice personnel what they think about the data
- Engage the clinic personnel in dialogue about the AFIX results and areas of improvement
- Ask the clinic personnel what they think are the potential fixes to their immunization practices
- Inform the office that there will be follow-up regarding the improvement plan
- Give the practice immunization resources as a gift – to help them with their plans.
- Disburse the ‘Provider Satisfaction Survey’. Each attendee should complete his/her own survey.

Cheat Sheet

Preparing for an AFIX Assessment using CoCASA

To open CoCASA, double-click on the CoCASA icon on your desktop.

Select your username and click *Log On*. This will bring up the program and show the five main tabs located at the top of the screen: (The tabs in bold are those which you will use for AFIXs)

1. **Provider Setup**
2. **Assessment Setup**
3. **Data Entry**
4. VFC-AFIX Evaluation
5. **Reports**

CoCASA initially opens up to the Provider Setup tab

1. Provider Setup

To add a new provider:

1. In the "Choose a Provider" portion of the window, Click *Add*
2. Under "Provider Site Name", enter the name of the practice
3. Type in the address and all desired contact information
 - a. **Required Fields:**
 - i. **Zip Code**
 - ii. **VFC number (can be acquired from VFC consultant)**
 - iii. **Provider Type**

Provider Setup is now complete.

Click on Assessment Setup tab

2. Assessment setup has five main sub-tabs:

- a) Setup Criteria
- b) Assessment Factors
- c) Custom Questions
- d) Antigens
- e) My Results

a) Setup Criteria (sub-tab)

To setup an AFIX assessment:

1. Click *Add* and then select *Standard* assessment for manual data entry or *Import Data* method if using registry or EMR data.
2. *Assessment Date* is the date the assessment is conducted.
3. *Assessment Name* is the name you would like to call the assessment. This is usually the name of the practice along with the assessment date.
4. The *Age Range* is: **24 to 35**
5. Click the radio button for **Months**
6. *As Of* should always be: **01/01/year the assessment is completed**
7. Enter the patient population estimate.

Setup Criteria is now complete.

b) Assessment Factors (sub-tab)

1. In the “Choose Demographics Field” – uncheck *Ethnicity* and *Race*.
2. In “Choose Patient Status Fields” check *Moved or Gone Elsewhere (MOGE)*.
3. There are no other required fields to be checked.

Assessment Factors section is complete.

c) Custom Questions (sub-tab)

Create a Custom Question: **Parent refused all vaccines?**

1. Select *New* under the *Yes/No* question.
2. Type in *Parent refused all vaccines?*
3. Select *Save New*.

Note: Once a Custom Question is created it does not need to be recreated. It just needs to be verified by clicking Show Previously Used Questions and assuring that it is marked for each assessment.

Custom Questions section is complete.

d) Antigens (sub-tab)

1. Select *Calculate Antigens* button. All ACIP recommendations will appear in the left box.
2. Select *Influenza* and click on the arrow pointing right.
3. Select *Hepatitis A* and click on the arrow pointing right.
4. Select *Rotavirus* and click the arrow pointing to the right.
5. Order the remaining vaccines according to the records at the provider site. This is done by highlighting the antigen and using the *Move Up* or *Move Down* buttons below the box on the left side to relocate them in the list.

Antigens section is complete.

Now you are ready to enter the Immunization History for your records.

Importing and Exporting Data:

Export CoCASA data:

Use the *Export-CoCASA data* function to move assessment data from one computer to another (i.e., to print reports or to merge assessments). **For example, this would be necessary if you and a coworker went to a large site to manually enter data for the assessment. After finishing the data entry, you would determine which computer you would use to merge the files. You decide to merge the files on your coworker’s computer. So, you must export your data onto a flash drive, disk or other device so that it can then be imported into your coworker’s computer and CoCASA program.**

To export:

1. Click on *File*, then highlight *Export*, then select *CoCASA data*

2. Select the provider information that is to be exported by clicking on the box next to the provider name.
3. Select *Assessments Data Only* and then select *Export*
4. Choose where the file is to be saved, rename the file so it can later be identified (using the name of the assessment being exported) and select *Save*

Import CoCASA data:

Use the *Import-CoCASA data* function to move assessment data from one computer to another (i.e., to merge assessments and/or move data to another computer to print reports). **For example, this would be necessary if you and a coworker went to a large site to manually enter data for the assessment. After finishing the data entry, you would determine which computer you would use to merge the files. In this case, you are merging the data on your computer. So, you must now import your coworker's data from a flash drive, disk or other device to your computer so that it can then be imported into your computer and CoCASA program.**

1. Click on *File*, then select *Import*, then select *CoCASA data*.
2. Find where the file is saved, highlight the file and select *Open*
3. Select the provider information that is to be imported by clicking on the box next to the provider name.
4. Select *Assessments Data Only* and select *Import*

Merging Assessments

Back to our example of two or more staff entering data for the same assessment, use the *Merge* function to combine the data. Both sets of assessment data must be in CoCASA before the data can be merged (see Import CoCASA data).

1. Click on *File*, then select *Merge*
2. Answer *Yes* to *Are you merging assessments because two or more people collected data from the same site and you need to merge the data together before running reports on that one site?*
3. Select the *Primary Provider* and *Secondary Provider*. Select the *Assessment* from each provider to be merged.
4. Select the *Provider* for the merged assessment.
5. *New Assessment Name* – This will be the name that appears on the reports.

