Enter New Client (Video Script #4)

Welcome to the ImmTrac2 Training Video: Entering a New Client

The objective of this video is to demonstrate how to enter a new client into the ImmTrac2 Registry.

An ImmTrac2 Client is anyone in the State of Texas who has granted consent to be added to the State of Texas Immunization database system known as ImmTrac2.

To begin the process of entering a new client, click the **Enter New Client** link in the application menu panel and the **Client Search** screen will display.

When entering a client, only the Smart Search option displays. The Quick Search and Basic Search options are not available when entering new clients.

Smart Search

Before entering a client, users must perform a Smart Search to validate the client does not already exist in the registry.

The **Smart Search** is the most intelligent search and uses a more complex searching process than the other 2 searches to reduce the likelihood of creating a duplicate client.

Enter the client's information you would like to add to the registry. **First Name**, **Last Name**, **Birth Date**, **Gender** and **Street Address** are required fields.

In this example we are searching for the client "**Brian Blue"** with a birth date of **"January 1st, 2010",** and an address of **"1365 Holly Dr."** After entering the client information, click the **Find** button.

This search results in one client record found, and displays the client information in the **Possible Matches** table. Notice that this client's birth date and address are different than the client we are needing to enter.

It is up to the user to look at all the client's information and determine if this is the same client or a different client.

Add Client and Consent Information

Since the client we are needing to enter is different from the existing client, we will continue with the Enter New Client process by responding to the question "**Do you have one of the following signed consent forms for your client"?**

Users have the option to select the following:

- **Yes – Add a Client:** This means the appropriate consent form to participate in ImmTrac2 has been signed and we will continue with adding the client.
- **NO – Request a Consent Form:** This options will navigate users to the Print Consent Documentation screen, where a pre-populated consent form can be printed with the client's information entered in the smart search.
- **Add Client – WITH Singed Disaster-Related Consent**: This means the Disaster Information Retention consent form has been singed and a Consented Disaster Only client record is created.

- **Add Client – WITHOUT Singed Disaster-Related Consent**: This means the Disaster Information Retention consent form has NOT been signed and an Unconsented Disaster Only client record is created.

For this example let's select the "Yes - Add a client" radio button to continue with the Enter New Client process, and then click the **Submit** button to proceed.

Add Client Screen

Users are re-directed to the **Add Client** screen where the **Address Information** tab will be automatically expanded.

In order to add the client, you must enter the minimum required information in both the Personal Information and the Address Information sections.

All fields in blue text marked with an asterisk (*) in these two section are required fields, and the information that was entered on the Client Search screen is already pre- populated

In the **Personal Information** section notice that the Last Name, First Name, Birth Date, and Gender information is already populated, and you must enter the Mother's Maiden Last (Name) and the Mother's First Name.

In the **Address Information** section the Street Address information is already populated, and you must enter the Zip, City and County.

Users are encouraged to enter as much client information as possible on the **Add Client** screen to increase reporting capabilities. Once all client information has been entered, click the **Continue Add** button at the top of the screen to continue with the Enter New Client process.

Client Summary Screen

When the Client Summary screen displays, review the client's information for accuracy.
If anything is incorrect, use the **Edit Client Info** button to return back to the Add Client screen to make necessary changes.

If all information is correct, select the **Continue** button to proceed.

Potential Match List

In this example, the Potential Match list screen appears.

This screen displays when the system has determined that the client record you are adding possibly already exists in ImmTrac2.

The table includes the clients listed during the initial Client Search, along with those not previously listed but have been identified as a possible match after client information was added or changed.

If needed, click the ImmTrac2 ID to view the client's record in detail.

If you don't see an existing records matching the client you are attempting to enter, click the **Create New Client** button.

Users will receive a message pop-up box asking "Are you sure you would like to OVERRIDE the system match?"

Click the "OK" button to continue with the client add.

Consent Affirmation Screen

Users are re-directed to the Consent Affirmation screen.

This screen is used to select which type of consent has been agreed to and signed.

Consent options display based on the client's date of birth. Since we are attempting to enter a child client, the "ImmTrac2 Child" option is selected by default.

Users can select additional consent attributes for the client using the check boxes. For example, the "Minor Child of a First Responder attribute, or the "With consent to retain disaster information…" attribute.

To continue, click the **Affirm** button.

Consent Affirmation Confirmation Screen

When the Consent Affirmation Confirmation screen displays, the record for the client has been successfully added. This screen will list the following client information.

- Client ID: System generated ImmTrac2 ID
- Name: Client's name
- DOB: Client's date of birth
- Org Name: Organization that entered the client
- Org Address: Organization's address
- Org Phone: Organization's phone number
- User ID: User ID who entered the client 8742
- TXIIS ID: Organization's ID number

From this screen, users have a choice of the following: Navigating to the client's record, by clicking the Go To Client button. Adding another client by clicking the Add Next button. Returning to the application home screen by clicking the Cancel button.

For our purposes, let's navigate to the **View Client** screen by clicking the **Go To Client** button.

Edit Consent Information

Now that we have completed the "Enter New Client" process, let's review how to edit client consent information. Navigating to the Edit Consent screen can be done in two ways.

First, users can navigate to the **Edit Consent Information** screen while in the View Client screen by clicking the **Edit Client** button, and then clicking the **Edit Consent** button.

Users are now on the Edit Consent Information screen. The second option is to click the **Edit Consent Information** link on the application menu panel.

Using the **Edit Consent Information** link requires uses to perform a client search using the Smart Search option.

Client Search

Let’s search for the client we just entered, Brian Blue. After all information is entered, click the **Find** button.

When the client’s record displays, review their person information to validate the correct client was selected. Then click the **Select Client** button.

Users are redirected to the **Edit Consent Information** screen where the client’s name and date of birth displays at the top of the screen.

It also displays the Client Type and consent attributes.

- Client Type: IC = **I**mmTrac2 **C**hild
- FR Attribute: M = **M**inor Child of a **F**irst **R**esponder
- DIR Attribute: N = **D**isaster **I**nformation **R**etention consent has **N**ot been signed.

This screen will only display the remaining consent atriums that can be assigned to the client in addition to the what has already been assigned.

Since Brian is an ImmTrac2 Child (IC) the consent options that display are only applicable to a client under 18 years of age.

Because Brian has already been designated as a Child Family Member of a First Responder, the Disaster Information Retention option is the only available option.

For more information on Client Types and Consent Form, please review the user manual located in the Related Links tab in the menu bar.

To update the client’s consent information, first select the Option #1 radio button to activate the checkboxes.

Then use the checkboxes to select the appropriate consent option. For this example, let’s select the Disaster Information Retention Consent Form option.

If needed, click the **Display Form** button to view and print a pre-populate Disaster Information Retention consent for (or any other selected consent form) for the client. You can also use the “Click here to obtain a blank copy of the ImmTrac2 Consent Forms” link to be redirected to the Forms tab in the menu bar where all consent forms all available.

After updates are made, click the **Update Client** button to save changes. A message dialog box will display asking the user to “Affirm” the changes. Click the **Affirm** button.

Users are returned to the **Edit Consent Information** screen and a “Client Updated” message displays at the top of the screen. The consent attributes will also reflect the changes. Notice the DIR Attribute has changed to an M, representing the Disaster Information Retention consent for a minor.

Users can now click the **Edit Client** button to navigate to the **View Client** screen, or the **Cancel** button to return to the home screen.

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at https://immtrac.dshs.texas.gov at your convenience.