TEXAS
Health and Human Services

Texas Department of State Health Services

ImmTrac2

Texas Immunization Registry

User Manual

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Immunization Unit

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Contents

ImmTrac2

Texas Immunization Registry

Section I

User Basics

(All Users)

Section I: User Basics (All Users)

Chapter 1: What Are Immunization Information Systems

Immunization Information Systems (IIS) are confidential, computerized statewide or community-based database systems that store records of vaccines administered to residents within that region. These systems enable health care providers to access consolidated immunization records for residents within a region. They enable multiple authorized public health professionals to access the information on immunizations that any individual has received. Immunization Information Systems also help health care professionals stay up to date in managing complex immunization schedules so that they can provide patient reminders and follow up when immunizations are due or overdue.

The ImmTrac2 Immunization Information System

The ImmTrac2 IIS is a lifespan, population-based web application containing immunization records for Texas residents. The immunization information in ImmTrac2 is provided by a variety of sources, including private health care providers, pharmacies, public health clinics, Medicaid claim administrators, and the Department of State Health Services (DSHS) Vital Statistics Unit (VSU). ImmTrac2 is able to perform a variety of functions, including:

- Recording immunizations, contraindications, and reactions
- Validating existing vaccines to a vaccine schedule and providing forecasts for vaccines due and past due
- Producing recall and reminder notices, vaccine coverage rates, and client reports

Access to the web-based system is available at https://immtrac.dshs.texas.gov. By law, only authorized users are allowed to access immunization information in ImmTrac2. Authorized users include health care providers, local health departments, schools, and child-care facilities. Texas residents who participate in ImmTrac2 may obtain a copy of an immunization record from their health care provider, or by submitting an Authorization to Release ImmTrac History Form found at http://www.dshs.texas.gov/immunize/immtrac/forms.shtm. The completed form can be faxed to 512-776-7790 or emailed to ImmTrac2@dshs.texas.gov.

Providers participating in ImmTrac2 can manually enter immunization data directly into the system or use their existing electronic data systems to exchange data with ImmTrac2. For more information on how to submit data to ImmTrac2, contact ImmTrac2 Customer Support at 1-800-348-9158 or by email at ImmTrac2@dshs.texas.gov . For more information on electronic data upload, see the Data Exchange section.

Consent

By Texas law, ImmTrac2 is an opt-in registry that requires written consent to participate. Parental consent is required for a child younger than 18 to participate. When the child turns 18 and is legally an adult, they can sign an adult consent form for lifetime participation in the registry. Consent may be obtained during the birth registration process or by public health professionals prior to entering immunization information into ImmTrac2. See the Consent Forms section for more details.

Clients

Clients are individuals who have received an immunization that has been entered, or uploaded, into the ImmTrac2 Immunization Information System (IIS). ImmTrac2 receives client immunization information from multiple sources, including direct data entry and electronic data transfer from electronic health records software.

Resources

There are a number of resources available for ImmTrac2. Access phone, fax, and email information in the "*Contact Us*" tab on the top menu bar of the web application. The following are other resources available.

- Phone: 800-348-9158
- Email: ImmTrac2@dshs.texas.gov
- Fax: 512-776-7790
- ImmTrac2 Online Help screens
- Online User Manual
- Health Service Region ImmTrac Coordinators
- Local Health Departments and local ImmTrac outreach specialists
- Your organization's Provider Supervisor (if one or more are designated)
- Webinars (Live and Pre-recorded)
- Self-guided online training videos

The ImmTrac2 program team in the DSHS Austin office provides records management, customer support, outreach, and training services. Customer support representatives are available Monday-Friday, 8 a.m. - 5 p.m. CST to address technical or operational questions.

System Requirements

Internet Access

ImmTrac2 is a web-based application. Reliable Internet access, preferably with a dedicated high-speed connection is required.

Software Requirements

The minimum software requirements for accessing ImmTrac2 are:

- Microsoft® Internet Explorer, version 10.0 or higher is recommended
- Acrobat Reader®

Chapter 2: Accessing ImmTrac2

User Roles

ImmTrac2 is set up to accommodate a variety of user types. Each user has access to certain features in the application based on the role that they are assigned. Each of these roles may have additional access to "Data Exchange", which allows the user to upload immunization records electronically into ImmTrac2. *See Table 1: User Roles.*

Table 1 - User Roles

Role	***Tasks***	***Users***
View Only Non-Provider	• View and print Immunization Records • Can create and print school report lists • View Admin Support documents • Manage their Account / Reset Password • Submit registrations and renewals	Schools and Child-Care facilities
Full Access Provider	Same as View Only Non-Provider but can also: • Add and edit client information • Add, edit, and delete immunizations • Generate specific reports	Any Organization that is administering vaccinations in Texas and is registered with ImmTrac2
Provider Supervisor	Same as Full Access Provider but can also: • Add and edit users • Access and make limited edits to Organization profile information	The select individual within each organization that will manage all of the org's users
Modified Access Sub-State	Same as Provider Supervisor but with more capabilities • View information and reports on provider organizations in their jurisdiction • More reports are available	Texas Health Service Region users and Local Health Departments users

Role	***Tasks***	***Users***
Full Access State	Highest level of access to: • Add, modify, and delete information • Access to all functional areas of the system, including Clients, Immunizations, Organizations, Registrations, Renewals, and Reports	Texas Department of State Health Services (DSHS) Employees in the central Austin office

ImmTrac2 Login

When logging on to the ImmTrac2 application, users will need their Organization Code, Username, and Password. When a new user is added, the user will receive a welcome email and a separate email with a temporary password. If a user is having difficulty successfully logging in, or has forgotten the login information, the organization's designated ImmTrac2 point of contact or an ImmTrac2 Provider Supervisor can provide assistance. ImmTrac2 Customer Support is an additional resource.

To access the ImmTrac2 web application, follow the steps below.

See Figure 1: Login Procedure Steps 1-3.

1. Open Internet Explorer and type https://immtrac.dshs.texas.gov into the browser.
2. On the login screen for ImmTrac2, enter the Organization Code (Org Code), Username, and Password that were provided in the welcome emails from ImmTrac2.
3. Click the "Login" button.

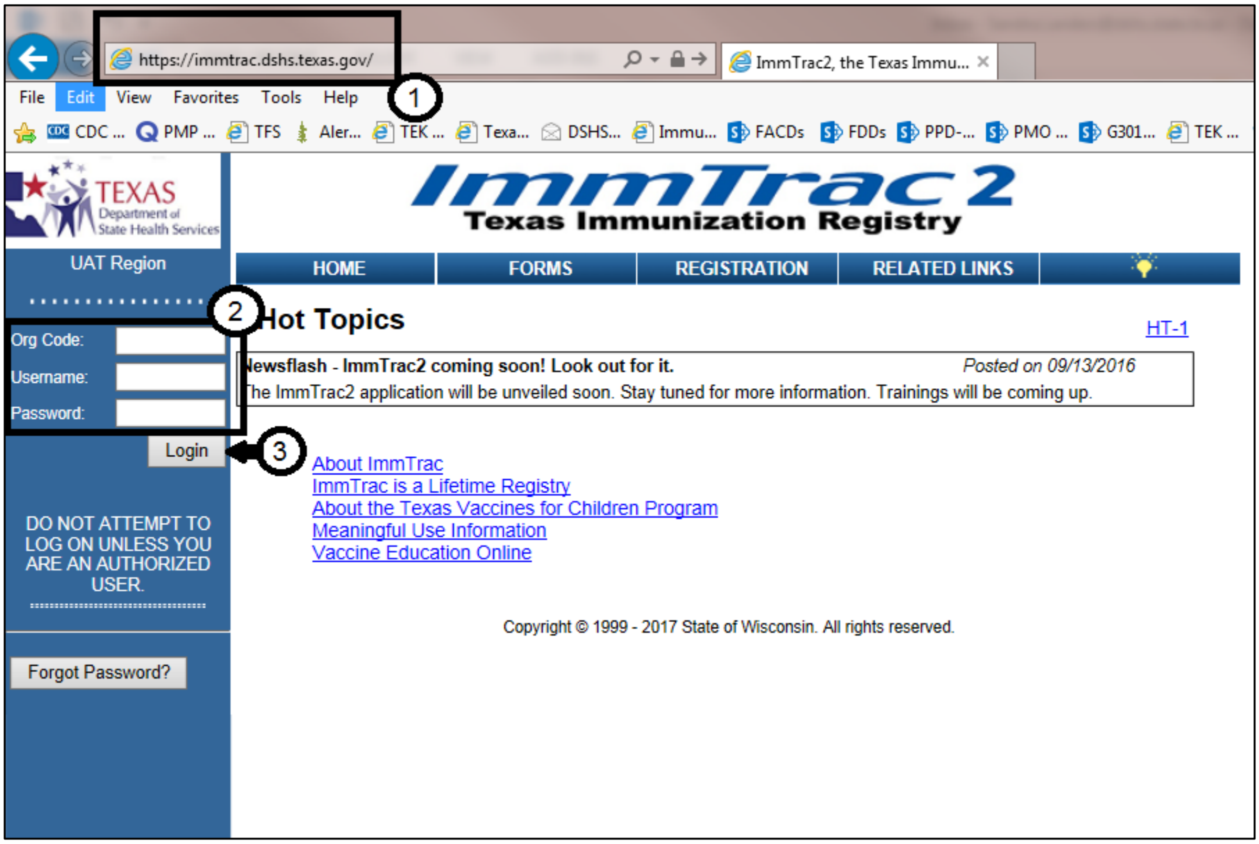


Figure 1 - Login Procedure Steps 1-3

See Figure 2: Login Procedure Step 4 - Confidentiality Statement.

4. After login, agree to the *Confidentiality Statement* by clicking the "I Agree" button.

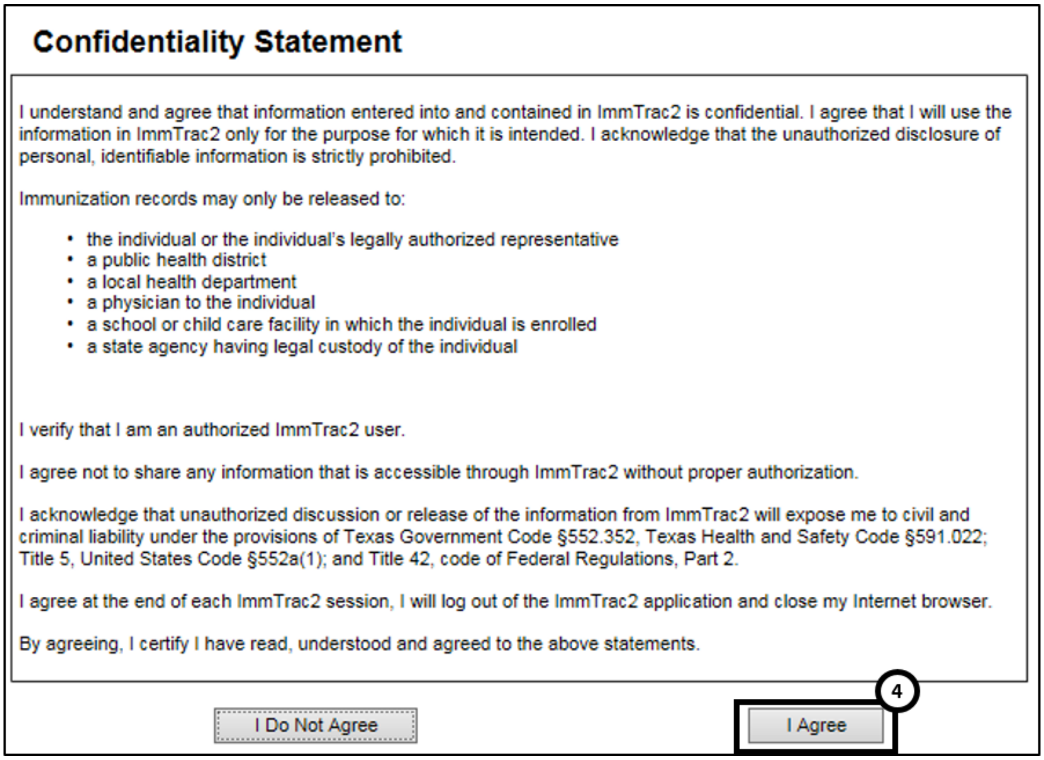


Figure 2 - Login Procedure Step 4 - Confidentiality Statement

***Note**: After 15 minutes of inactivity the user will be logged out automatically.*

***Important:** For security purposes, do not share your ImmTrac2 login information. ImmTrac2 user accounts are intended for single-person use, not for use by a group of individuals within an organization.*

Application vs. Portal View

After login, the view and menu links that display are determined by the user's role.

Application View (Single Organization Access)

Users that are set up with access to a single organization are taken directly to the ImmTrac2 application home screen. The center portion of the Application home screen contains important information on ImmTrac2. Enhancements and maintenance updates are listed in the Announcements and Release Notes section. *See Figure 3: Application View.*

Announcements

If an announcement has not been viewed it will be marked "New". To view the full text of an announcement, click the hyperlinked announcement title. The ImmTrac2 Announcement screen displays the details of the announcement and the date it was posted.

Release Notes

Release notes display below the Announcements section of the home screen. This section contains information regarding new releases of ImmTrac2. Release notes can be viewed in the same manner as Announcements.

Figure 3 - Application View

Portal View (Multiple Organizational Access)

Users who have access to more than one organization have single sign-on privileges. This means they can access multiple organizations with one username and password. Upon successful login, users associated with multiple organizations are taken to the ImmTrac2 portal screen instead of directly to the ImmTrac2 application screen. This screen lists all the organizations the user may select from to access client information. Choose an organization to access by selecting the "ImmTrac2" button to the left the organization name. *See Figure 4: Portal View.*

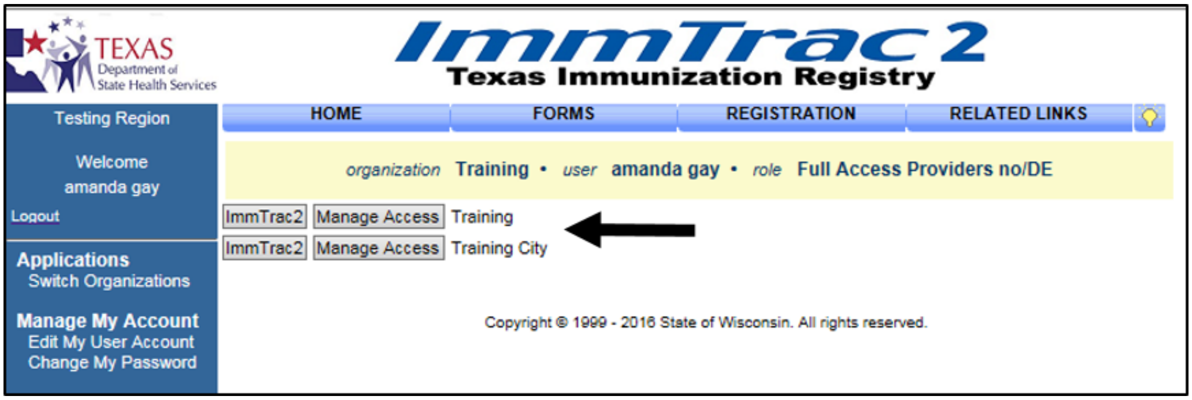


Figure 4 - Portal View

ImmTrac2 Logout

To exit the ImmTrac2 application, click the "logout" button in the menu panel on the top of the ImmTrac2 screen. Users can log out in this manner from any screen within the ImmTrac2 application view. *Figure 5: ImmTrac2 Logout.*

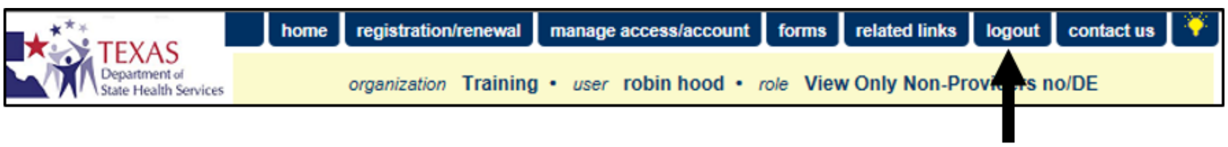


Figure 5 - ImmTrac2 Logout

Login Failure

ImmTrac2 provides warning messages after each unsuccessful login attempt.

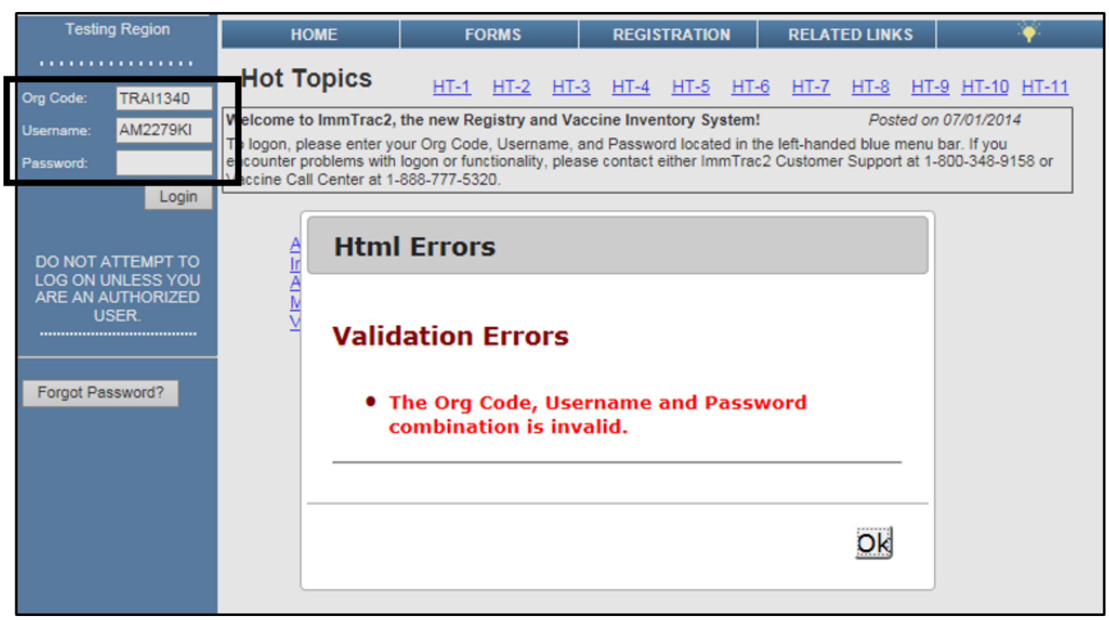


Figure 6 - Login Failure #1

After the third unsuccessful login attempt, the user is redirected to the Password Recall screen where there are three additional opportunities to attempt log in using additional or alternate information. This screen will allow users to continue with the login procedure using the Org Code, Username, and Password and entering the text displayed in the CAPTCHA image. If needed, click the “Refresh Captcha” button to display a new image.

If the second login attempt fails, users receive a warning message that they have one more attempt to login before being locked out. *See Figure 7: Login Failure#2 – Captcha Required.*

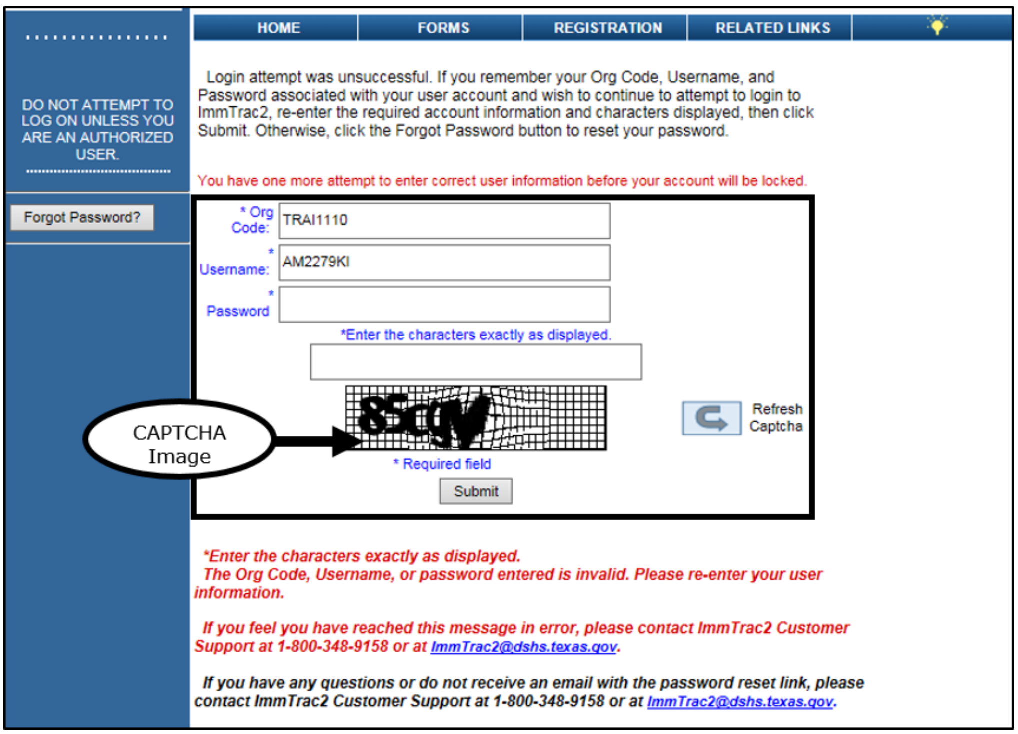


Figure 7 - Login Failure #2 – Captcha Required

After the third failed login attempt in this section, a Validation Error displays and users are forced to reset their password using the “Forgot Password” button. *See Figure 8: Login Failure #3 – Account Locked.*

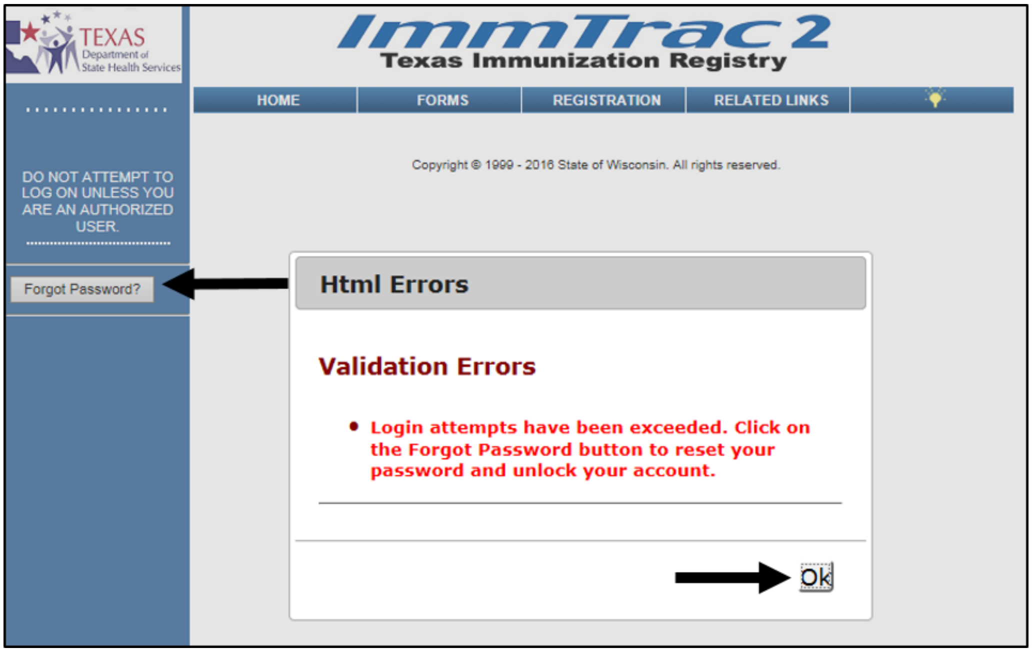


Figure 8 - Login Failure #3 – Account Locked

Forgot Password

The Forgot Password option can be used at any time to reset a password and will allow users three attempts to reset the password.

To reset a password, follow the steps below.

See Figure 9: Forgot Password / Password Reset Steps 1-3.

1. Click the "Forgot Password" button on the left of the screen.
2. Enter the Org Code, Username, and Email Address.
3. Click the **"**Submit" button. This will trigger an email with a link to reset your password.

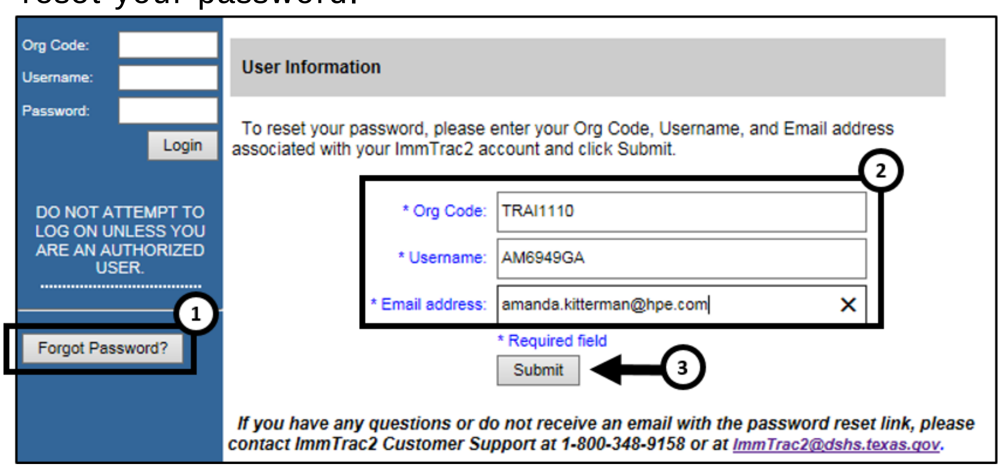
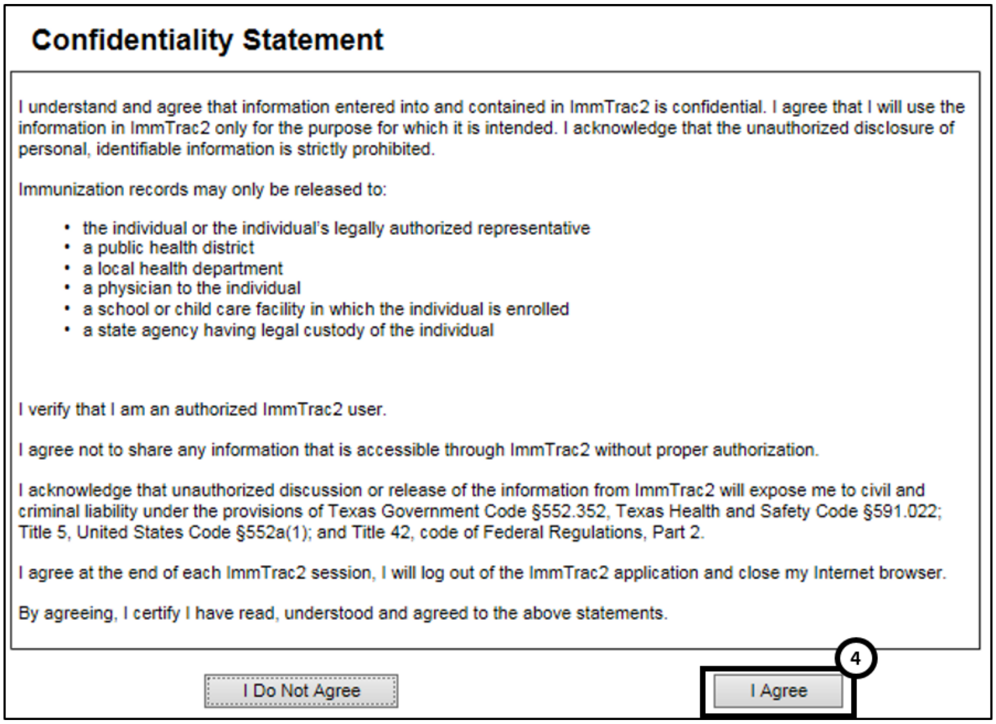


Figure 9 - Forgot Password / Password Reset Steps 1-3

See Figure 10: Forgot Password / Password Reset Step 4.

4. Click the link in the email. Users are re-directed to the ImmTrac2 Confidentiality Statement. Click “I Agree”.



Confidentiality Statement

I understand and agree that information entered into and contained in ImmTrac2 is confidential. I agree that I will use the information in ImmTrac2 only for the purpose for which it is intended. I acknowledge that the unauthorized disclosure of personal, identifiable information is strictly prohibited.

Immunization records may only be released to:

- the individual or the individual’s legally authorized representative
- a public health district
- a local health department
- a physician to the individual
- a school or child care facility in which the individual is enrolled
- a state agency having legal custody of the individual

I verify that I am an authorized ImmTrac2 user.

I agree not to share any information that is accessible through ImmTrac2 without proper authorization.

I acknowledge that unauthorized discussion or release of the information from ImmTrac2 will expose me to civil and criminal liability under the provisions of Texas Government Code §552.352, Texas Health and Safety Code §591.022; Title 5, United States Code §552a(1); and Title 42, code of Federal Regulations, Part 2.

I agree at the end of each ImmTrac2 session, I will log out of the ImmTrac2 application and close my Internet browser.

By agreeing, I certify I have read, understood and agreed to the above statements.

I Do Not Agree | 4 I Agree

Figure 10 - Forgot Password / Password Reset Step 4

See Figure 11: Forgot Password / Password Reset Steps 5-6.

5. When the Change Password screen displays, enter a new password following the password requirements listed on the screen.
6. Click the “Save” button.

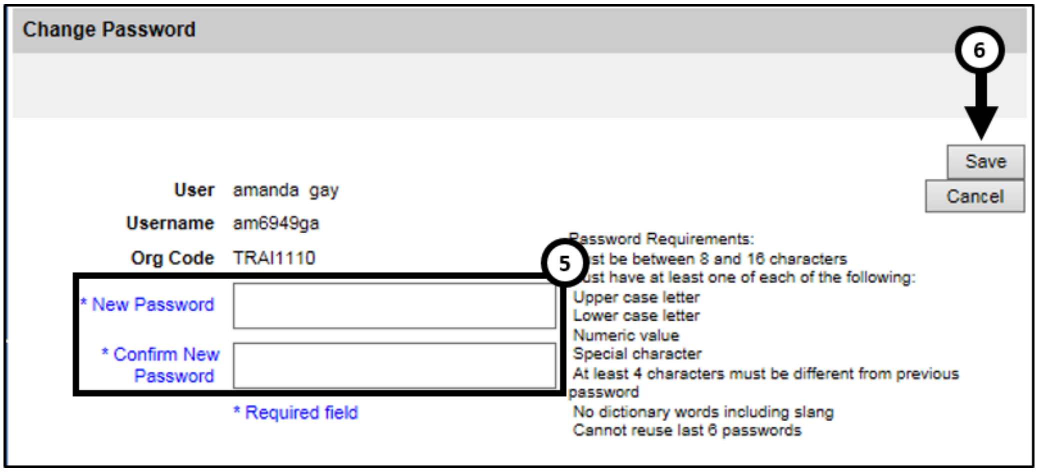


Figure 11 - Forgot Password / Password Reset Steps 5-6

***Note**: Notice the Password Requirements listed on the Change Password screen when creating a new password.*

Chapter 3: Navigation

The Application and Portal screens of ImmTrac2 are divided into several sections. Use the vertical scroll bar to the right of the ImmTrac2 screen to view all sections as needed. These screens consist of a top menu bar, a left menu panel, and a main content area.

Application Menu Bar

The application menu bar options will remain the same for every user role, and do not change with different levels of access. *See Figure 12: Application Menu Bar.*

Figure 12 - Application Menu Bar

Home

The “Home” option on the application menu bar returns the user to the home screen from anywhere in the application. The home screen displays ImmTrac2 Announcements and Release Notes.

Registration / Renewal

The “Registration / Renewal” option on the application menu bar allows users to manage their ImmTrac2 enrollment.

- Renew for existing Organization – Select this link to renew an existing ImmTrac2 Organization using a pre-populated registration form based on the last registration submission, including changes made in ImmTrac2 since the last registration was submitted.
- Register a new Organization – Select this link to register an Organization that isn’t already registered in ImmTrac2.
- Access saved / in progress Registration or Renewal – Select this link to continue working on a saved / in progress Registration or Renewal.
- Access previously approved Registration or Renewal – Select this link to access previously approved Registrations or Renewals.
- Registration of Intent - Select this link to access the Registration of Intent to pursue electronic data exchange and / or Meaningful Use immunization reporting with ImmTrac2.

***Note**: For details on how to complete a registration or renewal form, or how to access saved / in progress forms, see the Provider Online Enrollment user manual. For details on how to complete the Registration of Intent, see the Appendix C – Data Exchange section.*

Manage Access / Account

The "Manage Access / Account" option on the application menu bar takes users to the Portal Home screen where they can switch between organizations, manage their account, manage access to other accounts (depending on user role), manage organization profile date (depending on user role), and reset the login password. See the Managing My Account section for more information on these features.

Forms

The "Forms" option on the application menu bar shows a list of blank, printable client consent forms in English and Spanish. See the Consent Forms section for more details.

- ImmTrac2 Consent Form - Adult
- ImmTrac2 Consent Form - Minor
- ImmTrac2 Consent Form - Disaster Information Retention
- First Responder / Family Member Consent
- Withdrawal of Consent and Confirmation

Related Links

The "Related Links" option on the application menu bar displays links to other web sites that contain information of interest to the immunization community. This section also provides access to several training videos to assist users in learning how to use the ImmTrac2 system.

- About ImmTrac
- ImmTrac is a Lifetime Registry
- About the Texas Vaccines for Children Program
- Meaningful Use Information
- Vaccine Education Online

Logout

The "Logout" option on the application menu bar logs users out of the current ImmTrac2 session. A logout can be performed from any screen within ImmTrac2.

Contact Us

The “Contract Us” option on the application menu bar provides contact information for ImmTrac2 Customer Support. Representatives are available Monday - Friday, 8 a.m. - 5 p.m. CST to address technical or operational questions.

- Email: ImmTrac2@dshs.texas.gov
- Phone: 800-348-9158
- Fax: 512-776-7790

Online Help

The Online Help option displays function-specific help for the current page being viewed in a separate window. The help page is organized into multiple sections, starting with purpose and then describing tasks.

To access a help topic specific to a function on a screen, follow these steps:

1. Select the **specific function** in the side menu panel where need is help.
2. Click the “light bulb” icon located at the top-right of the menu bar for that page.
3. A separate window will open and displays helpful information specific to the content on the screen.

Status Information Header

The Status Information Header area is directly below the menu bar and contains the user’s organization’s name, first and last name, and the assigned user role within ImmTrac2. *See Figure 13: Status Information Header.*

Figure 13 - Status Information Header

***Important**: If users are members of more than one organization, refer to the Access Information Header to confirm that the correct organization has been selected.*

Portal Menu Bar

The portal screen menu bar options will also remain the same for every user role, do not change with different levels of access, and contain many of the same tabs as the application menu bar. This menu bar will be present before and after login. *See Figure 14: Portal Menu Bar.*

Figure 14 - Portal Menu Bar

Home

The “Home” option on the portal menu bar returns users to the Portal home screen displays Hot Topics as shown in figure Portal Manu Bar shown above. Users can view each Hot Topic by clicking the HT-1, HT-2 hyperlinks in the top right corner of the screen.

Forms

The “Forms” option on the portal menu bar shows a list of blank printable client consent forms in English and Spanish, and ImmTrac2 User Manuals. See the Consent Forms section for more details.

- ImmTrac2 Consent Form - Adult
- ImmTrac2 Consent Form – Minor
- ImmTrac2 Consent Form - Disaster Information Retention
- Withdrawal of Consent and Confirmation
- First Responder / Family Member Consent

Registration

The “Registration” option on the portal menu bar provides a link to request access to ImmTrac2 for organizations that have already registered but need to request access for new users. It also provides a link to register / enroll in ImmTrac2 participation for organizations that are not already registered in ImmTrac2.

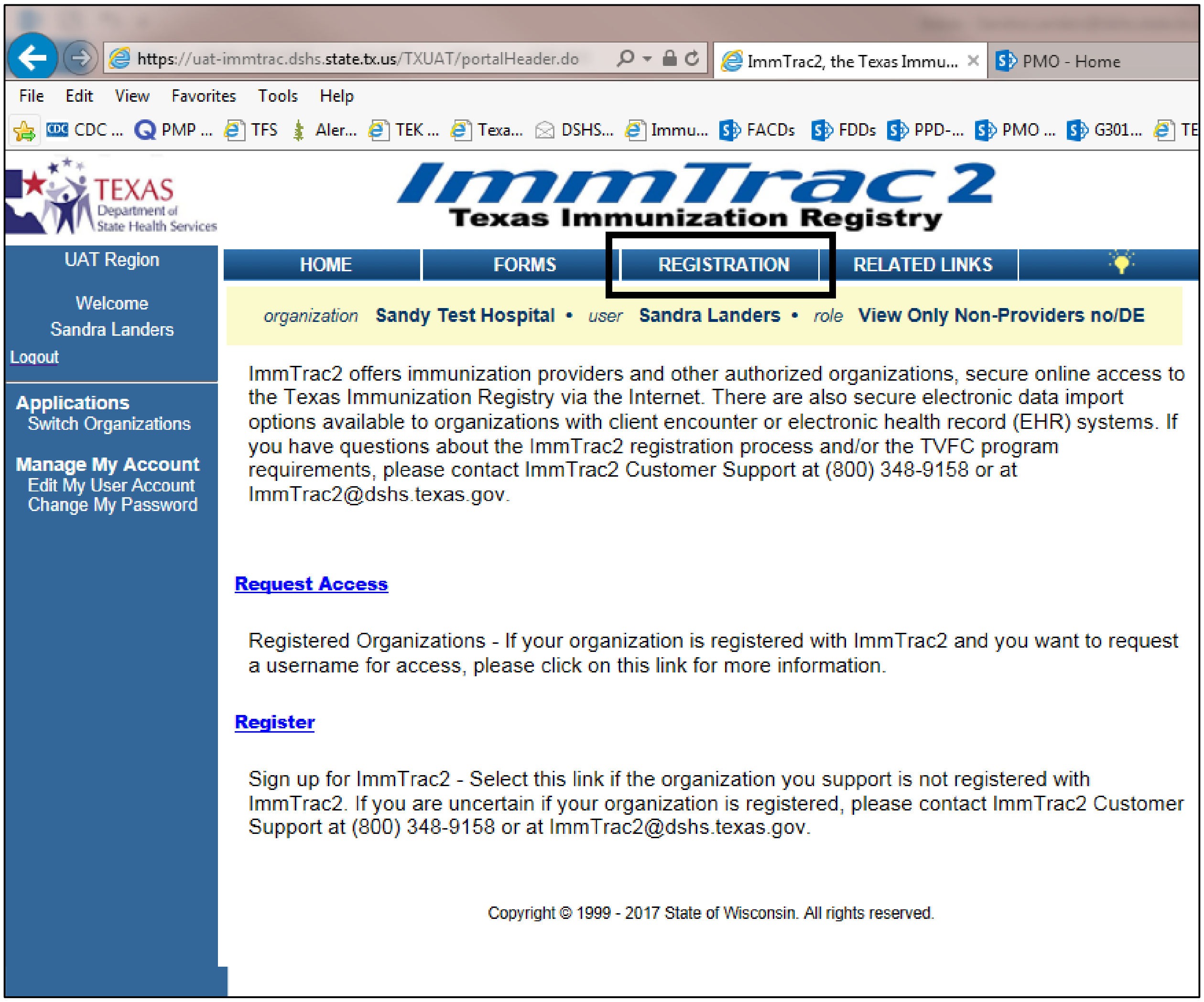


Figure 15 - Portal Menu Bar – Registration

***Note**: For details on how to complete a registration or renewal form, or how to access saved / in progress forms, see the Provider Online Enrollment user manual.*

Related Links

The “Related Links” option on the portal menu bar lists links to other related screens outside of ImmTrac2. This section also provides access to many training videos that will assist users in learning how to use the ImmTrac2 system.

- About ImmTrac
- ImmTrac is a Lifetime Registry
- About the Texas Vaccines for Children Program
- Meaningful Use Information
- Vaccine Education Online

Application Menu Panel

The menu panel appears on the left side of all screens within ImmTrac2. The items listed on the menu panel will differ, depending on the user role and which area of ImmTrac2 the user is currently in (application or portal areas). *See Figure 16: Application Menu Panel.*

The application screen gives users access to specific functions within the application. These functions are grouped under categories such as Clients, Immunizations, Reports, Admin Support, Manage My Account…etc. Remember, user roles determine which functions a user will have access to in the left menu panel. To navigate to the Portal screen click the “Manage Access / Accounts” button.

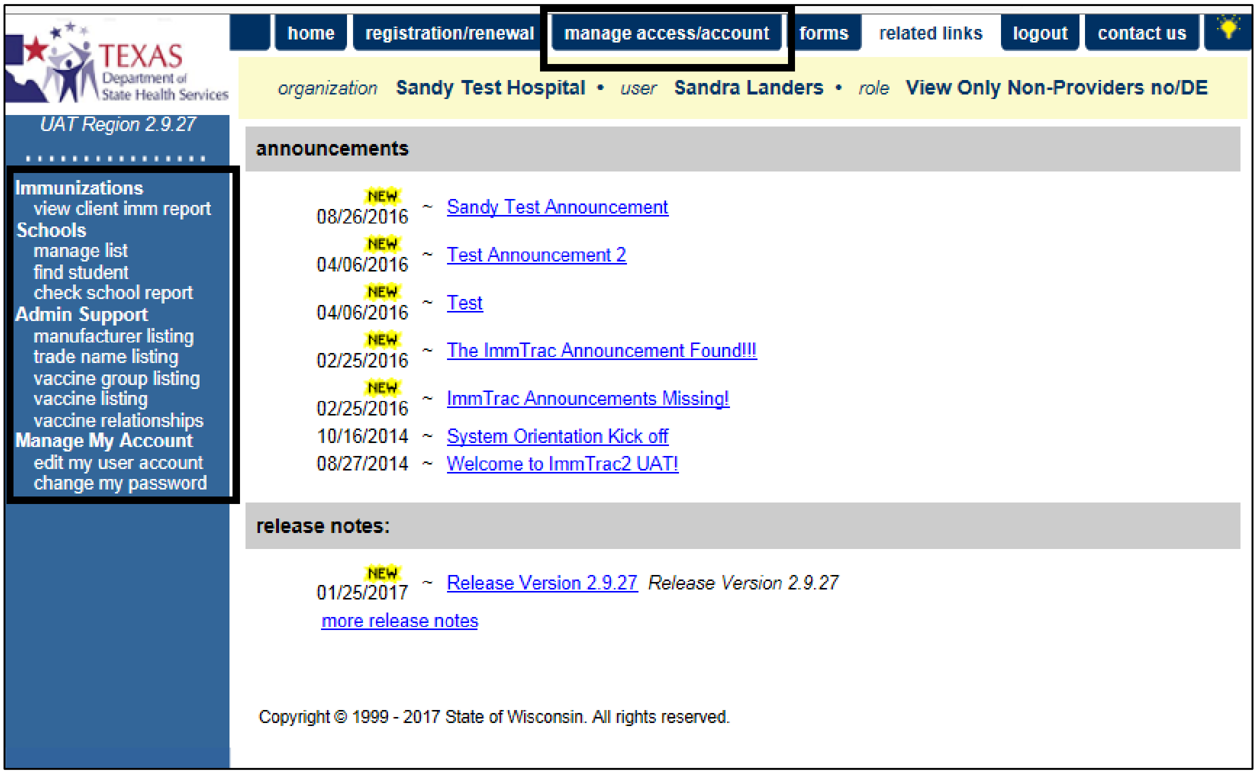


Figure 16 - Application Menu Panel

Portal Menu Panel

The menu panel on the Portal Page displays the user's name, a "logout" link, a "Switch Organizations" link, and Manage My Account links to edit a user's account or change the login password. As previously mentioned, the items listed on the menu panel will differ depending on the user role. Additional menu items may be available to users with elevated roles. *See Figure 17: Portal Menu Panel.*

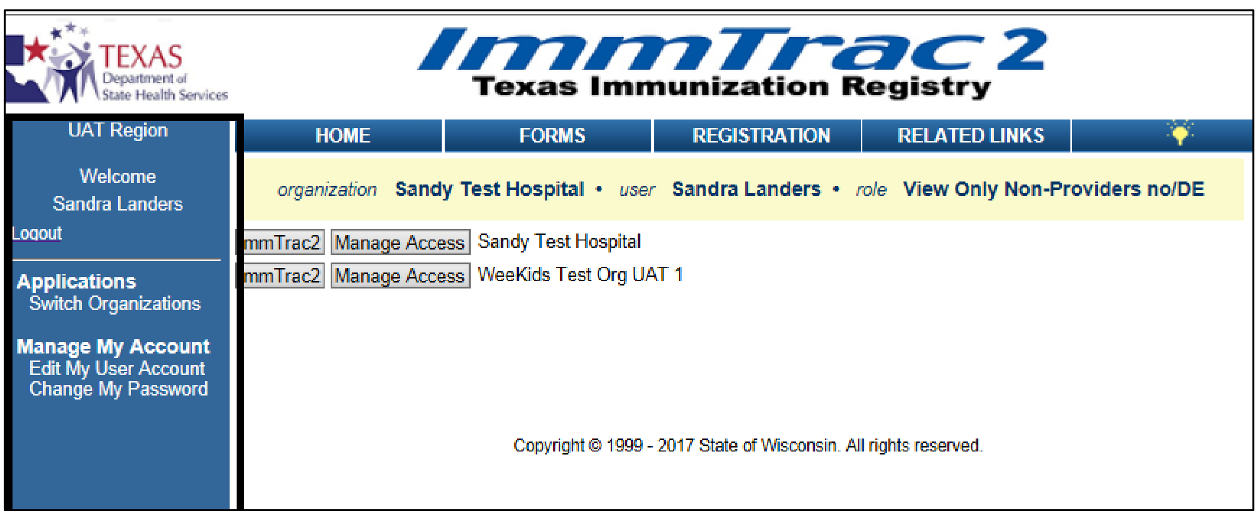


Figure 17 - Portal Menu Panel

Chapter 4: Consent Forms

Texas law requires written consent for ImmTrac2 participation and limits access to the registry to only those individuals who have been authorized by law. If an ImmTrac2 search is performed and the client's record is not found in the Registry, the appropriate consent form must be filled out by the client prior to entering any client data. The consent form is affirmed during the Enter New Client process. See the Enter New Client section for more details.

Minor Consent

Parent or guardian consent for ImmTrac2 participation is required for clients younger than 18 years of age. At age 18, their client record will become unavailable in the system until the client provides adult client consent. If ImmTrac2 doesn't receive affirmation of adult consent by the time the client reaches the age of 26, the client record will be purged from the system and all immunization information previously stored will be lost.

Adult Consent

Adult clients, 18 years of age and older, must provide written consent to participate in ImmTrac2. When a minor client turns 18 and legally becomes an adult, he or she can sign an adult consent form to participate in the registry for a lifetime. If the adult consent form is not completed, the client record is not viewable in the ImmTrac2 system and immunization information is deleted on his or her 26th birthday.

Disaster Information Retention (DIR) Consent

During a disaster or emergency event, any residents in the affected area who receive disaster-related vaccinations, antivirals, or medications will participate in ImmTrac2 regardless of age or consent status, and their immunization information will be retained for 5 years. In order for the information to remain in ImmTrac2 past the initial 5 years, the client must sign a Disaster Information Retention (DIR) Consent Form.

Withdrawal of Consent and Confirmation

A Withdrawal of Consent form must be a signed to have a client and the associated immunization records deleted from the ImmTrac2 system. The client record will be permanently removed and will no longer be available in the system. Immunization records associated with a disaster will still be retained for the 5 year period.

First Responder/Family Member Consent

This allows ImmTrac2 to track First Responders and their family members for federal reporting purposes and to ensure they are given appropriate priority for administration of antivirals, immunizations and mediations (AIMs) during a disaster event. An adult who is a First Responder and intends to participate in ImmTrac2 signs this consent form instead of the Adult Consent Form.

A First Responder Family Member consent form is only required for adult family members of a First Responder. A child family member of a First Responder does not require a consent form, but they are still identified in ImmTrac2 by selecting the corresponding First Responder Family Member option when adding a new client.

Chapter 5: Admin Support

There are several administrative lists under the *Admin Support* section in the left-side menu panel available to all user roles. These lists are available for convenience to help users navigate manufacturers, CVX codes, trade names and trade name rules. *See Figure 18: Admin Support List.*

Figure 18 - Admin Support Lists

Manufacturer Listing

The "Manufacturer Listing" option displays a table with Manufacturer ID, Manufacturer Code, Manufacturer Name, and whether it is active or not. Active means the Manufacturer is active and making vaccines. If they are not active, the Manufacturer is no longer active and no longer making vaccines.