Steps to Import data extracted from Impact SIIS: Refer to Tab 2 for the extraction process **Import using a template**

Once a template has been imported into CoCASA, use the *Import using template* to import data electronically into CoCASA.

These are the steps for importing data using a template:

1. Request data from your immunization registry (i.e., IMPACT SIIS, HDIS, Snyder).
2. Receive and save the text file on your computer.
3. Click on *File*, then select *Import*, then select *Using template*
4. Choose the template you wish to use. (Ohio-ImpactSIIS)

5. *Age Range* – Enter 24 to 35 months. As of 01/01/20??. **Note: Enter the appropriate age range you are importing (i.e., 24-35 or 0-35) and select months. Then make sure the appropriate *As Of* date is entered.**
6. *File Name* – select *Browse* and find where the export data file was saved. Highlight the file and select *Open*.
7. The box below *Browse* will fill up with information
8. *Provider* – Make sure the correct provider site appears.
9. *Assessment* – Enter the name of the assessment (i.e., Any City Health Department – June 2012). Be sure to assign a new name to each assessment.
10. Select *Import*

If there are any issues with importing the data, an error log report will appear. This does not necessarily mean the data did not import. There might be some particular children or CPT codes that didn't import (i.e., child outside the birth date range). Review the log to see what may not have imported.

This will import all of the information that Impact SIIS has on file for these patients. Therefore we need to go in and delete unnecessary information.

Reports

Reports are located under the *Reports* tab in the CoCASA database. At this time there are five different reports that will be used for the feedback session. Some of the information on these reports is to be transcribed or typed onto the AFIX Assessment Analysis. Present the AFIX Assessment Analysis to the practice as part of the feedback session.

Summary Reports (Two summary reports: 4:3:1:3:3:1 & 4:3:1:3:3:1:4)

1. Click once on the *Summary Report*
2. The *Age Range* will be **24 to 35 months, as of 01/01/(the year of the assessment)**
3. Select the *Series* **4:3:1:3:3:1**
4. Mark *Compliance* by age **24 months**
5. Leave *Apply ACIP Recommendations* and *Apply 4 day grace period* checked
6. For *Immunization opportunity missed* select **On Last Immunization Visit**.
7. Select *Run Report*

Once all the information is entered for a report, the criteria can be saved for the next time the report is run. Select *Save Criteria* and name the report that identifies what it is, i.e. 2012-431331 by 24 months.

Note: Repeat process using the *Save Criteria* feature for the 4:3:1:3:3:1:4 series. Also, the report criteria should be saved each year.

Single Antigen Report Childhood (4:3:1:3:3:1:4)

1. Double click on *Diagnostic Reports* and
2. Select *Single Antigen Report Childhood*

Criteria:

1. The *Age Range* will be **24 to 35 months, as of 01/01/(the year of the assessment)**
2. Select the *Series* **4:3:1:3:3:1:4**. This report will include rates on all vaccines assessed.

3. Mark *Compliance* by age **24 months**
4. Leave *Apply ACIP Recommendations* and *Apply 4 day grace period* checked.
5. Select *Run Report*

The criteria can be entered separately or select the *Saved Criteria* report for the 4:3:1:3:3:1:4 series.

Diagnostic Report Childhood (4:3:1:3:3:1:4)

1. Double click on *Diagnostic Reports*
2. select *Diagnostic Report Childhood*

Criteria:

1. The *Age Range* will be **24 to 35 months, as of 01/01/ (the year of the assessment)**
2. Select the *Series* **4:3:1:3:3:1:4**
3. Mark *Compliance* by age **24 months**
4. Leave *Apply ACIP Recommendations* and *Apply 4 day grace period* checked.
5. Select *Run Report*

The criteria can be entered separately or select the *Saved Criteria* report for the 4:3:1:3:3:1:4 series.

Missing Immunizations (4:3:1:3:3:1:4)

1. Double Click on *Lists*
2. Select *Missing Immunizations*

Criteria:

1. In the *Make a selection* box: Choose the last option of **“Missing any doses.”**
2. The *Age Range* will be **24 to 35 months, as of 01/01/ (the year of the assessment)**
3. Select the *Series* **4:3:1:3:3:1:4**
4. Mark *Compliance* by age *24 months*
5. Leave *Apply ACIP Recommendations* and *Apply 4 day grace period* checked.
6. Select *Run Report*

The criteria can be entered separately or select the *Saved Criteria* report for the 4:3:1:3:3:1:4 series.

Invalid Doses (4:3:1:3:3:1:4)

1. Double click on *Lists*
2. Select *Invalid Doses*

Criteria:

1. The *Age Range* will be **24 to 35 months, as of 01/01/ (the year of the assessment)**
2. Select the *Series* **4:3:1:3:3:1:4**
3. Mark *Compliance* by age **24 months**
4. Leave *Apply 4 day grace period* checked.
5. Select *Run Report*

Notes Report

1. Double click on *Other Standard Reports* and select *Notes Report*
2. Using the drop down menu indicate that you would like the report to be run by Name.

3. Select *Run Report*

The criteria can be entered separately or select the *Saved Criteria* report for the 4:3:1:3:3:1:4 series.

A total of 6 reports are to be run using CoCASA. Additional reports can be run to use other data.

Exporting Reports

After running any CoCASA report, the report can be saved in two ways: a pdf file or in *My Saved Reports*. A pdf file can be saved and then attached to an email. Reports saved in *My Saved Reports* can only be viewed under this tab in CoCASA.

To save a report as a pdf file:

Select *Export Report*

Choose where to save the file

Name the file

Select *Save*