The information is sorted first by the "Active" or "Non-active" designation, and then alphabetically. *See Figure 19: Manufacturing Listing.*

Manufacturer Listing

Id	Manufacturer Code	Manufacturer Name	Active
25	AB	Abbott Laboratories	Y
26	AD	ADAMS LABORATORIES	Y
75	AKR	Akorn, Inc.	Y
27	ALP	Alpha Therapeutic Corporation	Y
95	BRR	Barr Laboratories	Y
68	BAH	Baxter Healthcare Corporation	Y
33	BPC	Berna	Y
48	MIP	Bioport Corporation	Y

Figure 19 - Manufacturing Listing

Trade Name Listing

The “Trade Name Listing” option displays a table with unique identifying names for vaccines given by a manufacturer, including the Trade Name ID, Name, Trademark Name (if applicable), and Vaccine Name. The Trade Name is also known as the “Brand Name”. *See Figure 20: Trade Name Listing.*

Trade Name Listing

Id	Name	Trademark Name	Vaccine Name
182	ACAM2000		Vaccinia (smallpox)
183	ACAMBIS		Vaccinia (smallpox)
5	Acel-Imune		DTaP
6	ActHib		Hib-PRP-T
127	Adacel		Tdap
1	Adeno T4		Adeno T4
2	Adeno T7		Adeno T7
144	AFLURIA		Flu trivalent injectable
143	AFLURIA Pres-Free		Flu trivalent injectable pfree
199	Agriflu		Flu trivalent injectable pfree
3	Anthrax		Anthrax

Figure 20 - Trade Name Listing

Vaccine Group Listing

The “Vaccine Group Listing” option displays a table with vaccine groups. A vaccine group is the collection of vaccines used to meet the goals of preventing one or more diseases. In most cases, a vaccine group represents one disease (Hepatitis B), but in some cases, such as MMR (Measles, Mumps, and Rubella) and DTaP or Td / Tdap (Diphtheria, Tetanus, and acellular Pertussis) they are collections of diseases that are prevented. These reflect the way that vaccines have been grouped and formulated in the past. This table displays the Vaccine Group ID, Name, Display Name, Group Code, and Default Vaccine Name. *See Figure 21: Vaccine Groups Listing.*

Vaccine Group Listing

Id	Name	Display Name	Group Code	Default Vaccine Name
1	Adeno	Adeno	ADEN	Adeno, NOS
2	Anthrax	Anthrax	ANTH	Anthrax
3	BCG	BCG	BCG	BCG-TB
4	Cholera	Cholera	CHOL	Cholera-Oral
33	Diphtheria Antitoxin	Diphtheria	DIP	Diphtheria
7	Diphtheria, Tetanus, Acellular Pertussis	DTP/aP	DTAP	DTaP, NOS
8	Encephalitis	Encephalitis	ENC	Japanese Encephalitis, SC
11	Hepatitis A	HepA	HEPA	HepA, NOS
12	Hepatitis B	HepB	HEPB	HepB, NOS
13	Hib	Hib	HIB	Hib, NOS

Figure 21 - Vaccine Groups Listing

Vaccine Listing

The “Vaccine Name Listing” option displays a table with vaccine names and associated information. The Vaccine Name is a specific formulation of an administered vaccine. This table displays the Vaccine ID, Vaccine Name, Body Route, Body Site, VIS date, CPT Code, and CVX Code relevant to each vaccine. *See Figure 22: Vaccine Listing.*

Vaccine Listing

Id	Vaccine Name	Body Route	Body Site	VIS Date	CPT Code	CVX Code
22	Flu NOS	IM		08/10/2010	90724	88
24	HepA, NOS	IM		03/21/2006	90730	85
27	HepA-Ped 2 Dose	IM	LA	03/21/2006	90633	83
30	HepB, NOS	IM		07/18/2007	90731	45
34	HepB-Peds	IM	LA	07/18/2007	90744	08
43	MPSV4	SC	LA	01/28/2008	90733	32
53	Pneumococcal 23	SC	LA	10/06/2009	90732	33
58	RIg	IM			90675	34
66	Typhoid-ViCPs	IM	LA	05/19/2004	90691	101
115	DTaP,5 pertussis antigens			11/18/2008		106

Figure 22 - Vaccine Listing

Vaccine Relationships

The “Vaccine Relationships” option displays a table that helps compare and contrast similar vaccines listed under the same name and Group Code. For each vaccine group, the screen displays related vaccines and their associated CPT Codes, CVX Codes, and Trade Names. *See Figure 23: Vaccine Relationship.*

Vaccine Group, Vaccine, and Trade Name relationships

Group Id	Display Name	Name	Group Code
1	Adeno	Adeno	ADEN

Vaccine (ID) Name	CPT Code	CVX Code	Trade Name
(1) Adeno T4	90476	54	Adeno T4
(2) Adeno T7	90477	55	Adeno T7
(815) Adeno, NOS		82	
(825) Adeno T4 and T7		143	

Group Id	Display Name	Name	Group Code
2	Anthrax	Anthrax	ANTH

Vaccine (ID) Name	CPT Code	CVX Code	Trade Name
(3) Anthrax	90581	24	Anthrax
(3) Anthrax	90581	24	Biothrax

Figure 23 - Vaccine Relationship

Chapter 6: Manage My Account

ImmTrac2 allows all users to manage their own account information. User can access the *Manage My Account* options from the menu panel on the Portal Screen and the Application Screen.

Edit My User Account

The “Edit My User Account” menu option gives users the ability to update their own account information. User information includes the user’s first name, middle initial or name, last name, email address, and phone number. This menu option can be accessed from the Application or Portal view. If you click the “Edit My User Account” menu item in the Application view, users are redirected to the Portal view.

Important: *The email address is important during the password reset process. The temporary password notification is sent to this email address. ImmTrac2 does NOT allow more than one user account to have the same email address. If any user needs access to more than one organization, they can access multiple organizations with a single user account.*

To edit user account information, follow the steps below.

See Figure 24: Edit My Account Steps 1-3.

1. Click the “Edit My User Account” menu panel option.
2. Update information as needed.
3. Click the “Save” button.

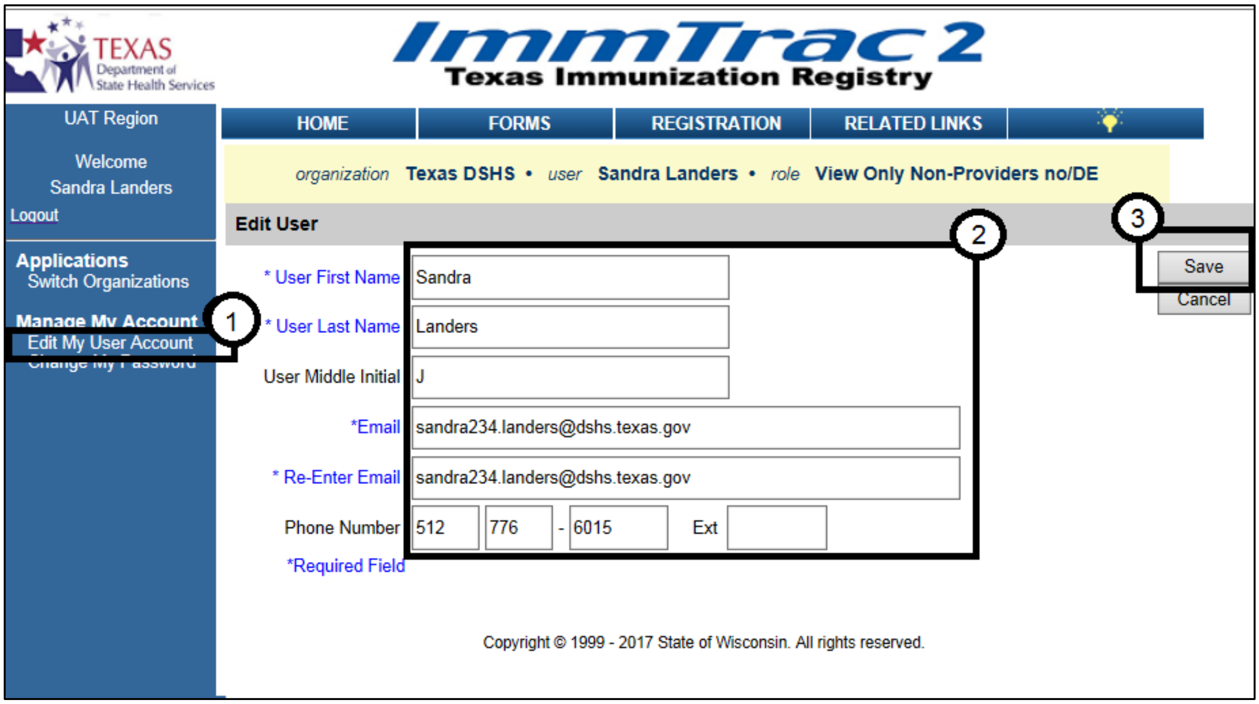


Figure 24 - Edit My User Account Steps 1-3

Change My Password

Periodically the user's password will need to be changed in order to meet ImmTrac2 security requirements. When a password update is required, ImmTrac2 displays a warning message on the Application home page. *See Figure 25 – Password will Expire Message*.

Users can click the "Change Password" link in the warning message, or click the "Change My Password" link in the menu panel. This menu option can be accessed from the Application or Portal view. If you click the "Edit My User Account" in the Application view, users are redirected to the Portal view.

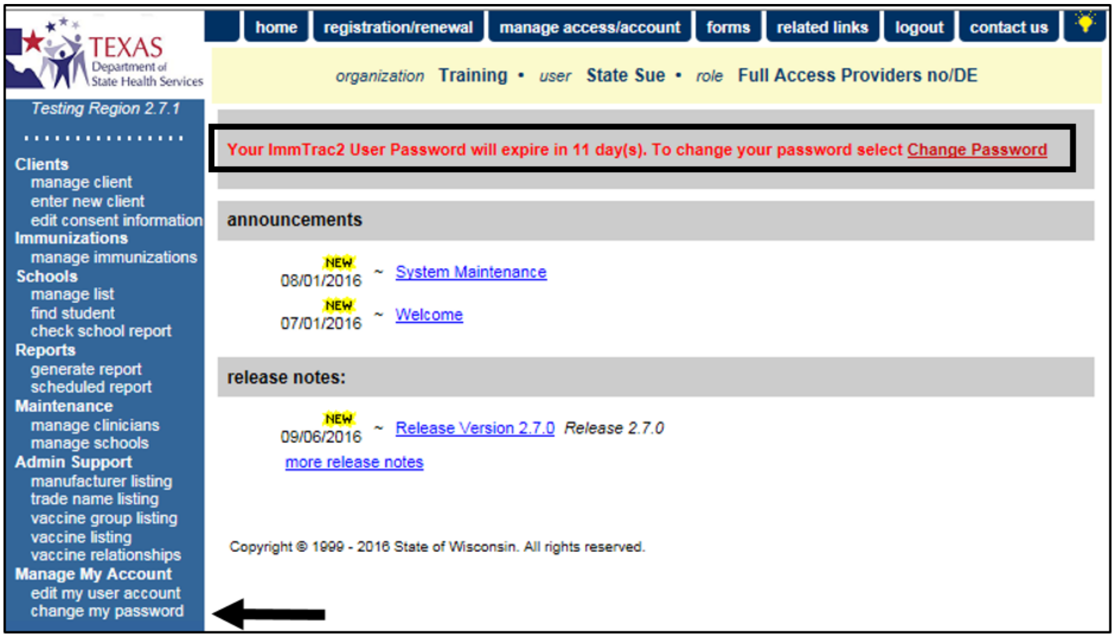


Figure 25 - Password will Expire Message

The "Change My Password" option allows users to change their password at any time. When selecting a new password, users must follow the password requirements listed on the *Change Password* screen.

Password Requirements: Must be between 8 and 16 characters, and must have at least one of each of the following:

- Upper case letter
- Lower case letter
- Numeric value
- Special character
- At least 4 characters must be different from previous password
- No dictionary words including slang
- Cannot reuse last 6 passwords

To change an ImmTrac2 user account password, follow the steps below.

See Figure 26: Change My Password Steps 1-3.

1. Click the "Change My Password" menu option.
2. Enter the new password in both the New Password and the Confirm New Password fields.
3. Click the "Save" button.

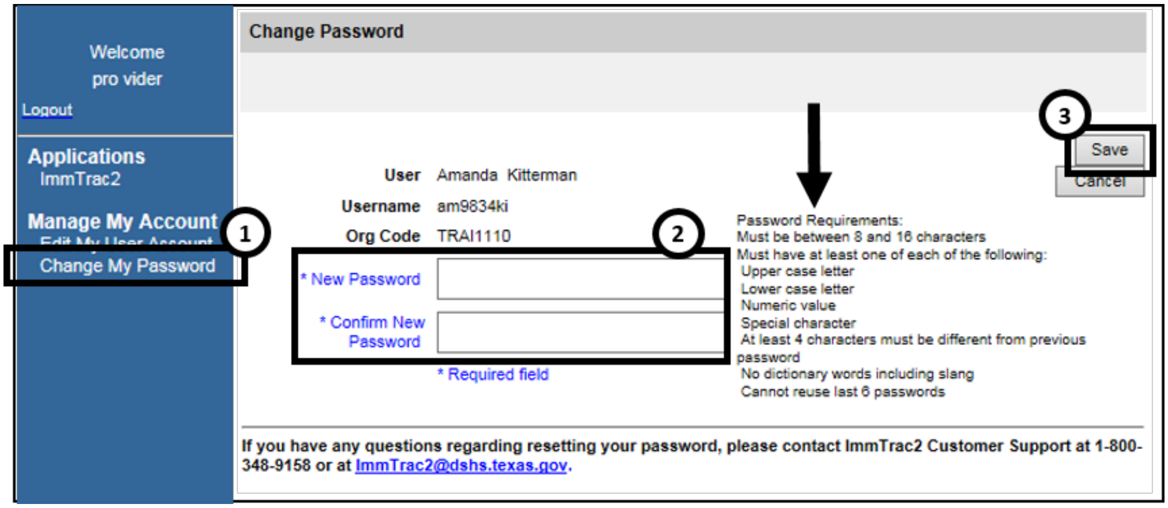


Figure 26 - Change My Password Steps 1-3

Chapter 7: Client Search

ImmTrac2 offers several search options to locate clients and their immunizations records. Client searches are statewide and records are available to all users regardless of user role.

There are three search options available: Quick Search, Basic Search, and Smart Search. The more information and accuracy of that information that is used in a query will provide the best results. *See Figure 27: Client Search Options.*

Figure 27 - Client Search Options

***Note**: ImmTrac2 disregards spaces, apostrophes, and hyphens on all first and last names entered for the search. If a single letter is entered in the first name field, the system will only search for first names that have only one letter. If both names have one letter, or the last name is only one letter, the system displays a warning message: "Minimum search criteria not met. Please enter full first and last name."*

Quick Search

The *Quick Search* option allows users to search one of four ways: by ImmTrac2 ID, Client ID, SSN#, and Birth Date, or Medicaid ID. This information must exactly match the data in ImmTrac2 for the client. *See Figure 28: Quick Search.*

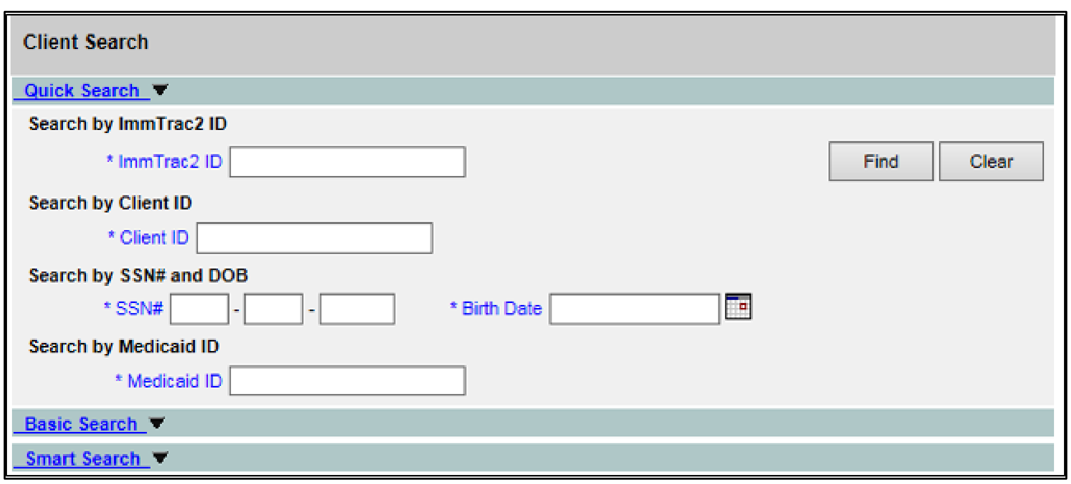


Figure 28 - Quick Search

Basic Search

The *Basic Search* option requires the user to search by First Name, Last Name, and Birth Date; all other fields are optional. If a complete first name, last name, and birth date are entered, they must be exact. If partial information is known, Basic Search allows for wild card searching. This means that partial information can be entered and a search can still be performed. *See Figure 29: Basic Search.*

Search criteria:

First Name

Entering at least the first two letters of the client's first name, at least two letters of the last name, and a birth date will initiate a search of all clients matching the information entered. This is a type of wild card search. (No asterisks are required after the letters in the name search.)

Last Name

Entering at least the first two letters of the client's last name, at least the first two letters of the first name, and a birth date will initiate a search of all clients matching the information entered. This is a type of wild card search. Remember clients may go by more than one last name, so vary the search options.

Gender

If this field is blank, ImmTrac2 will search both male and female clients. If the "Unknown" option is selected, only client records that are designated as an "Unknown" gender will be searched.

Birth Date

Entering the client's birth date and the full or partial first and last name will narrow a search for a client name. A search can also be performed with the date of "??/??/????" in the birth date field as a wild card search when a full or partial first and last name are entered.

***Note**: The ImmTrac2 search functionality disregards spaces, apostrophes, and hyphens on all first and last names entered for the search. If a single letter is entered in the first name field, the system will only search for first names that have only one letter. If both names have one letter, or the last name is only one letter, the system displays a warning message: "Minimum search criteria not met. Please enter full first and last name."*

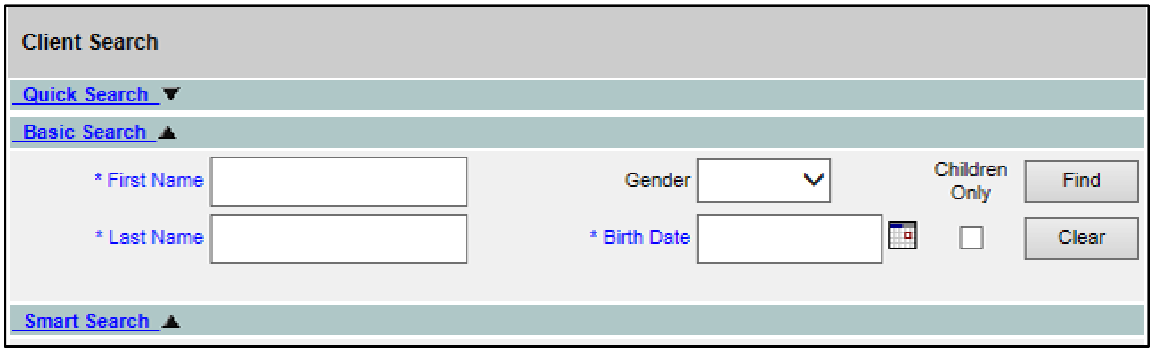


Figure 29 - Basic Search

Smart Search

The *Smart Search* option requires more information, such as First Name, Last Name, Birth Date, Gender, and Street Address (fields marked in blue with an asterisk). All other fields are optional but recommended to help narrow search results. The Smart Search function uses a more complex searching algorithm than the Quick Search or Basic Search functions. Smart Search allows some error in the spelling of some of the fields and may still bring back matching records, whereas the Quick Search and Basic Search functions require precise spelling. *See Figure 30: Smart Search.*

Search criteria:

First Name and **Last Name:** Enter in as much information as possible. Some searches may generate results while other similar searches may not.

Birth Date: Birth date is required and it must be exact. The "??/??/????" wild card search cannot be used with the Smart Search option.

Gender: The gender selection must be correct to locate a client.

Street Address: Users must enter at least the numerical digits of the client's address to perform a search. If the street address is not known, use any digit(s) to complete a search.

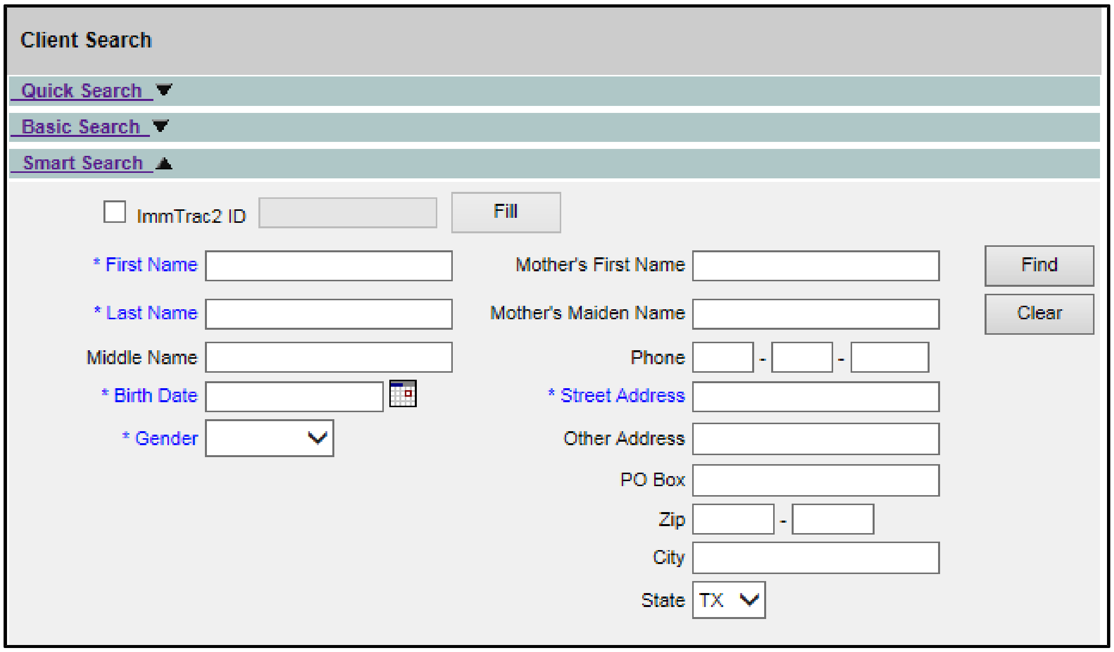


Figure 30 - Smart Search

Search Results

No Results Found

When no results are found based on the search criteria, the "Possible Matches" will equal "0". Check the criteria for accuracy and perform the search again, or use a different search option. *Figure 31: Client Search – No Results.*

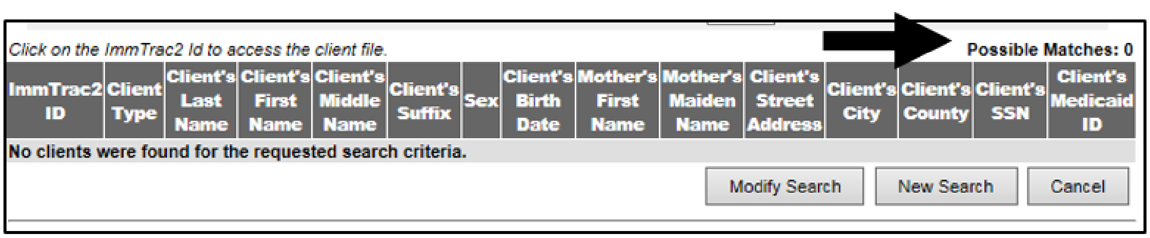
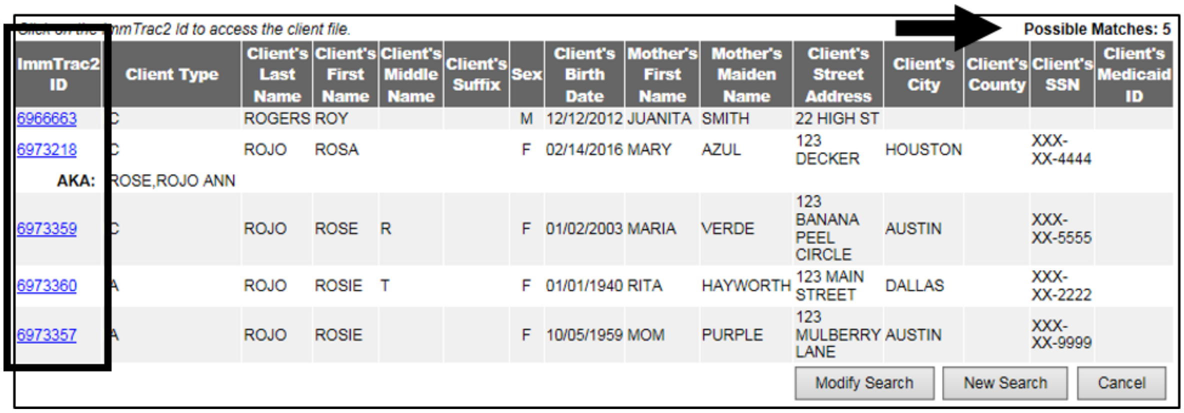


Figure 31 - Client Search – No Results

> ***Important****: Users who can enter new clients must attempt to locate the clients using Smart Search in order to prevent creating duplicate records. Smart Search provides the most protection against duplicate client entry in ImmTrac2.*

Multiple Results

If multiple results are found, the "Possible Matches" value will equal the total number of potential client matches. Review all the information to ensure that the correct client is selected. Click the client's "ImmTrac2 ID" hyperlink to view more details and their immunization records. *Figure 32: Client Search – Multiple Results.*



mmTrac2 Id to access the client file.

Possible Matches: 5

ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Client's Suffix	Sex	Client's Birth Date	Mother's First Name	Mother's Maiden Name	Client's Street Address	Client's City	Client's County	Client's SSN	Client's Medicaid ID
6966663	C	ROGERS	ROY			M	12/12/2012	JUANITA	SMITH	22 HIGH ST				
6973218	C	ROJO	ROSA			F	02/14/2016	MARY	AZUL	123 DECKER	HOUSTON		XXX-XX-4444	
AKA:	ROSE,ROJO ANN													
6973359	C	ROJO	ROSE	R		F	01/02/2003	MARIA	VERDE	123 BANANA PEEL CIRCLE	AUSTIN		XXX-XX-5555	
6973360	A	ROJO	ROSIE	T		F	01/01/1940	RITA	HAYWORTH	123 MAIN STREET	DALLAS		XXX-XX-2222	
6973357	A	ROJO	ROSIE			F	10/05/1959	MOM	PURPLE	123 MULBERRY LANE	AUSTIN		XXX-XX-9999	

Modify Search New Search Cancel

Figure 32 - Client Search – Multiple Results

Exact Match

If the search criteria returns an exact match, the user is taken directly to the client's information instead of presenting a list of possible matches. Check the information on the screen to make sure the search resulted in the correct client.

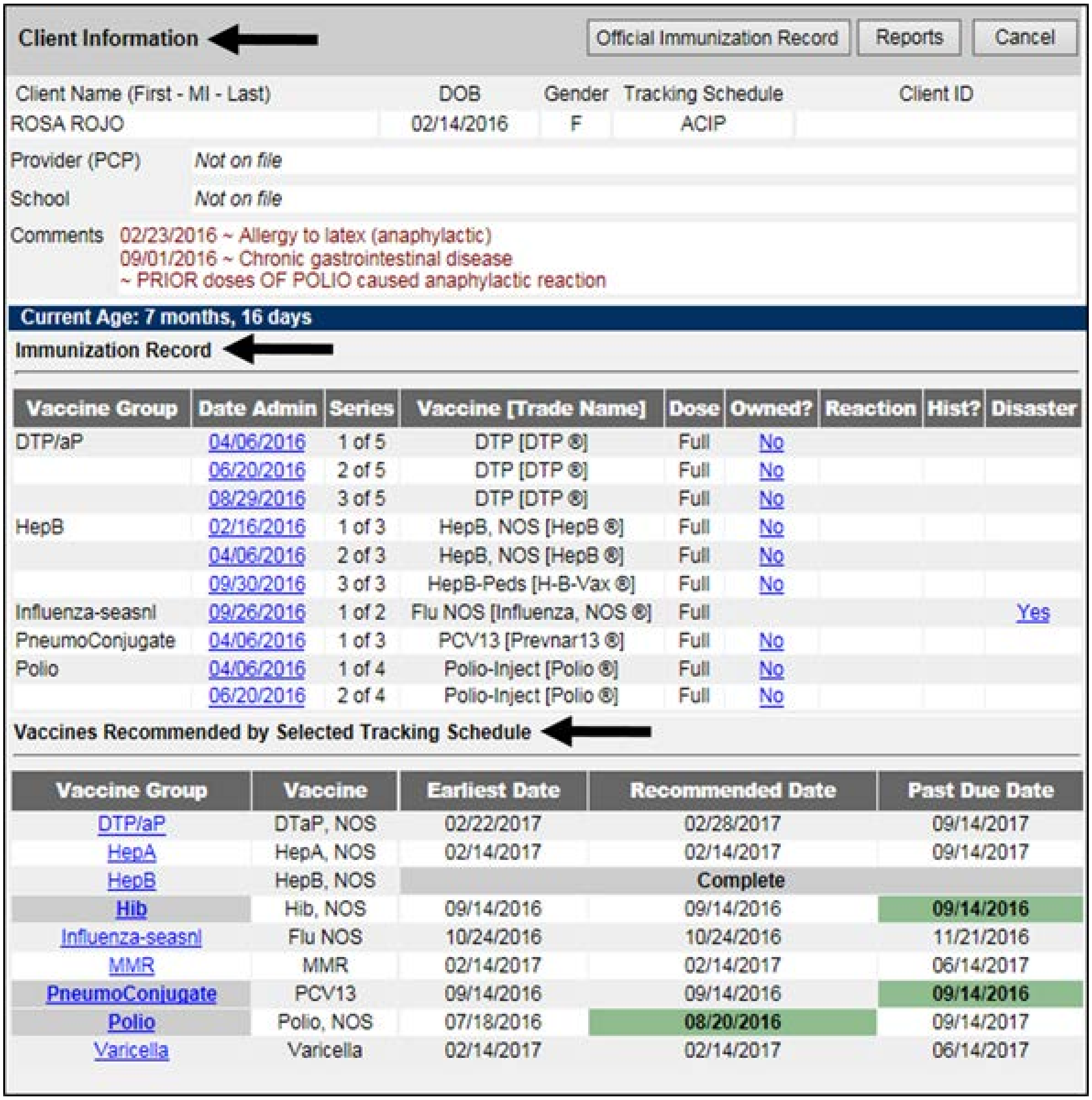
>50 Matches Returned

If the number of clients exceeds 50 matches, only the first 50 matches will display along with the following message: *"Please refine your search, only the first 50 matches were returned."*

If this message is received, clear the search criteria and try again with more detailed information.

Chapter 8: View Immunization Records

There are several ways to view a client's immunization record. The View Only Non-Provider and Full Access Provider user roles access these records in different ways that will be discussed in later sections. The *Client Immunization History* screen has three sections: Client Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule. *See Figure 33: View Client Immunization History (View Only Non-Provider View).*



Client Information

Official Immunization Record | Reports | Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
ROSA ROJO	02/14/2016	F	ACIP	

Provider (PCP) *Not on file*

School *Not on file*

Comments 02/23/2016 ~ Allergy to latex (anaphylactic)
09/01/2016 ~ Chronic gastrointestinal disease
~ PRIOR doses OF POLIO caused anaphylactic reaction

Current Age: 7 months, 16 days

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
DTP/aP	04/06/2016	1 of 5	DTP [DTP ®]	Full	No			
	06/20/2016	2 of 5	DTP [DTP ®]	Full	No			
	08/29/2016	3 of 5	DTP [DTP ®]	Full	No			
HepB	02/16/2016	1 of 3	HepB, NOS [HepB ®]	Full	No			
	04/06/2016	2 of 3	HepB, NOS [HepB ®]	Full	No			
	09/30/2016	3 of 3	HepB-Peds [H-B-Vax ®]	Full	No			
Influenza-seasnl	09/26/2016	1 of 2	Flu NOS [Influenza, NOS ®]	Full				Yes
PneumoConjugate	04/06/2016	1 of 3	PCV13 [Prevnar13 ®]	Full	No			
Polio	04/06/2016	1 of 4	Polio-Inject [Polio ®]	Full	No			
	06/20/2016	2 of 4	Polio-Inject [Polio ®]	Full	No			

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS	02/22/2017	02/28/2017	09/14/2017
HepA	HepA, NOS	02/14/2017	02/14/2017	09/14/2017
HepB	HepB, NOS		Complete	
Hib	Hib, NOS	09/14/2016	09/14/2016	**09/14/2016**
Influenza-seasnl	Flu NOS	10/24/2016	10/24/2016	11/21/2016
MMR	MMR	02/14/2017	02/14/2017	06/14/2017
PneumoConjugate	PCV13	09/14/2016	09/14/2016	**09/14/2016**
Polio	Polio, NOS	07/18/2016	**08/20/2016**	09/14/2017
Varicella	Varicella	02/14/2017	02/14/2017	06/14/2017

Figure 33 - View Client Immunization History (View Only Non-Provider View)

Client Information

The Client Information section at the top of the immunization record screen displays identifying information about the client, including client name, date of birth, gender, client's selected tracking schedule, Client ID, address, phone, and a scrollable list of comments. It also include the client's age in years, months, and days and any Client Notes that have been entered for this client. Use this information to verify that this is the correct client. *See Figure 34: View Immunization – Client Information.*

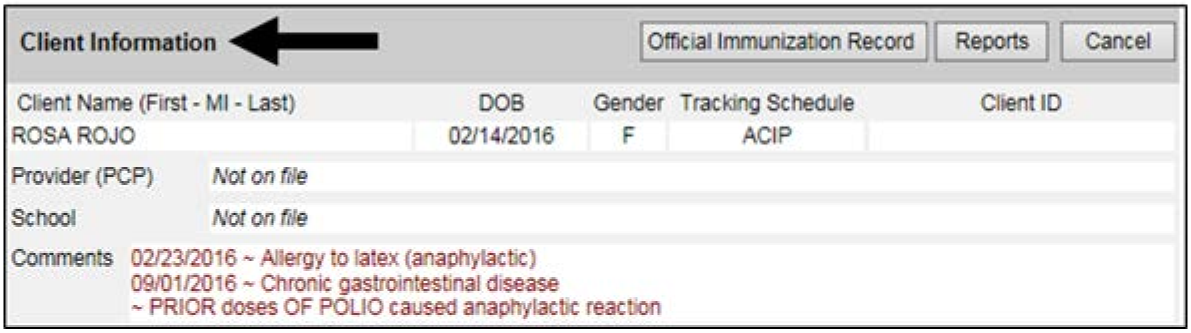


Figure 34 - View Immunization – Client Information
(View Only Non-Provider View)

Reports

Clicking the "Reports" button opens the *Reports Available for This Client* screen where Client-specific reports can be generated. See the Client Immunization Reports section for details.

Official Immunization Record

Clicking the "Official Immunization Record" button displays the client's official immunization record as recorded in ImmTrac2. *See Figure 35: Official Immunization Record Example.*

04 October 2016

ImmTrac2, the Texas Immunization Registry

Training

Immunization History Report

Client ID: | Tracking Schedule: **ACIP**

Client Name: **ROSA ROJO**

Birth Date: **02/14/2016** | Gender: **Female**

Age: **7 months, 20 days**

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Manufacturer	Lot #	Provider of Information
DTP/aP	04/06/2016	1 of 5	DTP [DTP]	Full	PMC-Sanofi Pasteur Inc.	123456	Texas DSHS
	06/20/2016	2 of 5	DTP [DTP]	Full	PMC-Sanofi Pasteur Inc.	A548748	Texas DSHS
	08/02/2016	3 of 5	DTaP, NOS [DTaP, NOS]	Full			Training
HepB	02/16/2016	1 of 3	HepB, NOS [HepB]	Full	MSD-Merck & Co., Inc.	GT456123	Texas DSHS
	04/06/2016	2 of 3	HepB, NOS [HepB]	Full	MSD-Merck & Co., Inc.	LKT36197	Texas DSHS
	09/30/2016	3 of 3	HepB-Adult [Engerix-B Adult]	Full		123456	Training
Hib	09/30/2016	1 of 3	Hib-PRP-T [Hiberix]	Full	SKB-GlaxoSmithKline	A548748	Training
Influenza-seasnl	09/26/2016	1 of 2	Flu NOS [Influenza, NOS]	Full		789789	Training City
PneumoConjugate	04/06/2016	1 of 3	PCV13 [Prevnar13]	Full	PFR-Pfizer-Wyeth	33325485	Texas DSHS
	09/30/2016	2 of 3	PCV13 [Prevnar13]	Full	PFR-Pfizer-Wyeth	REG178726	Training
Polio	04/06/2016	1 of 4	Polio-Inject [Polio]	Full	PMC-Sanofi Pasteur Inc.	PL147852	Texas DSHS

Reaction Descriptions:

1: 13 - Persistent crying lasting >= 3 hours within 48 hours of immunization

Client Comments:	Start Date:	End Date:
PRIOR doses OF POLIO caused anaphylactic reaction		
Chronic gastrointestinal disease	09/01/2016	
Allergy to latex (anaphylactic)	02/23/2016	

Primary Physician:

Address:

-

Physician's Signature

ROSA ROJO **02/14/2016**

Figure 35 - Official Immunization Record Example

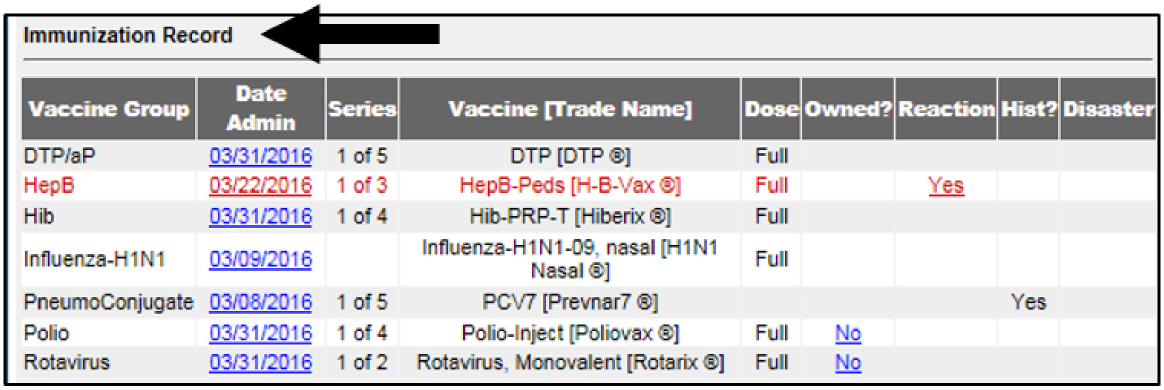
Edit Client

The “Edit Client” button will take users back to the *View Client* screen for the currently selected client. (This option is not available for View Only Non-Provider users.)

Immunization Record

The Immunization Record table lists all the immunizations the client has received to date, and that have been entered into ImmTrac2. Immunizations are listed alphabetically by Vaccine Group and the Series is ordered by Date Administered. *See Figure 36: View Immunization Information.*

For more information regarding each column in the immunization record see *Table 2*: *Immunization Record Details.*



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
DTP/aP	03/31/2016	1 of 5	DTP [DTP ®]	Full				
HepB	03/22/2016	1 of 3	HepB-Peds [H-B-Vax ®]	Full		Yes		
Hib	03/31/2016	1 of 4	Hib-PRP-T [Hiberix ®]	Full				
Influenza-H1N1	03/09/2016		Influenza-H1N1-09, nasal [H1N1 Nasal ®]	Full				
PneumoConjugate	03/08/2016	1 of 5	PCV7 [Prevnar7 ®]				Yes	
Polio	03/31/2016	1 of 4	Polio-Inject [Poliovax ®]	Full	No			
Rotavirus	03/31/2016	1 of 2	Rotavirus, Monovalent [Rotarix ®]	Full	No			

Figure 36 - View Immunization Information

Table 2 - Immunization Record Details

Field Name	***Description***
Vaccine Group	The vaccine group name.
Date Administered	Date the client was given the vaccine. Click the link to display the tracking schedule information for the selected immunization.
Series	The sequence number within the immunization series. A vaccine may show as invalid if the client was not old enough when it was administered or not enough time has elapsed between doses. "Partial Dose" displays if the vaccine is flagged as a partial dosage.
Trade Name	The manufacturer's name for the vaccine.
Dose	Indicates whether full, half, or multiple doses were administered to the client. If this is blank, it is assumed that the full dose was given.

Field Name	*Description*
Owned	Indicates whether the user's Organization administered the vaccine or not. If the field is blank, the immunization data is owned by the user's organization, which means your organization administered the vaccine. If the value in this field is "No", the immunization data is not owned by your organization. Click the "No" link to display the owner of this vaccine's information.
Reaction	If this field is "Yes" and appears in red, a reaction to a vaccine was recorded. Click the "Yes" link in the Reaction column or click the notepad icon in the "Edit" column to view the client's reaction.
Historical (Hist)	If the field is "Yes", this indicates that the record is historical. This means the immunization was administered at one organization but the data was submitted to ImmTrac2 by a different organization. If the field is blank, this indicates the immunization was not a Historical Immunization. If this field is "Yes" and the Owned field is "No", the Historical Immunization data was not added by your organization.
Disaster	This field displays "Yes" if the immunization was designated a disaster immunization and was administered during the Disaster Event date. If the selected immunization has a field value of "Yes", the field will be a hyperlink that provides information about the disaster event that the immunization is associated with.
Edit	This column provides the ability to edit the information about the immunization. It also provides the ability to associate a reaction to the immunization. Reactions can be entered by any provider organization and do not need to be recorded by the provider that administered the immunization.

Vaccines Recommended by Selected Tracking Schedule

By default, the Vaccines Recommended by Selected Tracking Schedule section lists all the vaccines recommended by the ACIP (Advisory Committee on Immunization Practices) tracking schedule for the selected client. To view vaccines recommended under different schedules other than ACIP, the user must navigate to the Edit Client screen and select a different tracking schedule for the client under Organization Information. Immunizations are listed alphabetically by Vaccine Group. The current schedule being displayed in the Vaccines Recommended by Selected Tracking schedule can be determined by locating the "Tracking Schedule" field in the "Client Information" section of this page.

The green shaded fields highlight specific vaccinations that are due or past due for the client. The dark grey background is used to highlight a vaccination with a specific status. *See Figure 37: View Immunizations – Recommended Vaccines and Table 3: Select Tracking Schedule – Data Fields.*

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS	03/27/2016	04/14/2016	**05/14/2016**
HepA	HepA, NOS		**Contraindicated**	
HepB	HepB, NOS	04/19/2016	04/22/2016	**07/14/2016**
Hib	Hib, NOS	06/30/2016	**06/30/2016**	09/02/2016
Influenza-seasnl	Flu NOS	09/08/2016	09/08/2016	10/06/2016
MMR	MMR	02/14/2017	02/14/2017	06/14/2017
PneumoConjugate	PCV13	07/01/2016	**07/01/2016**	09/03/2016
Polio	Polio, NOS	08/31/2016	08/31/2016	09/14/2017
Rotavirus	Rotavirus, NOS		**Complete**	
Varicella	Varicella	02/14/2017	02/14/2017	06/14/2017

Figure 37 - View Immunizations – Recommended Vaccines

Table 3 - Select Tracking Schedule – Data Fields

Field Name	Description
Vaccine Group	The vaccine group name. Click the vaccine group name to view the tracking schedule information for the selected immunization.
Vaccine	Lists the Vaccine Group Name.
Earliest Date	The earliest date that the client should receive the vaccine.
Recommended Date	The recommended date that the client should receive the vaccine.
Past Due Date	The date at which the client is past due for the immunization.
Recommended Date is green	Displays dates with a green background when today's date is on or after the Recommended Date and before the Past Due Date.
Past Due Date is green	Displays dates with a green background when today's date is on or after the Past Due Date.

Field Name	***Description***
Status is dark grey *(Status includes Earliest, Recommended, or Past Due Date)*	A status bar displays with a dark grey background in the Earliest Date, Recommended Date, and Past Due Date for the following scenarios. • **'Complete'** displays when the client is complete for the specific vaccine group. • **'Contraindicated'** displays when the client has a contraindicated comment associated with the client for the specific vaccine group. • **'Maximum Age Exceeded'** displays when the client has exceeded the maximum age for the specific vaccine group. • **'Maximum Doses Met or Exceeded for Vaccine Group'** displays when the client has exceeded the maximum number of doses that can be given for the specific vaccine group. • **'Immunity Recorded for Vaccine Group'** displays when the client has an immunity comment associated with the client for the specific vaccine group. • **'Medical Exemption'** displays when the client has a Medical Exemption comment associated with the client for the specific vaccine group.

Chapter 9: Client Immunization Reports

When viewing the client immunization records, users have an option to view Client Immunization Reports. Click the “Reports” button to view and print client immunization reports. *See Figure 38: Client Immunization Reports (View Only Non-Provider View).*

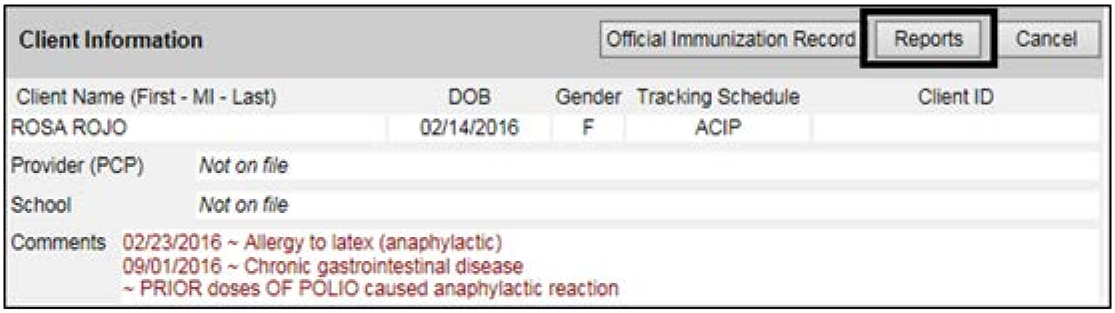


Figure 38 - Client Immunization Reports

Users are redirected to the *Client Information - Reports Available for this Client* screen. This section offers two hyperlinks:

See Figure 39: Reports Available for the Client

- Official Immunization Record
- Immunizations Needed report

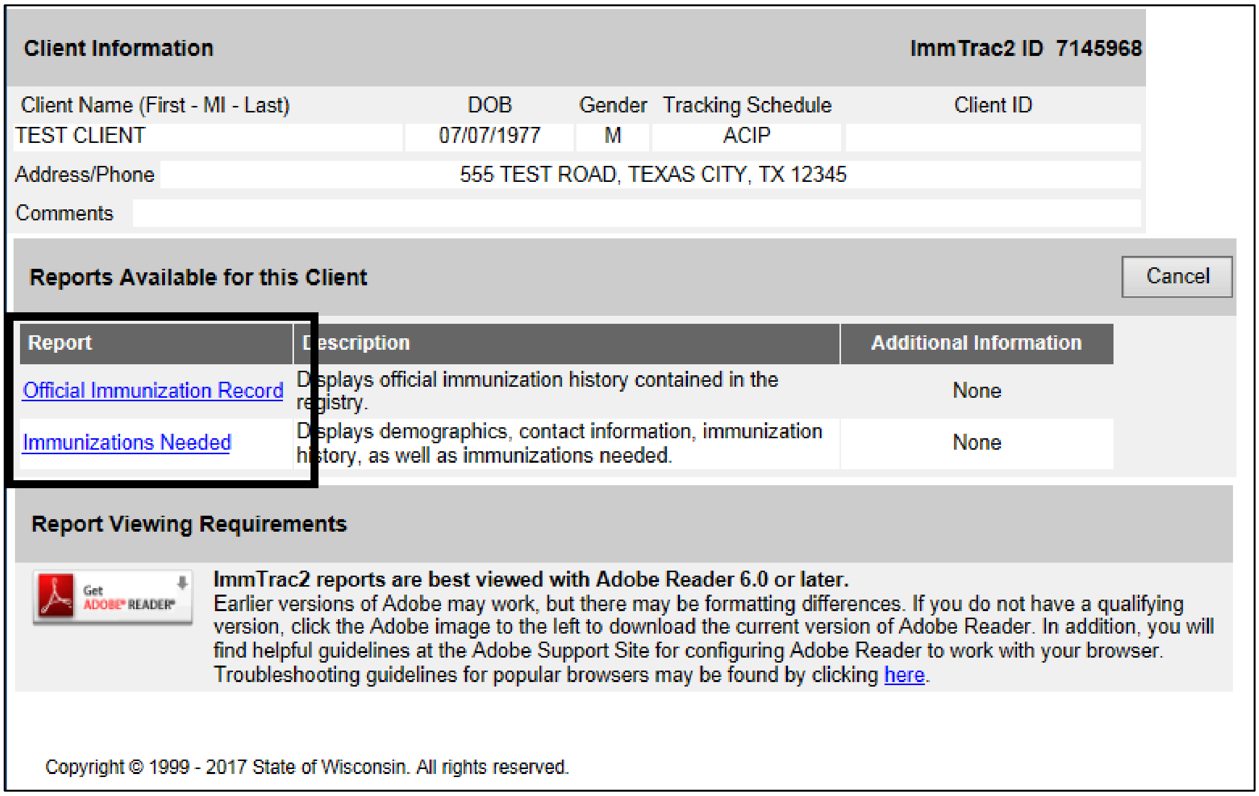


Figure 39 - Reports Available for the Client

Official Immunization Record

This reports displays client information, contact information, and a detailed summary of the client's immunization history. This report can only be printed with consent from the parent or guardian. *See Figure 40: Official Immunization Record Example.*

04 October 2016

ImmTrac2, the Texas Immunization Registry

Training

Immunization History Report

Client ID: Tracking Schedule: **ACIP**

Client Name: **ROSA ROJO**

Birth Date: **02/14/2016** Gender: **Female**

Age: **7 months, 20 days**

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Manufacturer	Lot #	Provider of Information
DTP/aP	04/06/2016	1 of 5	DTP [DTP]	Full	PMC-Sanofi Pasteur Inc.	123456	Texas DSHS
	06/20/2016	2 of 5	DTP [DTP]	Full	PMC-Sanofi Pasteur Inc.	A548748	Texas DSHS
	08/02/2016	3 of 5	DTaP, NOS [DTaP, NOS]	Full			Training
HepB	02/16/2016	1 of 3	HepB, NOS [HepB]	Full	MSD-Merck & Co., Inc.	GT456123	Texas DSHS
	04/06/2016	2 of 3	HepB, NOS [HepB]	Full	MSD-Merck & Co., Inc.	LKT36197	Texas DSHS
	09/30/2016	3 of 3	HepB-Adult [Engerix-B Adult]	Full		123456	Training
Hib	09/30/2016	1 of 3	Hib-PRP-T [Hiberix]	Full	SKB-GlaxoSmithKline	A548748	Training
Influenza-seasonal	09/26/2016	1 of 2	Flu NOS [Influenza, NOS]	Full		789789	Training City
PneumoConjugate	04/06/2016	1 of 3	PCV13 [Prevnar13]	Full	PFR-Pfizer-Wyeth	33325485	Texas DSHS
	09/30/2016	2 of 3	PCV13 [Prevnar13]	Full	PFR-Pfizer-Wyeth	REG178726	Training
Polio	04/06/2016	1 of 4	Polio-Inject [Polio]	Full	PMC-Sanofi Pasteur Inc.	PL147852	Texas DSHS

Reaction Descriptions:

1: 13 - Persistent crying lasting >= 3 hours within 48 hours of immunization

Client Comments:	Start Date:	End Date:
PRIOR doses OF POLIO caused anaphylactic reaction		
Chronic gastrointestinal disease	09/01/2016	
Allergy to latex (anaphylactic)	02/23/2016	

Primary Physician:

Address:

-

Physician's Signature

ROSA ROJO **02/14/2016**

Figure 40 - Official Immunization Record Example

Immunizations Needed Report

This report displays the client's name, identifying information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the client. This report helps to identify upcoming immunizations. *See Figure 41: Immunizations Needed Report Example.*

01 April 2016

ImmTrac2, the Texas Immunization Registry

Page 1

Immunization Record

Client ID: Seton123 **Race:** **Tracking Schedule:** ACIP

Client Name (L, F, M): SUE, PEGGY, M. **Ethnicity:** null

Birth Date: 02/14/2016 **Gender:** F

Age: 1 month, 18 days

Client Comments: Fever of 40.5 C (105 F) within 48 hours of **From Date:** **To Date:**

Immunization Record				
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
DTP/aP	03/31/2016	1 of 5	DTP	Full
HepB	03/22/2016	1 of 3	HepB-Peds	Full
Hib	03/31/2016	1 of 4	Hib-PRP-T	Full
Influenza-H1N1	03/09/2016		Influenza-H1N1-09, nasal	Full
PneumoConjugate	03/08/2016	1 of 5	PCV7	Full
Polio	03/31/2016	1 of 4	Polio-Inject	Full
Rotavirus	03/31/2016	1 of 2	Rotavirus, Monovalent	Full

Immunizations Due Record	
Vaccine	Date Needed
DTP/aP	06/14/2016
HepA	02/14/2017
HepB	04/22/2016
Hib	06/14/2016
Influenza-seasnl	08/14/2016
MMR	02/14/2017
PneumoConjugate	06/14/2016

Figure 41 - Immunizations Needed Report Example

ImmTrac2

Texas Immunization Registry

Section II

View Only

Non-Provider

Section II: View Only Non-Provider Users

A View Only Non-Provider role is given to users whose organization does not administer immunizations. Staff who work for school systems and Child-Care facilities are typically assigned this role. These users can use ImmTrac2 to access immunization histories and client records for students or any individual who is participating in ImmTrac2. These users can view immunizations and use lists to view and run reports for groups of clients. View Only Non-Providers do not have the capability to add new clients to ImmTrac2 or to update client records.

After logging in, the left-side menu panel displays options designed specifically for View Only Non-Providers. *See Figure 42: View Only Non-Provider Application View.*

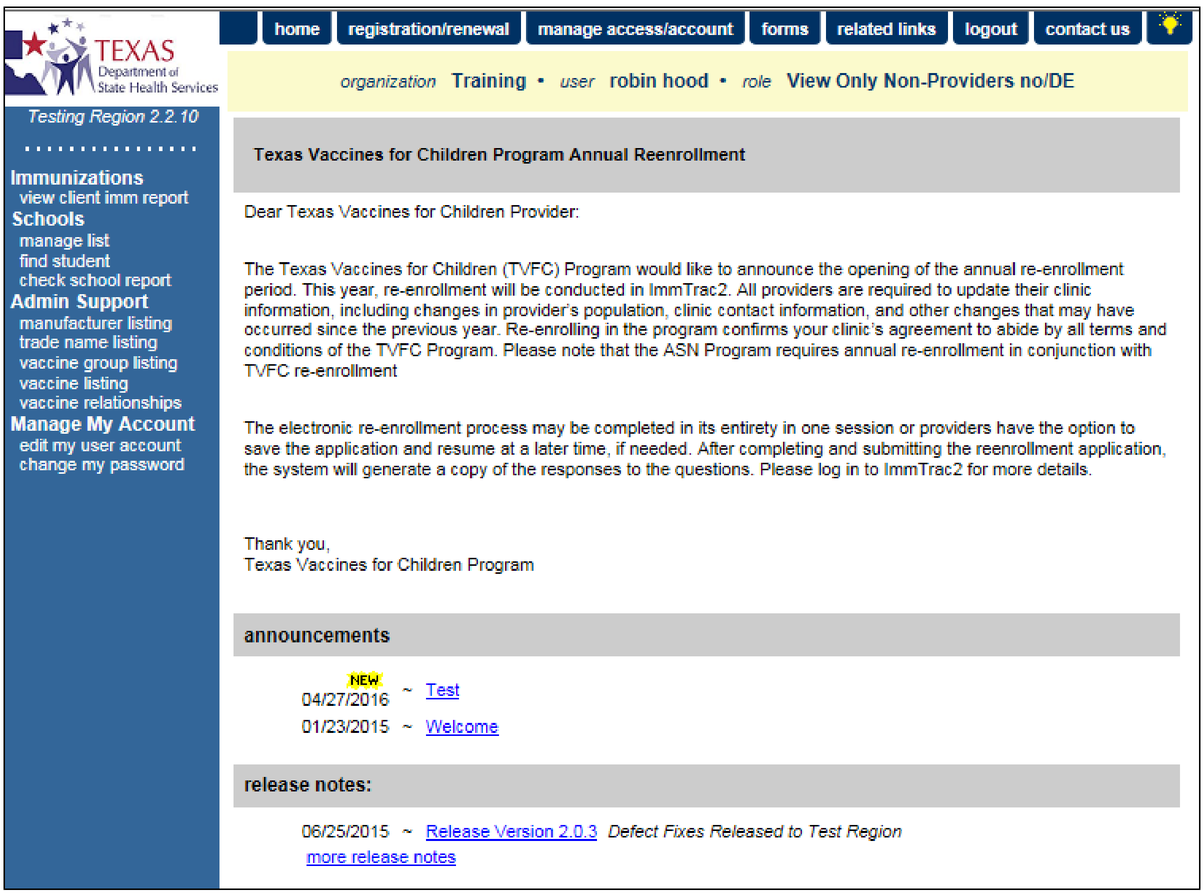


Figure 42 - View Only Non-Provider Application View

Chapter 10: Immunizations

From the left menu panel, under the *Immunizations* menu group, the user can select the "view client imm report" link to view immunizations for an individual client.

View Client Immunization Record

To view client immunization records, use one of the three search options to locate the client: Quick Search, Basic Search, and Smart Search. The Basic Search option is a common search option if the client's first and last name, along with their date of birth (DOB) are known. If the DOB is not known, use "??/??/????" in that field as a wild card. If the Basic Search doesn't provide a result, use the Smart search option for additional fields of information.

For more details on how to perform a client search, search results, viewing, and printing a client immunization record, refer to Section 1 - Client Search.

To view an immunization record, follow the steps below.

See Figure 43: View Immunization Report Steps 1-4.

1. Click the "View Client Imm Report" menu option.
2. Select a search option.
3. Enter the search criteria. Fields marked with a blue asterisks are required.
4. Click the "Find" button.
    - The client immunization report displays immediately if only one result was found. *See Figure 44: View Immunization Report Example.*

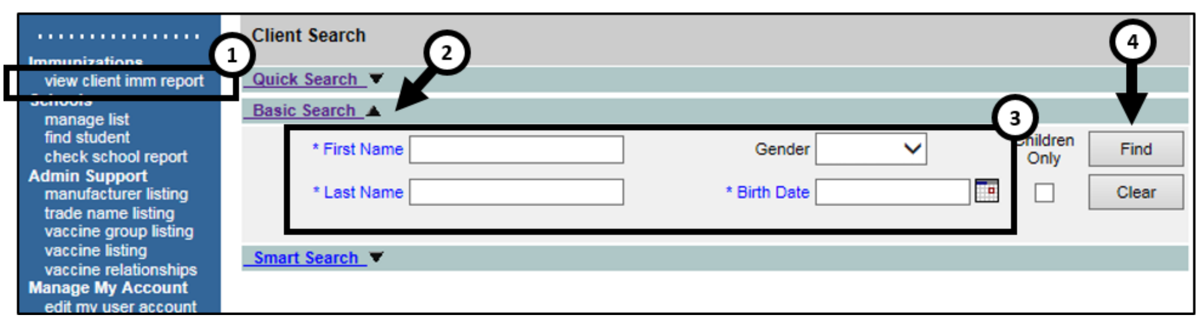
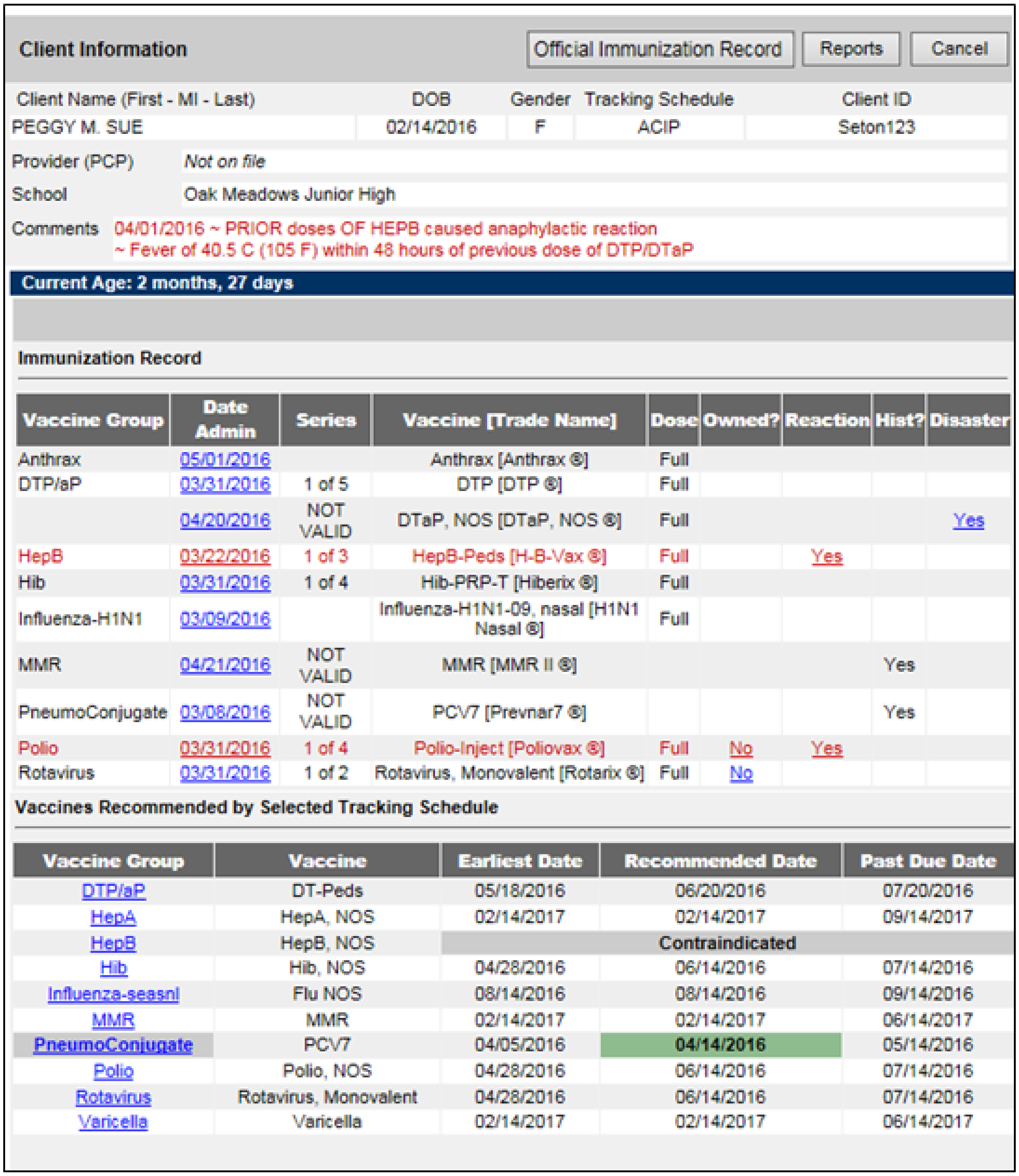


Figure 43 - View Immunization Report Steps 1-4



Client Information Official Immunization Record | Reports | Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
PEGGY M. SUE	02/14/2016	F	ACIP	Seton123

Provider (PCP) *Not on file*

School Oak Meadows Junior High

Comments 04/01/2016 ~ PRIOR doses OF HEPB caused anaphylactic reaction
~ Fever of 40.5 C (105 F) within 48 hours of previous dose of DTP/DTaP

Current Age: 2 months, 27 days

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
Anthrax	05/01/2016		Anthrax [Anthrax ®]	Full				
DTP/aP	03/31/2016	1 of 5	DTP [DTP ®]	Full				
	04/20/2016	NOT VALID	DTaP, NOS [DTaP, NOS ®]	Full				Yes
HepB	03/22/2016	1 of 3	HepB-Peds [H-B-Vax ®]	Full		Yes		
Hib	03/31/2016	1 of 4	Hib-PRP-T [Hiberix ®]	Full				
Influenza-H1N1	03/09/2016		Influenza-H1N1-09, nasal [H1N1 Nasal ®]	Full				
MMR	04/21/2016	NOT VALID	MMR [MMR II ®]				Yes	
PneumoConjugate	03/08/2016	NOT VALID	PCV7 [Prevnar7 ®]				Yes	
Polio	03/31/2016	1 of 4	Polio-Inject [Poliovax ®]	Full	No	Yes		
Rotavirus	03/31/2016	1 of 2	Rotavirus, Monovalent [Rotarix ®]	Full	No			

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DT-Peds	05/18/2016	06/20/2016	07/20/2016
HepA	HepA, NOS	02/14/2017	02/14/2017	09/14/2017
HepB	HepB, NOS	Contraindicated		
Hib	Hib, NOS	04/28/2016	06/14/2016	07/14/2016
Influenza-seasnl	Flu NOS	08/14/2016	08/14/2016	09/14/2016
MMR	MMR	02/14/2017	02/14/2017	06/14/2017
PneumoConjugate	PCV7	04/05/2016	04/14/2016	05/14/2016
Polio	Polio, NOS	04/28/2016	06/14/2016	07/14/2016
Rotavirus	Rotavirus, Monovalent	04/28/2016	06/14/2016	07/14/2016
Varicella	Varicella	02/14/2017	02/14/2017	06/14/2017

Figure 44 - View Immunization Report (View Only Non-Provider View)

Chapter 11: Schools

The options under the *Schools* category on the menu panel are functions to organize and access immunization information for groups of students (or clients) by creating lists.

Manage List

The "Manage List" menu panel option is used to create, edit, and delete school lists, and to run reports against those lists. To access this screen, click the "Manage List" option under the Schools section on the menu panel.

Create a New School List

Use the "Manage List" menu option to create a new list. When a list is created, the student count displays as 0 until students (clients) have been added to the list. After students are added to a list, the list name becomes an active hyperlink that is clickable and navigates to the list reports detail screen. See the Add Students to a List section for more details.

To create a new school list, follow the steps below.

Figure 45: Create New School List Steps 1-3.

1. Click the "Manage List" menu option.
2. Type an entry into the "New List Name" field.
3. Click the "Save" button.
   - The new list will appear in the *Reports List* section.
   - "The list has been created successfully" message displays at the top of the screen.

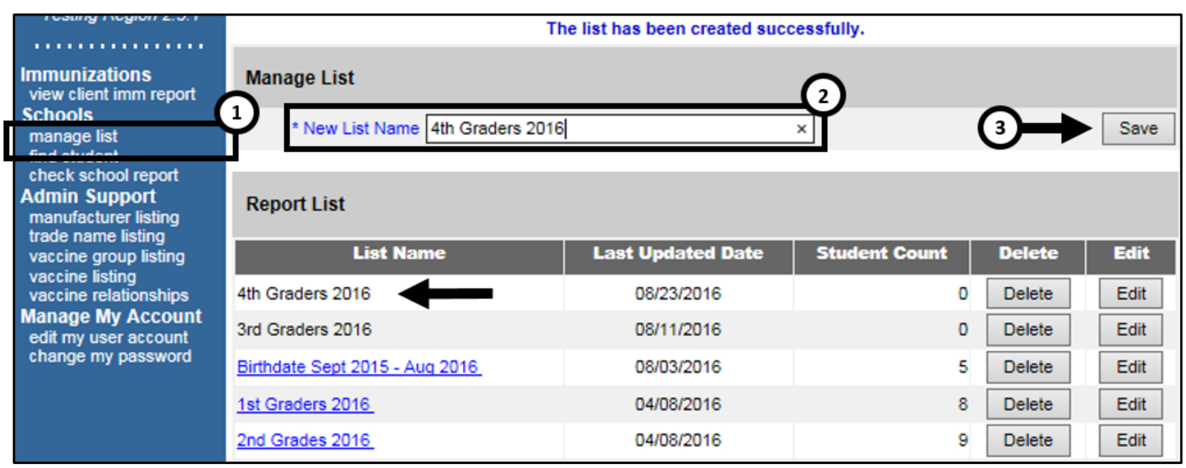


Figure 45 - Create New School List Steps 1-3

Edit a School List Name

The list name can be edited so that a new list does not have to be created. For example, the “4th Graders 2016” list can be renamed to “5th Graders 2017” for the next school year. When the list name is edited, it is updated on all screens.

To edit a list name, follow the steps below.

See Figure 46: Edit School List Name Steps 1-2.

1. Click the “Manage List” menu option.
2. Click the “Edit” button next to the list to be edited.

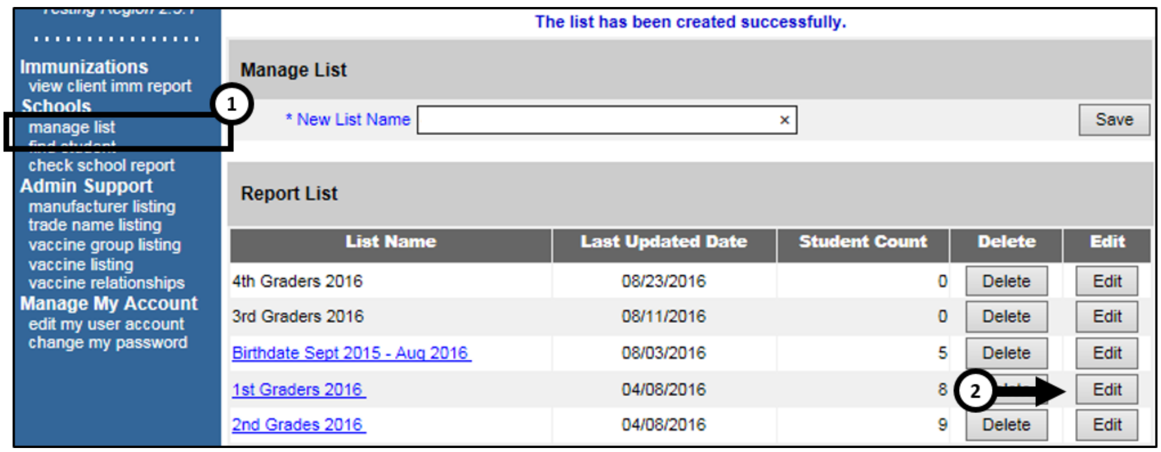


Figure 46 - Edit School List Name Steps 1-2

See Figure 47: Edit School List Name Steps 3-4.

3. Enter the new list name in the New List Name field.
4. Click the “Save” button.
    - Users are returned to the Manage List screen where updates can be validated.
    - Click the “Cancel” button to disregard updates and return to the Manage List screen.

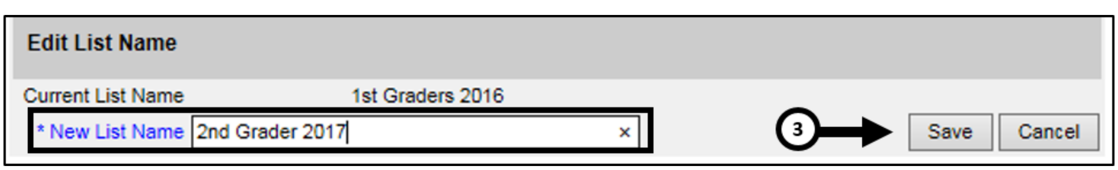


Figure 47 - Edit School List Name Steps 3-4

Delete a School List

To delete a list follow the steps below.

See Figure 48: Delete School List Steps 1-2.

1. Still on the "Manage List" screen, click the "Delete" button next to the list to be deleted.
2. Click "OK" when the message dialog box appears to complete the deletion action.

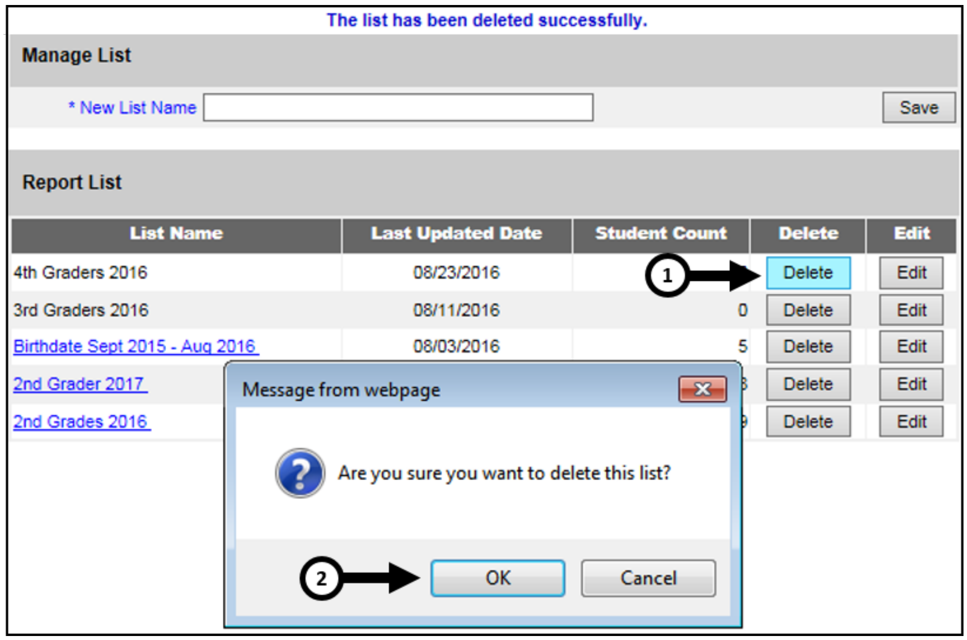


Figure 48 - Delete School List Steps 1-2

Important: Once you delete a list, you cannot retrieve it. Deleting a list will also remove all students from the list and will remove it from the Current Report List section on the *Find Student* screen.

View a School List

To view a school list follow the steps below.

See Figure 49: View School List Steps 1-2.

1. Click the "Manage List" menu option.
2. Click the "List Name" hyperlink of the list to be viewed.
   - Users are redirected to the *Student List* screen.

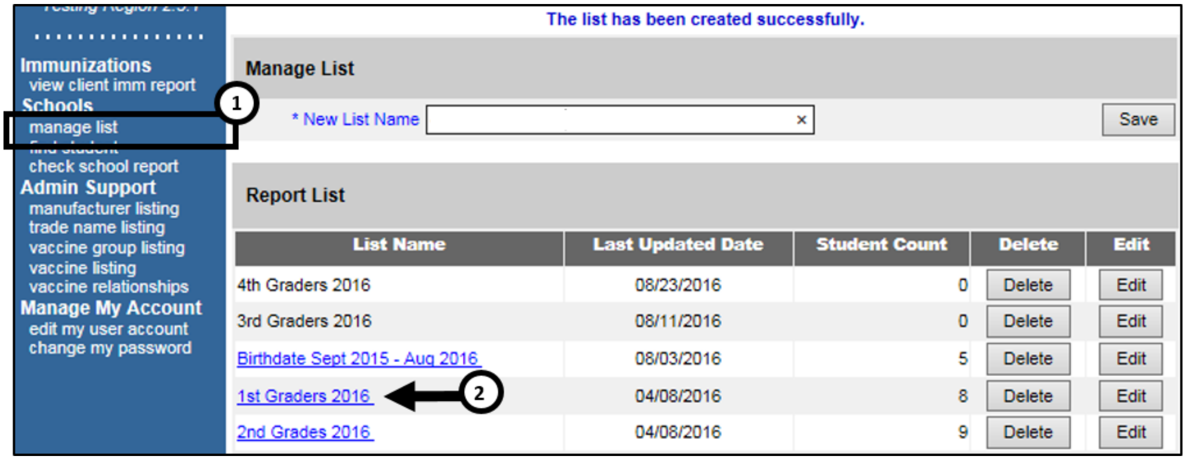


Figure 49 - View School List Steps 1-2

The *Student List* screen is divided into three main sections: Reports Available for, Select Tracking Schedule, and the Student (Client) List. *See Figure 50 - View Student List Example.*

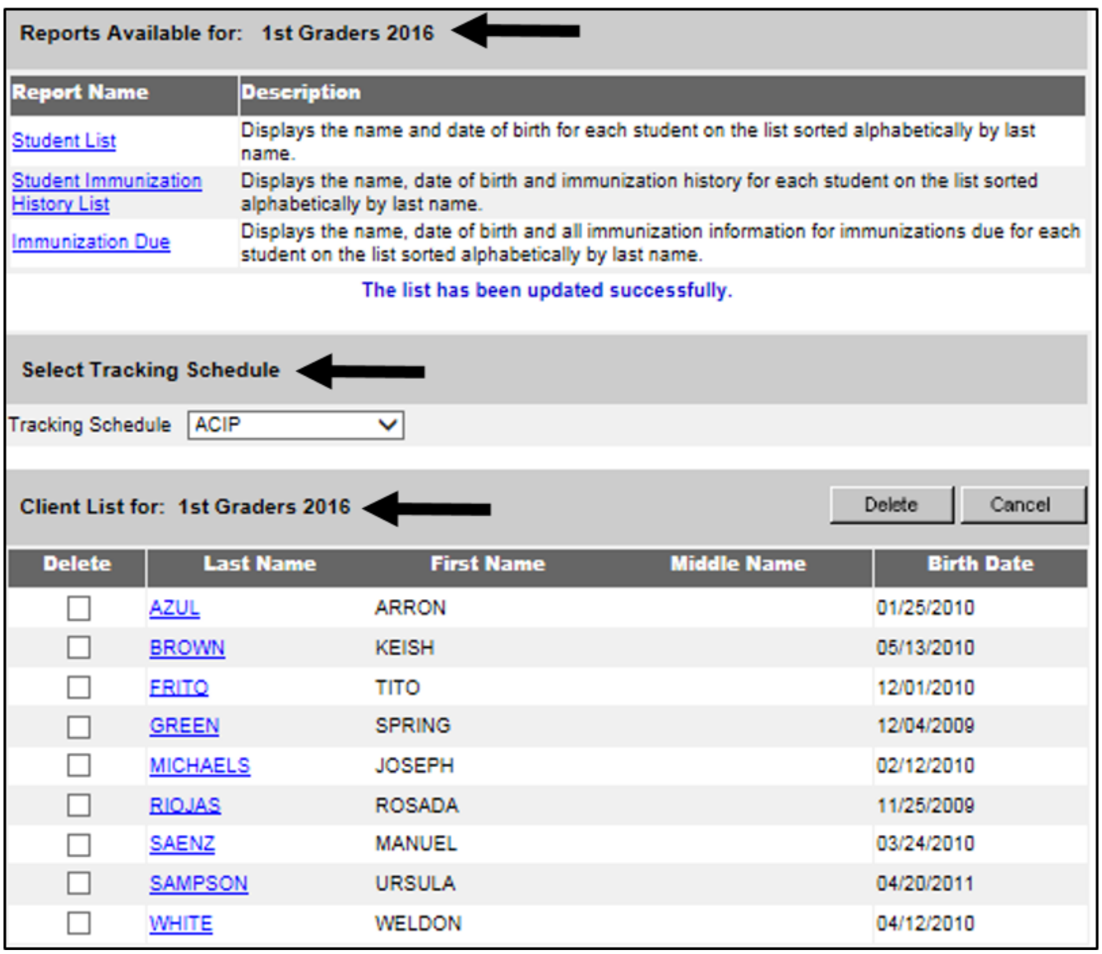


Figure 50 - View Student List Example

Reports Available for: List Name

This section displays the three types of reports you can run for the selected list:

- Student List
- Student Immunization History List
- Immunization Due list.

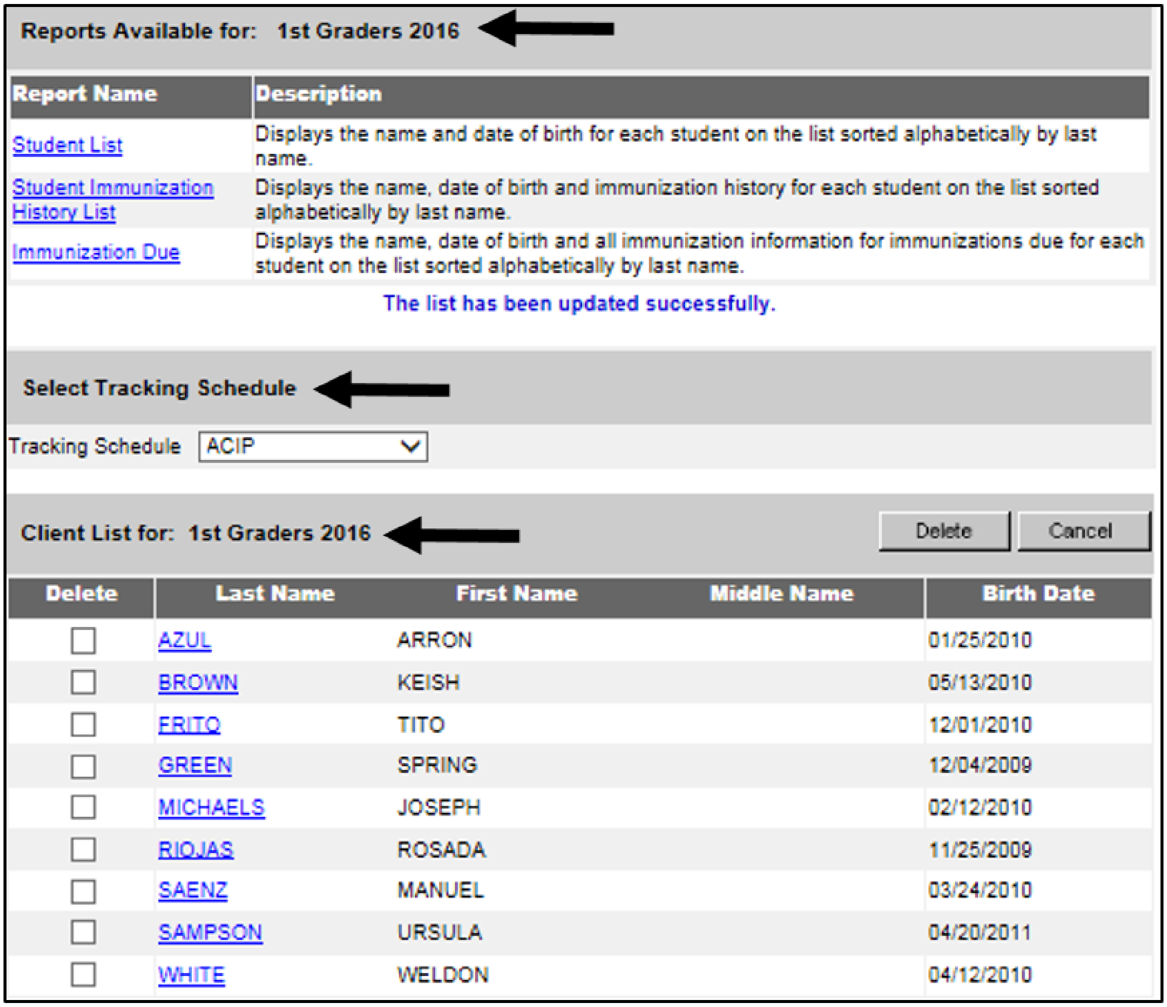
This section in ImmTrac2 includes a brief description of the information that displays for each report. All reports are produced as PDF files and display using Adobe Acrobat Reader. *See Figure 51: View Student List Example.*

Select Tracking Schedule

This function allows users to set the Tracking Schedule for each report in order to evaluate the records based on the selected Tracking Schedule.

Client List for: List Name

This section displays the clients assigned to the selected list. In this section, you can click on a last name to navigate to the client's information screen. You can also delete clients from the list by selecting the checkboxes for applicable students and clicking the "Delete" button.



Reports Available for: 1st Graders 2016

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

The list has been updated successfully.

Select Tracking Schedule

Tracking Schedule ACIP

Client List for: 1st Graders 2016

Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	AZUL	ARRON		01/25/2010
☐	BROWN	KEISH		05/13/2010
☐	FRITO	TITO		12/01/2010
☐	GREEN	SPRING		12/04/2009
☐	MICHAELS	JOSEPH		02/12/2010
☐	RIOJAS	ROSADA		11/25/2009
☐	SAENZ	MANUEL		03/24/2010
☐	SAMPSON	URSULA		04/20/2011
☐	WHITE	WELDON		04/12/2010

Figure 51 - View School List Example

Edit a School List (Remove Student from a School List)

A student, or multiple students can be removed from a school list after selecting a “Report List Name” hyperlink on the *Manage List* screen.

To remove a student from a school list, follow the steps below.

See Figure 52: Edit School List Steps 1-3.

1. Use the check box(es) to select a student or multiple students to remove from the list.
2. Click the “Delete” button.
    - Click the “Cancel” button to disregard selections and return to the *Manage List* screen.

3. Click “OK**”** when the “Are you sure you want to permanently delete selected students from the list” message appears.
    - “The list has been updated successfully” message displays in the middle of the screen.

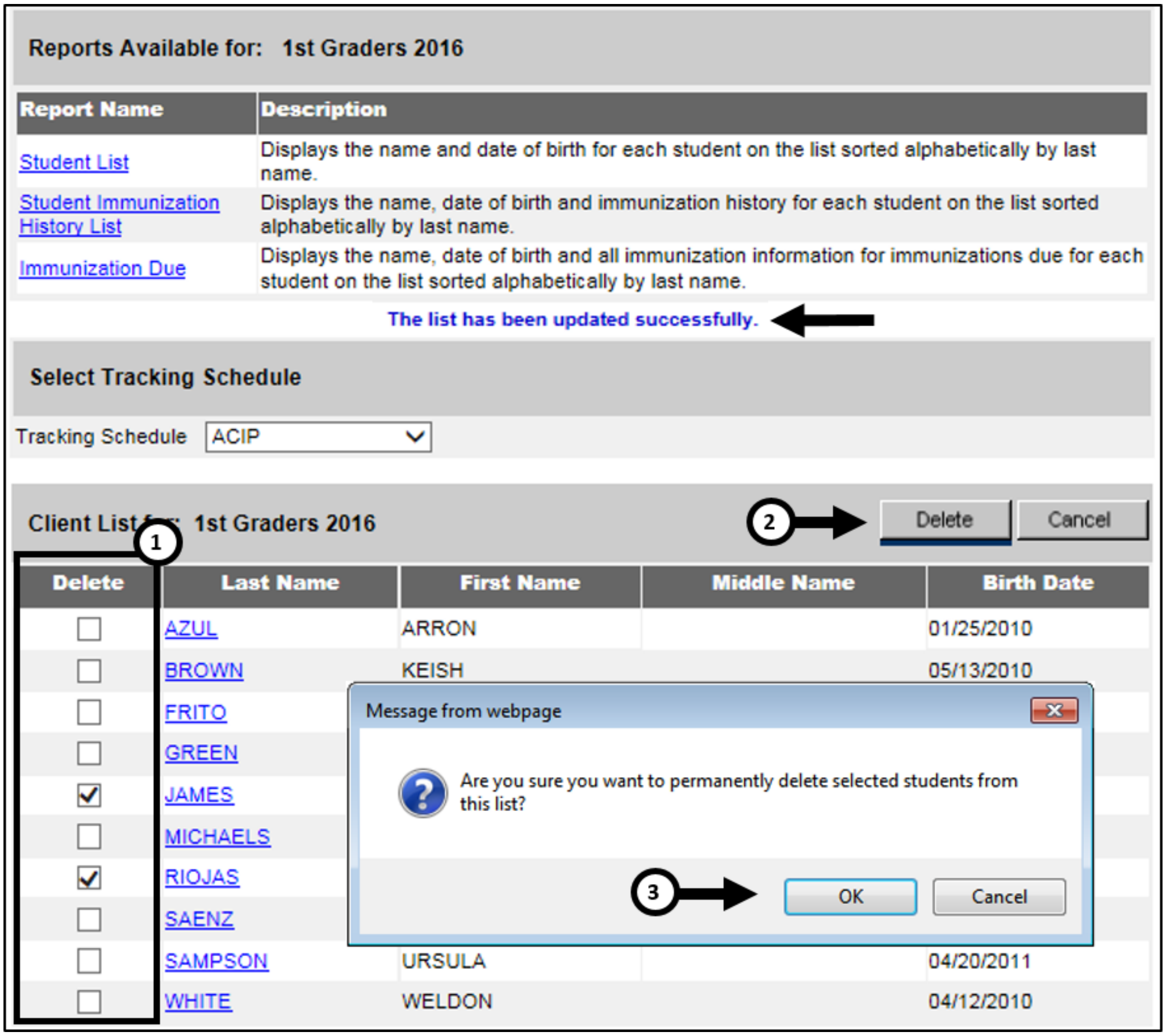
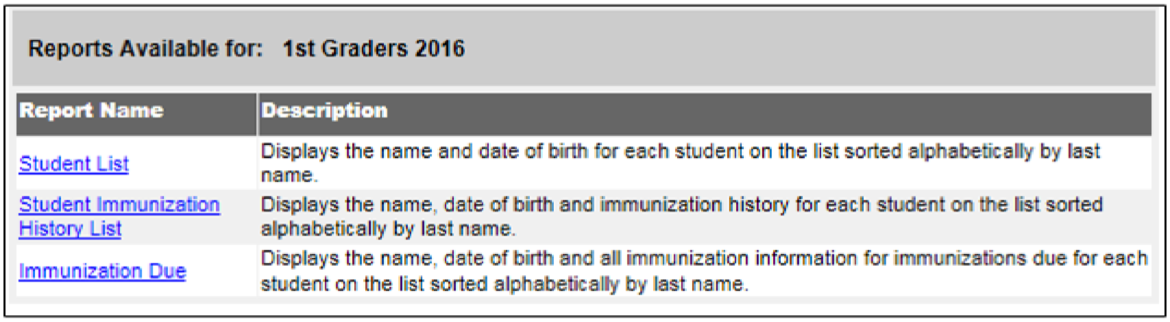


Figure 52 - Edit School List Steps 1-3

School List Reports (Reports Available for:)

This section displays the three types of reports you can run for the selected list: Student List, Student Immunization History List, and Immunization Due list. *See Figure 53: School List Report Options.*



Reports Available for: 1st Graders 2016

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Figure 53 - School List Report Options

Student List Report

This report displays the name and date of birth for each client on the list sorted alphabetically by last name.

To view the Student List report, follow the steps below.

See Figure 54: View Student List Report Steps 1-3.

1. Click the “Manage List” menu option.
2. Select an active list name.
3. When the Report List screen displays, click the “Student List” option.
    - The Student List Report will open in a new browser window. See Figure 55: Student List Report Example.

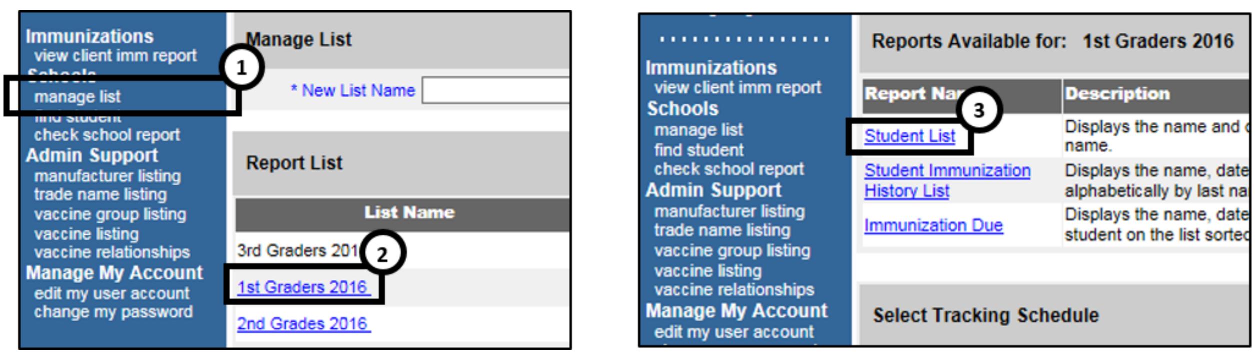


Figure 54 - View Student List Report Steps 1-3

ImmTrac2, the Texas Immunization Registry

Student Listing

*Report run on:*08/23/2016

Last Name	First Name	Middle Name	Birth Date
BOB	TERRY		10/05/2015
DOE	JOHN	ABRAHAM	01/01/2014
HARRISON	GEORGE		10/05/2015
KITTERMAN	AMANDA	M	02/14/2016
SUE	SALLY		02/14/2016
SUE	PEGGY	M	02/14/2016
SUE	TED		02/14/2016
TERRY	BOB		10/05/2015

Figure 55 - Student List Report Example

Student Immunization History List Report

This report displays the name, date of birth and immunization history for each student, along with a list of their immunizations due. It is sorted alphabetically by student last name.

To view the “Student Immunization History Report”, follow the steps below.

See Figure 56: View Student Immunization History Report Steps 1-4.

1. Click the “Manage List” menu option.
2. Select any active list name.
3. When redirected to the next screen, choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the “Student Immunization History List” option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

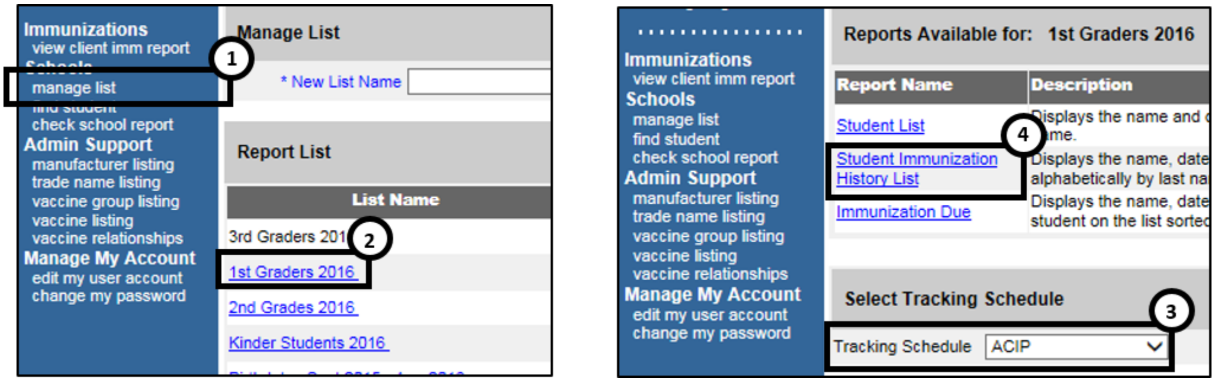


Figure 56 - View Student Immunization History Report Steps 1-4

Figure 57: Student Immunization History Report Steps 5-6.

5. On the *School Report Job Status* screen, click “Refresh” periodically to update the job status.
6. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report.
    - The Student Immunization History Report will open in a new browser window. *See Figure 58: Student Immunization History List Example.*

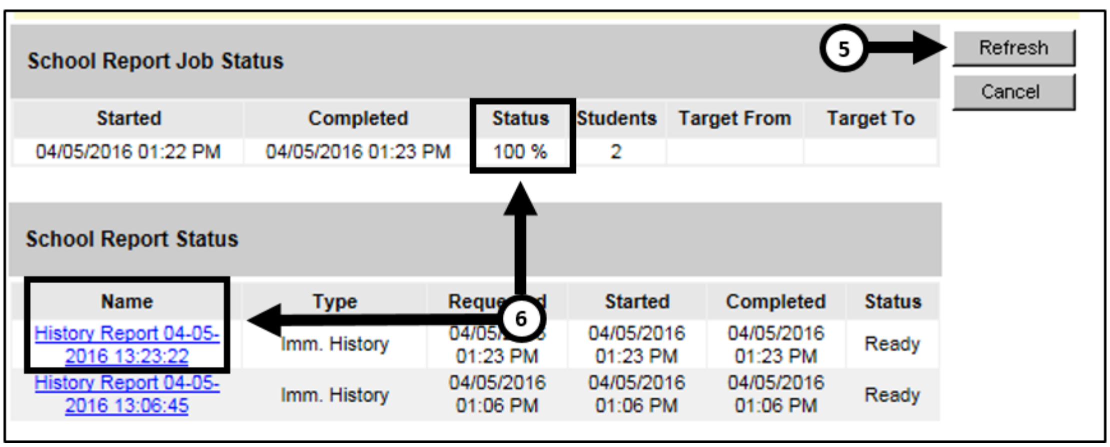


Figure 57 - Student Immunization History Report Steps 5-6

04/05/2016

ImmTrac2, the Texas Immunization Registry

Student Immunization History

Student Name (L, F, M): BOB, TERRY	Birth Date: 10/05/2015	Gender: Male

Immunization Record	Tracking Schedule: ACIP

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
DTP/aP	11/02/2015	Not Valid	DTaP, NOS [DTaP, NOS ®]	Full
DTP/aP	02/15/2016	1 of 5	DTaP, NOS [DTaP, NOS ®]	Full
HepA	11/01/2015	Not Valid	HepA, NOS [HepA, NOS ®]	Full
HepB	01/10/2016	1 of 3	HepB, NOS [HepB ®]	Full

Immunizations Due
DTP/aP
HepA
HepB
Hib
Influenza-seasnl
MMR
PneumoConjugate
Polio
Varicella

Figure 58 - Student Immunization History List Example

Immunization Due Report

This report displays the name, date of birth (DOB), and immunizations due for each student on the list sorted alphabetically by last name.

There are two different ways to configure the report.

Use All Vaccine Groups

This option is used to see the full list of immunizations due or past due. Immunization due dates will be based on the Tracking Schedule selected for this report. Only students on the list who are due or past due for any of the vaccines in the Tracking Schedule will be included in the report.

Use Vaccine Groups Selected

This option is used to focus on a specific vaccine within the selected Tracking Schedule. For example, this report can be used to identify students on the list who may need a specific vaccine. If the student is due or past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report.

To view the "Immunization Due" report, follow the steps below.

See Figure 59: View Student Immunization Due Report Steps 1-4.

1. Click the "Manage List" menu option.
2. Select an active list name.
3. Choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the "Immunization Due" report option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

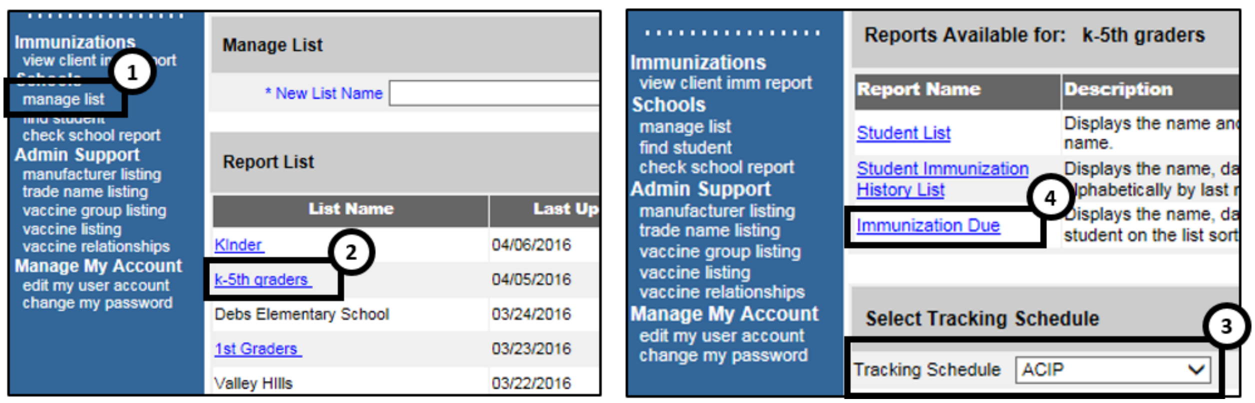


Figure 59 - View Student Immunization Due Report Steps 1-4

See Figure 60: View Student Immunization Due Report Steps 5-7.

5. On the *School Immunization Due List Request* screen, select a Vaccine Group to report on or select to "Use All Vaccine Groups".
   - If you want to report on specific vaccines, select the "Use Vaccine Groups Selected" radio button option.
   - Highlight a vaccine from the list and click "Add". (This can be repeated as many times as necessary to add additional vaccine groups to the report. If needed, use the "Remove" button to delete vaccines from the report list.)
6. Enter the date criteria.
   - If the "To" date is unspecified for the Target Date Range, the report date range will include the "From" date up to and including today's date.
   - If the "From" date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the "To" date.

- If both dates are left unspecified for the Target Date Range, then today's date will be entered for both "From" and "To" fields.

7. Click the "Generate" button.

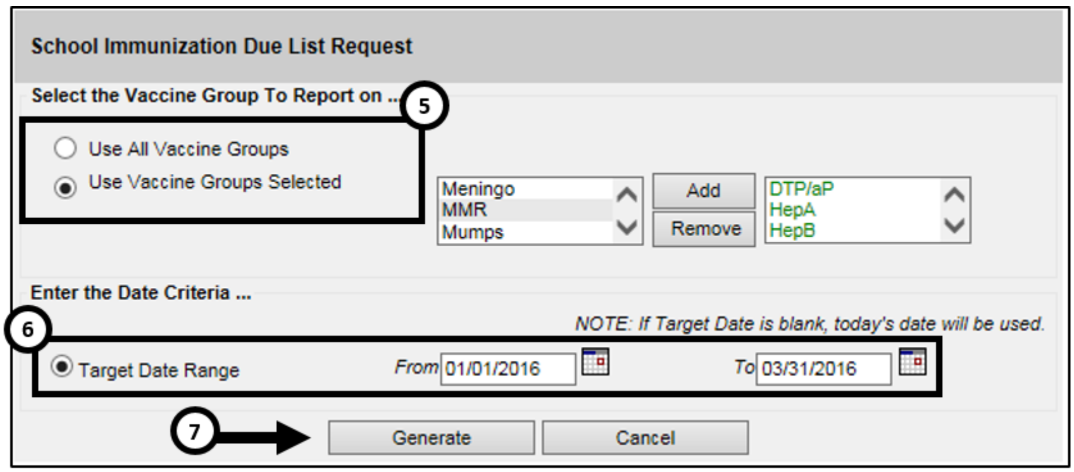


Figure 60 - View Student Immunization Due Report Steps 5-7

See Figure 61: View Student Immunization Due Report Steps 8-9.

8. On the *School Report Job Status* screen, click the "Refresh" button periodically to update the job status.
9. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report. (NOTE: If no students matched the report criteria, when the report reaches 100%, there a will not be a new report in the "School Report Status" section of the screen. Please look to see if the "Students" value in the "School Report Job Status" section is "0".)
   - If records were found and the report was created, the Student Immunization History Report will open in a new browser window. *See Figure 62: View Student Immunization History Report Example.*

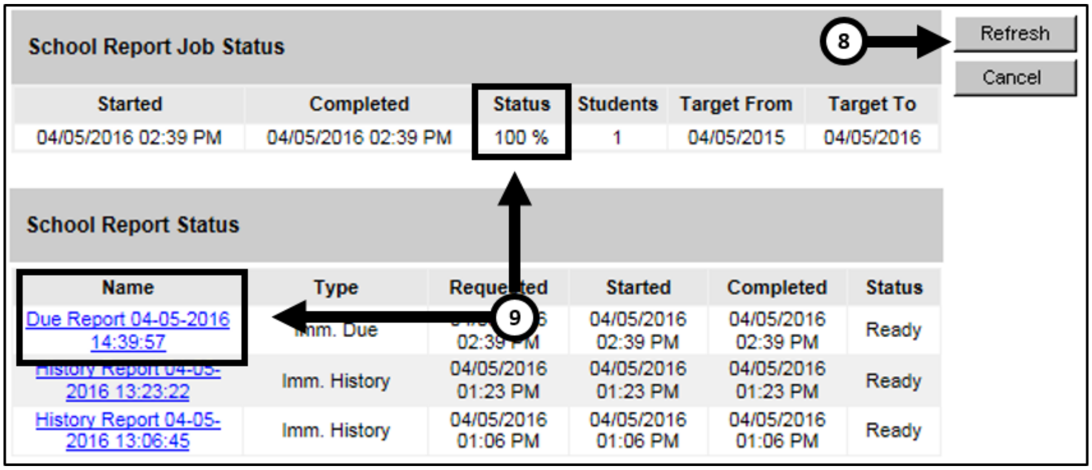
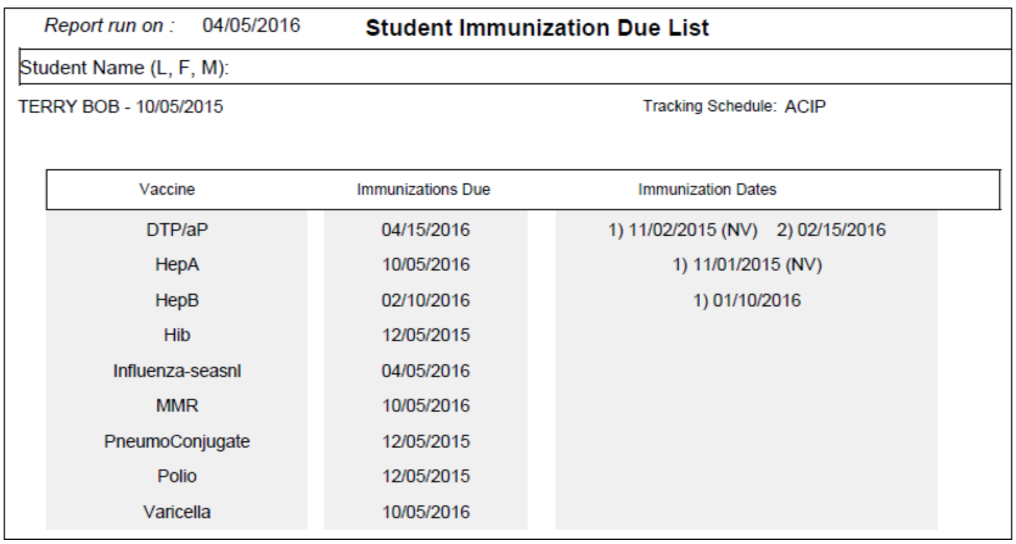


Figure 61 - View Student Immunization Due Report Steps 8-9



Report run on : 04/05/2016 **Student Immunization Due List**

Student Name (L, F, M):

TERRY BOB - 10/05/2015 Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	04/15/2016	1) 11/02/2015 (NV) 2) 02/15/2016
HepA	10/05/2016	1) 11/01/2015 (NV)
HepB	02/10/2016	1) 01/10/2016
Hib	12/05/2015	
Influenza-seasnl	04/05/2016	
MMR	10/05/2016	
PneumoConjugate	12/05/2015	
Polio	12/05/2015	
Varicella	10/05/2016	

Figure 62 - View Student Immunization History Report Example

Find Student

The “Find Student” menu option is an additional way to view the student immunization history, their recommended vaccines, and to print their official immunization record. However, it is also used to add a student to a list. There are four sections on the *Student Immunization History* screen: *Figure 63: Student Immunization History Screen.*

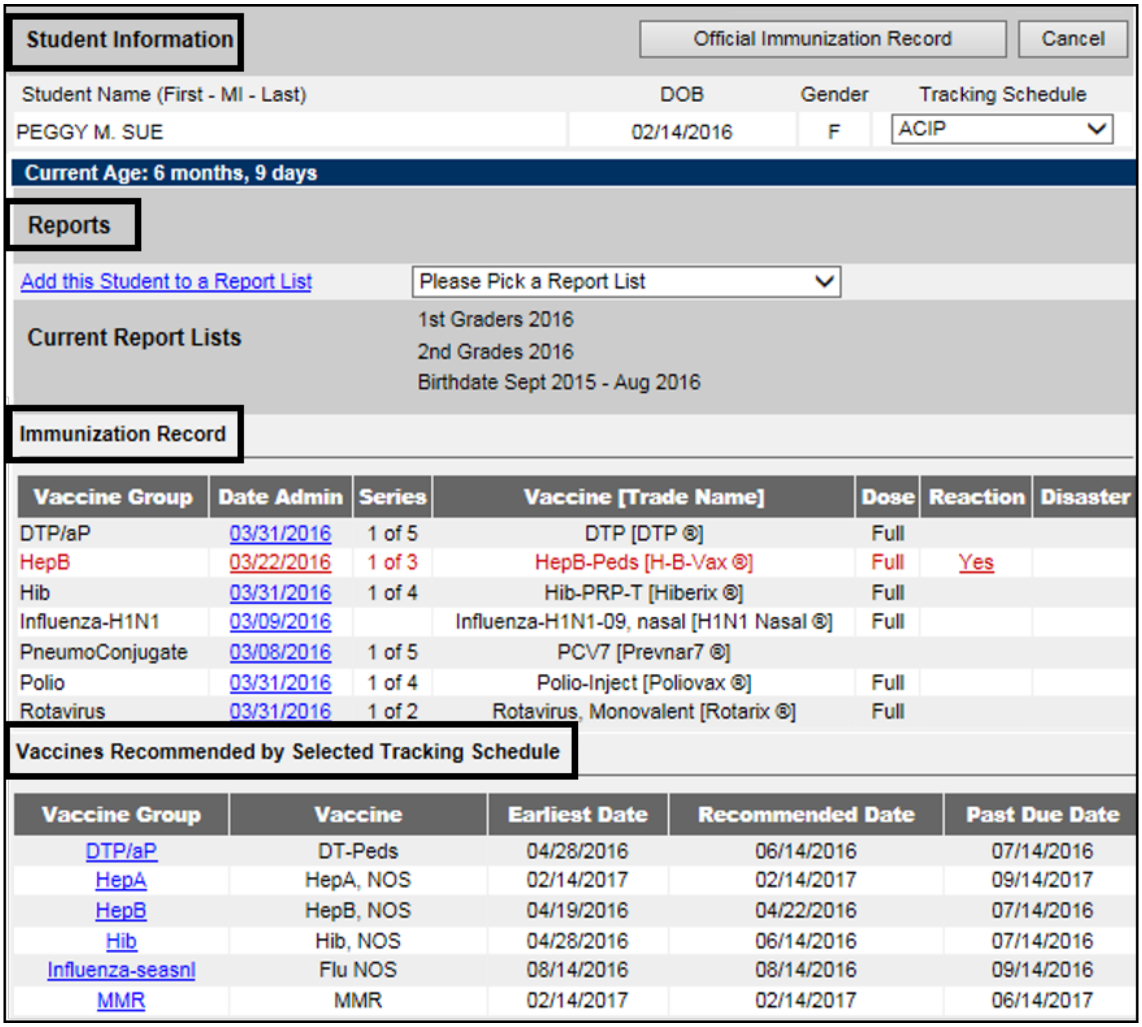
- **Student Information**: This section displays the student’s name, date of birth, gender, and the selected vaccine Tracking Schedule. Select the appropriate Tracking Schedule from the drop down menu to evaluate the immunization record and determine the recommended vaccines. ACIP is the clinical schedule and is the initial default.

Important: *The ACIP schedule should be used when printing a record for the parent to use when obtaining immunizations for their child.*

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

- **Reports**: This section displays the lists that are available to add the student to generate reports, and the lists that the student is already assigned to.
- **Immunization Record**: This section displays all immunizations the student has received to date ordered alphabetically, then by 'Date Administered.
- **Vaccines Recommended by Selected Tracking Schedule**: This section displays the vaccines recommended for the student based on the vaccine Tracking Schedule selected in the *Student Information* section.

Note: *For more details on immunization records See Section 1 View Immunization Records.*



Student Information | Official Immunization Record | Cancel

Student Name (First - MI - Last)	DOB	Gender	Tracking Schedule
PEGGY M. SUE	02/14/2016	F	ACIP

Current Age: 6 months, 9 days

Reports

Add this Student to a Report List | Please Pick a Report List

Current Report Lists

1st Graders 2016
2nd Grades 2016
Birthdate Sept 2015 - Aug 2016

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction	Disaster
DTP/aP	03/31/2016	1 of 5	DTP [DTP ®]	Full		
HepB	03/22/2016	1 of 3	HepB-Peds [H-B-Vax ®]	Full	Yes	
Hib	03/31/2016	1 of 4	Hib-PRP-T [Hiberix ®]	Full		
Influenza-H1N1	03/09/2016		Influenza-H1N1-09, nasal [H1N1 Nasal ®]	Full		
PneumoConjugate	03/08/2016	1 of 5	PCV7 [Prevnar7 ®]			
Polio	03/31/2016	1 of 4	Polio-Inject [Poliovax ®]	Full		
Rotavirus	03/31/2016	1 of 2	Rotavirus, Monovalent [Rotarix ®]	Full		

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DT-Peds	04/28/2016	06/14/2016	07/14/2016
HepA	HepA, NOS	02/14/2017	02/14/2017	09/14/2017
HepB	HepB, NOS	04/19/2016	04/22/2016	07/14/2016
Hib	Hib, NOS	04/28/2016	06/14/2016	07/14/2016
Influenza-seasnl	Flu NOS	08/14/2016	08/14/2016	09/14/2016
MMR	MMR	02/14/2017	02/14/2017	06/14/2017

Figure 63 - Student Immunization History Screen

Add Student to a List

To add a student to a list, the list name must have been created in the *Manage Lists* section of the application. See the Manage List section for details.

To add a student to a list, follow the steps below.

See Figure 64: Add Student to a List Steps 1-3.

1. Click the “Find Student” menu option.
2. Perform a search using either the Basic Search or Smart Search options. (See the Client Search section for details.)

3. Click the “Find” button.
    a. Depending on the search results, users may need to select the correct client from the result list.
    b. If the search results in finding the exact client, the student information screen displays immediately.

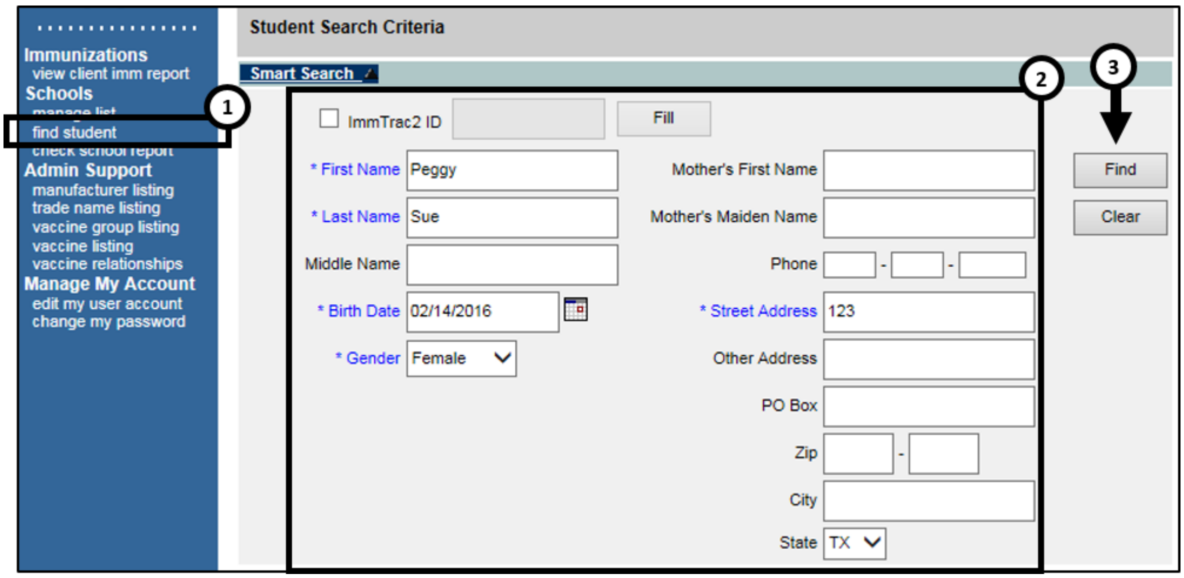


Figure 64 - Add Students to a List Steps 1-3

See Figure 65: Add Students to a List Steps 4-5.

4. When the student information displays, select a list from the “Please pick a Report List” drop-down menu.
5. Click “Add this Student to a Report List”.
    a. The newly added list displays in the *Current Report Lists* section.

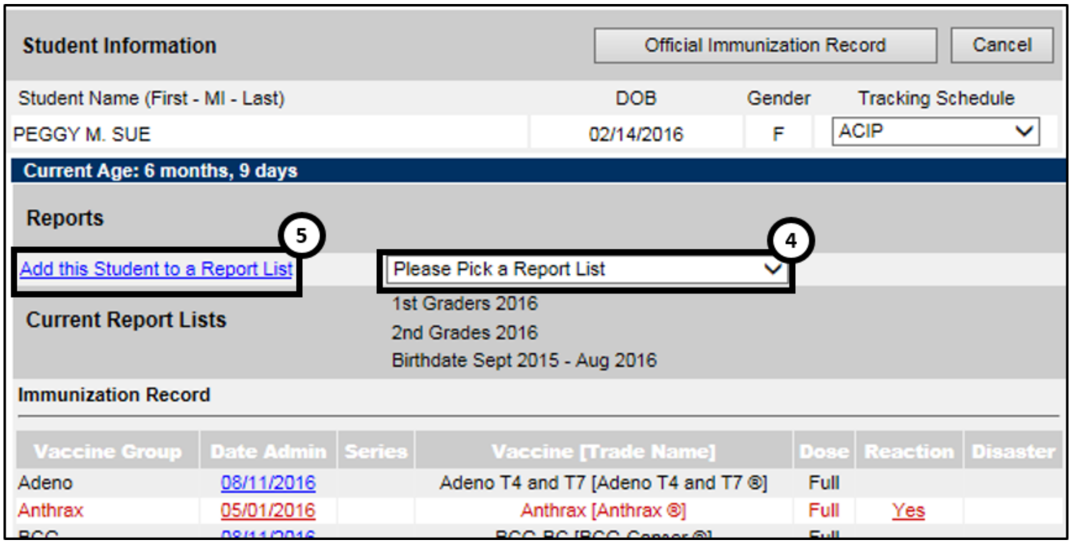


Figure 65 - Add Students to a List Steps 4-5

Note: *Students can be added to more than one list. The available options in the Pick Report List are the list that the student is not already assigned.*

Check School Report

If you have navigated to a different screen during report generation, or want to view reports that were previously run, use the “Check School Report” menu option to view the report. Previously run Student Immunization History List reports and Immunization Due list reports will be available on the Check School Report screen for 7 days. The screen is separated into two sections: *School Report Job Status* and *School Report Status.* *See Figure 66: Check School Report Status Screen.*

School Report Job Status

This section displays the date and time the last run report job started and completed, the overall percentage completion, the number of students returned, and the target date range if one was specified. Clicking the “Refresh” button will update the percent completion status. Only one job is listed in this section. Once you run a new report job, your previous job displays below in the School Report Status section.

School Report Status

This section displays reports generated from the *Reports Available* screen. It contains the name of the report, the type of report, the date and time the report was requested, the time it started, and the report status. Reports will be sorted by time generated, with the most recent report at the top.

When the report name appears as a link and the Status displays "Ready", it has completed processing and is ready for viewing. To view the report, click the report name hyperlink. The selected report displays using the Adobe Acrobat Reader. At any time, click the "Cancel" button to return to the application *Home* screen.

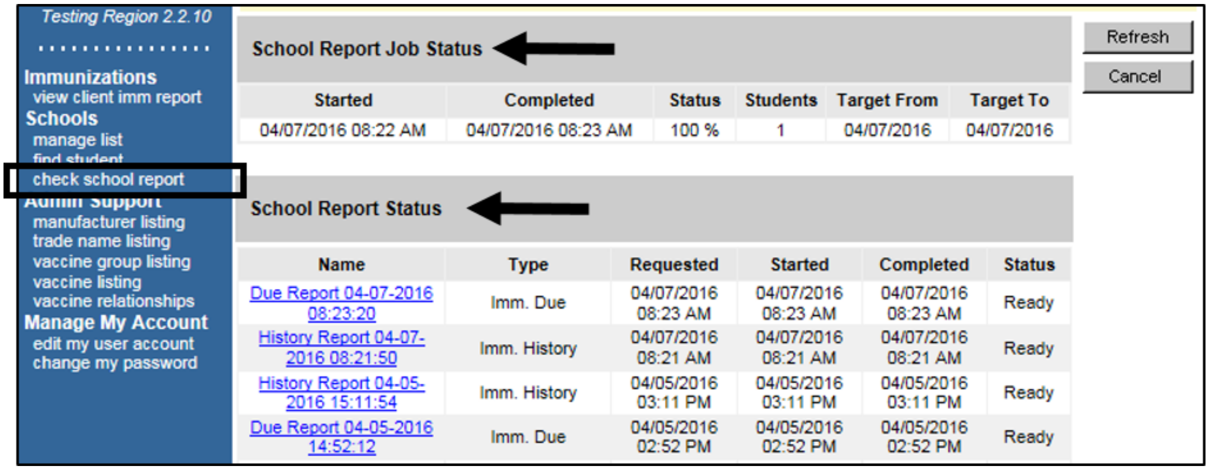


Figure 66 - Check School Report Status Screen

ImmTrac2

Texas Immunization Registry

Section III

Full Access Provider & Provider Supervisor

Section III: Full Access Provider & Provider Supervisor Users

A staff member who works at a hospital, doctor's office, or any organization that can administer vaccines will have access to ImmTrac2 as a Full Access Provider user. After logging into ImmTrac2 the user role is displayed at the top of the screen in the user header.

Full Access Provider users have all the same functionality of a View Only user, but can also can manage client records, manage immunization records, edit client consent, and run select reports. After logging into ImmTrac2, the left-side menu panel displays options designed specifically for these tasks. *See Figure 67: Full Access Provider and Provider Supervisor View – Application Home Screen.*

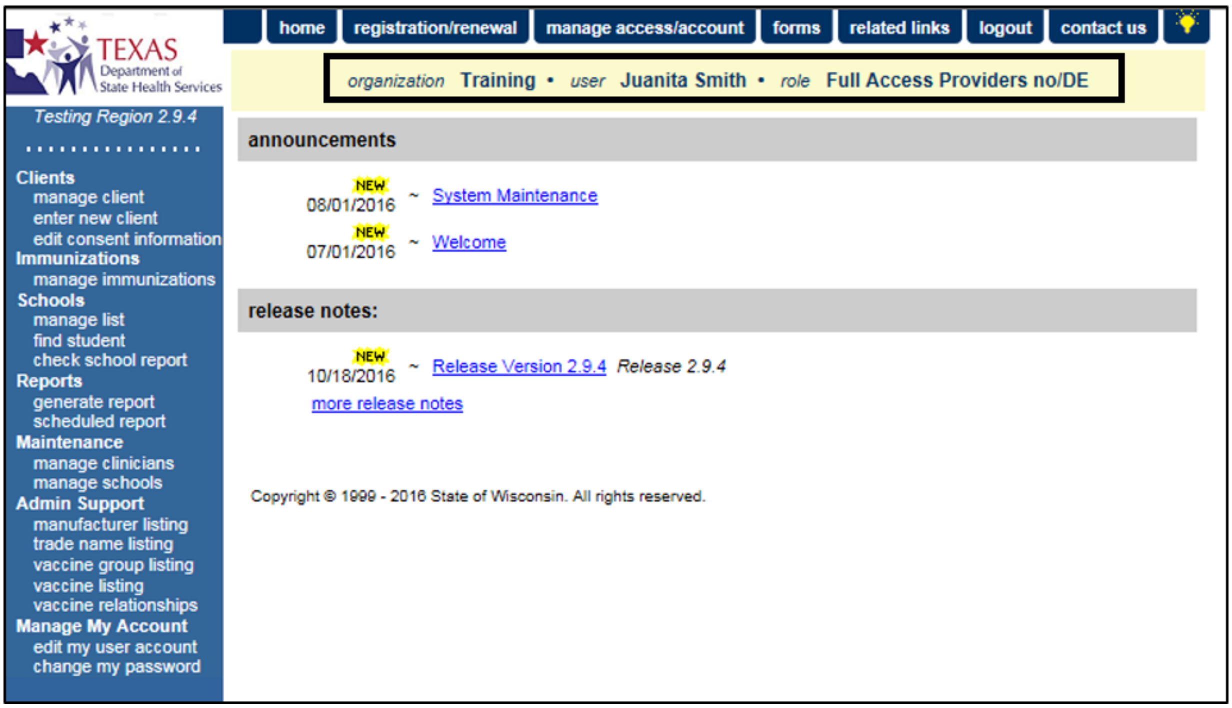


Figure 67 - Full Access Provider and Provider Supervisor View – Application Home Screen

Chapter 12: Clients

Clients are individuals who have provided consent, or whose parent or legal guardian has provided consent, to participate in the ImmTrac2 statewide immunization registry. ImmTrac2 receives client immunization information from multiple sources, including birth record downloads. Under the ***Clients*** category in the menu panel, users can view, add and edit client information.

Manage Client

The "Manage Client" menu option is used to search for existing clients and edit client information. There are different combinations of search criteria that can be used to locate clients in ImmTrac2. Remember, performing a client search accesses records across the entire statewide registry and not just records within an organization. Ensuring query information is accurate and complete will provide the best search results. See Section 1 – Client Search for more details on how to use the Quick Search, Basic Search and Smart Search functions.

Client Search

To search for a client in ImmTrac2, follow the steps below.

See Figure 68: Client Search Steps 1-4.

1. Click the "Manage Client" menu option.
2. Select a search option. (Quick, Basic, or Smart Search)
3. Enter the search criteria.
    - Required information is in blue text marked with an asterisk.
4. Click the "Find" button to display the search results.
    - If multiple results are found, review the client information and select the appropriate client record.
    - When an exact match is found, the *View Client* screen will open immediately.

***Note**: For more information on search results see Section 1 Search Results.*

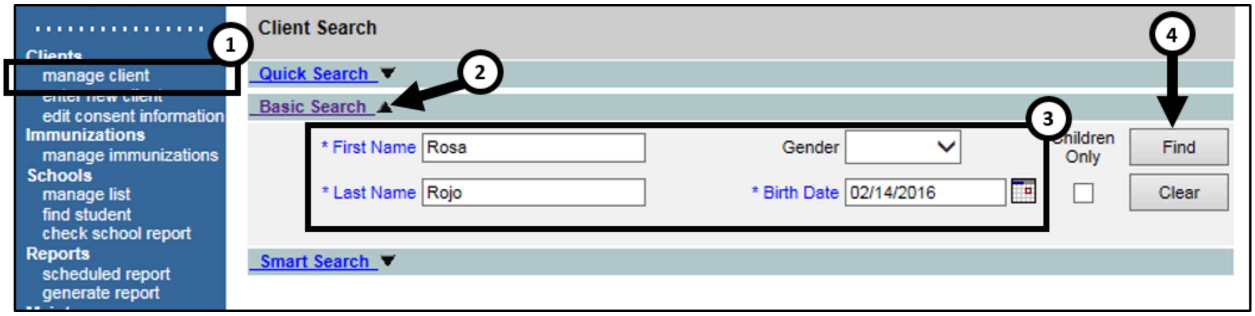


Figure 68 - Client Search Steps 1-4

View Client

The View Client screen displays the client record in “view only” mode. The screen is divided into the following demographic sections: *Personal Information, Consent Information, Client AKA, Organization Information, Client Information, Address Information, Responsible Persons, Client Comments*, and *Client Notes*. Certain section headings include a quick count in parenthesis of the number of saved entries for that topic. To view the detail in a section, click the arrow next to the heading to expand the section. *See Figure 69: View Client Record.*

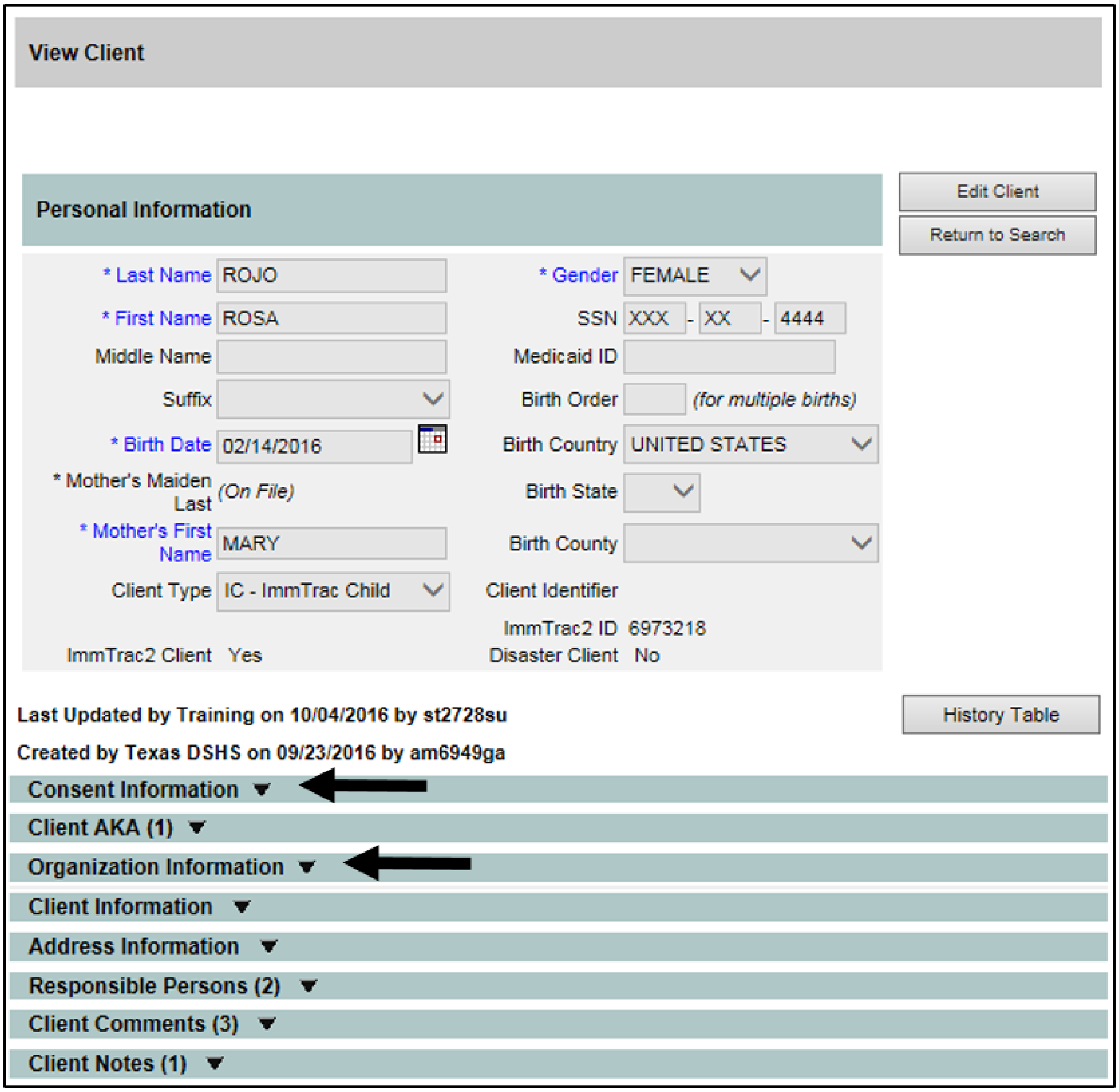


Figure 69 - View Client Record

Edit Client Information

The *Update Client* screen allows users to edit client information in the demographic tabs. All fields in white can be edited. If information is entered into a particular section, fields marked with asterisks are required in order to save that section's information.

Users must save changes by clicking the "Save" button located at the top right of the *Update Client* screen once all changes are made.

To edit client information, follow the steps below.

See Figure 70: Edit Client Information Step 1.

From the *View Client* screen, click the “Edit Client” button.

- The screen will refresh to the *Update Client* screen.

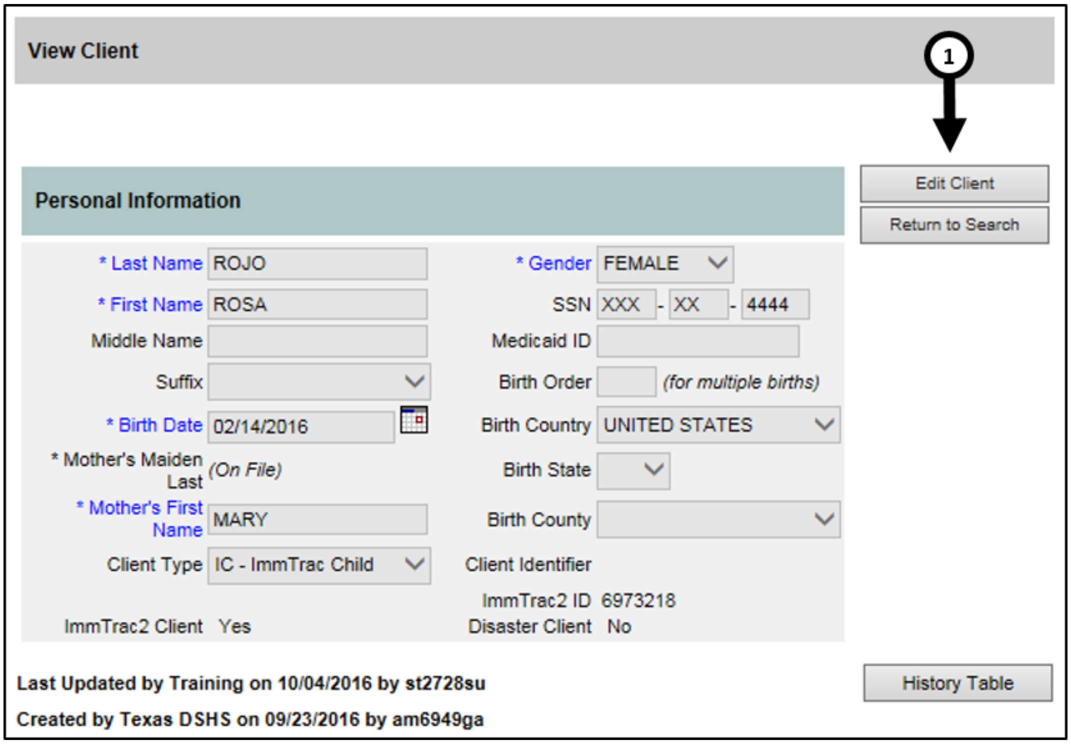


Figure 70 - Edit Client Information Step 1

See Figure: Edit Client Information Steps 2-3.

2. Click the arrow next to each section header to expand the specific section. Make edits as needed.
    - All fields in white can be edited.
    - See the following sections for details on each client demographic tab, starting with the Personal Information tab.
3. Click the “Save” button.

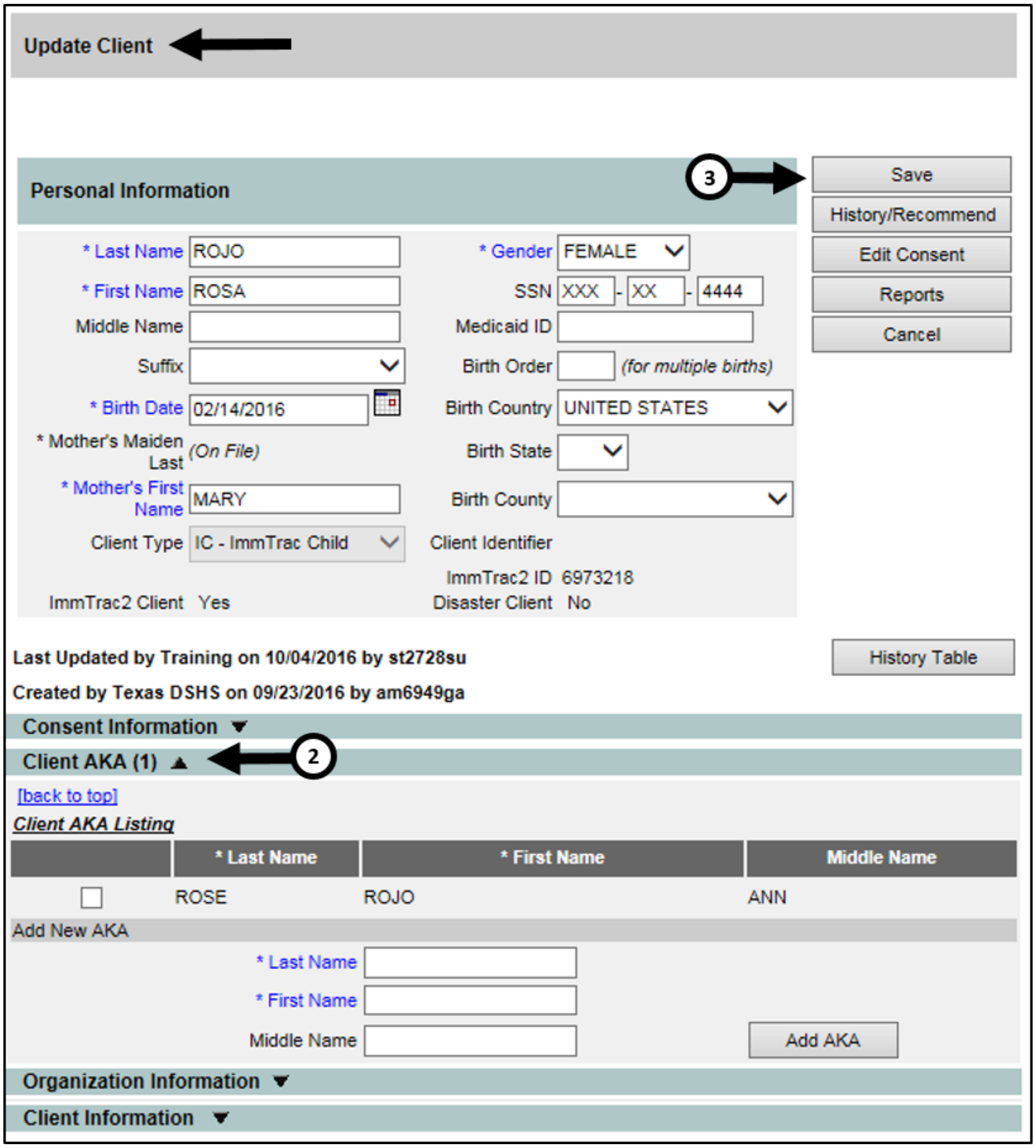


Figure 71 - Edit Client Information Steps 2-3

Personal Information

The *Personal Information* section at the top of the Update Client screen contains the individual's information that is used to identify a client. *See Figure 72: Personal Information.*

See Table 4: Personal Information – Data Fields and *Table 4: Client Types* for details about the Personal Information section.

***Note**: See Appendix A of this manual for information on allowable characters and names for these fields.*

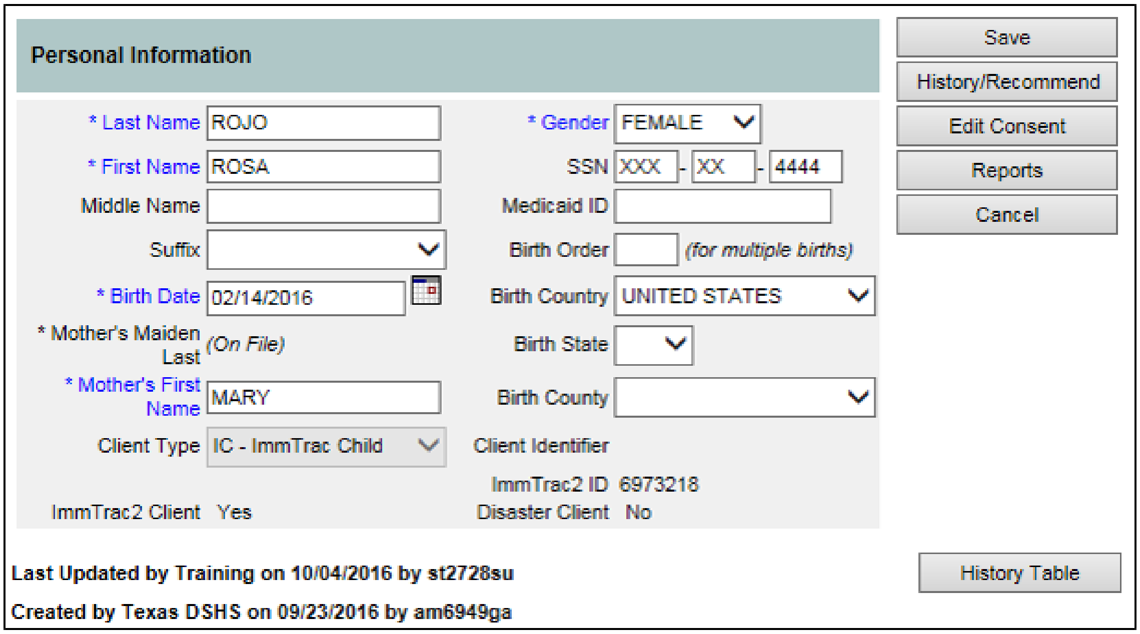


Figure 72 - Personal Information

Table 5 - Personal Information – Data Fields

Field	***Description***
Last Name	*Required*. The client's last name.
First name	*Required*. The client's first name.
Middle name	The client's middle name.
Suffix	The client's suffix. *Example: Jr. or III.*
Birth Date	*Required*. The client's date of birth. Complete the field using a MM/DD/YYYY format or use the pop-up calendar. ***Note****: Children entered by the Vital Records program do not have editable birth dates. The parent / guardian must contact the Vital Records program in the event a birth date is wrong. Contact ImmTrac2 Customer Support to obtain the Vital Records phone number.*
Mother's Maiden Last Name	*Required*. The client's mother's maiden last name. This information is required when adding a client, but once entered the field displays the words *(On File)*.
Mother's First Name	*Required*. The client's mother's first name.
Client Type	The client type is automatically updated based on the type of affirmed consent processed in the system. *Review the Client Types Table for a list of client types.*

Field	***Description***
ImmTrac2 Client	Indicate "Y" (Yes) if the client has signed a consent form to participate in ImmTrac2. All disaster only clients (DU and DC clients) will be indicated as "N" (No) for this field.
Gender	*Required*. The client's gender.
Social Security Number (SSN)	The client's social security number. Once entered this field will only display the last 4 digests of the SSN. *Example: XXX-XX-1234.*
Medicaid ID	The client's Medicaid ID number.
Birthing Order	The client's birthing order. This identifies the birth order of the client and should only be used for multiple births. *Example: twins, triplets.*
Birth Country	The client's birth country. This field defaults to United States. Use the drop-down list to select a different country of birth, if applicable.
Birth State	The client's birth state. Use the drop-down list to select a state of birth.
Birth County	The client's birth county. Use the drop-down list to select a county of birth. This field only contains Texas counties and only applies if the client was born in the State of Texas.
Client Identifier	Displays the primary client identifier listed in the Organization Information demographic tab. If the current organization has not entered a Client ID for this client, this field will be blank. *See the Organization Information section for more details.*
ImmTrac2 ID	The systematically generated ImmTrac2 ID.
Disaster Consent	Displays "Yes" or "No" classifying the client as a "Disaster" client. This will only display "Yes" if the client has received an antiviral, immunization or medication (AIM) as a part of a disaster event recorded in ImmTrac2.

Table 6 - Client Types

Client Type Code and Description	**Age Restriction**
IC = ImmTrac Child	Younger than age 18
IA = ImmTrac Adult	Age 18 or older
FR = First Responder	Age 18 or older
FM = Adult Family Member of a First Responder	Age 18 or older
DC = Disaster Only Client – has given consent to retain information.	none
DU = Disaster Only Client – has not given consent to retain information.	none

Consent Information

This section displays First Responder and Disaster Information Retention (DIR) attributes for the selected client. *See Figure 73: Consent Information* and *Table 6: Consent Information Attributes.*

First Responder Attribute: A public safety employee or volunteer whose duties include responding rapidly to an emergency.

Disaster Information Retention (DIR) Attribute: If a Disaster Information Retention (DIR) consent is not signed, ImmTrac2 will retain disaster-related information for a period of five years. At the end of the five-year retention period, disaster-related information will be removed from the registry unless consent is granted to retain the information in ImmTrac2 beyond the five-year retention period.

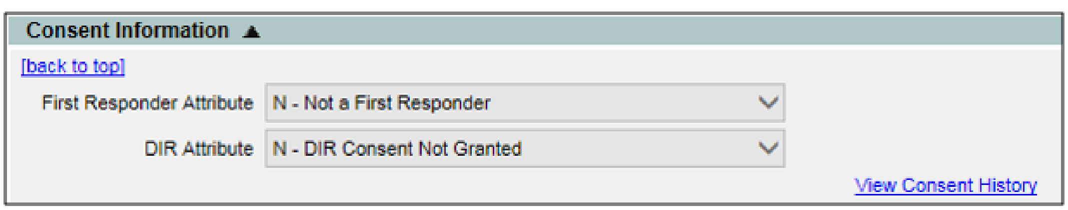


Figure 73 - Consent Information

Table 7 - Consent Information Attributes

Consent Type	Code	Description
First Responder Attribute	F	First Responder
First Responder Attribute	A	Adult Family Member of a First Responder
First Responder Attribute	M	Minor Family Member of a First Responder
First Responder Attribute	N	Not a First Responder or First Responder Family Member
Disaster Information Retention Attribute (DIR)	Y	Yes, DIR consent granted
Disaster Information Retention Attribute (DIR)	N	No, DIR consent not granted

Client AKA (Also Known As)

This section lists other names that the client may also be known as and can be used to validate a client when performing a search. A client can have several AKA listings.

Add Client AKA

To add an AKA, follow the steps listed below.

See Figure 74: Add Client AKA Steps 1-2.

1. Enter the required information.
2. Click the "Add AKA" button.
3. Click the "Save" button at the top of the screen.

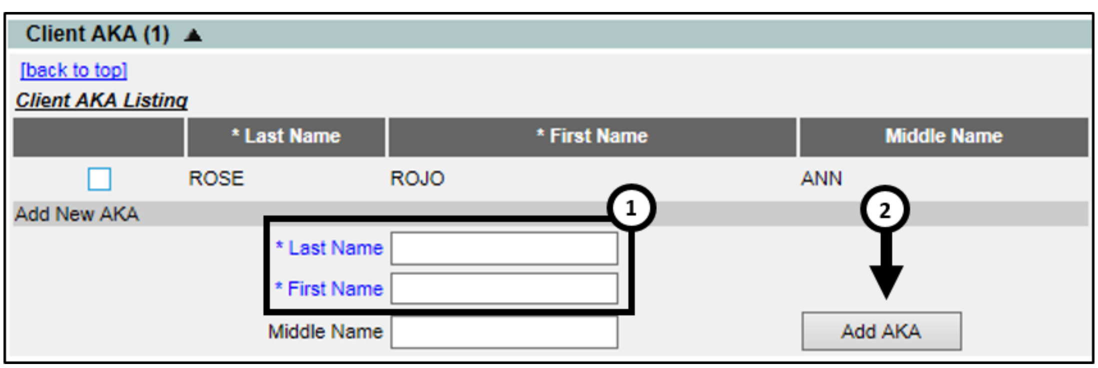


Figure 74 - Add Client AKA Steps 1-2

Organization Information

This section includes organization-specific information about the client. *See Figure 75: Client Organization Information.*

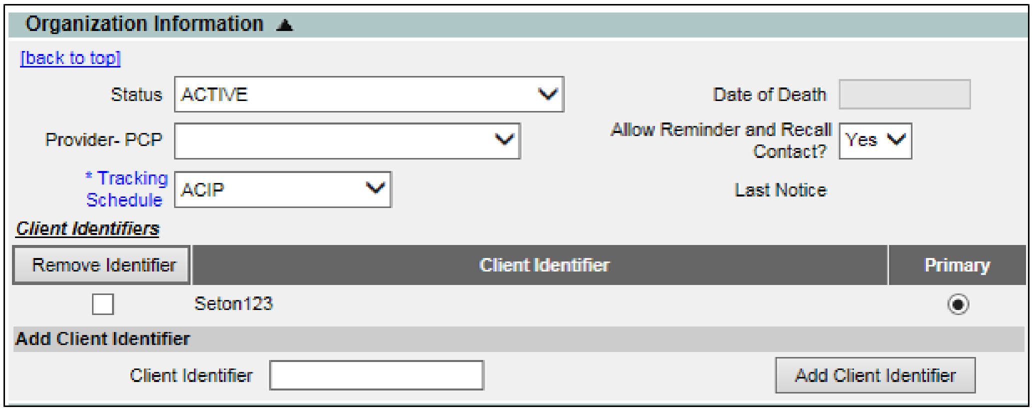


Figure 75 – Client Organization Information

Status: Select Active from the drop-down list if the client is actively receiving services from the user's organization. The Active or Inactive status on this screen applies only in relationship to the user's organization. *See Table 7: Client Status*

Table 8 - Client Status

Status	***Description***
ACTIVE	Client is actively associated with the user's organization.
INACTIVE - LOST TO FOLLOW UP	Client has not responded to follow up contact.
INACTIVE - MOGE	Moved or gone elsewhere.
INACTIVE - MOOSA	Moved out of service area.
INACTIVE - ONE TIME ONLY	Received an immunization once but is not a regular.
INACTIVE - OTHER	Select when all other options do not apply.
INACTIVE - PERMANENTLY (DECEASED)	Client is deceased. If this status is selected, the client's status displays deceased for all organizations. If the client status is set to this value, there must be a date entered in the "Date of Death" field.

Status	Description
INACTIVE - UNKNOWN	An individual made inactive by an electronic interface, perhaps with demographic and historical data, but without that individual's status specified. This situation can occur because of health insurance companies or Providers providing historical data by an electronic interface. (AIRA Definition)

Provider-PCP: Fill in the client's primary care physician (PCP) or health care organization from the drop-down list, as applicable. The list of names available in the drop-drown list is managed from the Manage Clinicians option of the menu panel. Provider organizations may need assistance from DSHS Customer Support to add or remove clinicians from the list due to restrictions for Texas Vaccines for Children (TFVC) organizations.

Tracking Schedule: This required field initially defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects ImmTrac2 recall and reminder notices and the Comprehensive Clinic Assessment Software Application (CoCASA). See the Recall and Reminder Reports section for more details.

Note: *If the Tracking Schedule option is changed, when navigating away and returning later it does not reset to the default ACIP schedule. You must manually change it back to the ACIP option.*

Date of Death: This field becomes active and becomes required when the "INACTIVE-PERMANENTLY (DECEASED)" option is selected as the client's Status.

Allow Reminder and Recall Contact: Choose "Yes" from the drop-down list to allow reminder / recall notices to be sent to the client when the reminder / recall report is generated. Choose "No" from the drop-down list to exclude the client from being contacted. See the Recall and Reminder Reports section for more details.

Client Identifiers: The ImmTrac2 system-generated ID is the default primary identifier. However, a client may have another associated *Client Identifier* that is specific to an organization. For example, this could be the organization's Patient ID. An organization can enter more than one Client ID for a single client. To save a primary client identifier simply select the "Primary" radio button option.

Add Client Identifier

To **add** a client identifier, follow the steps below.

> *See Figure 76: Add Client Identifier Steps 1-2.*

1. Enter the “Client Identifier”.
2. Click the “Add Client Identifier” button.
    - Repeat steps to add multiple client identifiers.
3. Click the “Save” button at the top of the screen.

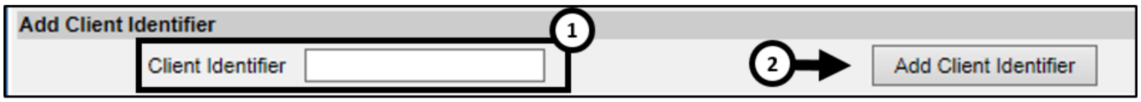


Figure 76 - Add Client Identifier Steps 1-2

Delete Client Identifier

To **delete** a client identifier, follow the steps below.

> *See Figure 77: Delete Client Identifier Steps 1-2.*

1. Select one or more “Client Identifier” to be deleted (using the check box).
2. Click the “Remove Identifier” button.
3. Click the “Save” button at the top of the screen.

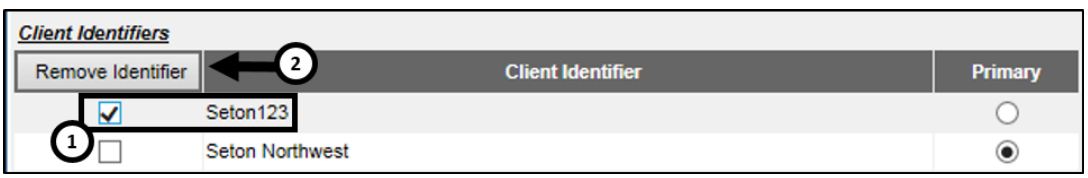


Figure 77 - Delete Client Identifier Steps 1-2

Client Information

The Client Information section gives additional information about the client. *See Figure 78: Client Information.*

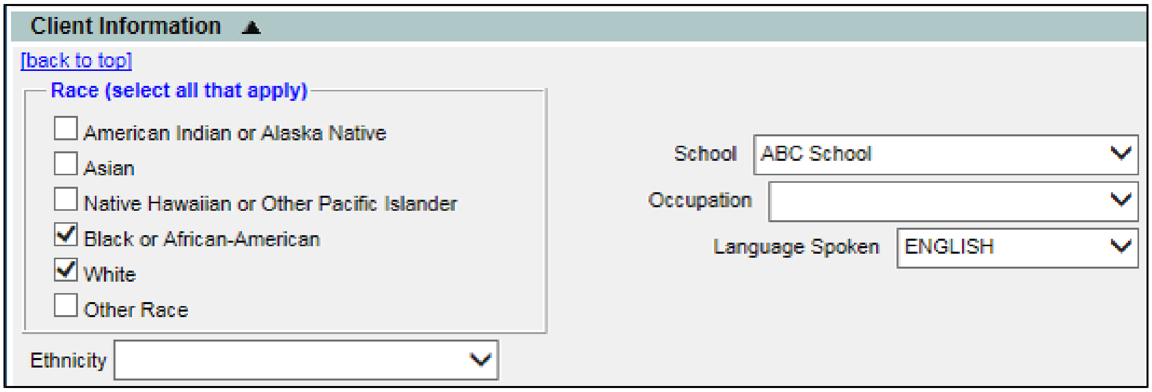


Figure 78 - Client Information

Table 9 - Client Information – Data Fields

Status	Description
Race	Select the client's race by clicking the appropriate boxes. Multiple races may be selected.
Ethnicity	Select the client's ethnic background from the drop-down list provided.
School	Select the client's school from the drop-down list, if applicable and available. This information is used only for reporting purposes and is optional. See the Manage Schools section for details on how to add, edit, or delete schools from the drop-down list.
Occupation	Select the client's occupation from the drop-down list, if applicable. This field can be used in emergency response situations when certain occupation groups are selected for vaccination.
Language Spoken	Select the primary language as English or Spanish; this determines the language of the Reminder / Recall letters.

Address Information

This section is used to identify the current address of the client and to view previous addresses. *See Figure 79: Address Information.*

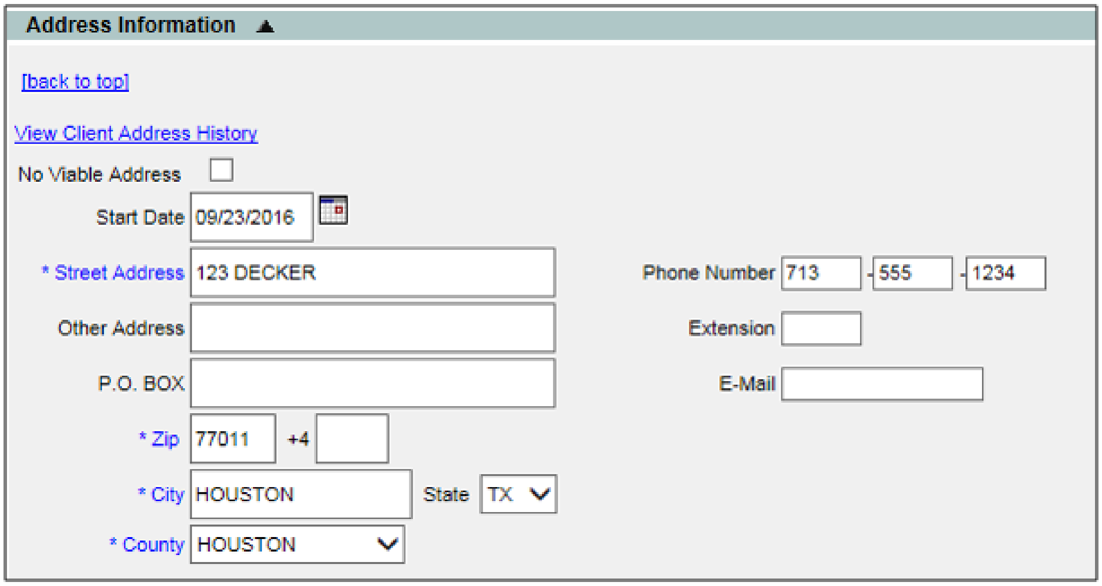


Figure 79 - Address Information

Table 10 - Client Information – Data Fields

Status	***Description***
View Client Address History	Click this link to open a window with the client's address history, if available.
No Viable Address	Mark this check box if information was mailed to the client and later returned as not deliverable.
Start Date	The start date of the client's new address. Enter the start date using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon. This field is used when a new address for a client is being entered for the first time. If no value it entered, the previous address value may be overwritten instead of maintained.
Street Address	*Required*. The client's Street address.
Other Address	The client's additional address information, such as for a suite number or apartment number if applicable.
P.O. Box	The client's Post Office Box if applicable.
Zip	*Required*. The client's Zip Code.
+4	The client's extended Zip Code if available.
City	*Required*. The client's City (or town).
State	The client's State. This will default to Texas.

Status	Description
County	*Required*. The client's County. This field is required, but only has value in the application of the client is a Texas resident. Only Texas counties are listed in this dropdown.
Phone Number	The client's phone number.
Extension	The client's phone extension.
Email	The client's email address.

Responsible Persons

This section allows the user to identify the contact information for a client's responsible person, such as a parent or legal guardian. The user may also select the primary contact from multiple contacts entered using the radio button as needed, but it is not required.

If the client has more than one responsible person and one is selected as the primary contact, they will be listed first in the *Responsible Person Listing* section. If no person is designated as the primary contact, the names will be listed alphabetically.

Add Responsible Persons

To **add** a Responsible Person, follow the steps below.

See Figure 80: Add Responsible Person Steps 1-3.

1. Click the "Add New" button as needed to clear the data fields.
   - This will clear the prepopulated information that is display in the *Details for Responsible Person* section. If there are no existing responsible persons, these fields will be blank.
2. Enter the details for the new Responsible Person.
   - Required information is in blue text marked with an asterisk.
3. Click the "Apply Changes" button.
   - The screen will refresh and the name will be added to the *Responsible Person Listing* section.
4. Click the "Save" button at the top of the screen.

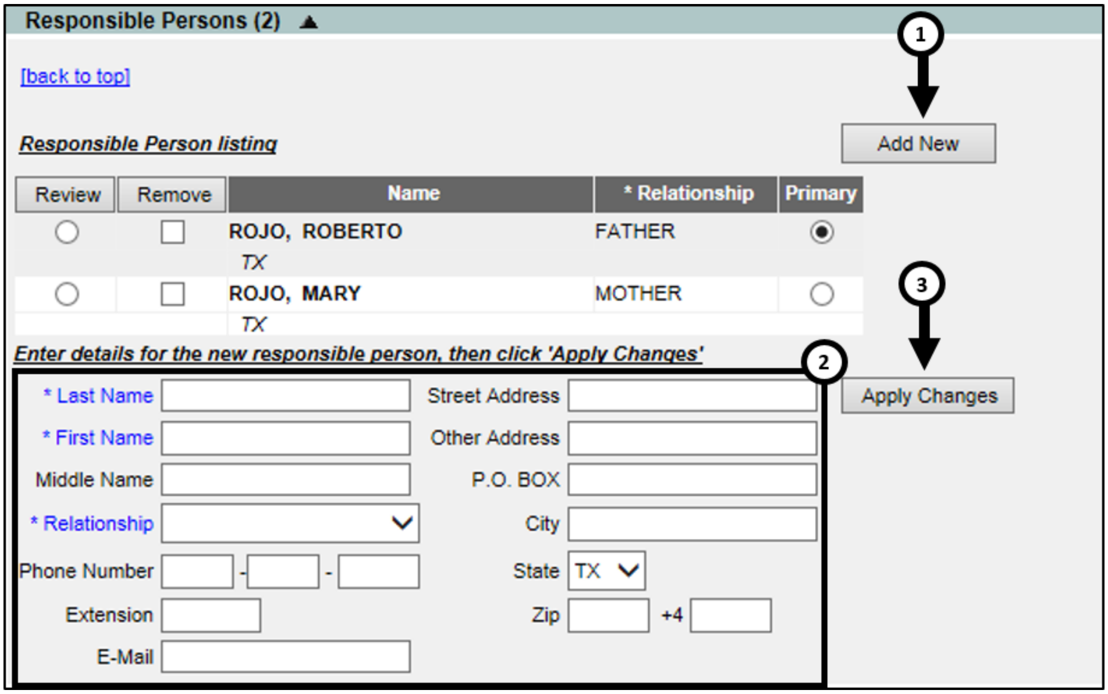


Figure 80 - Add Responsible Person Steps 1-3

Edit Responsible Persons

To **edit** a Responsible Person, follow the steps below.

See Figure 81: Edit Responsible Person Steps 1-3.

1. Select the radio button in the "Review" column for the person that needs to be edited, as needed, and then click the "Review" button.
    - The first name in the list will be selected by default.
2. Change or add necessary information.
3. Click the "Apply Changes" button.
4. Click the "Save" button at the top of the screen.

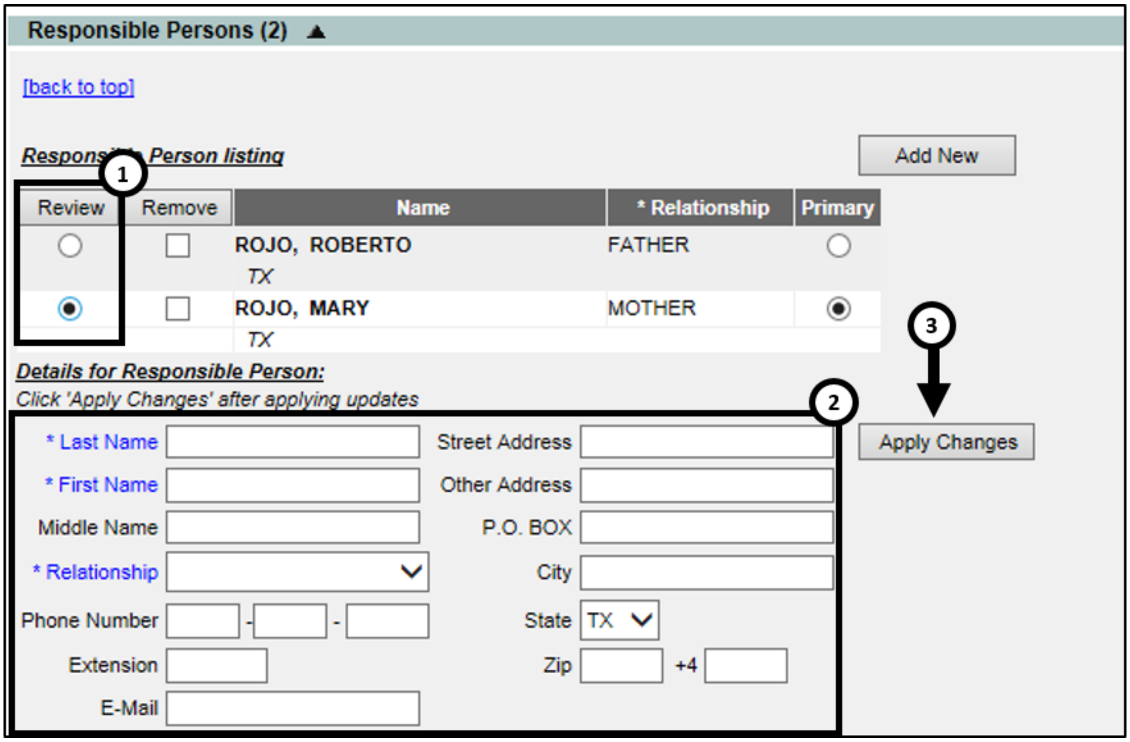


Figure 81 - Edit Responsible Person Steps 1-3

Remove Responsible Persons

To **remove** a Responsible Person, follow the steps below.

See Figure 82: Remove Responsible Person Step 1.

1. Select the check box in the “Remove” column for the person that needs to be removed, then click the “Remove” button.
    - The screen will refresh and the name will no longer display in the *Responsible Person Listing* section.
2. Click the “Save” button at the top of the screen.

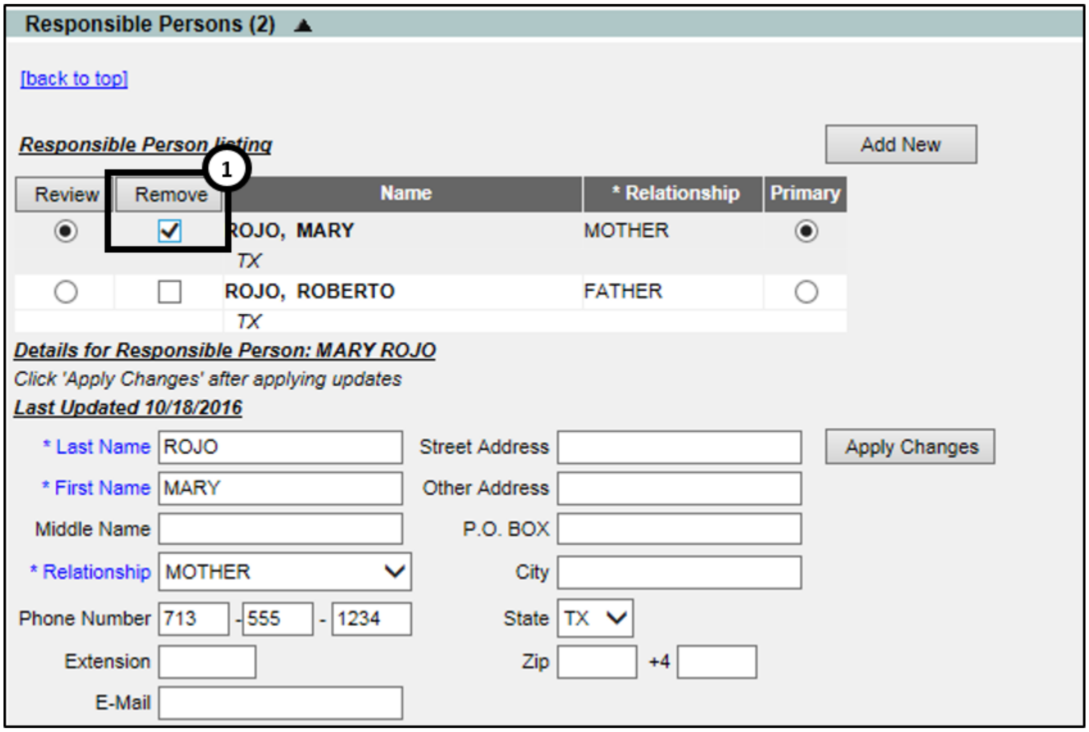


Figure 82 - Remove Responsible Person Step 1

Client Comments

In this section, users can enter immunization-related comments for a client, such as contraindication information and refusals of a vaccine. The client comments list is derived from a CDC-standardized set of options and displays as a drop-down list.

The client comments are visible in the *Client Information* section on various screens, such as the client immunization record. All users, excluding View-Only users, can add, edit, or delete any comment regardless of the user that entered it.

Immunity Comments: These comments are linked to vaccine group recommendations. If a client has a reaction to a vaccine, select an immunity comment and a specific Start Date. This will ensure that the recommendation for that vaccine group will not display on the client's record.

Client Refusal of Vaccine Comments: Enter refusal comments with an appropriate Start Date to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular client in ImmTrac2. Refusal of vaccine will not affect the recommendations display on the client's record.

Add Client Comments

To add a Client Comment, follow the steps below.

See Figure 83: Add Client Comments Steps 1-3.

1. Select the appropriate comment / contraindication from the “Client Comment” drop-down list.
2. Enter the start date and end date as needed. (Complete the field using the MM/DD/YYYY format or using the calendar icon .)
   - Some comment will not require an end date, and if a date is entered it will be automatically removed when the record is saved displaying the following message: “Selected Comment does not permit an End Date. The date entered has been ignored.”
3. Click the “Add Comment” button.
   - The screen will refresh and the comment will be displayed in the Client Comment Listing.
4. Click the “Save” button at the top of the screen.

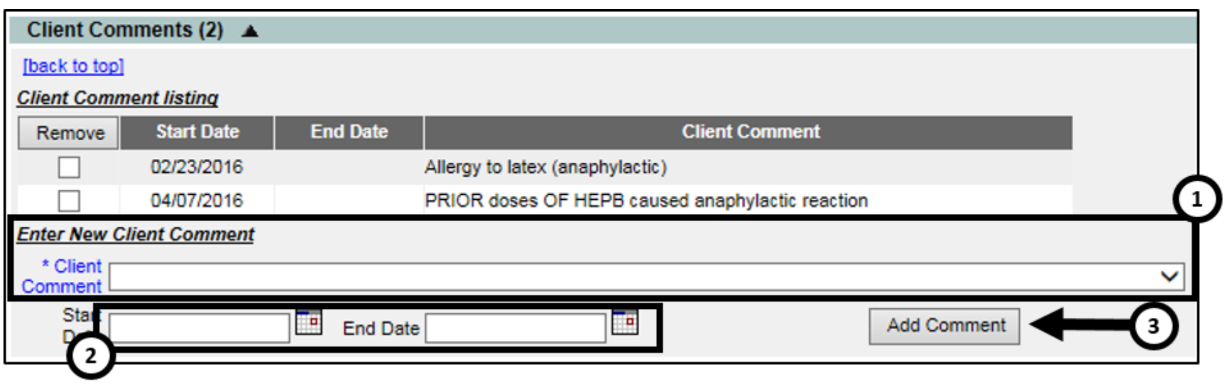


Figure 83 - Add Client Comments Steps 1-3

Important: *Although the Start Date is not shown as a required field, <u>a start date must be entered with a contraindication comment</u> in order to properly interact with the immunization schedule for the specified vaccine group. If a start date is not entered, the contraindicated vaccine group will still be listed on the Recommended Tracking Schedule. See Figure 84: Comment Impacting the Tracking Schedule Example.*

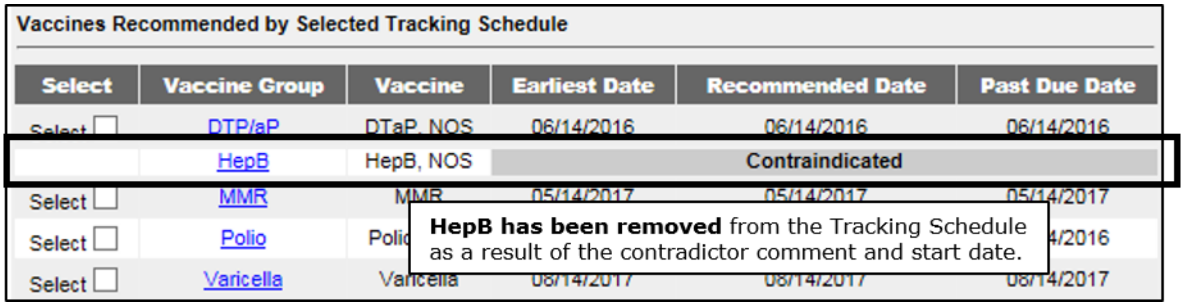


Figure 84 - Comment Impacting the Tracking Schedule Example

Remove Client Comment

To remove a client comment, follow the steps below.

See Figure 85: Remove Client Comment Step 1.

1. Select the check box of the comment to be removed in the *Client Comment* listing, then click the “Remove” button.
   - The screen will refresh and the comment will be removed from the *Client Comment* Listing.
2. Click the “Save” button at the top of the screen.

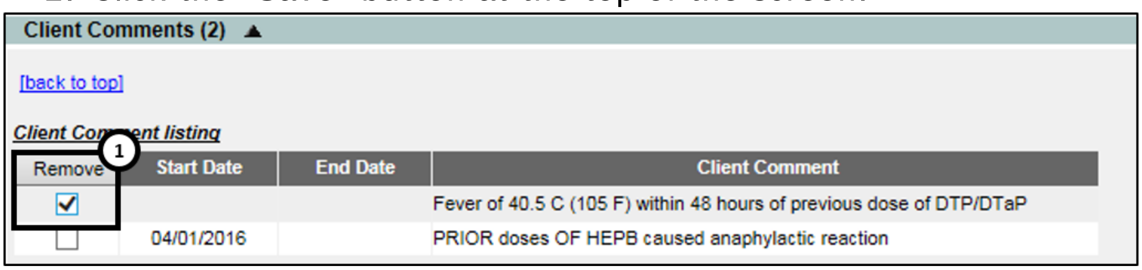


Figure 85 - Remove Client Comment Step 1

Client Notes

The Client Notes section allows users to enter notes for a client that may be useful to other clinicians and are visible to all organizations. Client notes can also be accessed from the client’s immunization record. Confidential information should not be noted in this section.

Add Client Notes

To add a client note, follow the steps below.

See Figure 86: Add Client Notes Steps 1-2.

1. Enter text up to 300 characters in length in the “Create New Note” text box.
2. Click the “Add New Note” button.

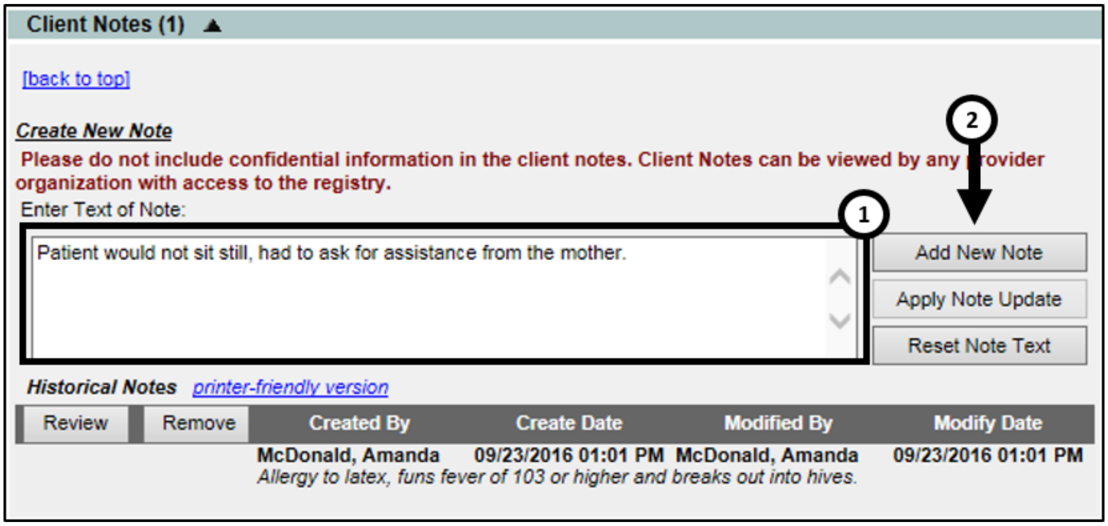


Figure 86 - Add Client Notes Steps 1-2

The screen will refresh and the note displays in the Notes table in a pending status until the "Save" button is clicked at the top of the page. Once saved, the "Created By", "Create Date", "Modified By", and "Modify Date" information will be populated. See Figure 87: Add Client Notes – Note Pending.

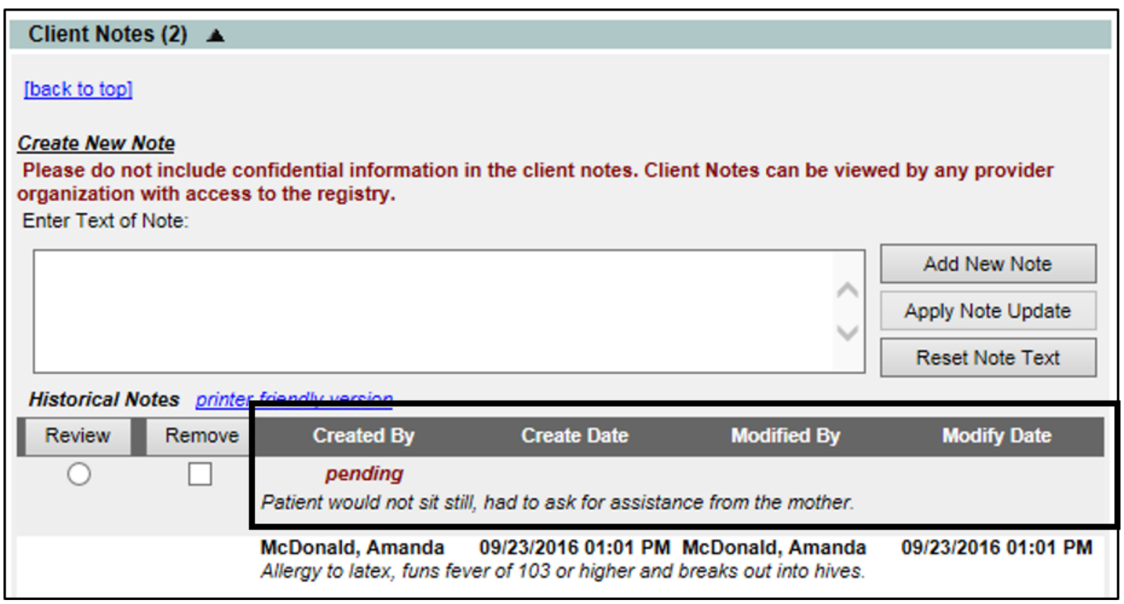


Figure 87 - Add Client Notes – Note Pending

Edit Client Notes

Even though Client Notes are viewable by all users, they can only be edited by the user who entered the note or by DSHS Customer Support personnel.

To edit a client note, follow the steps below.

See Figure 88: Edit Client Notes Steps 1-3.

1. Select the radio button in the “Review” column of the note to edit, then click the “Review” button.
    - Only notes that were entered by the user display a radio button for editing.
2. Make the edit in the *Enter Text of Note* section.
3. Click the “Apply Note Update” button.

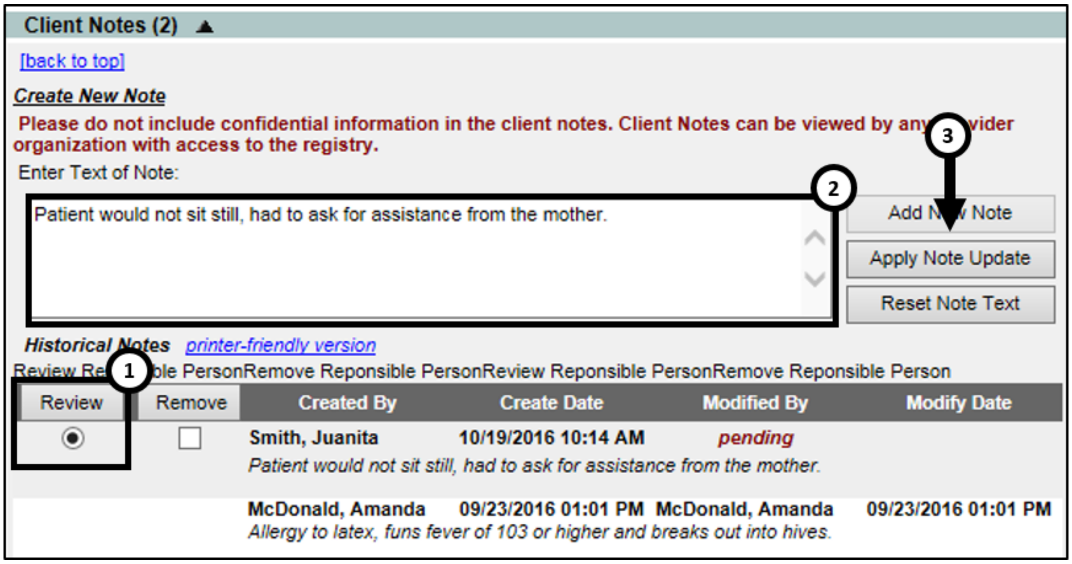


Figure 88 - Edit Client Notes Steps 1-3

The screen will refresh and the updated note displays in the Notes table in a pending status until the “Save” button is clicked at the top of the page. Once saved, the “Modified By” and “Modify Date” information will be populated. See Figure 89: Edit Client Notes – Note Pending.

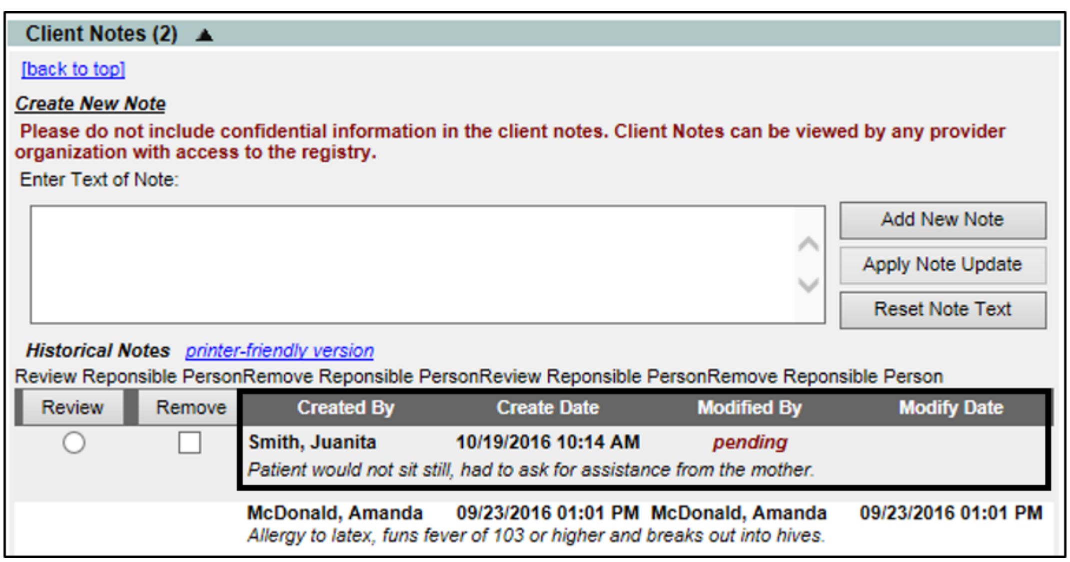


Figure 89 - Edit Client Notes – Note Pending

Delete Client Notes

Client Notes can only be deleted by the user who entered the note or by ImmTrac Customer Support personnel.

To delete a client note, follow the steps below.

See Figure 90: Delete Client Notes Steps 1-2.

1. Select the checkbox(es) in the "Remove" column of the note(s) to delete, then click the "Remove" button.
   - Only notes that were entered by the user display a check box for deletion.
2. Click "OK" when asked "Are you sure you want to delete this information?"
   - The screen will refresh and the note(s) will no long be displayed.
3. Click the "Save" button at the top of the screen.

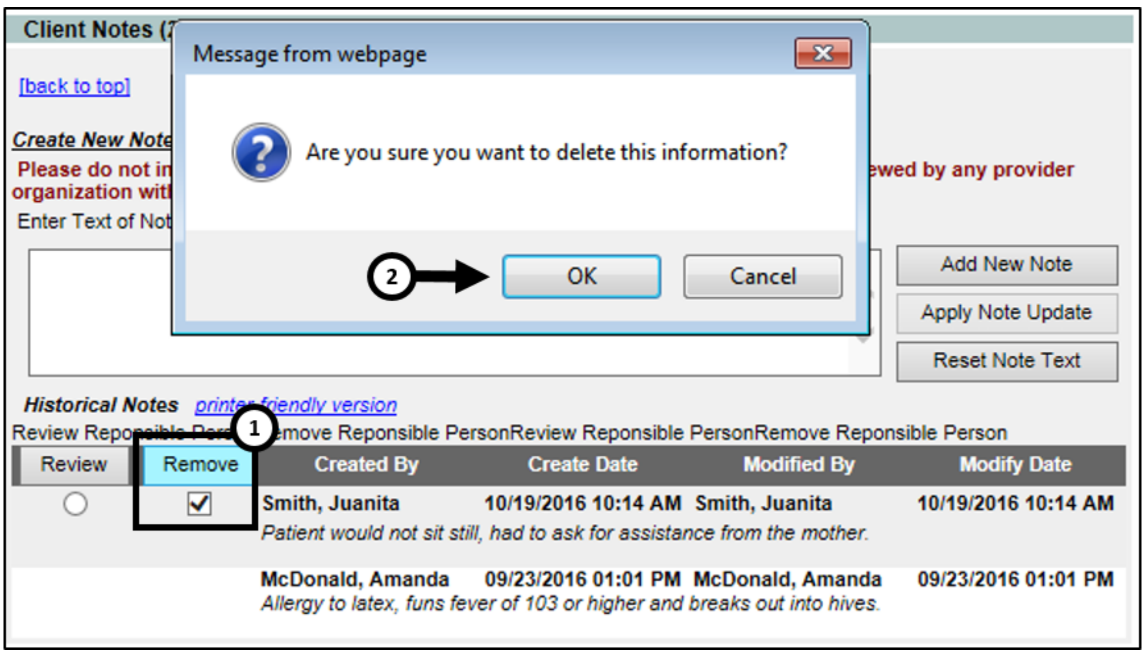


Figure 90 - Delete Client Notes Steps 1-2

Saving Client Information

Listed below are several ways to save information on the Edit Client screen. After clicking one of the below command buttons, if there are any errors in the entered information or if any required fields are missing, a validation error message will appear in red at the top of the screen. Make corrections as needed and continue with the save.

Save: When clicked, the "Save" button at the top of the screen will save all information fields within each demographic section. The message "Client record successfully saved" will appear at the top of the screen if no validation errors are found. The user will remain on the Edit Client page after the save action completes.

History / Recommend: As with the "Save" button, the "History / Recommend" button will save the client's information and then redirects the user to the *Client Immunization History* screen. See Section 2 – Manage Immunizations for more details on this screen. If any validation errors were encountered during the save, the user will be required to correct the validation errors and then reselect the "History / Recommend" button to be directed to the *Client Immunization History* screen.

Reports: As with the "Save" button, the "Reports" button will save the client's information and redirects the user to the *Reports Available for this Client* screen. See Section 1 - Client Reports for more details this screen. If any validation errors were encountered during the save, the user will be required to correct the validation errors and then reselect the "Reports" button to be directed to the *Reports Available for this Client* screen.

Cancel: When clicked, the "Cancel" button clears all entered information and does not save to ImmTrac2 and the user is returned to the application home screen.

Enter New Clients

When entering a new client, ImmTrac2 requires users to search existing client records to prevent a duplicate entry of the same individual in the system. ImmTrac2 will compare and attempt to match entered information against existing client records before completing the steps to save the information entered on the screen.

Remember, Smart Search uses a more sophisticated matching process for locating a client in ImmTrac2. See Section 1 – Client Search for more details on how to use the Smart Search option. If a client records is identified with the same or similar person information, review each record to determine if you should continue with the Enter New Client process.

To enter a new client, follow the steps below.

See Figure 91: Enter New Client Steps 1-3.

1. Click the "Enter New Client" menu option.

2. Enter as much client information as possible to perform a search.
    - Required information is in blue text marked with an asterisk.
3. Click the “Find” button.

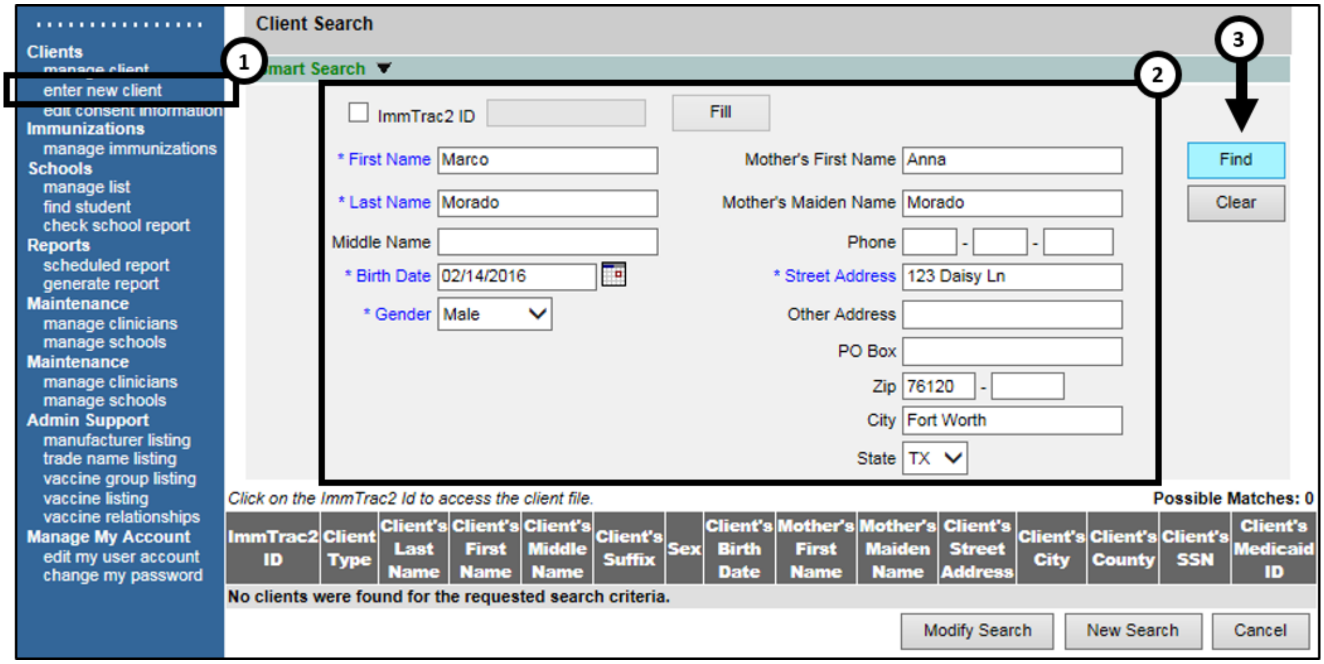


Figure 91 - Enter New Client Steps 1-3

4. If there are no *Possible Matches*, continue by selecting one of the two consent options in the “Do you have one of the following signed consent forms for your client?” section (*these options are for clients that have provided consent to participate in ImmTrac2 and are not “Disaster Only” clients*) or select an option under the “Disaster-Related Information” section (*these options are for clients that are only participating in a disaster and received a disaster-related antiviral, immunization or medication (AIM)*).

    “Do you have one of the following signed consent forms for your client?” options:

    - Yes – Add a client (Yes the client does have a signed consent form on file).
    - No – Request a Consent Form.

    “Disaster-Related Information” options:

    - WITH Signed Disaster-Related Consent.
    - WITHOUT Signed Disaster-Related Consent.
5. Click the “Submit” button.

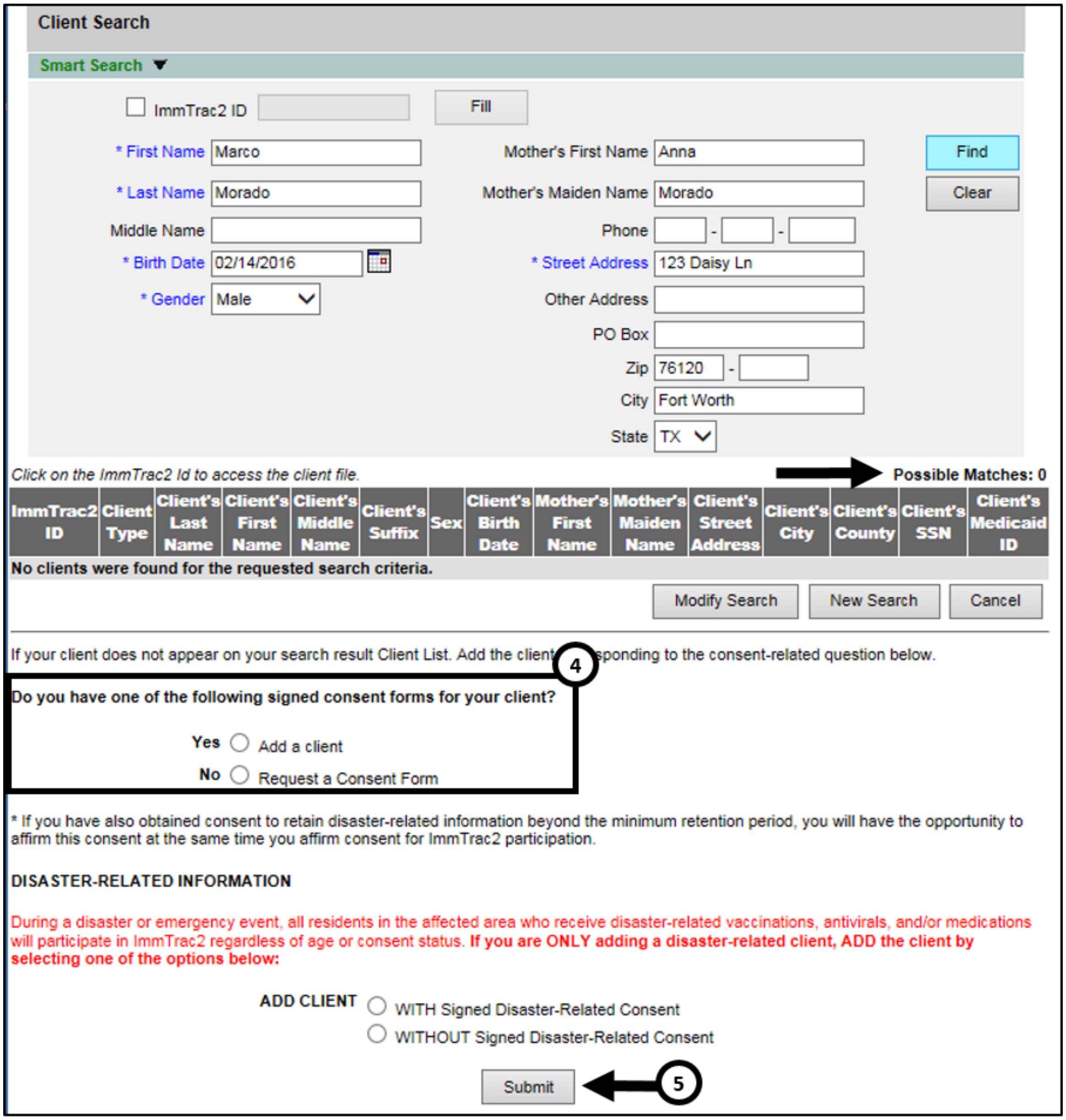


Figure 92 - Enter New Client Steps 4-5

If the “No - Request a Consent Form” option is selected in step 4, after clicking “Submit”, the Print Consent Documentation screen displays giving options to display and print a pre-populated consent form with the client’s information from the Smart Search fields. Available options are determined by the client date of birth. *See Figure 93: Print Consent Forms. See Table 10: Print Consent Documentation – Command Buttons* for explanations of command buttons.

Table 11 - Print Consent Documentation – Command Buttons

Command Button	**Description**
Display Form	Select the appropriate form to display using the radio buttons then click this button to open a pre-populated form.
Continue with Client Add	Will proceed with the “Enter New Client” process and open the *Add Client* screen.
Cancel	Returns users back to the previous Enter New Client screen.

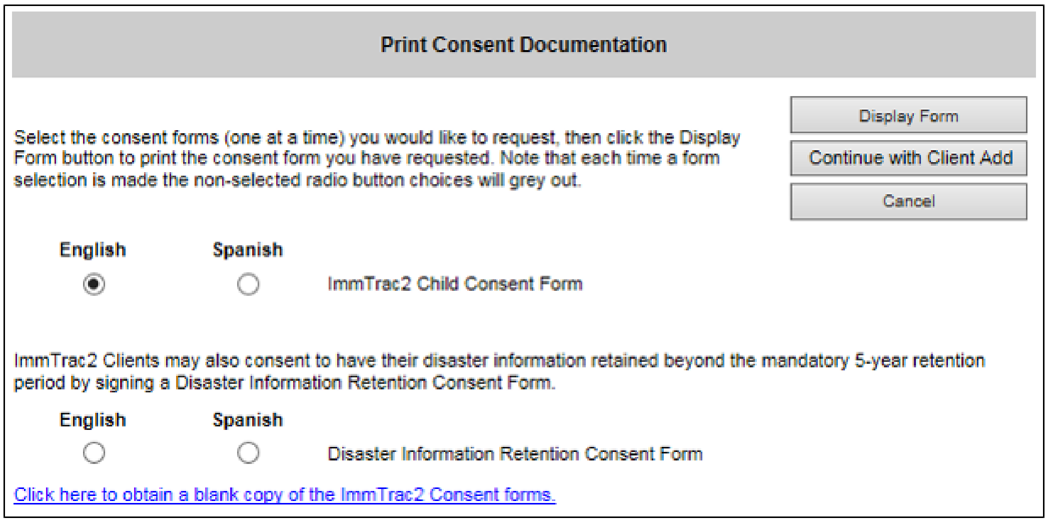


Figure 93 - Print Consent Forms

See Figure 94: Enter New Client Steps 6-8.

6. If the “Yes – Add a Client” option is selected, or the “Continue with Client Add” button is clicked on the print consent screen, the *Add Client* screen will open.
    - The *Personal Information* fields are pre-populated with the information entered in the search screen.
    - Enter any additional information as needed.
    - Required information is in blue text marked with an asterisk.
7. Enter all additional client information under each demographic tab as needed, using the arrow to expand a demographic section.
    - In the *Address Information* section, the County is a required field and must be selected using the drop down arrow to continue with the Enter New Client process.

- For a detailed review of each section, see the [Update / Edit Client Information](#) section.

8. Click the "Continue Add" button.

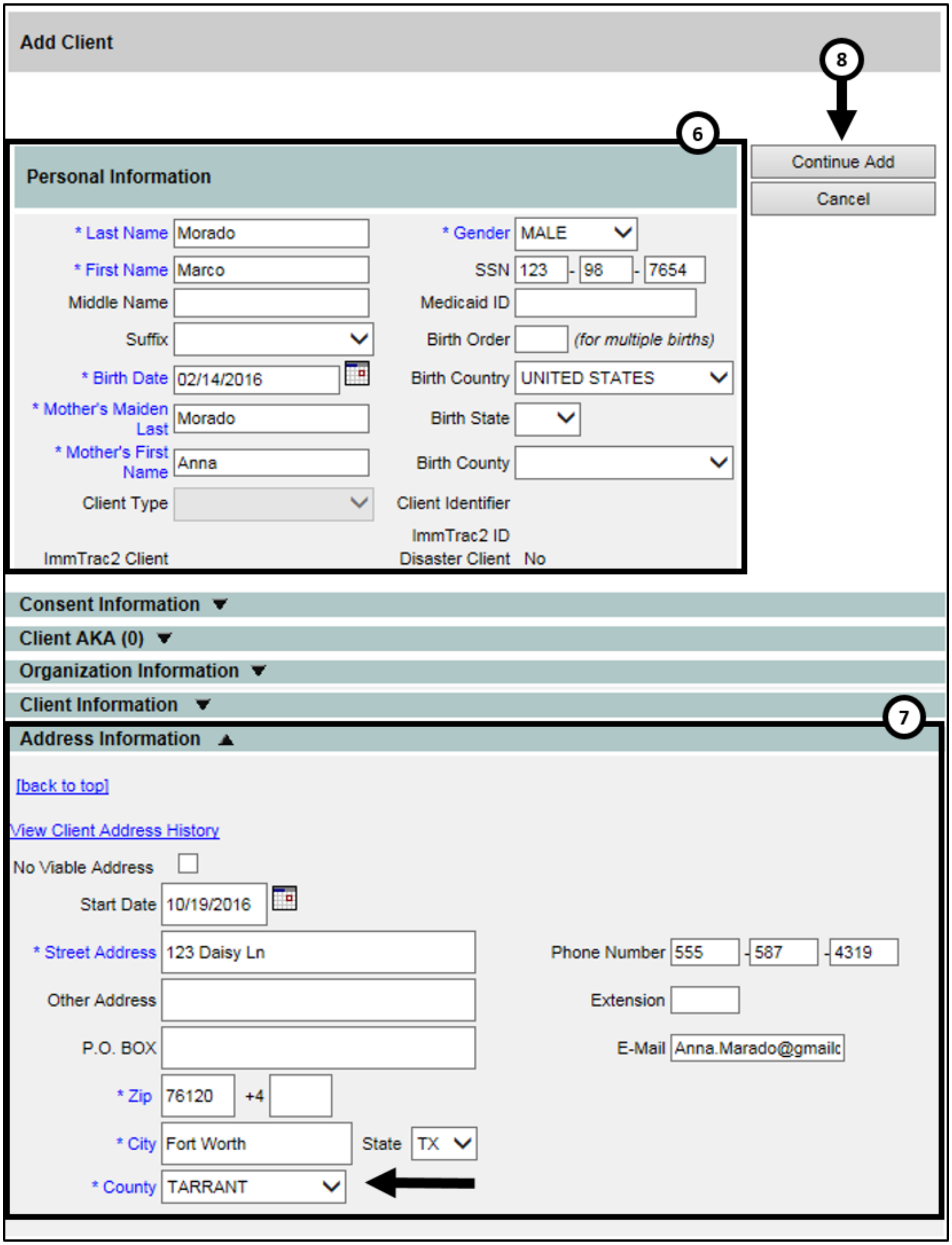
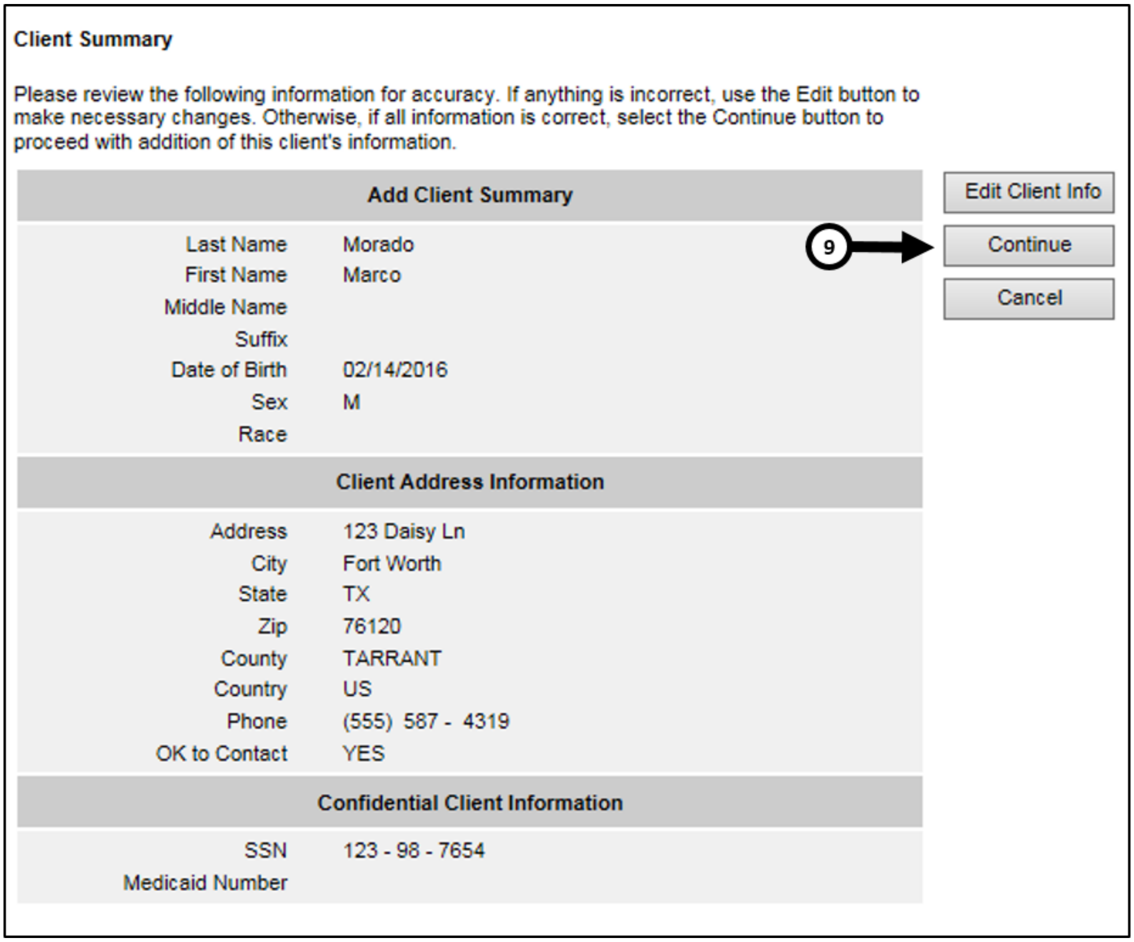


Figure 94 - Enter New Client Steps 6-8

See Figure 95: Enter New Client Step 9

9. Review the client information on the *Client Summary* screen and if no edits need to be made click the "Continue" button.

- Click the “Edit Client Info” button if the client information needs to be edited, or the “Cancel” button to return to the client search screen without saving.



Client Summary

Please review the following information for accuracy. If anything is incorrect, use the Edit button to make necessary changes. Otherwise, if all information is correct, select the Continue button to proceed with addition of this client's information.

Edit Client Info

9 Continue

Cancel

Add Client Summary	
Last Name	Morado
First Name	Marco
Middle Name	
Suffix	
Date of Birth	02/14/2016
Sex	M
Race	
Client Address Information	
Address	123 Daisy Ln
City	Fort Worth
State	TX
Zip	76120
County	TARRANT
Country	US
Phone	(555) 587 - 4319
OK to Contact	YES
Confidential Client Information	
SSN	123 - 98 - 7654
Medicaid Number	

Figure 95 - Enter New Client Step 9

See Figure 96: Enter New Client Steps 10-11. (Child Consent Options)

10. Select the appropriate check box or radio button on the *Consent Verification* screen.
    - Available options are determined by client date of birth.
11. Click the “Affirm” button.

Important: *For more information on the different consent options please See Section 1 – Consent Forms.*

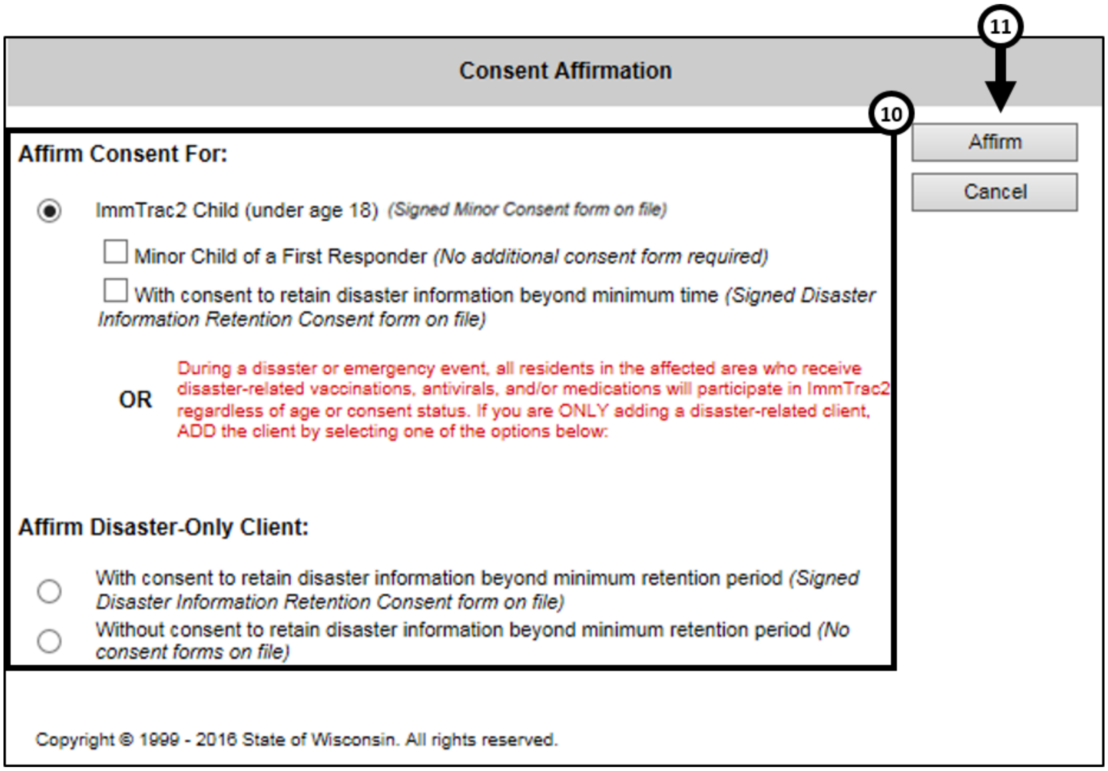


Figure 96 - Enter New Client Steps 10-11

The below consent option displays for adult clients. *See Figure 97: Enter New Client – Adult Consent Affirmation.*

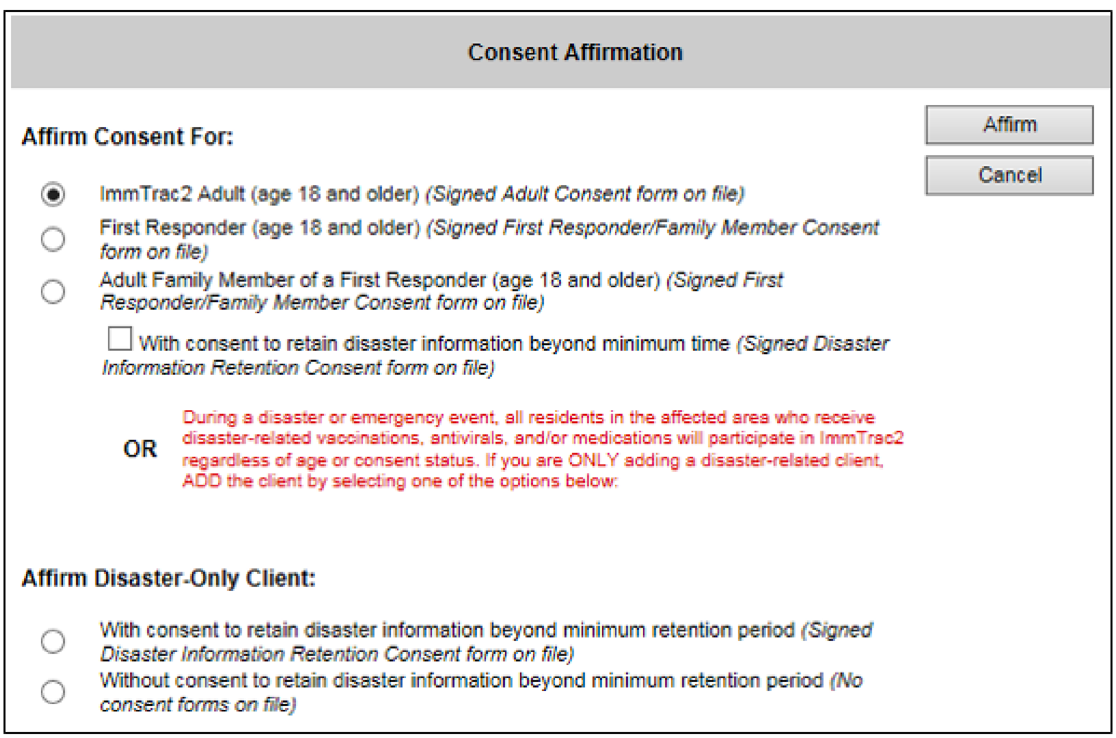


Figure 97 - Enter New Client – Adult Consent Affirmation

After clicking the “Affirm” button, the *Consent Affirmation Confirmation* screen displays with the client’s information and the client record has been created. Click a command button to continue or simply use the menu panel option to navigate to another screen. *See Figure 98: Enter New Client Step 12.*

Table 12 - Consent Verification Confirmation – Command Buttons

Command Button	**Description**
Go To Client	Navigates user to the *View Client* screen.
Add Next	Navigates the user to the *Enter New Client* screen.
Cancel	Navigates the user to the application *Home* page.

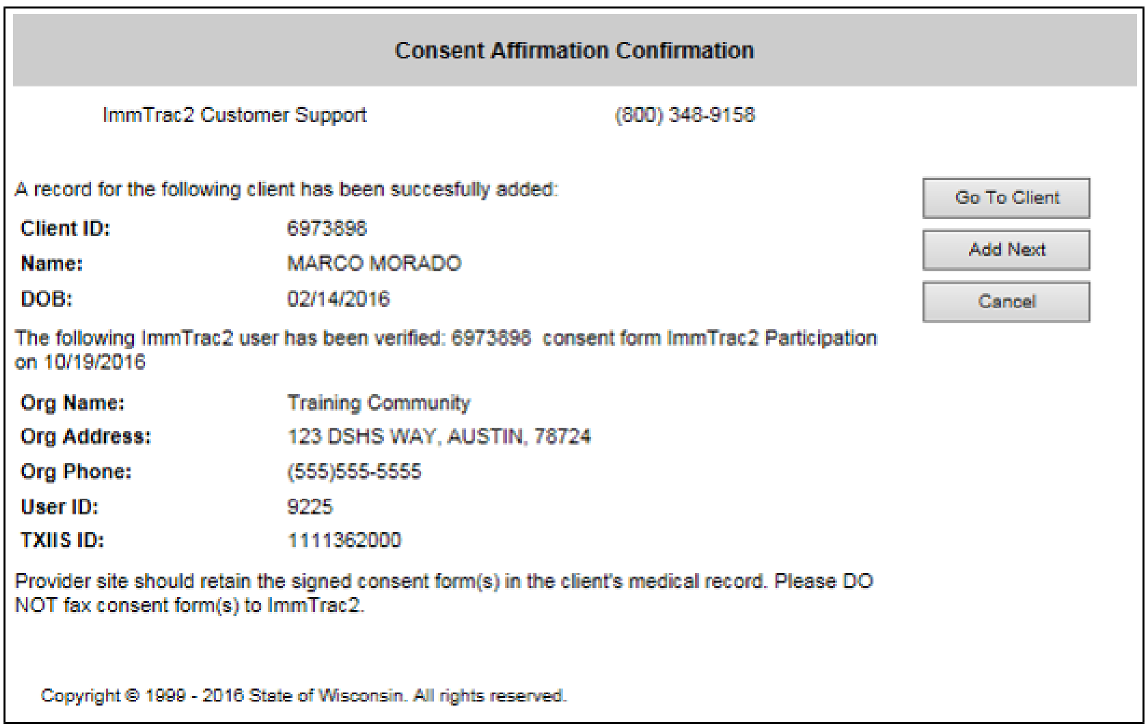


Figure 98 - Enter New Client Step 12

Potential Match List – System Match Override

When entering a new client, if a potential duplicate match is found users will see the *Potential Match List* screen after step 9 of the Enter New Client process. This screen shows a list of clients that could be a possible duplicate match to the client that is being entered.

From the *Enter New Client* screen, in the *Possible Matches* area, select the “ImmTrac2 ID” link for a potential matching client to view the client’s detailed information. Click the “Cancel” button on the *View Client* screen to return to the search results and review other possible match results. If the potential match clients do not match the client being entered, proceed as listed in the by clicking the “Create New Client” button. If one of the clients listed is the same as the one being entered, click the “Cancel” button or the “ImmTrac2 ID” hyperlink of the matching client. *See Figure 99: Enter New Client – Potential Match List.*

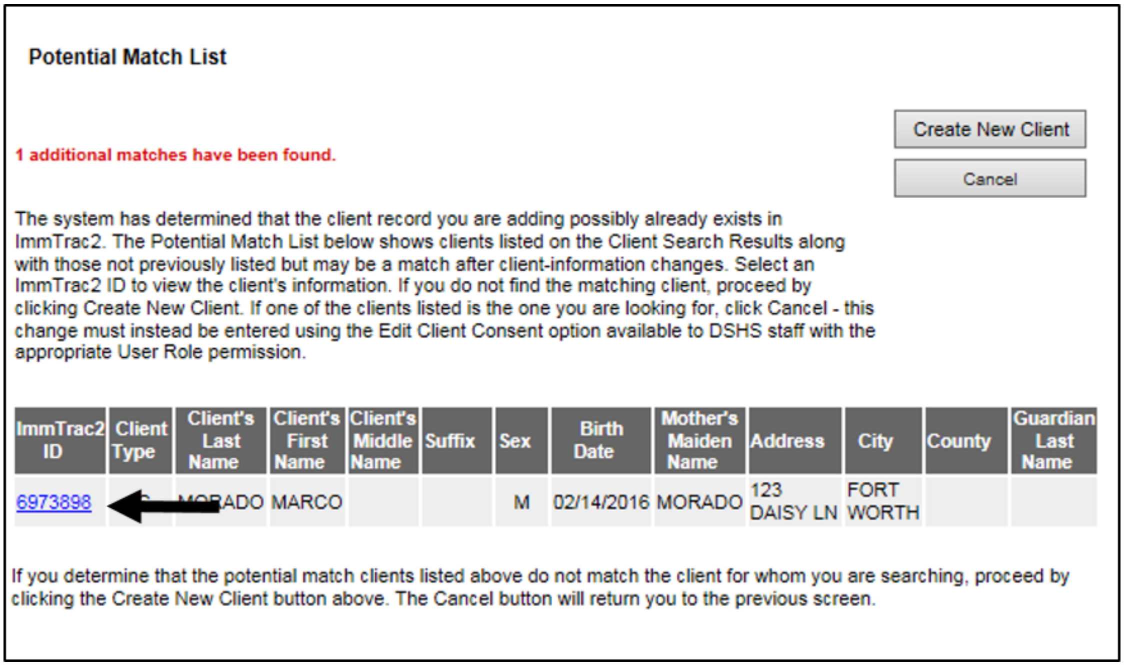


Figure 99 - Enter New Client – Potential Match List

After clicking the “Create New Client” button, click the “OK” button when the “Are you sure you would like to OVERRIDE the System Match” message is displayed. This will create the new client record. *See Figure 100: Enter New Client – System Match Override.*

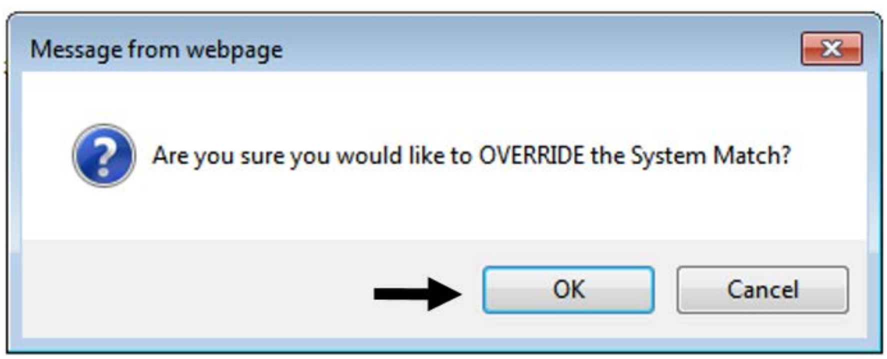


Figure 100 - Enter New Client – System Match Override

Edit Consent Information

To update a client’s consent information use the “Edit Consent Information” menu option. The consent options that display will depend on the client type and current consent on file. When consent information is updated, the client type and consent attributes will change accordingly to reflect the updates. For more information on the different consent options and when they are required, see [Section 1 – Consent Forms](#).

To edit the client's consent information, follow the steps below.

See Figure 101: Edit Consent Information Steps 1-3.

1. Click the "Edit Client Consent" menu option.
2. Enter search criteria.
    - Required information is in blue text marked with an asterisk.
3. Click the "Find" button.

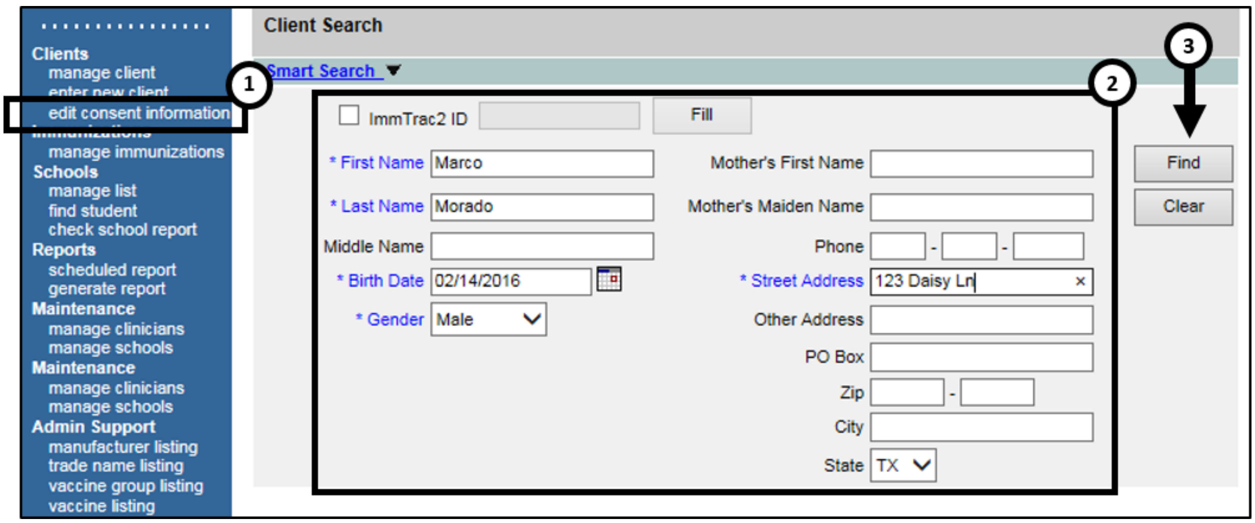


Figure 101 - Edit Consent Information Steps 1-3

See Figure 102: Edit Consent Information Step 4.

4. Once the client is located, click the "Select Client" button.

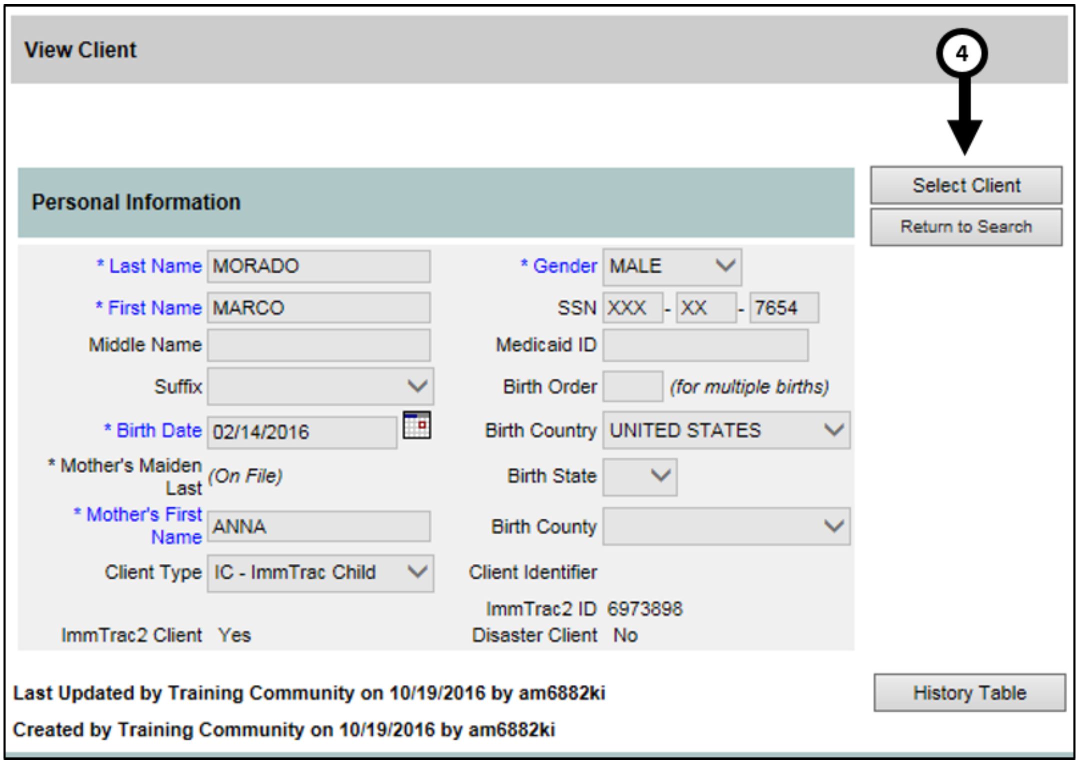


Figure 102 - Edit Consent Information Step 4

See Figure 103: Edit Consent Information Steps 5-6.

5. On the *Edit Consent Information – Add a Form* screen, select the applicable radio button and checkbox(es) for the needed update.
6. Click the "Update Client" button to save.

The *Edit Consent Information – Add a Form* screen displays the client's name, date of birth, and current consent attributes. See the Consent Information Attributes Table in the Consent Information section for more details.

This screen also offers multiple command buttons for navigation and a "Click here to obtain a blank copy of the ImmTrac2 Consent form" hyperlink that will navigate users to the *Form* tabs in the menu bar where a blank copy of all consent forms are located.

Table 13 - Edit Consent Information – Command Buttons

Command Button	***Description***
Display Form	Opens the selected consent form pre-populated with the client's information.
Update Client	Save the updated consent information.
Edit Client	Navigates user to the *View Client* screen when the Edit button can be selected to edit the client
Cancel	Navigates the user to the application home page.

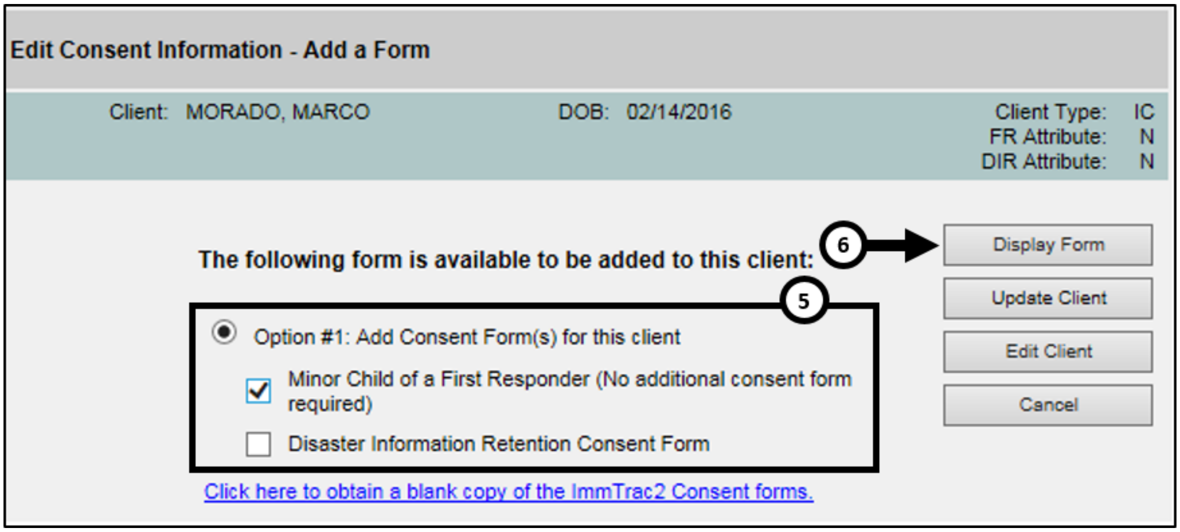


Figure 103 - Edit Consent Information Steps 5-6

See Figure 104: Edit Consent Information Step 7.

7. When the affirm message displays click the “Affirm” button to continue with the updates if the appropriate consent form has been signed.
    - The consent information in blue corresponds with the option selected in the previous screen.

Figure 104 - Edit Consent Information Step 7

After clicking the “Affirm” button, the screen will refresh and the “Client Updated” message will appear at the top of the screen. *See Figure 105: Edit Consent – Update Confirmation.*

Click the “Edit Client” button to navigate to the *Update Client* screen, or click the “Cancel” button to navigate to the application *Home* page.

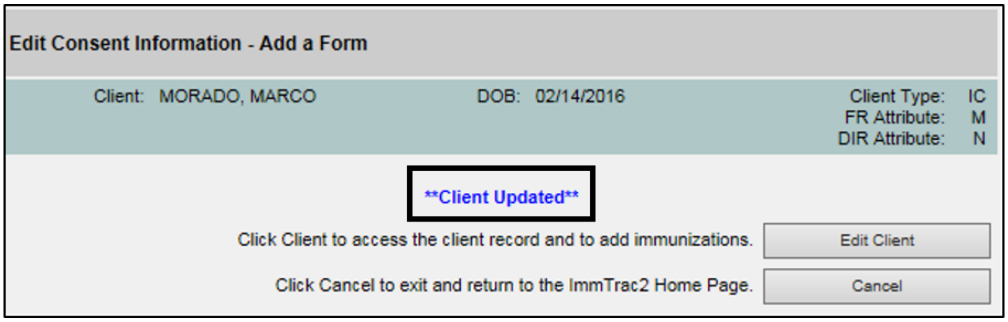


Figure 105 - Edit Consent Information – Update Confirmation

Chapter 13: Immunizations

ImmTrac2 allows users to manage client immunization information using the *Manage Immunization* option on the left menu panel. Managing immunizations consist of viewing, adding, editing, and deleting existing immunization records for a client.

Manage Immunizations

Immunization information for a specific client may be accessed one of two ways:

Click “Manage Client” under the *Clients* section of the menu panel. This displays the *Client Search* screen. For information on finding clients, see Section 1 – Client Search. Once a client is retrieved, click the “Edit Client” button, then click the “History / Recommend” button to display the client’s Immunization Record screen.

Or

Click “Manage Immunizations” under the *Immunizations* section of the menu panel. This will bring up the *Client Search* screen. For information on finding clients, see Section 1 – Client Search. When the “Find” button is clicked from the search screen, the client’s Immunization Record displays immediately if accurate information was entered and only one record was found. This is the quickest way to view a client’s immunization information.

View Immunization Records

The immunization record has three sections: Client Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule.

This screen will look very similar to the screen described in Section 1 – View Immunizations, but Full Access Provider or Provider Supervisor users can add new immunizations, add historical immunizations, edit client information, and edit and delete immunization information. For details on the “Reports” and the “Print Official Immunization Record” buttons, see the Section 1 – View Immunizations section.

To view client immunization records, follow the steps below.

See Figure 106: View Client Immunization Steps 1-4.

1. Click the “Manage Immunization” menu option.
2. Select a Search option. (Quick, Basic, or Smart Search)

3. Enter the search criteria.
    - Required information is in blue text marked with an asterisk.
4. Click the “Find” button. Once the client is located, the client immunization record displays.

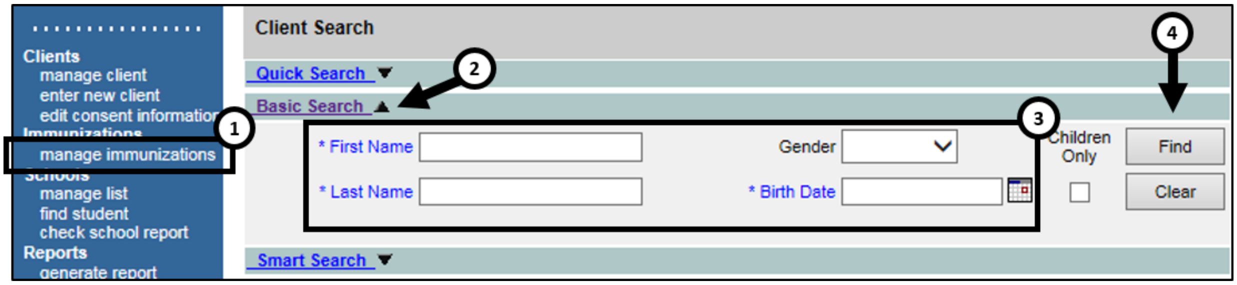
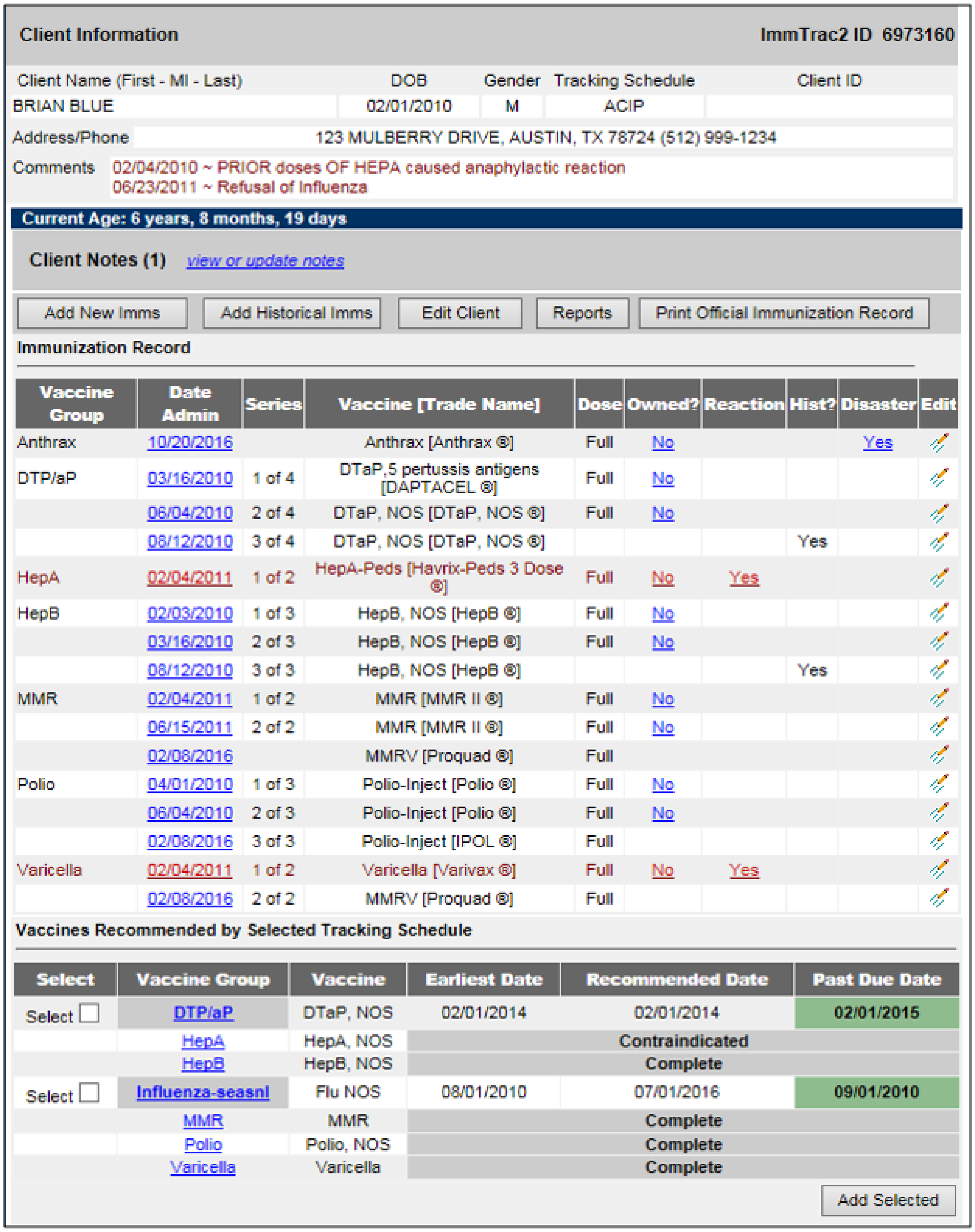


Figure 106 - View Client Immunization Steps 1-4



Client Information ImmTrac2 ID 6973160

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
BRIAN BLUE	02/01/2010	M	ACIP	

Address/Phone 123 MULBERRY DRIVE, AUSTIN, TX 78724 (512) 999-1234

Comments 02/04/2010 ~ PRIOR doses OF HEPA caused anaphylactic reaction
06/23/2011 ~ Refusal of Influenza

Current Age: 6 years, 8 months, 19 days

Client Notes (1) view or update notes

Add New Imms | Add Historical Imms | Edit Client | Reports | Print Official Immunization Record

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full	No				
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full	No				
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]				Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full	No	Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full	No				
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full	No				
	08/12/2010	3 of 3	HepB, NOS [HepB ®]				Yes		
MMR	02/04/2011	1 of 2	MMR [MMR II ®]	Full	No				
	06/15/2011	2 of 2	MMR [MMR II ®]	Full	No				
	02/08/2016		MMRV [Proquad ®]	Full					
Polio	04/01/2010	1 of 3	Polio-Inject [Polio ®]	Full	No				
	06/04/2010	2 of 3	Polio-Inject [Polio ®]	Full	No				
	02/08/2016	3 of 3	Polio-Inject [IPOL ®]	Full					
Varicella	02/04/2011	1 of 2	Varicella [Varivax ®]	Full	No	Yes			
	02/08/2016	2 of 2	MMRV [Proquad ®]	Full					

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Select	DTP/aP	DTaP, NOS	02/01/2014	02/01/2014	02/01/2015
	HepA	HepA, NOS	Contraindicated		
	HepB	HepB, NOS	Complete		
Select	Influenza-seasnl	Flu NOS	08/01/2010	07/01/2016	09/01/2010
	MMR	MMR	Complete		
	Polio	Polio, NOS	Complete		
	Varicella	Varicella	Complete		

Add Selected

Figure 107 - View Client Immunization Example

The client's Immunization Record is separated into four sections. For additional information on this screen, see Chapter 8 – View Immunization Record.

Client Information

The Client Information section at the top of the Immunization Record screen displays information about the client, such as Name, DOB, Gender, Tracking Schedule, Client ID, Address, Phone, and a scrollable list of comments derived from vaccine records. Review this information to verify that the correct client record has been accessed. To edit this information, click the "Edit Client" button. See the Editing Client Information section for details on how to edit client information.

Client Notes

This section links to a pop-up window that allows users to view or update Client Notes. Each note includes a record of the user who created it and the date it was saved. Client Notes can be viewed by any provider organization with access to the registry. As notes are saved, the cumulative record count displays in parentheses on the *Client Immunization History* screen.

Immunization Record

This table lists all the immunizations the client has received to date that have been entered into ImmTrac2. Immunizations are listed alphabetically by Vaccine Group and the Series is ordered by Date Administered. For each row in this section users can select the "Edit" icon to edit the immunization record or delete an immunization, if appropriate. Users may only edit or deleted immunizations that are owned by their organization. Users can also click the "Add New Imms" and "Add Historical Imms" buttons to add records of administered vaccines.

Vaccines Recommended by Selected Tracking Schedule

This section lists all the vaccines recommended by the ACIP tracking schedule associated with the client. As a provider users can use this section to quickly select an immunization to add to the client's record by using the check box and clicking the "Add Selected" button.

Important: *For more information how to read the Vaccines Recommended by the Selected Tracking Schedule see Section 1 – Vaccines Recommended by the Selected Tracking.*

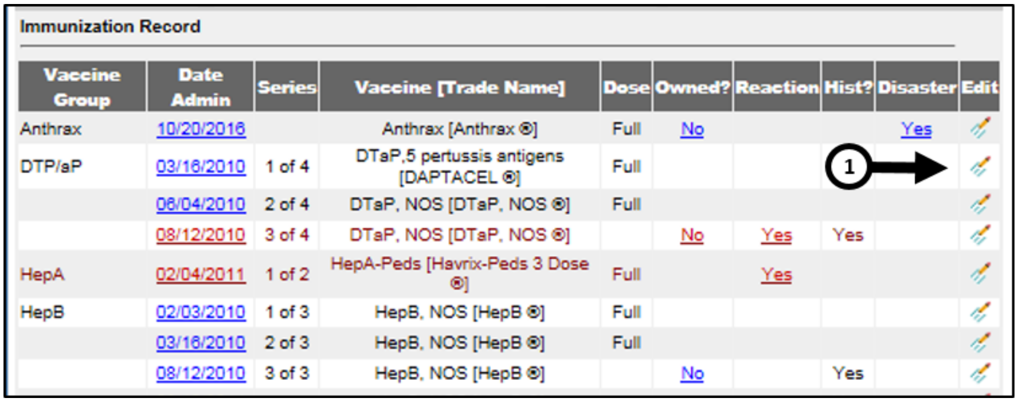
Edit Immunizations

Users have the ability to edit historical immunizations and immunizations that are owned by their organization. If the "Owned" column of the immunization record displays "No", the vaccine record cannot be edited by the user.

To edit an immunization record, follow the steps below.

See Figure 108: Edit Immunizations Step 1.

1. After searching and locating the client, click the “edit” icon next to the immunization that needs to be edited.


Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full					
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full					
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]		No	Yes	Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full		Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full					
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full					
	08/12/2010	3 of 3	HepB, NOS [HepB ®]		No		Yes		

Figure 108 - Edit Immunizations Step 1

See Figure 109: Edit Immunizations Step 2-3.

2. To edit, make updates as needed to the immunization data.
3. Click the “Save” button.
    - Users are redirected back to the client immunization record.

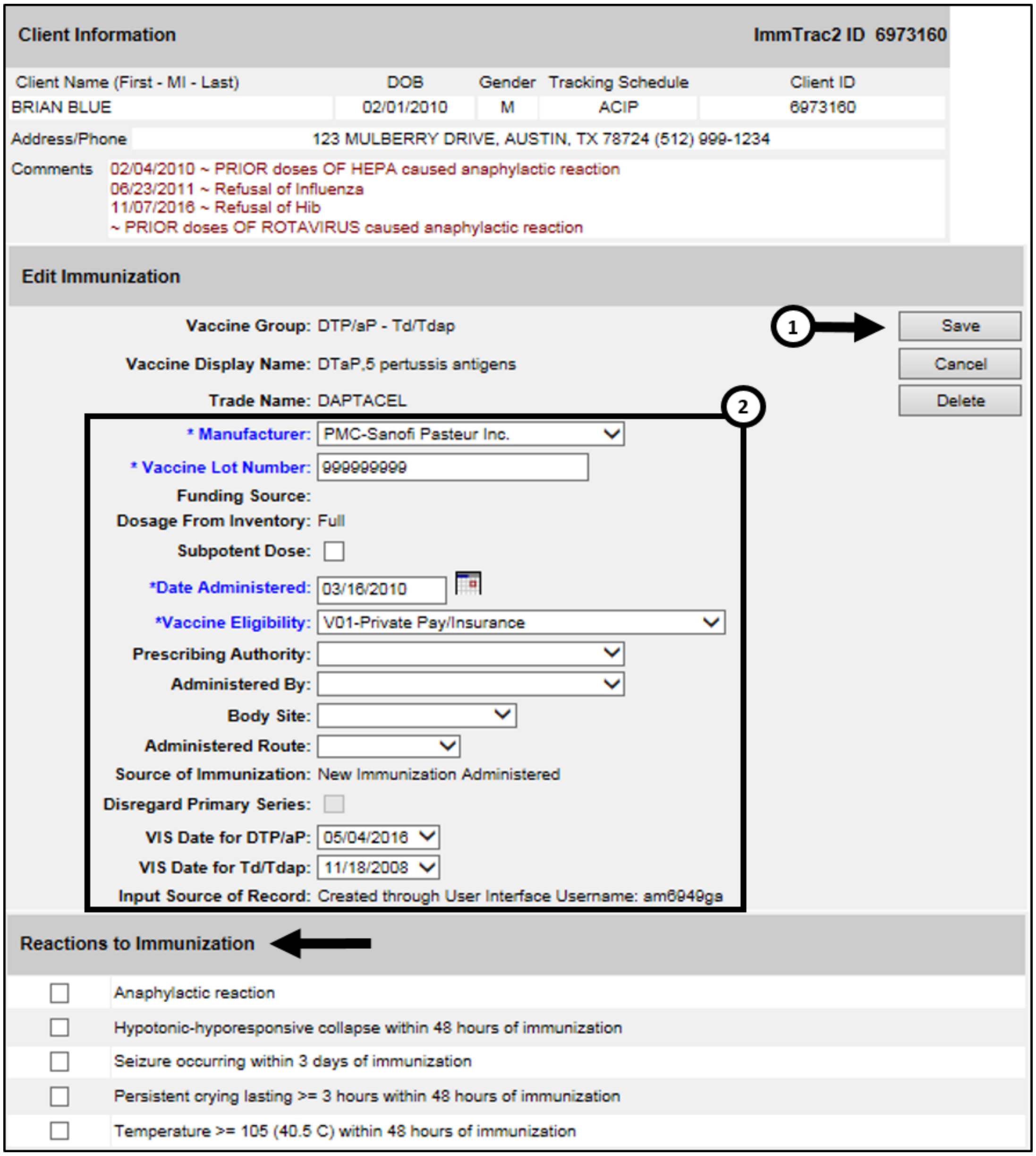


Figure 109 - Edit Immunizations Step 2-3

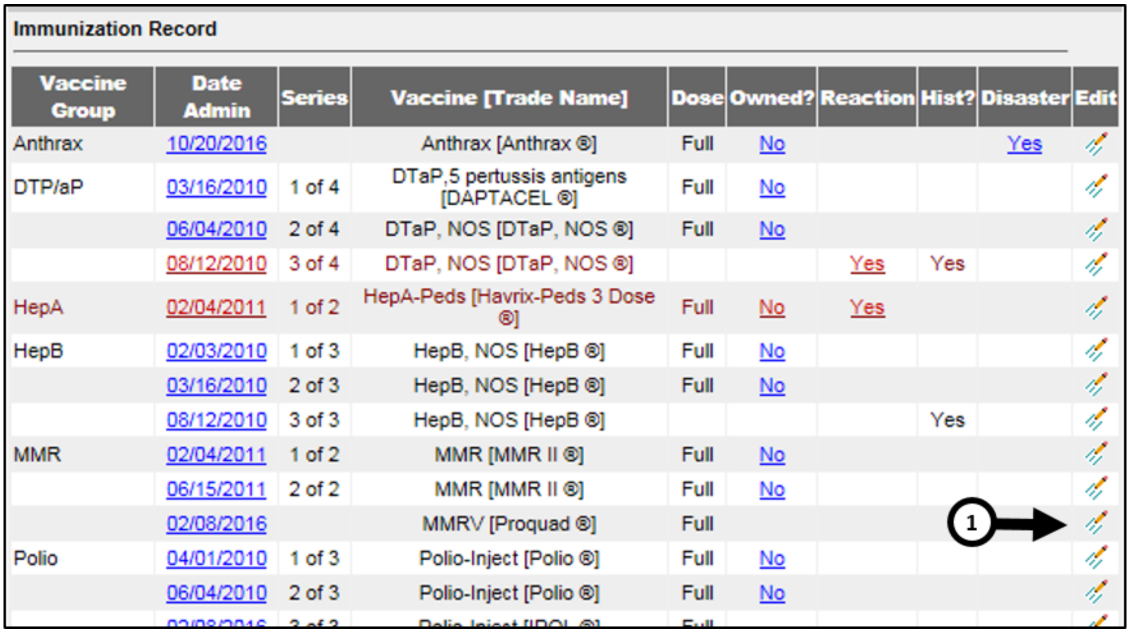
Delete Immunizations

Users have the ability to delete historical immunization and immunizations that are owned by their organization and the ability to delete any Historical Immunization. If the “Owned” column of the immunization record displays “No”, the vaccine record cannot be deleted by the user.

To delete an immunization record, follow the steps below.

See Figure 110: Delete Immunizations Step 1.

1. After searching and locating the client, click the “Edit”  icon next to the immunization that needs to be deleted.



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full	No				
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full	No				
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]			Yes	Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full	No	Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full	No				
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full	No				
	08/12/2010	3 of 3	HepB, NOS [HepB ®]				Yes		
MMR	02/04/2011	1 of 2	MMR [MMR II ®]	Full	No				
	06/15/2011	2 of 2	MMR [MMR II ®]	Full	No				
	02/08/2016		MMRV [Proquad ®]	Full					
Polio	04/01/2010	1 of 3	Polio-Inject [Polio ®]	Full	No				
	06/04/2010	2 of 3	Polio-Inject [Polio ®]	Full	No				

Figure 110 - Delete Immunizations Step 1

See Figure 111: Delete Immunizations Step 2-3

2. Click the "Delete" button.
3. Click "Yes", when the message dialog box displays asking "Are you sure you want to delete this immunization?"
    - Users are redirected back to the client immunization record.

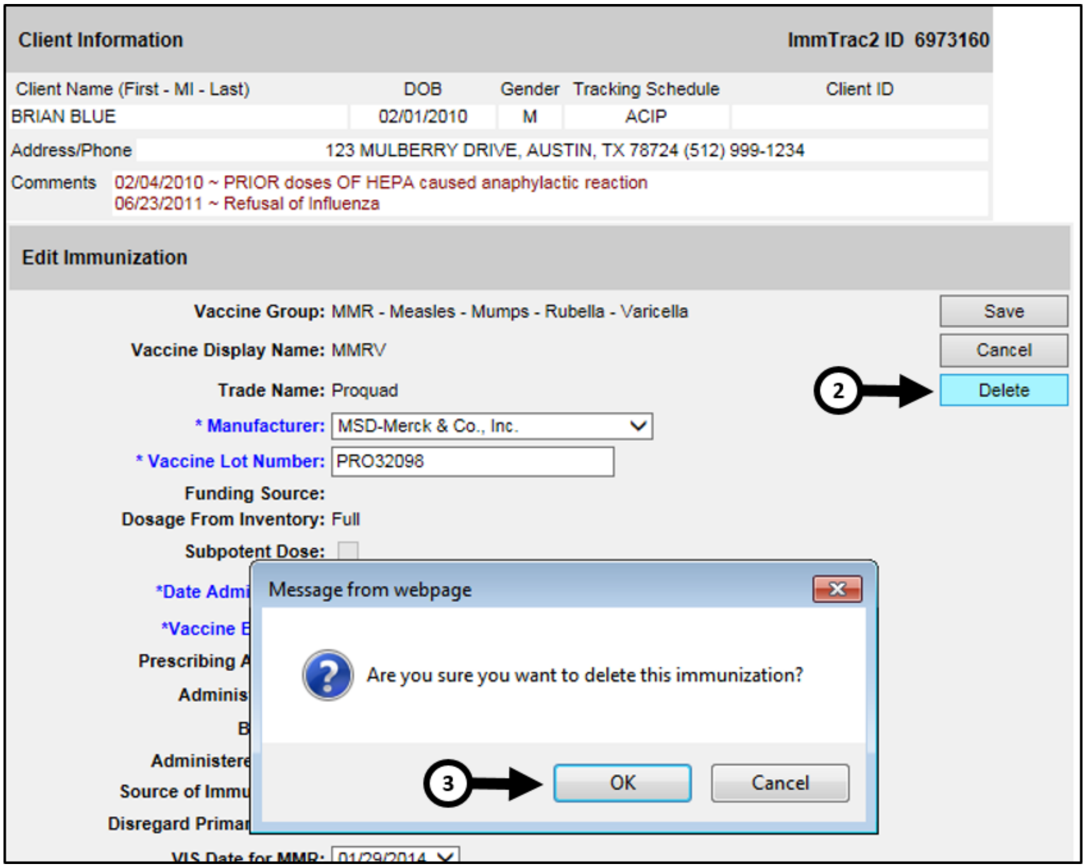


Figure 111 - Delete Immunizations Step 2-3

Add New Scheduled Immunizations

Any vaccine administered by the user's organization should be added to the client's immunization information record. There are two different ways to add new immunizations. For clients receiving vaccines as part of the recommended tracking schedule, the easiest way to add an administered vaccine is to use the *Vaccines Recommended by Select Tracking Schedule* section.

To add a new scheduled immunization, follow the steps below.

See Figure 112: Add New Scheduled Imm Steps 1-2.

1. From the *Client Immunization History* screen, use the check box under the *Vaccines Recommended by Selected Tracking Schedule* to select one or more immunizations.
2. Click the "Add Selected" button.

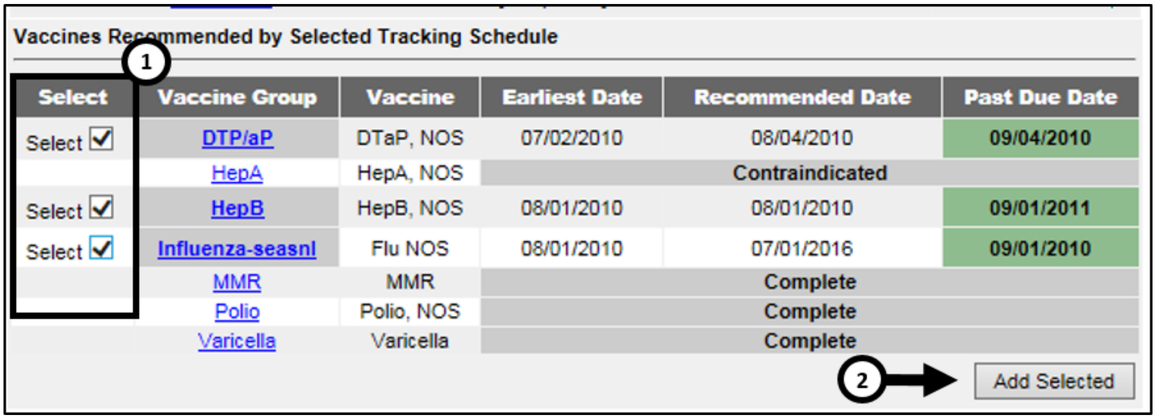


Figure 112 - Add New Scheduled Imm Steps 1-2

When the next screen displays, the selected vaccines will auto populate in the Enter New Immunization section. The "Remove" checkbox will be selected for each vaccines, but as the required information is entered for each immunization the checkbox will automatically be de-selected.

See Figure 113: Add New Scheduled Imm Steps 3-5.

3. In the *Enter New Immunization* section, enter the date in a MM/DD/YYYY format or use the calendar icon to select a date in the *Date Administered* field.
4. Enter the immunization data.
   - Blue fields marked with an asterisks are required.
   - Review the following table for details about each data field. See Figure: New Immunization Data Field Table.
5. Click the "Save" button.
   - Users are redirected back to the client immunization record.

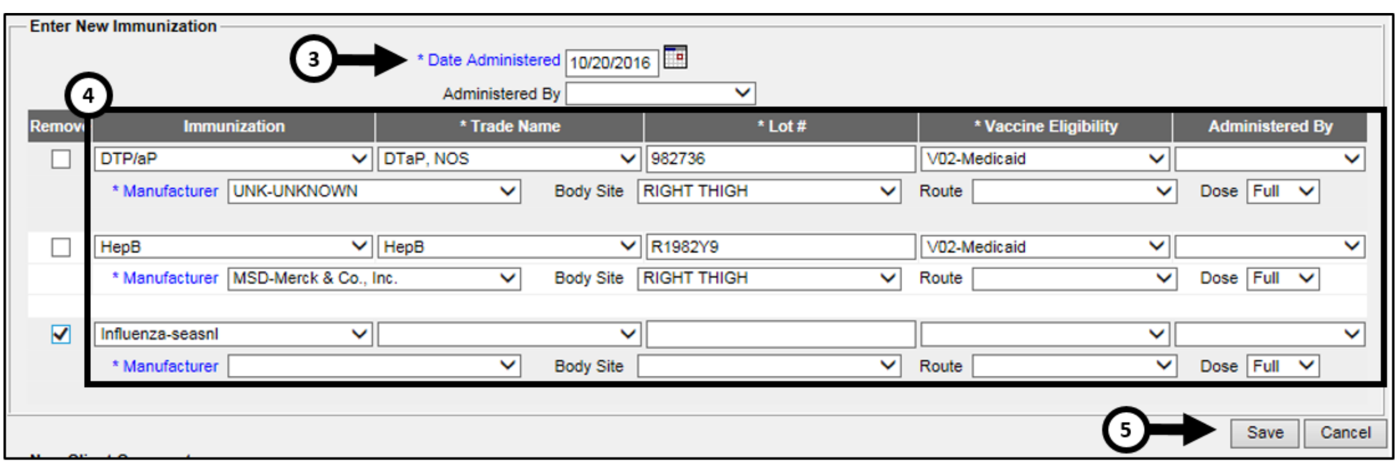


Figure 113 - Add New Scheduled Imm Steps 3-5

Table 14 - New Immunization Data Fields

Field Name	***Description***
Date Administered	Enter the date the vaccine was administered using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon.
Administer By	Select a name from the drop down list to identify the person who administered the vaccine. The names listed in the drop down box are maintained by a user with higher access. To have a name added, please contact ImmTrac2 Customer Support using the information in the *Contact Us* menu bar tab.
Immunization	When using the *Selected Tracking Schedule* to add an immunization, this field will auto populate based on the selected immunization. If the "Add New Imm" button was clicked, users will need to use the drop down arrow to manually select the immunization to add.
Trade Name	Use the drop down arrow to select the Trade Name. This list displays only the vaccine trade names associated with the selected immunization.
Lot #	Use this field to enter the vaccine's lot identification number.
Vaccine Eligibility	Use the drop down arrow to select the applicable reimbursement eligibility (client's insurance status) for this client's immunization.
Body Site	Use the drop down arrow to select the body site where the vaccine was given.
Route	Use the drop down arrow to select the route by which the vaccine was given.
Dose	Use the drop down arrow to select the dose for the vaccine. This is how much of the dose was given or which dose in a series was given.

Add New (Non-Scheduled) Immunizations

If a vaccine needs to be added to a client's immunization record that is not listed under the *Vaccines Recommended by Select Tracking Schedule* section, use the "Add New Imms" button to enter a non-scheduled immunization.

To add a new non-scheduled immunization, follow the steps below.

See Figure 114: Add New Non-Scheduled Immunization Step 1.

1. From the *Client Immunization History* screen, chick the "Add New Imms" button.

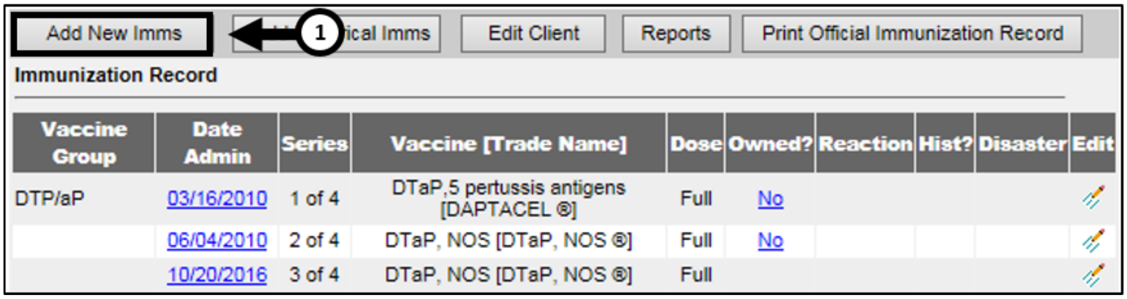


Figure 114 - Add New Non-Scheduled Immunization Step 1

When the next screen displays, multiple rows will be available to enter immunization data in the Enter New Immunization section. Each row with have the “Remove” checkbox selected, but as vaccine data is entered the checkbox will automatically be de-selected.

See Figure 115: Add New Non-Scheduled Imm Steps 2-4.

2. In the Enter New Immunization section, enter the date in a MM/DD/YYYY format or use the calendar icon to select a date in the Date Administered field.
3. Enter the immunization data.
   - Blue fields marked with an asterisks are required.
   - Review the following table for details about each data field. *See Figure: New Immunization Data Field Table*.
4. Click the “Save” button.
   - Users are redirected back to the client immunization record.

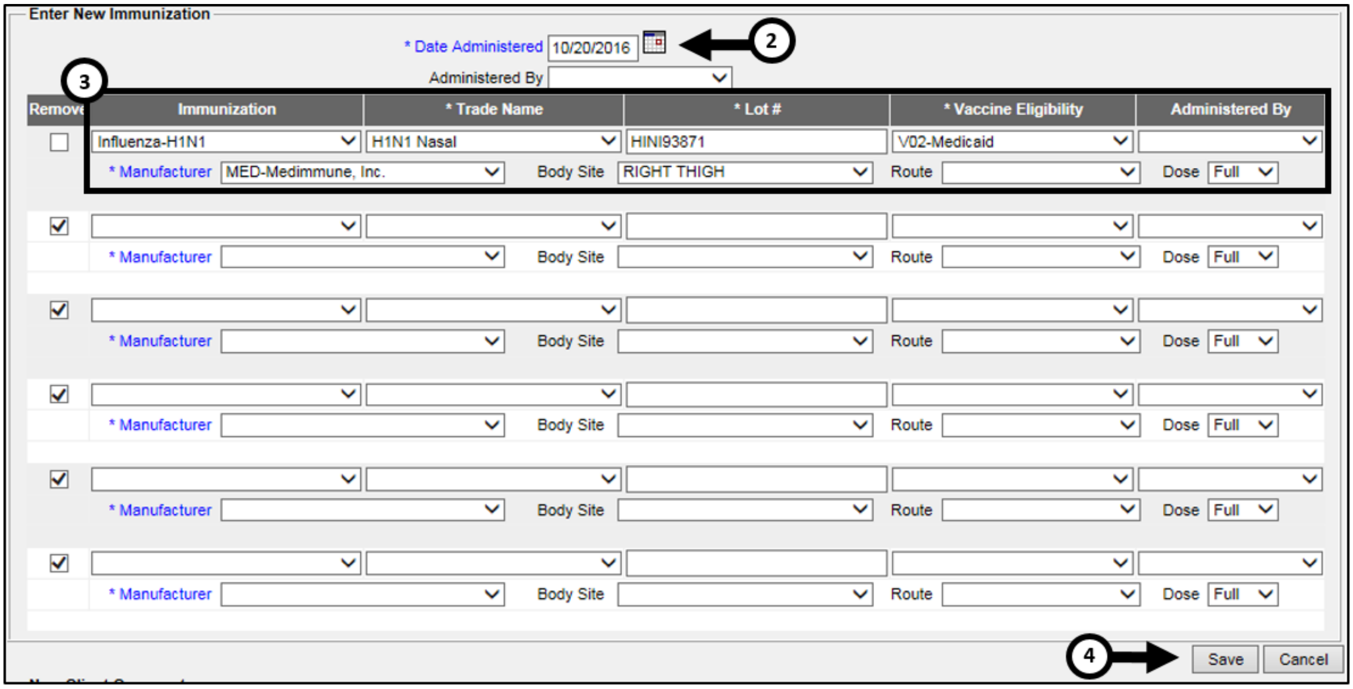


Figure 115 - Add New Non-Scheduled Imm Steps 2-4

Add Historical Immunizations

Historical immunizations are records of administered vaccine doses that the client received in the past. This data may be submitted to ImmTrac2 by any organization and may not accurately reflect which organization in the registry, if any, actually administered the dose. In other words, the immunization may have been administered at one organization but the data was submitted to ImmTrac2 by a different organization.

To add an historical immunizations, follow the steps below.

See Figure 116: Add Historical Imm Step 1.

1. From the *Client Immunization History* screen, click the "Add Historical Imms" button.

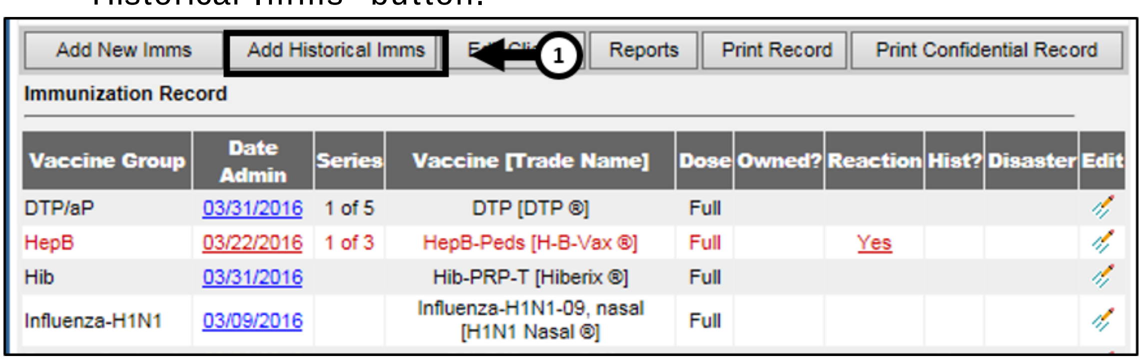


Figure 116 - Add Historical Imm Step 1

See Figure 117: Add Historical Imm Steps 2-4.

2. On the next screen in the Enter Historical Immunization section, locate the applicable vaccine row or use the drop down option (select additional types of immunizations) at the bottom of the screen to select a vaccine.
3. Enter the date in a MM/DD/YYYY format in the appropriate Dose field.
4. Click the "Save" button or click "Add Details" to add additional information.

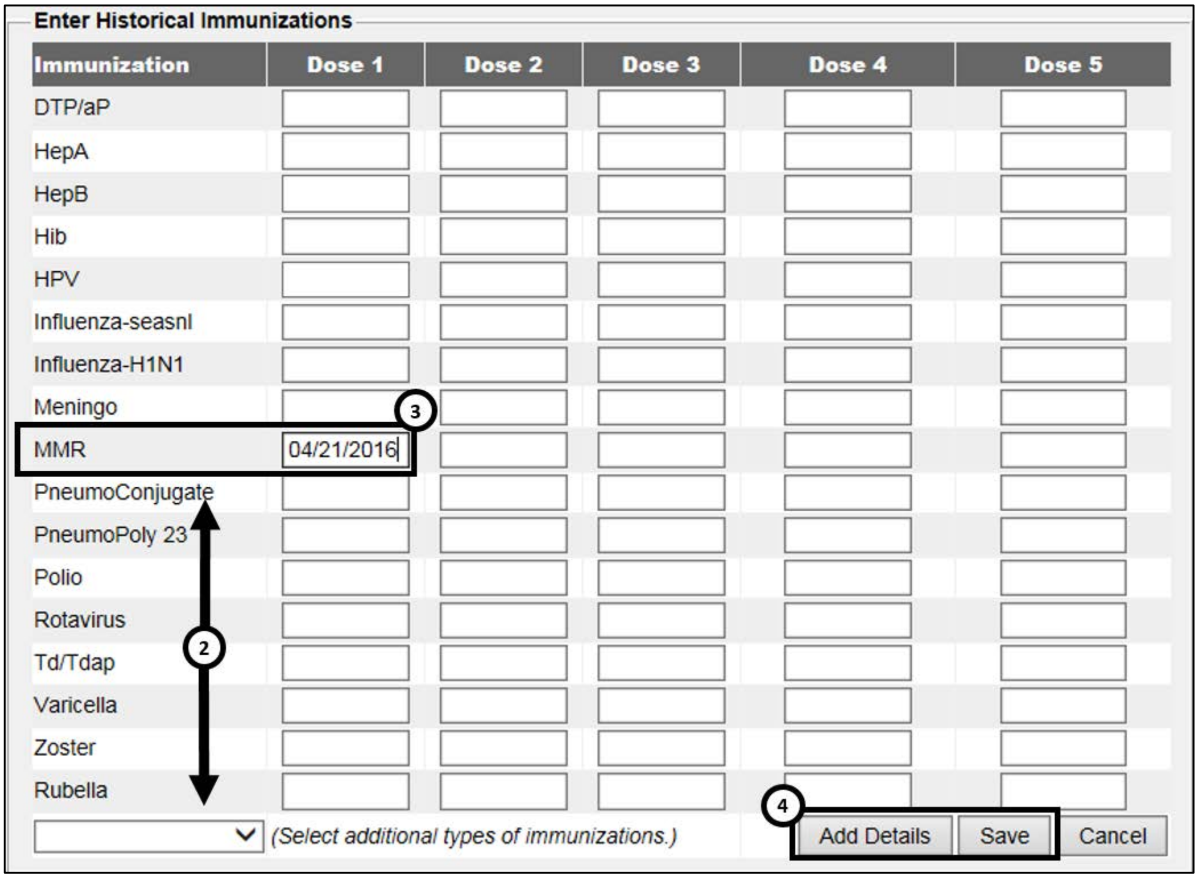


Figure 117 - Add Historical Imm Steps 2-4

See Figure 118: Add Historical Imm Steps 5-6.

5. If the "Add Details" button was clicked, enter any additional information as needed. (Trade Name, Lot Number, Provider Org, Source of Imm.) *See Table 14: Historical Immunization Data Fields.*
6. Click the "Save" button.
   - Users are redirected back to the client immunization record.

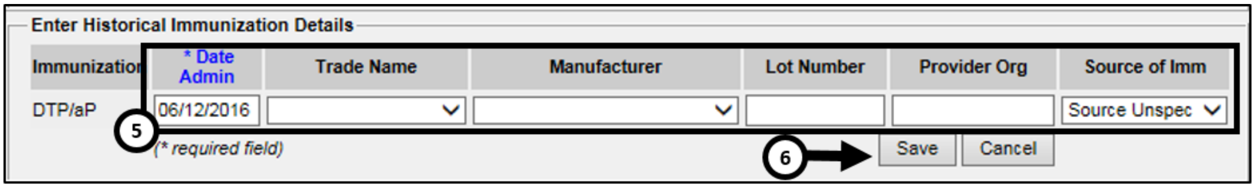


Figure 118 - Add Historical Imm Steps 5-6

Table 15 - Historical Immunization Data Fields

Field Name	**Description**
Date Administered	This field will auto populate based on the date selected on the previous screen.
Trade Name	Use the drop down arrow to manual select a Trade Name. This list options displays only the Trade Names associated to the vaccine selected in the Immunization field.
Lot #	Use this field to manually enter the vaccine's identification number of up to 30 characters.
Provider Org	A free text field to enter the name of the provider that administered the historical immunization.
Source of Imm	Use the drop down arrow to manually select the source of the immunization.

Duplicate Immunizations

If a user attempts to enter a duplicate immunization the Duplicate Immunization Override pop-up window displays. Users can override the warning and proceed to save the immunization information, or they make edits. A duplicate immunization is determined by the following and applies to both new and historical imms. *See Figure 119: Duplicate Immunization Override.*

- If the incoming immunization is within 14 days before or 14 days after the existing immunization, or if entered on the same day.
- If a vaccine group matches, regardless of presence of trade name, lot number, or historical indicator.

To override the warning and save, check the "Selected" check box for the immunization to override and then click the "Save Selected" button.

Click the "Make Edits" button to return to the *Enter New Immunization* screen to update the information.

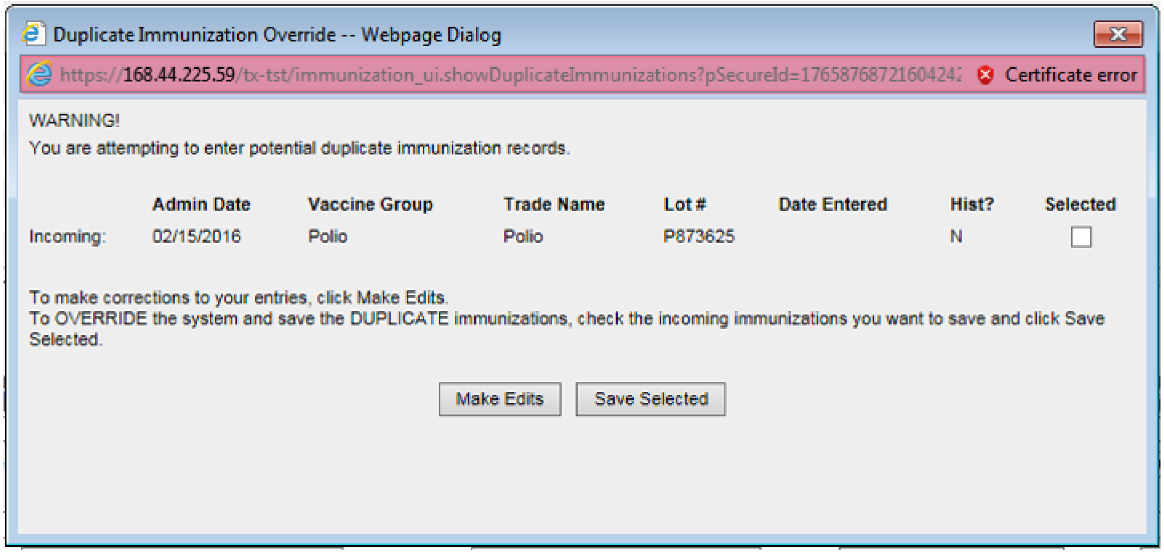


Figure 119 - Duplicate Immunization Override

Add Client Notes

If Client Notes need to be added when updating the client's immunization records, this can be done quickly from the *Immunization Record* screen. However, notes can also be added on the *Update Client* screen under the *Manage Client* menu option.

To add a **Client Note**, follow the steps below.

See Figure 120: Add Client Notes Step 1.

1. Click the "view or update notes" hyperlink above the Immunization Record.

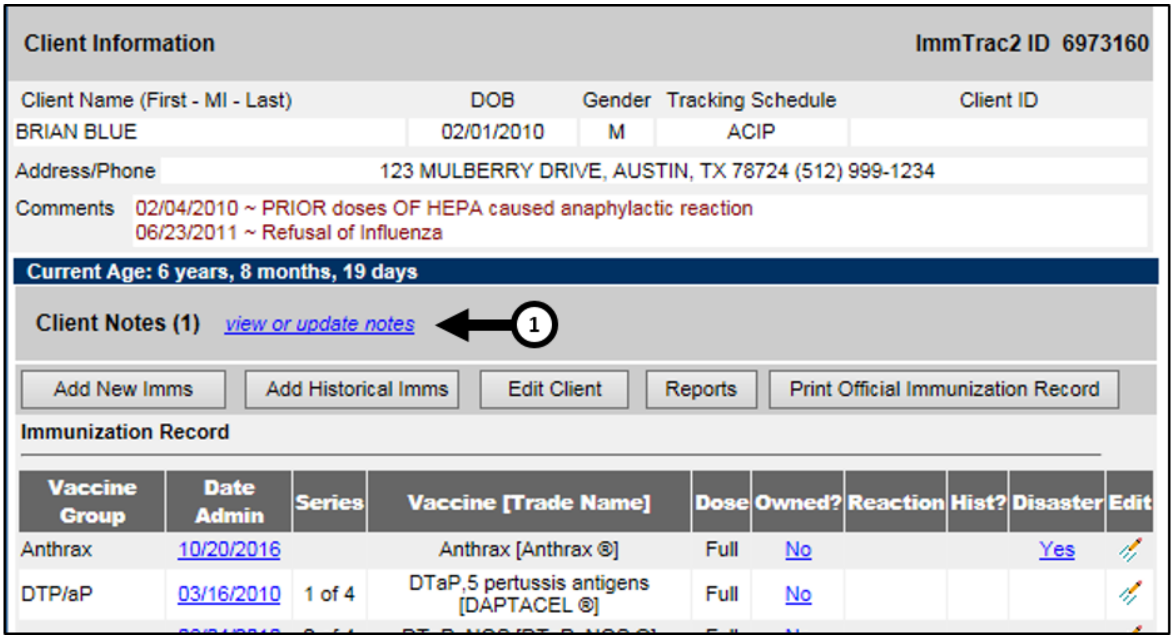


Figure 120 - Add Client Notes Step 1

See Figure 121: Add Client Note Step 2-3.

2. The client notes will open in a new pop-up window. Enter the note information.
3. Click the "Save Note" button and a "Note successfully saved" message displays in the center of the screen.
    - The note will appear at the bottom of the pop-up window in the notes table and will also be visible in the client record on the *Client Notes* demographic tab.
    - For more details on the *Client Notes* see the Client Notes section.

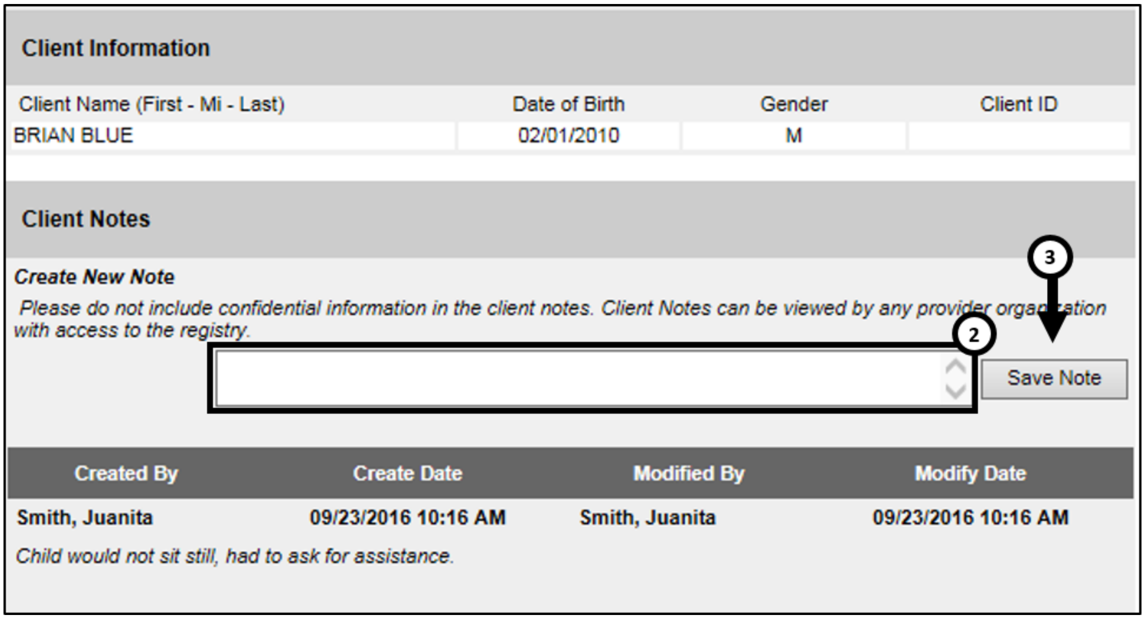


Figure 121 - Add Client Note Step 2-3

Add Client Comments

If Client Comments need to be added when updating the client's immunization records, this can be done quickly from the Enter New Immunization screens when immunization data is saved.

Comments can also be added on the Update Client screen under the *Manage Client* menu option.

To add a **Client <u>Comments</u>** on the Enter New Immunization screen, follow the steps below.

See Figure 122: Enter New Client Comments Steps 1-4.

1. At the bottom of the Enter New Immunization screen, use the drop down arrow to select a Client Comment.
2. Enter a date using the calendar icon or enter the date in an XX/XX/XXXX format.
3. Click the "Add" button. The newly added note displays above in the Client Comment section.
    - The comment will also be visible in the client record on the *Client Comments* demographic tab.
    - For more details on the *Client Comments* see the Client Comments section.
4. Click the "Save" button to add the immunization data and the comment.

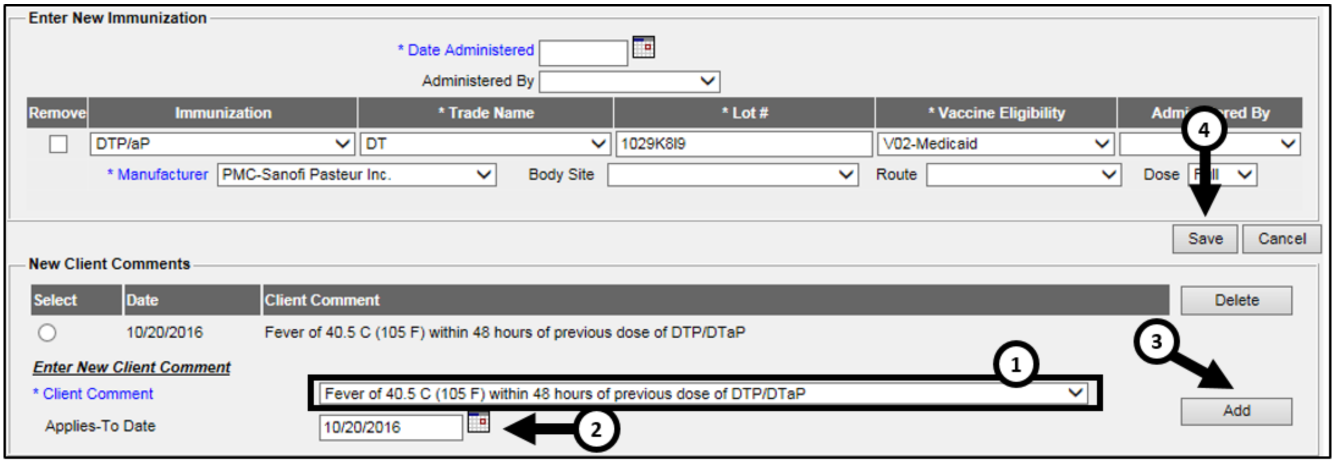


Figure 122 - Enter New Client Comments Steps 1-4

Chapter 14: Schools

The options under the **Schools** category on the menu panel helps to organize and access immunization information for groups of students (or clients) by creating lists.

Manage List

The *Manage List* screen is used to create and manage lists, as well as generate reports. To access this screen, click the "Manage List" option under the Schools section on the menu panel. The two sections of this screen are *Manage List* and *Report List*.

Create a New School List

Use the *Manage List* section to create a new list. When a list is created, the student count displays as 0 until students (clients) have been added to the list. After students are added to a list, the list name becomes an active hyperlink that is clickable and navigates to the list reports detail screen. See the Add Students to a List section for more details.

To create a new school list, follow the steps below.

Figure 123: Create New School List Steps 1-3.

1. Click the "Manage List" menu option.
2. Type an entry into the New List Name field.
3. Click the "Save" button.
    - The new list will appear in the *Reports List* section.
    - "The list has been created successfully" message displays at the top of the screen.

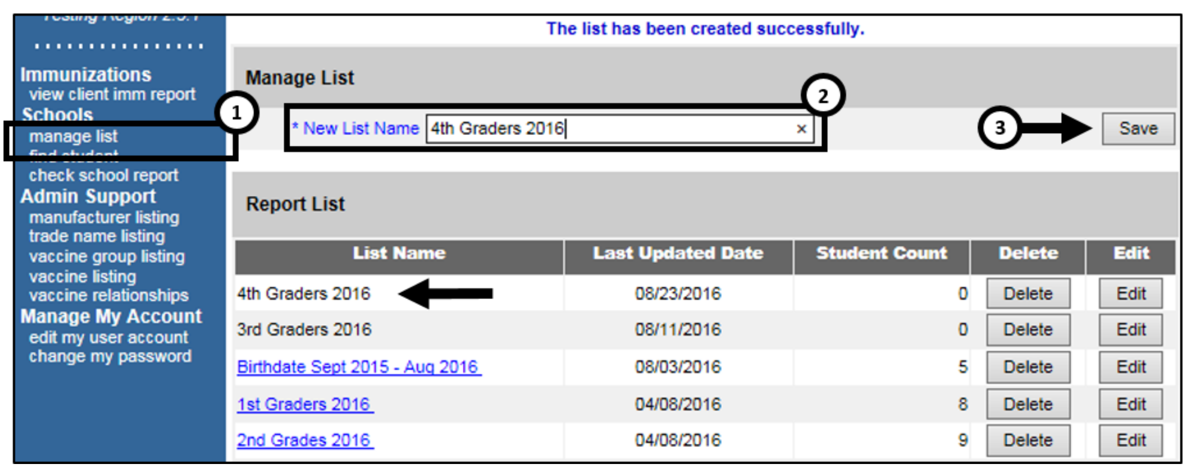


Figure 1243 - Create New School List Steps 1-3

Edit a School List Name

The list name can be edited so that a new list does not have to be created. For example, the "4th Graders 2016" list can be renamed to "5th Graders 2017" in the next school year. When the list name is edited, it is updated in all screens.

To edit a list name, follow the steps below.

See Figure 124: Edit School List Name Steps 1-2.

1. Click the "Manage List" menu option.
2. Click the "Edit" button next to the list to be edited.

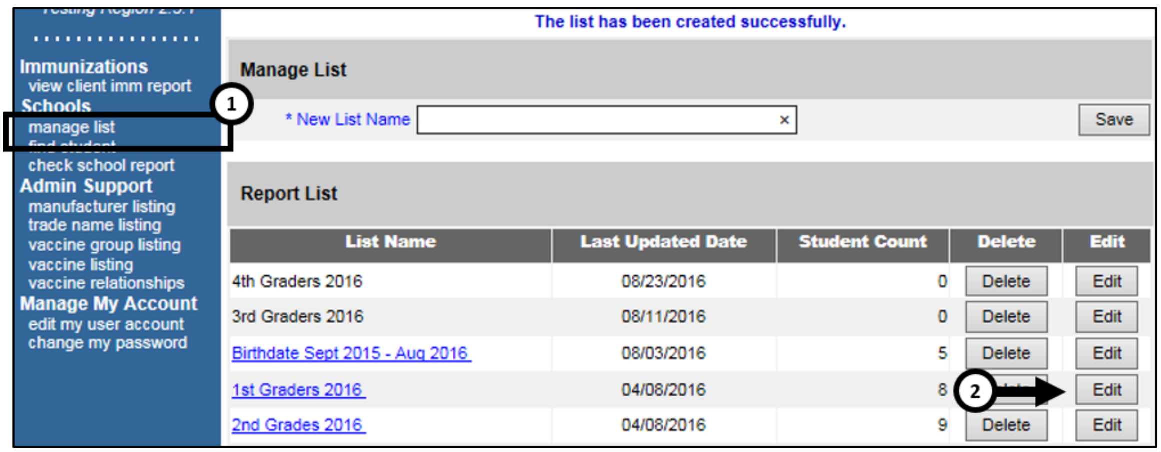


Figure 125 - Edit School List Name Steps 1-2

See Figure 125: Edit School List Name Steps 3-4.

3. Enter the new list name.
4. Click the "Save" button.
   - Users are returned to the Manage List screen where updates can be validated.
   - Click the "Cancel" button to disregard updates and return to the Manage List screen.

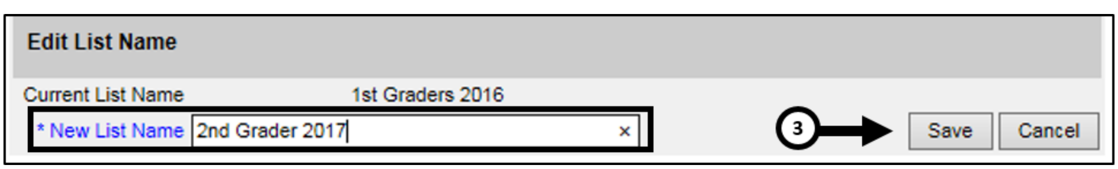


Figure 126 - Edit School List Name Steps 3-4

Delete a School List

To delete a list follow the steps below.

See Figure 126: Delete School List Steps 1-2.

1. Still on the Manage List screen, click the “Delete” button next to the list to be deleted.
2. Click “OK” when the massage dialog box appears.

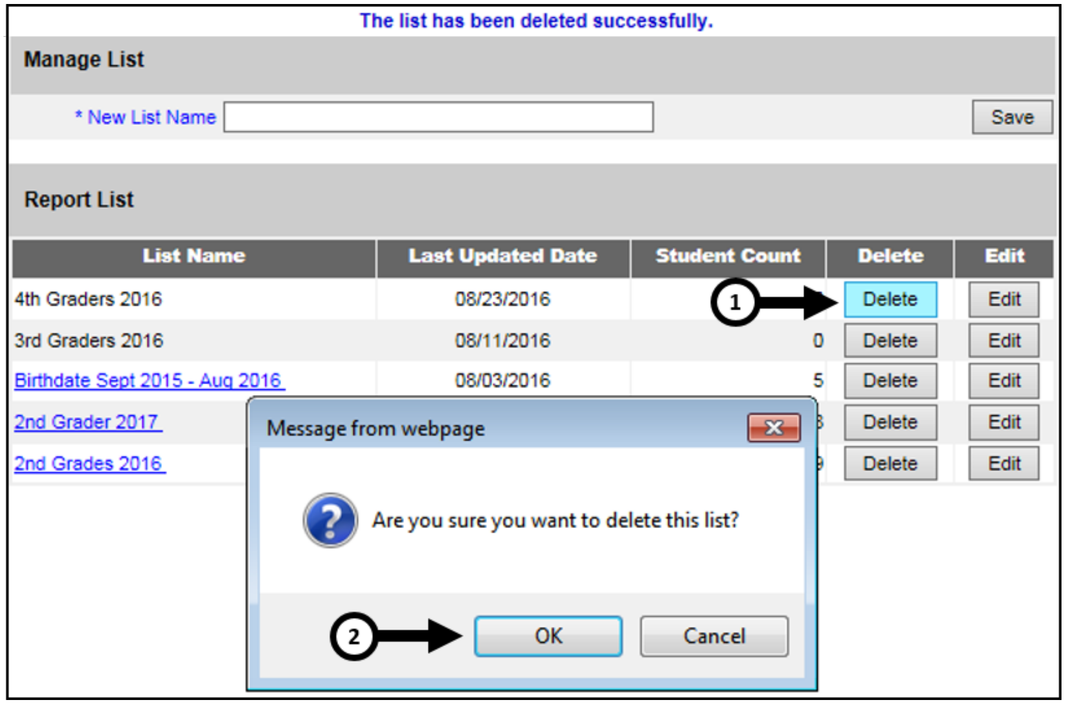


Figure 127 - Delete School List Steps 1-2

Important: Once you delete a list, you cannot retrieve it. Deleting a list will also remove all students from the list and will remove it from the Current Report List section on the *Find Student* screen.

View a School List

To view a school list follow the steps below.

See Figure 127: View School List Steps 1-2.

1. Click the **Manage List** menu option.
2. Click the List Name hyperlink of the list to be viewed.
   - Users are redirected to the Student List.

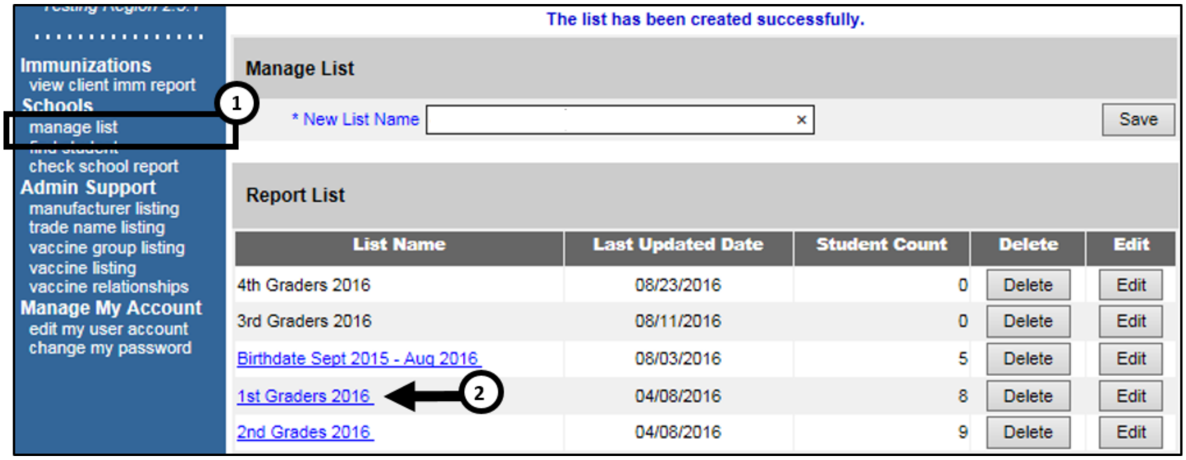


Figure 128 - View School List Steps 1-2

The Student List screen is divided into three main sections: Reports Available for, Select Tracking Schedule, and the Client (Student) List **Error! Reference source not found.**. *See Figure 128: View Student List Example.*

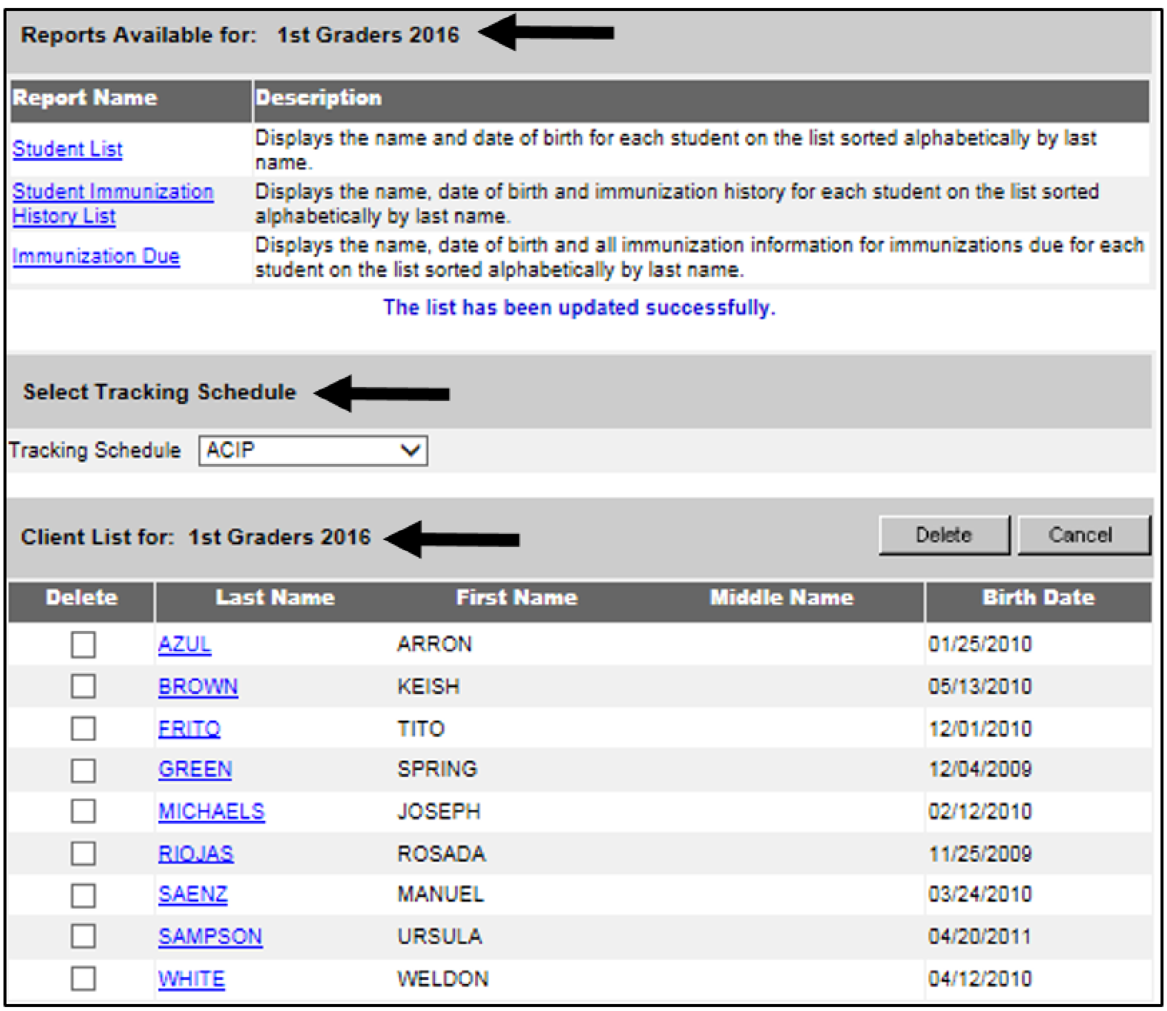


Figure 129 - View School List Example

Reports Available for: List Name

This section displays the three types of reports you can run for the selected list:

- Student List
- Student Immunization History List
- Immunization Due list

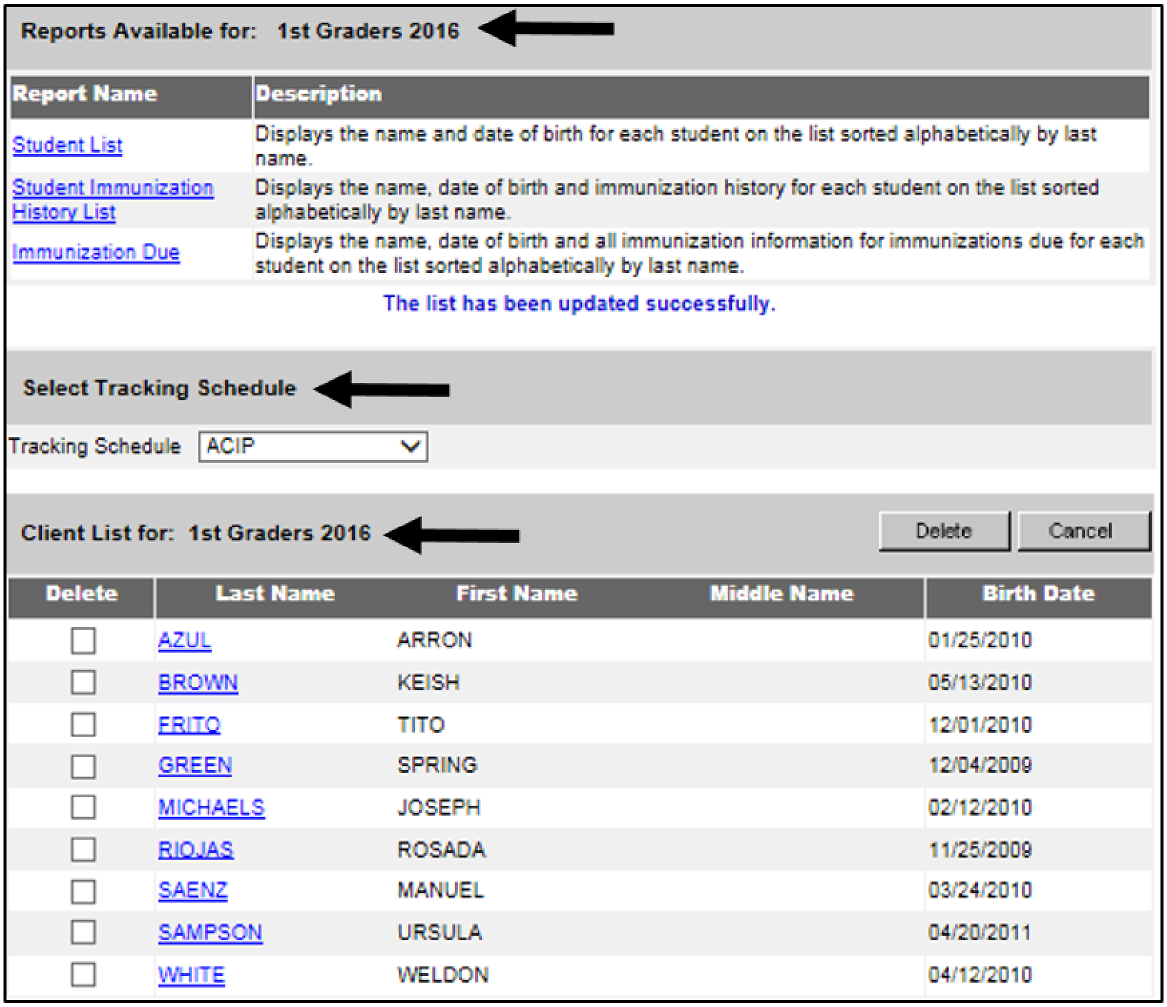
The section includes a brief description of the information that displays for each report. All reports are produced as PDF files and display using Adobe Acrobat Reader.

Select Tracking Schedule

This function allows users to set the Tracking Schedule for each report in order to evaluate the records based on the selected Tracking Schedule.

Client List for: List Name

This section displays the clients assigned to the selected list. In this section, you can click on a last name to navigate to the client's information screen. You can also delete clients from the list by selecting the checkboxes for applicable students and clicking the "Delete" button.



Reports Available for: 1st Graders 2016

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

The list has been updated successfully.

Select Tracking Schedule

Tracking Schedule ACIP

Client List for: 1st Graders 2016

Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	AZUL	ARRON		01/25/2010
☐	BROWN	KEISH		05/13/2010
☐	FRITO	TITO		12/01/2010
☐	GREEN	SPRING		12/04/2009
☐	MICHAELS	JOSEPH		02/12/2010
☐	RIOJAS	ROSADA		11/25/2009
☐	SAENZ	MANUEL		03/24/2010
☐	SAMPSON	URSULA		04/20/2011
☐	WHITE	WELDON		04/12/2010

Figure 130 - View School List Example

Edit a School List (Remove Student from a School List)

A student, or multiple students can be removed from a school list after selected a Report List Name in the Manage List menu option.

To edit, or removing a student from a school list, follow the steps below.

See Figure 130: Edit School List Steps 1-3.

1. Use the check boxes to select a student to remove from the list.
2. Click the “Delete” button.
    - Click the “Cancel” button to disregard selections and return to the Manage List screen.
3. Click “OK” when the “Are you sure you want to permanently delete selected students from the list” message appears.
    - “The list has been updated successfully” message displays in the middle of the screen.

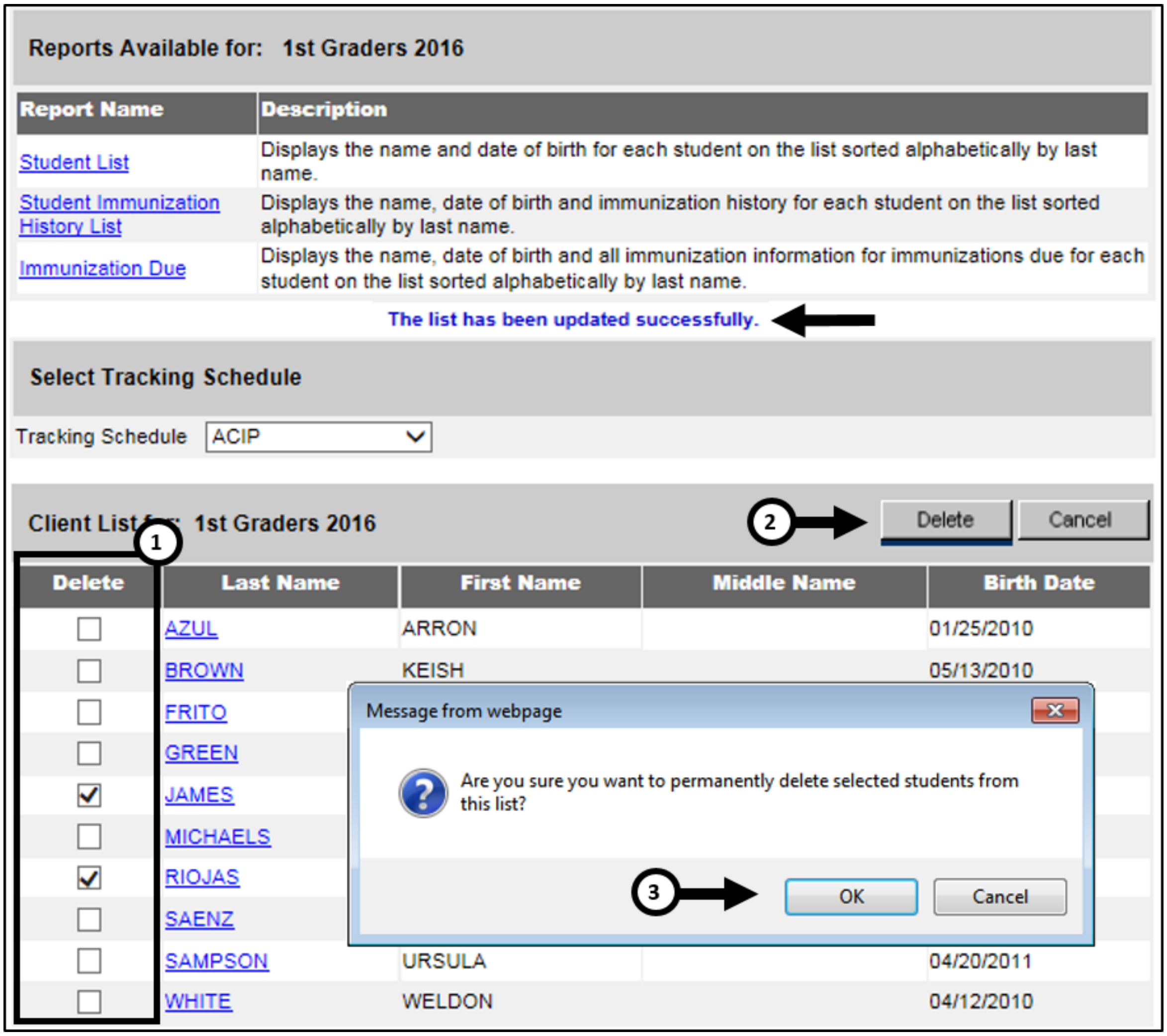


Figure 131 - Edit School List Steps 1-3

School List Reports (Reports Available for:)

This section displays the three types of reports you can run for the selected list: Student List, Student Immunization History List, and Immunization Due list. *See Figure 131: School List Report Options.*

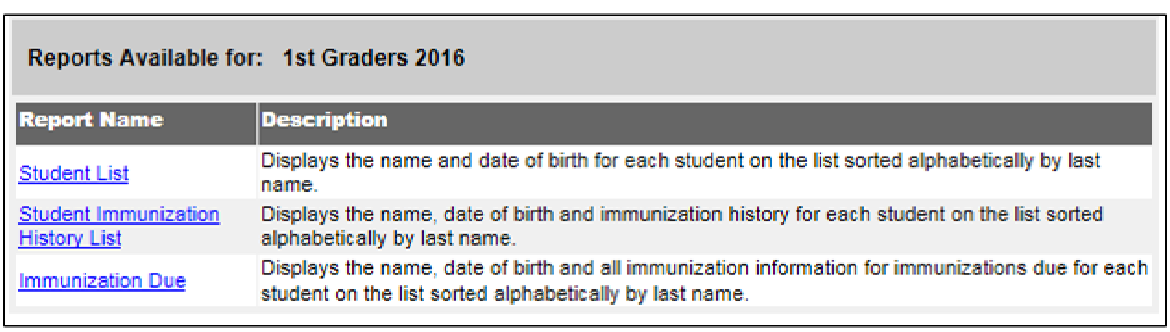


Figure 132 - School List Report Options

Student List Report

This report displays the name and date of birth for each client on the list sorted alphabetically by last name.

To view the Student List report, follow the steps below.

See Figure 132: View Student List Report Steps 1-3.

1. Click the **Manage List** menu option.
2. Select an active list name.
3. When the Report List screen displays, click the **Student List** option.
    - The Student List Report will open in a new browser window. *See Figure 133: Student List Report Example.*

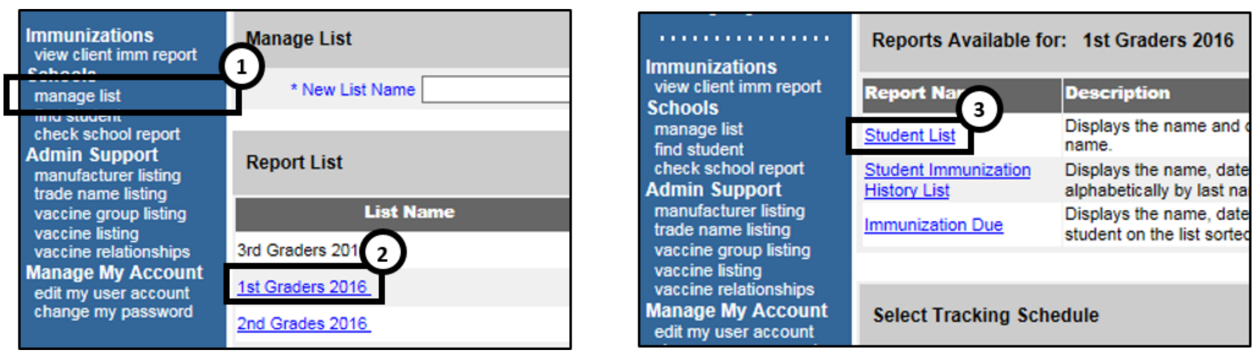


Figure 133 - View Student List Report Steps 1-3

ImmTrac2, the Texas Immunization Registry

Student Listing

*Report run on:*08/23/2016

Last Name	First Name	Middle Name	Birth Date
BOB	TERRY		10/05/2015
DOE	JOHN	ABRAHAM	01/01/2014
HARRISON	GEORGE		10/05/2015
KITTERMAN	AMANDA	M	02/14/2016
SUE	SALLY		02/14/2016
SUE	PEGGY	M	02/14/2016
SUE	TED		02/14/2016
TERRY	BOB		10/05/2015

Figure 134 - Student List Report Example

Student Immunization History List Report

This report displays the name, date of birth, and immunization history for each student, along with a list of their immunizations due. It is sorted alphabetically by last name.

To view the Immunization History Report follow the steps below.

See Figure 134: View Student Immunization History Report Steps 1-4.

1. Click the **Manage List** menu option.
2. Select any active list name.
3. When redirected to the next screen, choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the **Student Immunization History List** option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

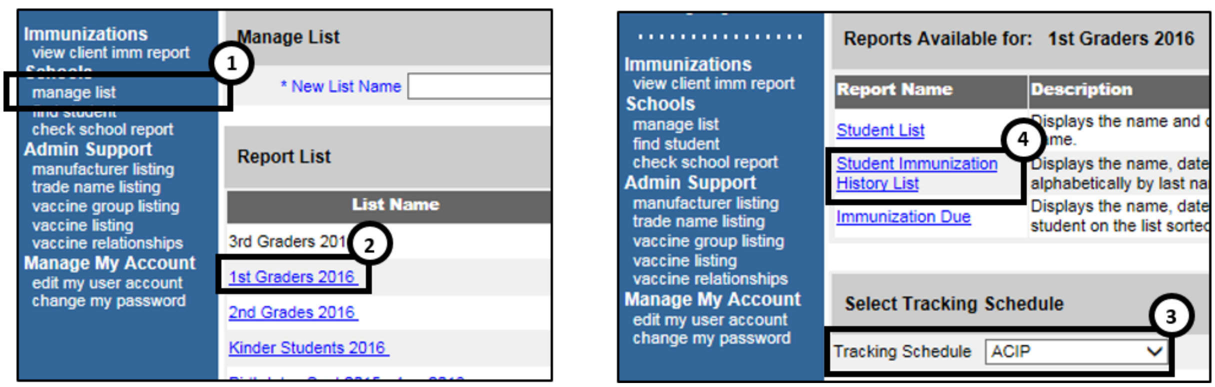


Figure 135 - View Student Immunization History Report Steps 1-4

Figure 135: Student Immunization History Report Steps 5-6.

5. On the *School Report Job Status* screen, click **Refresh** periodically to update the job status.
6. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report.
    - The Student Immunization History Report will open in a new browser window. *See Figure 136: Student Immunization History List Example.*

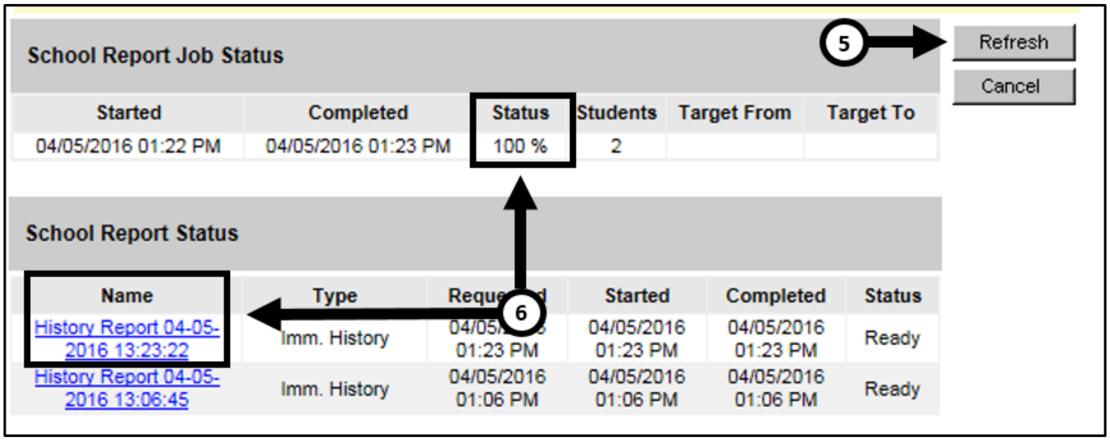
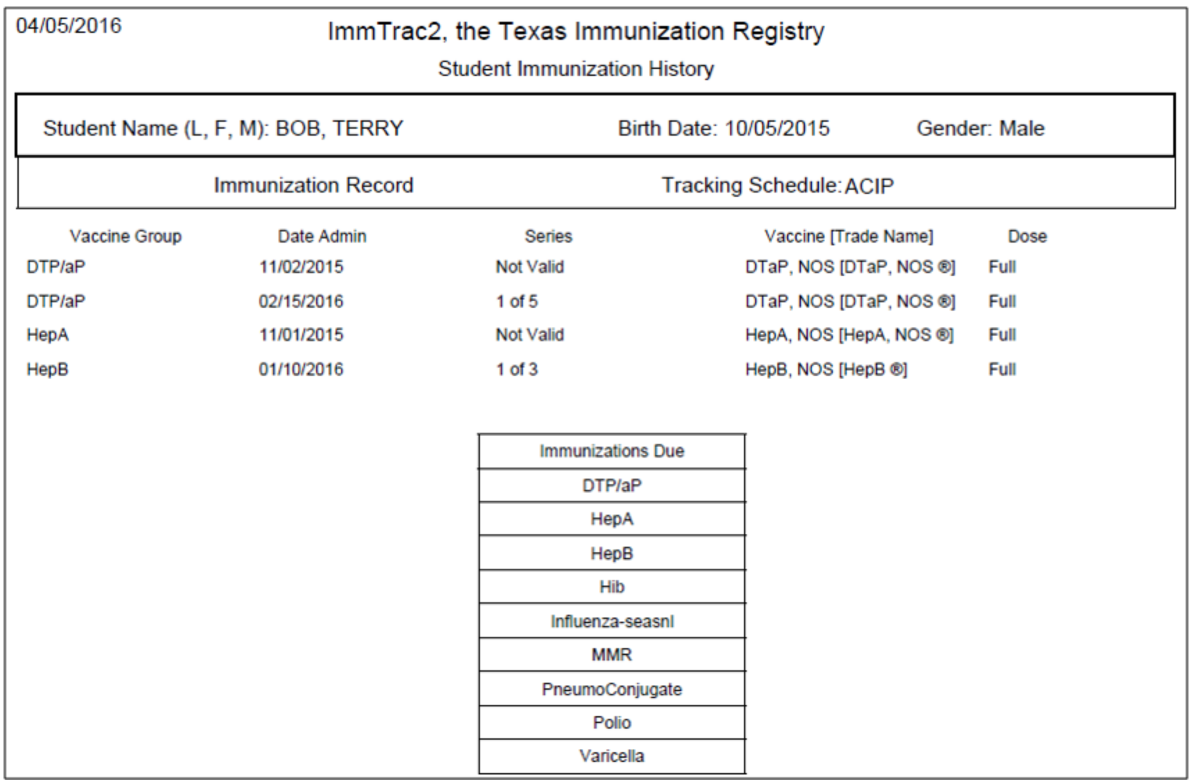


Figure 136 - Student Immunization History Report Steps 5-6


04/05/2016

ImmTrac2, the Texas Immunization Registry

Student Immunization History

Student Name (L, F, M): BOB, TERRY   Birth Date: 10/05/2015   Gender: Male

Immunization Record   Tracking Schedule: ACIP

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
DTP/aP	11/02/2015	Not Valid	DTaP, NOS [DTaP, NOS ®]	Full
DTP/aP	02/15/2016	1 of 5	DTaP, NOS [DTaP, NOS ®]	Full
HepA	11/01/2015	Not Valid	HepA, NOS [HepA, NOS ®]	Full
HepB	01/10/2016	1 of 3	HepB, NOS [HepB ®]	Full

Immunizations Due
DTP/aP
HepA
HepB
Hib
Influenza-seasnl
MMR
PneumoConjugate
Polio
Varicella

Figure 137 - Student Immunization History List Example

Immunization Due Report

This report displays the name, date of birth (DOB) and immunizations due for each student on the list sorted alphabetically by last name.

There are two different ways to configure the report.

Use All Vaccine Groups

This option is used to see the full list of immunizations due or past due. Immunization due dates will be based on the Tracking Schedule selected for this report. Only students on the list who are due or past due for any of the vaccines in the Tracking Schedule will be included in the report.

Use Vaccine Groups Selected

This option is used to focus on a specific vaccine within the selected Tracking Schedule. For example, this report can be used to identify students on the list who may need a specific vaccine. If the student is due or past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report.

To view the Immunization Due report, follow the steps below.

See Figure 137: View Student Immunization Due Report Steps 1-4.

1. Click the **Manage List** menu option.
2. Select an active list name.
3. Choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the **Immunization Due** report option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

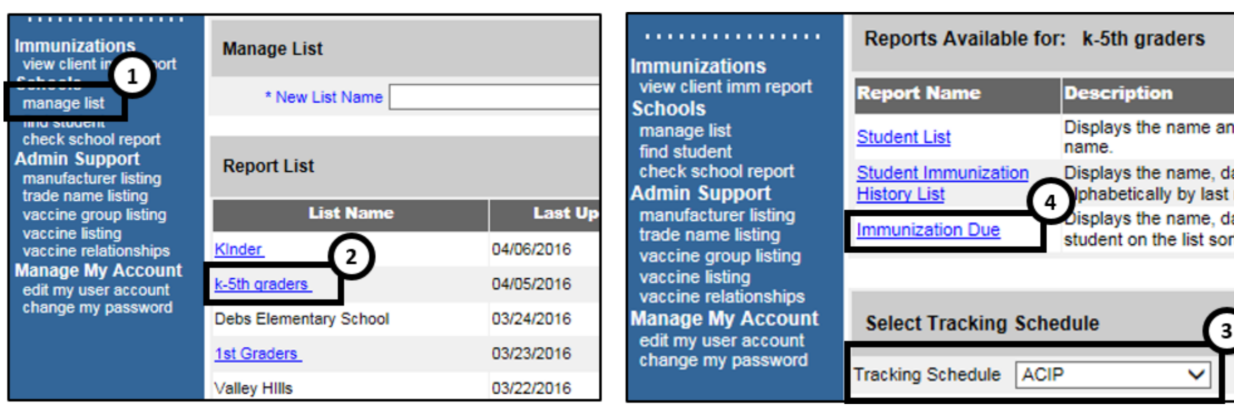


Figure 138 - View Student Immunization Due Report Steps 1-4

See Figure 138: View Student Immunization Due Report Steps 5-7.

5. On the School Immunization Due List Request screen, select a Vaccine Group to report on or select to use all vaccine groups.
   - If you want to report on specific vaccines, select the “Use Vaccine Groups Selected” radio button option.

- Highlight a vaccine from the list and click “Add”. (If needed, use the “Remove” button to delete vaccines from the report list.)

6. Enter the date criteria.
   - If the “To” date is unspecified for the Target Date Range, the report date range will include the “From” date up to and including today's date.
   - If the “From” date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the “To” date.
   - If both dates are left unspecified for the Target Date Range, then today's date will be entered for both “From” and “To” fields.
7. Click the “Generate” button.

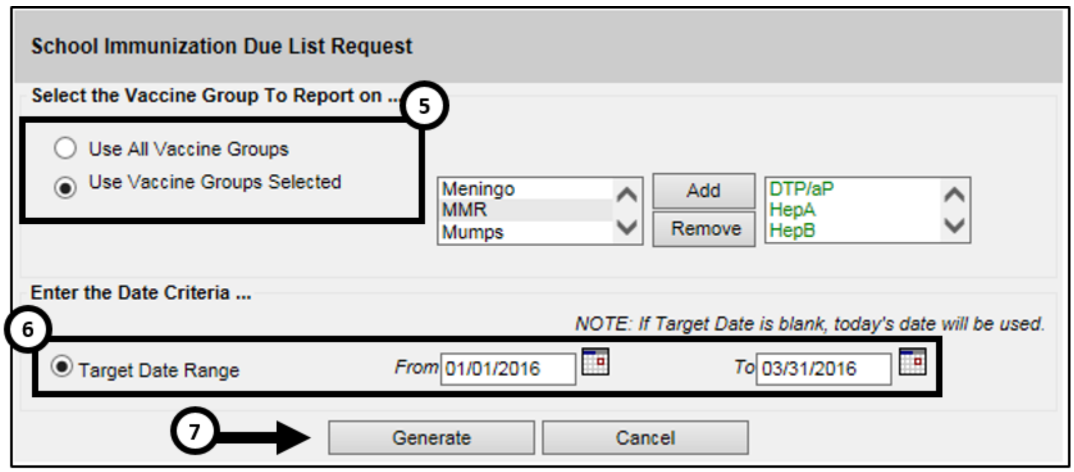


Figure 139 - View Student Immunization Due Report Steps 5-7

See Figure 139: View Student Immunization Due Report Steps 8-9.

8. On the *School Report Job Status* screen, click “Refresh” periodically to update the job status.
9. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report.
   - The Student Immunization History Report will open in a new browser window. *See Figure 140: Figure: View Student Immunization History Report Example.*

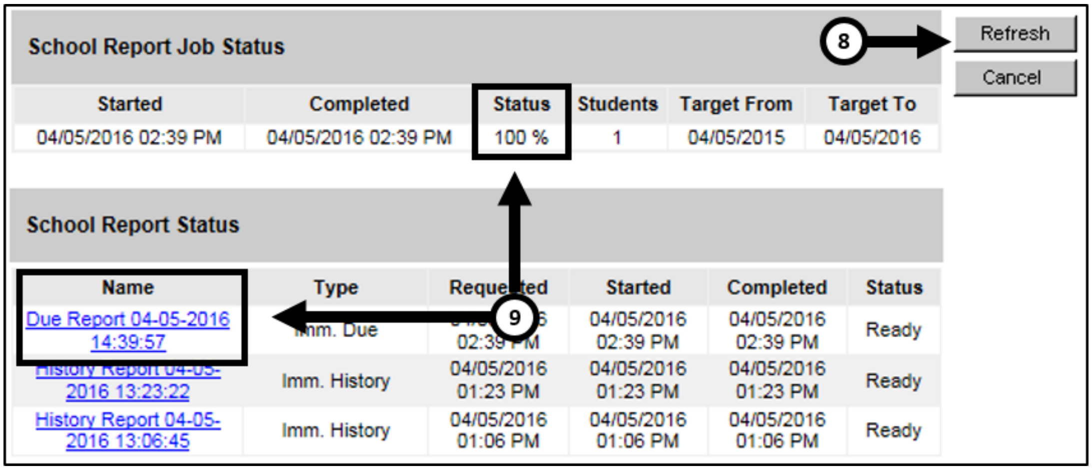


Figure 140 - View Student Immunization Due Report Steps 8-9

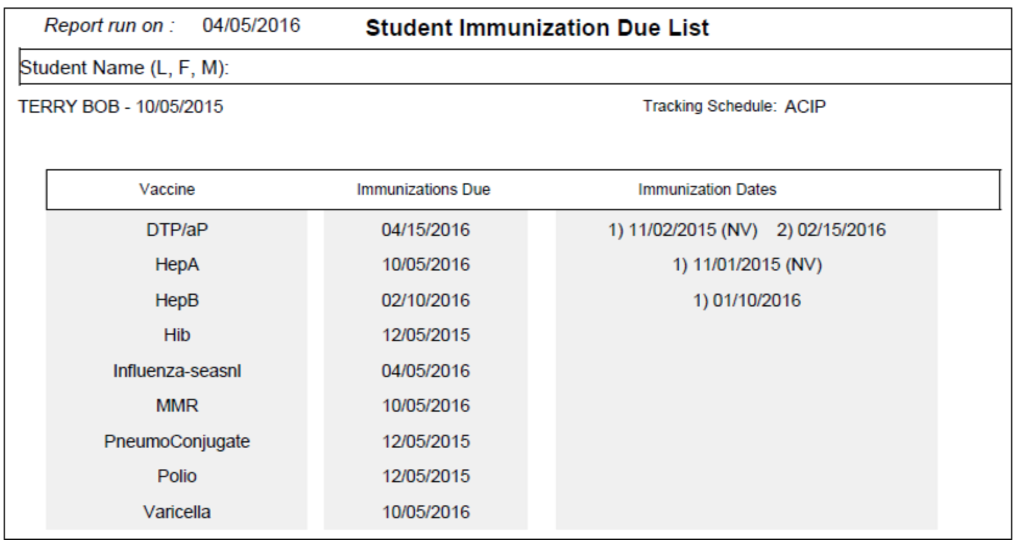


Figure 141 - View Student Immunization History Report Example

Find Student

The *Find Student* menu option is an additional way to view the student immunization history, their recommended vaccines, and to print their official immunization record. However, it is also used to add a student to a list. There are four sections in the Student Immunization History screen: *Figure 141: Student Immunization History Screen.*

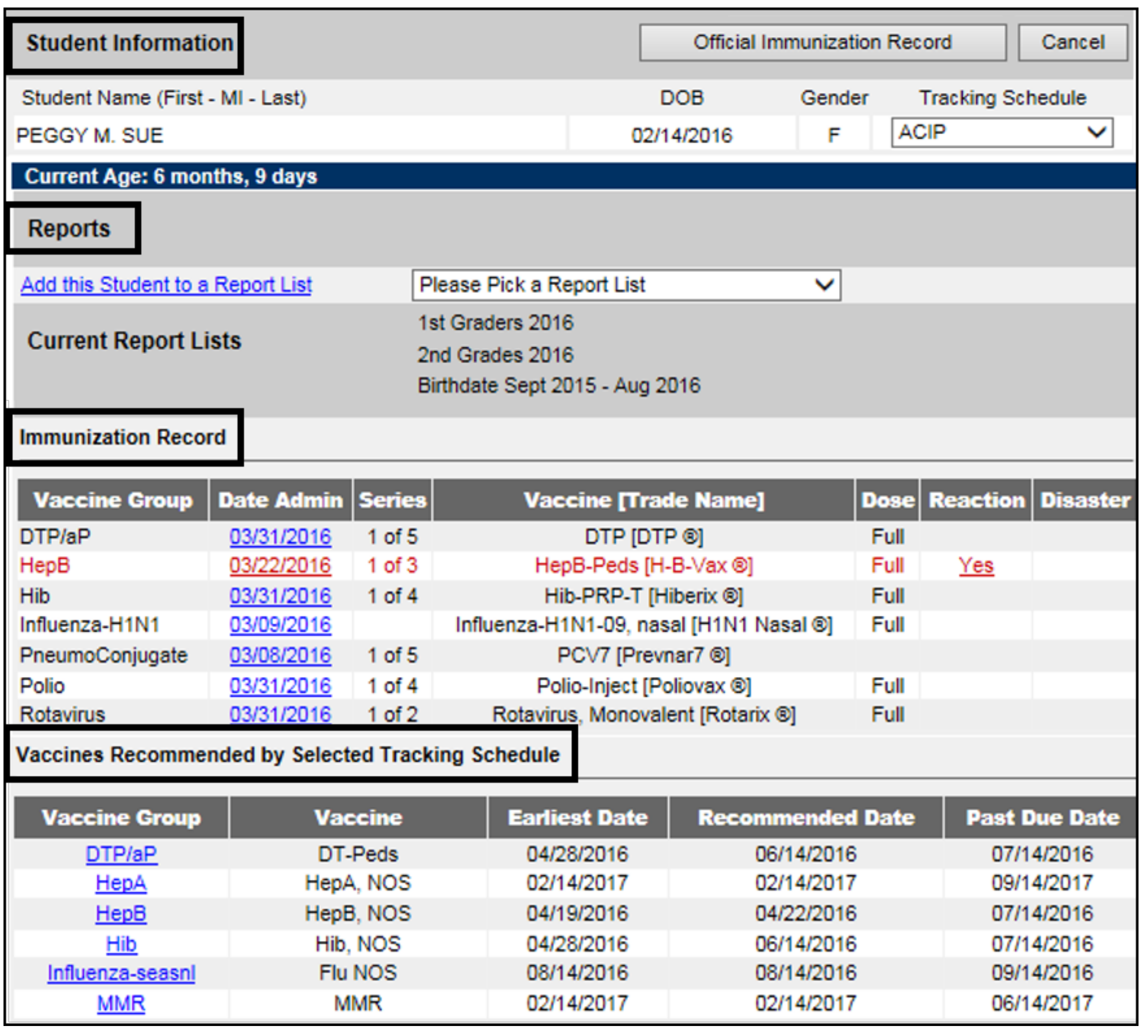
- **Student Information**: the student's name, date of birth, gender, and the selected vaccine Tracking Schedule. Select the appropriate Tracking Schedule from the drop down menu to evaluate the immunization record and determine the recommended vaccines. ACIP is the clinical schedule and is the initial default.

Important: *The ACIP schedule should be used when printing a record for the parent to use when obtaining immunizations for their child.*

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

- **Reports**: the lists that are available to add the student to generate reports, and the lists that the student is already assigned to.
- **Immunization Record**: all immunizations the student has received to date ordered alphabetically, then by 'Date Administered'.
- **Vaccines Recommended by Selected Tracking Schedule**: the vaccines recommended for the student based on the vaccine Tracking Schedule selected in the Student Information section.

Note: *For more details on immunization records See Section 1 View Immunization Records.*



Student Information

Official Immunization Record | Cancel

Student Name (First - MI - Last)	DOB	Gender	Tracking Schedule
PEGGY M. SUE	02/14/2016	F	ACIP

Current Age: 6 months, 9 days

Reports

Add this Student to a Report List | Please Pick a Report List

Current Report Lists
1st Graders 2016
2nd Grades 2016
Birthdate Sept 2015 - Aug 2016

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction	Disaster
DTP/aP	03/31/2016	1 of 5	DTP [DTP ®]	Full		
HepB	03/22/2016	1 of 3	HepB-Peds [H-B-Vax ®]	Full	Yes	
Hib	03/31/2016	1 of 4	Hib-PRP-T [Hiberix ®]	Full		
Influenza-H1N1	03/09/2016		Influenza-H1N1-09, nasal [H1N1 Nasal ®]	Full		
PneumoConjugate	03/08/2016	1 of 5	PCV7 [Prevnar7 ®]			
Polio	03/31/2016	1 of 4	Polio-Inject [Poliovax ®]	Full		
Rotavirus	03/31/2016	1 of 2	Rotavirus, Monovalent [Rotarix ®]	Full		

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DT-Peds	04/28/2016	06/14/2016	07/14/2016
HepA	HepA, NOS	02/14/2017	02/14/2017	09/14/2017
HepB	HepB, NOS	04/19/2016	04/22/2016	07/14/2016
Hib	Hib, NOS	04/28/2016	06/14/2016	07/14/2016
Influenza-seasnl	Flu NOS	08/14/2016	08/14/2016	09/14/2016
MMR	MMR	02/14/2017	02/14/2017	06/14/2017

Figure 142 - Student Immunization History Screen

Add Student to a List

To add a student to a list, the list name must have been created in the Manage Lists section of the application. See the Manage List section for details.

To add a student to a list, follow the steps below.

See Figure 142: Add Student to a List Steps 1-3.

1. Click the **Find Student** menu option.
2. Perform a search using. (See the Client Search section for details.)
3. Click the "Find" button.
    a. Depending on the search results, users may need to select the correct client from the result list.
    b. If the search results in finding the exact client, the student information screen displays immediately.

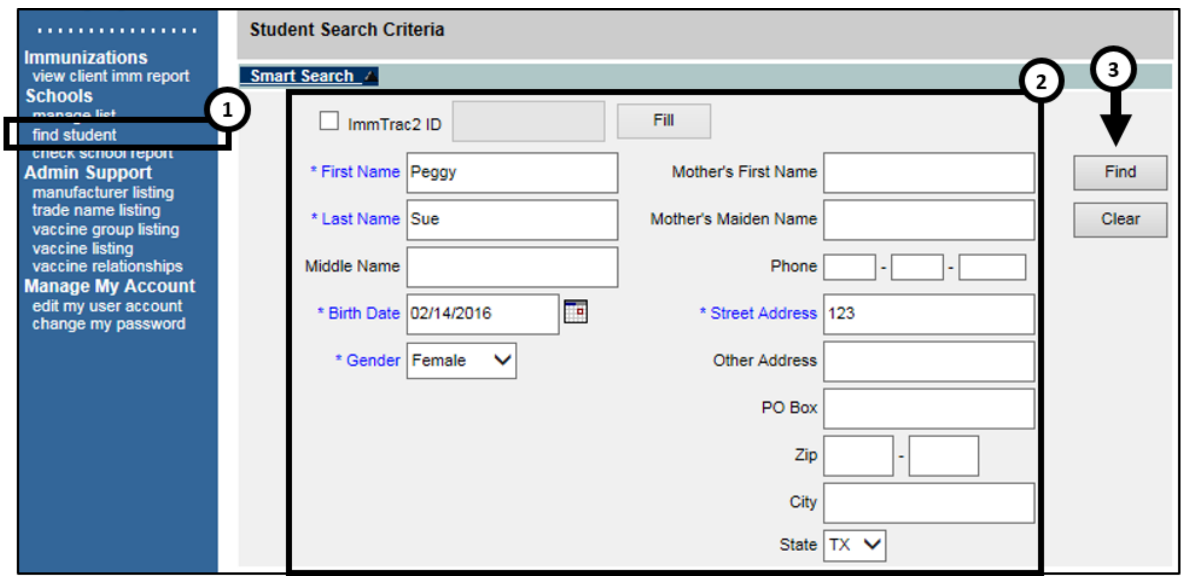


Figure 143 - Add Students to a List Steps 1-3

See Figure 143: Add Students to a List Steps 4-5.

4. When the student information displays, select a list from the "*Please pick a Report List*" drop-down menu.
5. Click "Add this Student to a Report List".
    a. The newly added list displays in the Current Report Lists section.

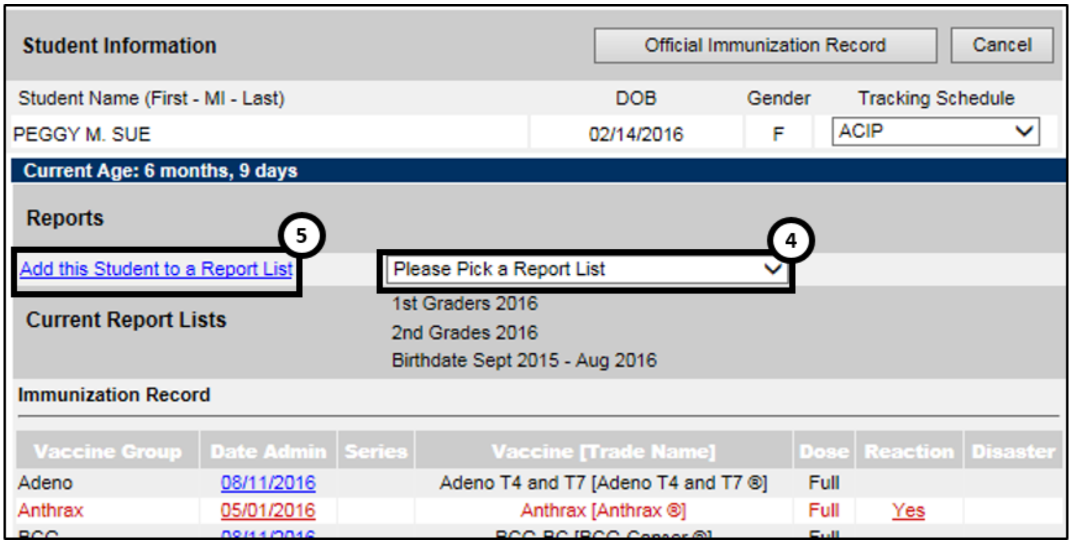


Figure 144 - Add Students to a List Steps 4-5

Note: *Students can be added to more than one list. The available options in the Pick Report List are the list that the student is not already assigned.*

Check School Report

If you have navigated to a different screen during report generation, or want to view reports that were previously run, use the *Check School Report* menu option to view the report. The Student Immunization History List and the Immunization Due list will be available on the Check School Report screen for 7 days. The screen is separated into two sections: *School Report Job Status* and *School Report Status.* *See Figure 144: Check School Report Status Screen.*

School Report Job Status

This section displays the date and time a report job started and completed, the overall percentage completion, the number of students returned, and the target date range if one was specified. Clicking the "Refresh" button will update the percent completion status. Only one job is listed in this section. Once you run a new report job, your previous job displays below in the School Report Status section.

School Report Status

This section displays reports generated from the *Reports Available* screen. It contains the name of the report, the type of report, the date and time the report was requested, the time it started, and the report status. Reports will be sorted by time generated, with the most recent report at the top.

When the report name appears as a link and the Status displays “*Ready*”, it has completed processing and is ready for viewing. To view the report, click the report name. The selected report displays using the Adobe Acrobat Reader. At any time, click the “Cancel” button to return to the previous screen.

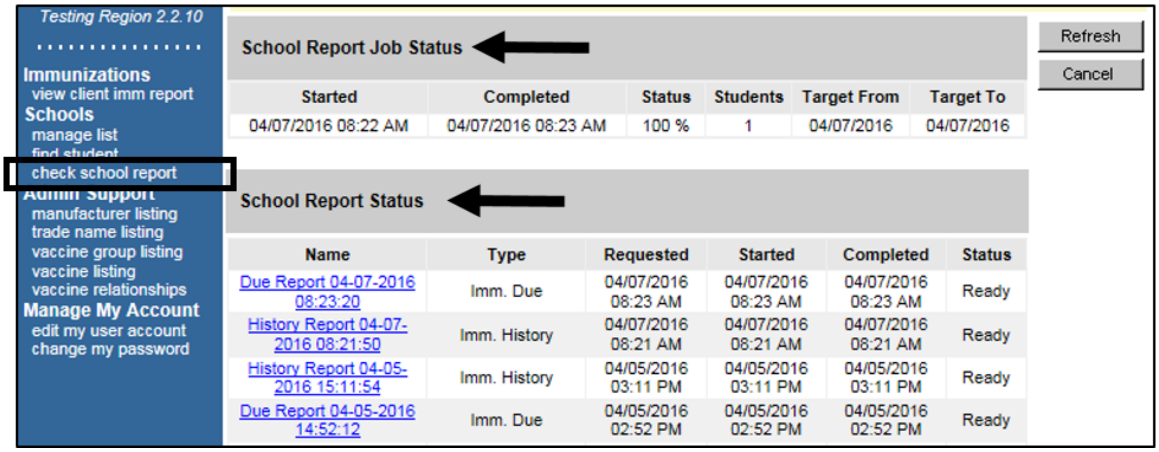


Figure 145 - Check School Report Status Screen

Chapter 15: Reports

The ImmTrac2 application has many reporting capabilities available under the Reports section on the left-side menu panel. Reports can be exported to different file types including Excel, PDF, XML, and plain text formats.

Generate Reports

The Report Available Table lists the reports available under the *Generate Report* menu panel option. From the Generate Report screen users can click on the *Status* link under the Output column for any given report to view previously generated reports. In some cases, the only available option is the last generated version for that particular report.

Table 16 - Reports Available

Generate Report	***Description***
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.
Ad Hoc List Report	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.
Check Reminder List	The Check Reminder List allows Provider Organizations to be able to view their clients for statewide reminder / recalls prior to the state reminder recall process being ran.
Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.
Client and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.
CoCASA Extract	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.

Generate Report	Description
Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.
Manage Ad hoc Template	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.
Reminder / Recall Custom Letters	The Reminder / Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.
Reminder / Recall Report	The Reminder / Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.

Ad Hoc Count Report

The *Ad Hoc Count Report* produces a list of selected information based on client or immunizations information in order to count specific data. Users can refine results by selecting up to three "Factors" to include in the report, define filters, and choose the sort order. Client Factors include, but is not limited to, the following examples: Client Type, DOB, Ethnicity, and Gender. Immunization Factors include, but is not limited to, the following examples: Clinic Site, Trade Name, Vaccine, Vaccine Date, and Vaccine Group.

To run the Ad Hoc Count Report follow the steps below.

See Figure 145: Generate Ad Hoc Count Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Ad Hoc Count Report**.

Note: *Click the Status link in the right "Output" column at any time to view the Ad Hoc Report State screen. The ad hoc reports are retained for 72 hours for an organization. ImmTrac2 will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.*

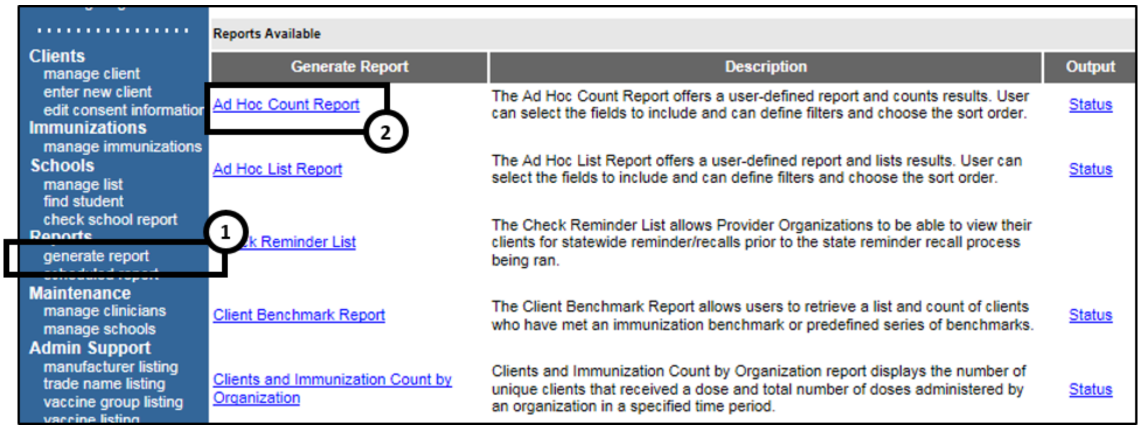


Figure 146 - Generate Ad Hoc Count Report Steps 1-2

See Figure 146: Generate Ad Hoc Count Report Steps 3-5.

3. Once the *Create a Customized Count Report* screen displays choose what to count, Clients or Immunizations.
4. Select up to three factors to use to group the counts on the report by highlighting the items in the left column (for example, Vaccine Group).
    - To highlight multiple items hold the Ctrl button on your computer keyboard and select the options.
5. Clicking the "Add" button to move the items to the right column for use in the report.
    - To remove factors, select the one to remove and click the "Remove" button or the "Remove All" button to remove all factors.

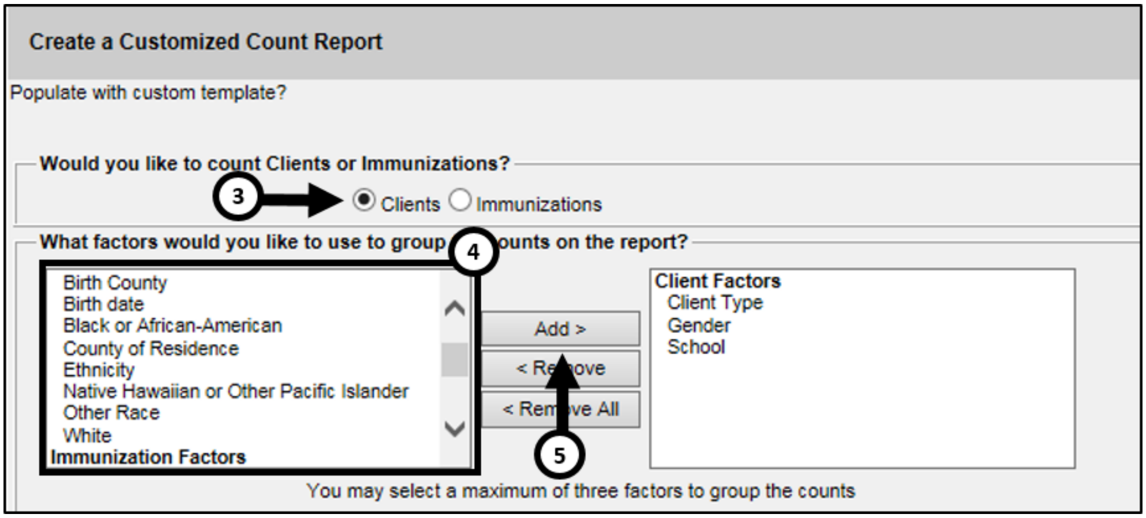


Figure 147 - Generate Ad Hoc Count Report Steps 3-5

See Figure 147: Create a Customized Count Report 6-9.

6. Under the "How would you like to filter?" section, select the appropriate criteria for the report as needed.
    - *See Table 16: Ad Hoc Count Report Filter Data Options for details about the filter options*.
7. Click on "Add / Save Edit" to add the filter to the "Selected Filters" box.
    - Repeat Steps 6-7 to add additional filters.
8. Use the "Filter" button to add, edit, or configure the filter options.
    - *See Table 16: Ad Hoc Count Report Filter Data Options for details about the filter options buttons.*
9. Click the "Generate" button. The Ad Hoc Report Status screen displays.

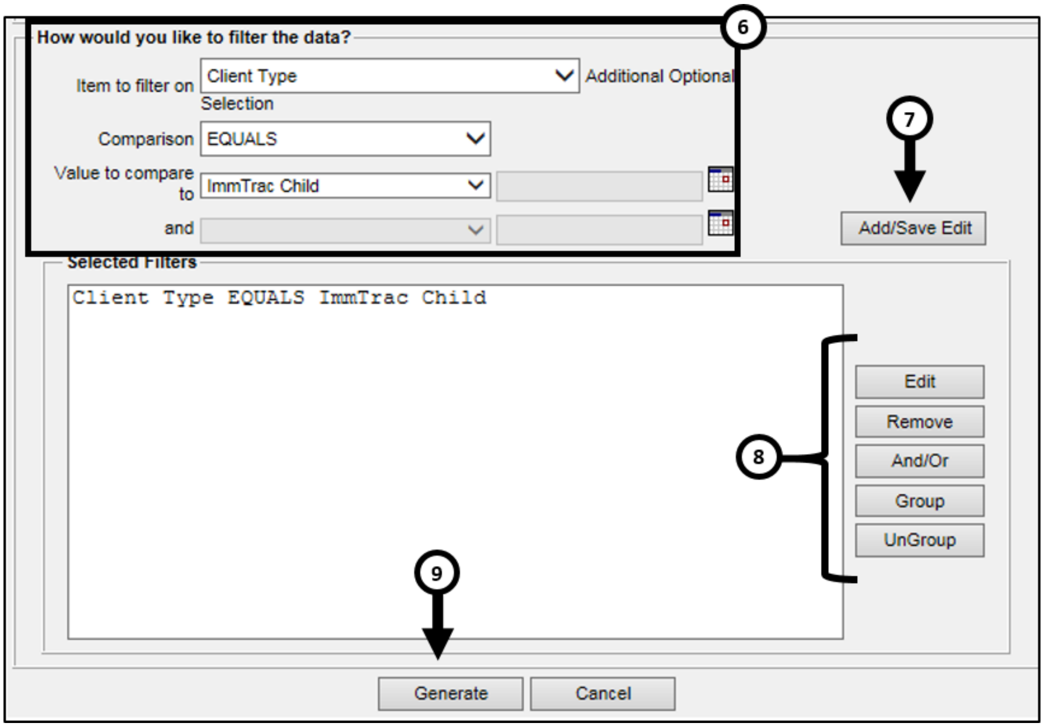


Figure 148 - Create a Customized Count Report 6-9

Table 17 - Ad Hoc Count Report Filter Data Options

Field	**Description**
Item to filter on	Select an item to add as a filter by using the drop down list. The filters are grouped by Client and Immunization factors. For example, Birth Date Range, Client ID, Gender, School, Zip, Trade Name Vaccine…etc.
Comparison	Select a comparison option from the drop down list that best describes the type of comparison to make. Options: Before, Equals, Not Equal to, After, Between, Is and Is Not. ***NOTE****: In some instances, depending on the "Item to Filter on", this field will auto select. For instance, if "State" is selected as a filter the comparison will auto update to "Equals". Some comparison options will trigger a text box in the Value to compare to field.*
Value to compare "to"	The "to" fields will be become active depending on the "Comparison" option that was selected. The first "to" field has a drop down list that is populated with the options relevant to the "Comparison" option. For instance, if "State" is selected as a filter the drop down list will contain state options. If "Ethnicity" is selected, the ethnicity options will list. The second field will either be used to enter a date, such as when the "Birth Date" filter is selected, or it will be used to enter free text when an options such as "Zip Code" is selected.
Value to compare "and"	The "and" fields will be become active depending on the "Comparison" option that was selected. In most cases only the second "and" field will become activated to allow for a comparison between two data points. For example, "Birth Date" is "between" XX/XX/XXXX and XX/XX/XXXX.
Selected Filters	This section will list all filters being applied to the report.

Field	Description
Edit (button)	Highlight a statement in the Selected Filters box and click “Edit”. The filter data will display in the “How would you like to filter data” section to allow for edits.
Remove (button)	Highlight a statement and click “Remove” to delete it from the selected filters.
And / Or (button)	Change the AND to an OR statement by highlighting ‘AND’ and clicking the “And / Or” button. An OR statement can also be changed to an AND statement by clicking the “And / Or” button. ***NOTE**: Example – Zip Code Equals 78724 AND State Equals Texas.*
Group (button)	Group filters together by highlighting two filter statements and click the “Group” button. Filters that are grouped will be encompassed in parenthesis.
UnGroup (button)	Highlight a grouped statement and click on the “Ungroup” button to ungroup the statements.

Ad Hoc Report Status

The *Ad Hoc Report Status* screen displays after clicking the “Generate” button on the Ad Hoc Count or Ad Hoc List Report screens. Users can also access the status screen from the Reports Available screen by clicking on the “Status” link following the report description. This screen will only display one list and one count report at any given time.

See Figure 148: Ad Hoc Status Report Steps 1-3.

1. Click Refresh occasionally to check the status of the report.
2. Once the underlined report type appears in blue, click it. The report displays directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.

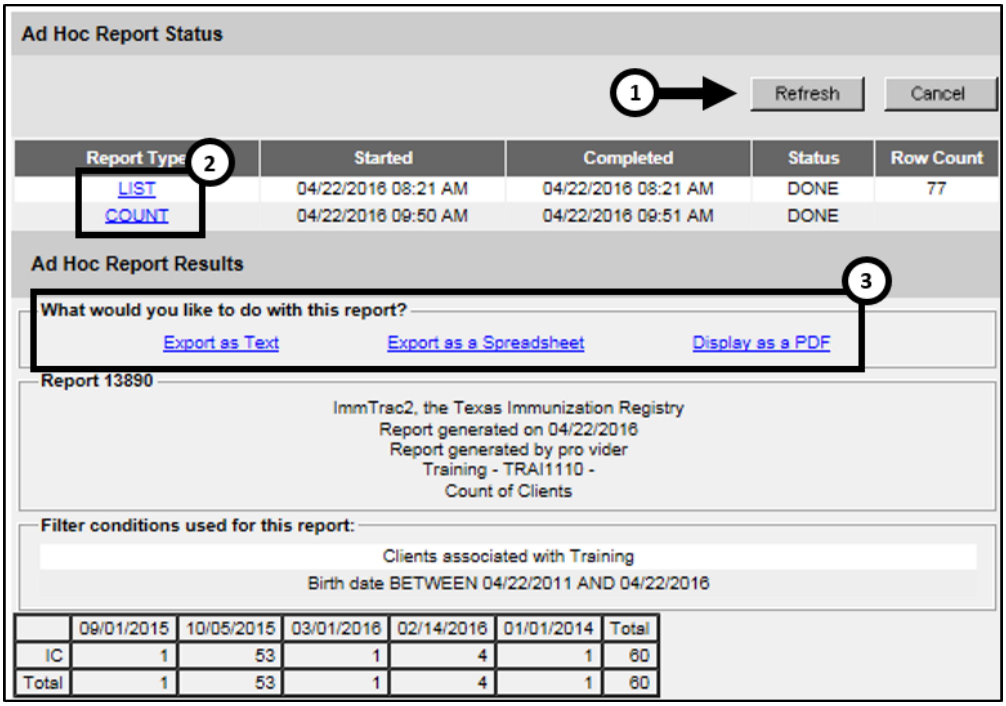


Figure 149 - Ad Hoc Report Status 1-3

Table 18 - Ad Hoc Report Status Screen Data

Field	***Description***
Report Type	Links to the most recent List or Count report.
Started	Date and time the report began generating.
Completed	Date and time the report finished generating.
Status	The status of the report.
Row Count	The row count returned in each report. ***NOTE****: The column will always display a blank for the Count Report.*
Report Number	An auto generate ImmTrac2 report number assigned to the report. ***NOTE****: This is only relevant when technical difficulties are encountered.*
Filter Conditions	The filter options selected to generate the report.

Ad Hoc List Report

The *Ad Hoc List Report* produces a list of clients who match the selected criteria. User can refine results by selecting the items to include in the report, define filters, and choose the sort order. Users can select multiple items such as client information, address, immunization, and person's responsible information. In this report select as few or as many items (fields) as needed.

To run the Ad Hoc List Report follow the steps below.

See Figure 149: Generate Ad Hoc List Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Ad Hoc List Report**.

Note: *Click the Status link in the left "Output" column at any time to view the Ad Hoc Report State screen. The Ad hoc reports are retained for 72 hours per organization. ImmTrac2 will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.*

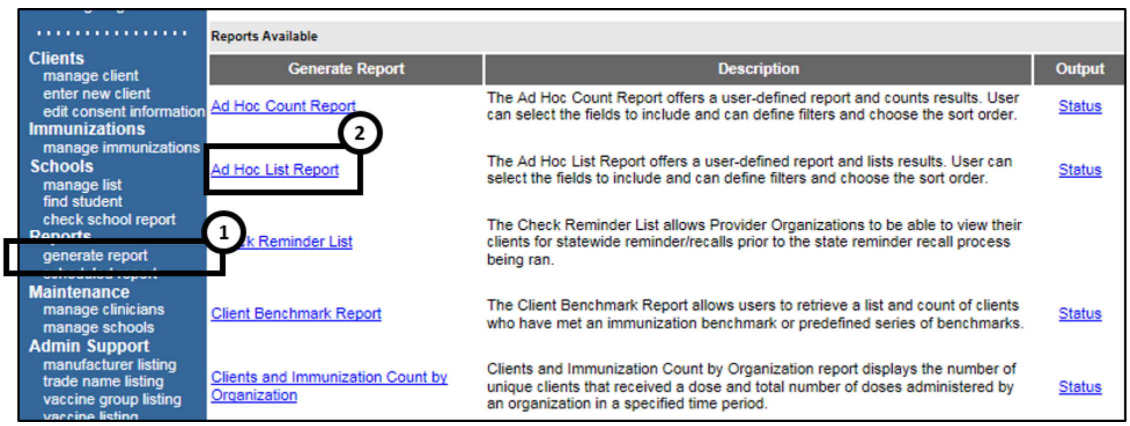


Figure 150 - Generate Ad Hoc List Report Steps 1-2

See Figure 150: Generate Ad Hoc List Report Steps 3-7.

3. Once the *Create a Customized Count Report* screen displays, select the client population to include in the report.
4. Select up to three factors to use to group the counts on the report by highlighting the items in the left column (for example, Vaccine Group).
   - To highlight multiple items hold the Ctrl button on the computer keyboard and select the options.
5. Clicking the "Add" button to move the items to the right column for use in the report.

- To remove factors, select the one to remove and click the "Remove" button or the "Remove All" button to remove all factors.

6. Use the drop down arrow to select a sort option.
   - List options will mirror the items selected to display on the report.
7. Select a sort order as needed.

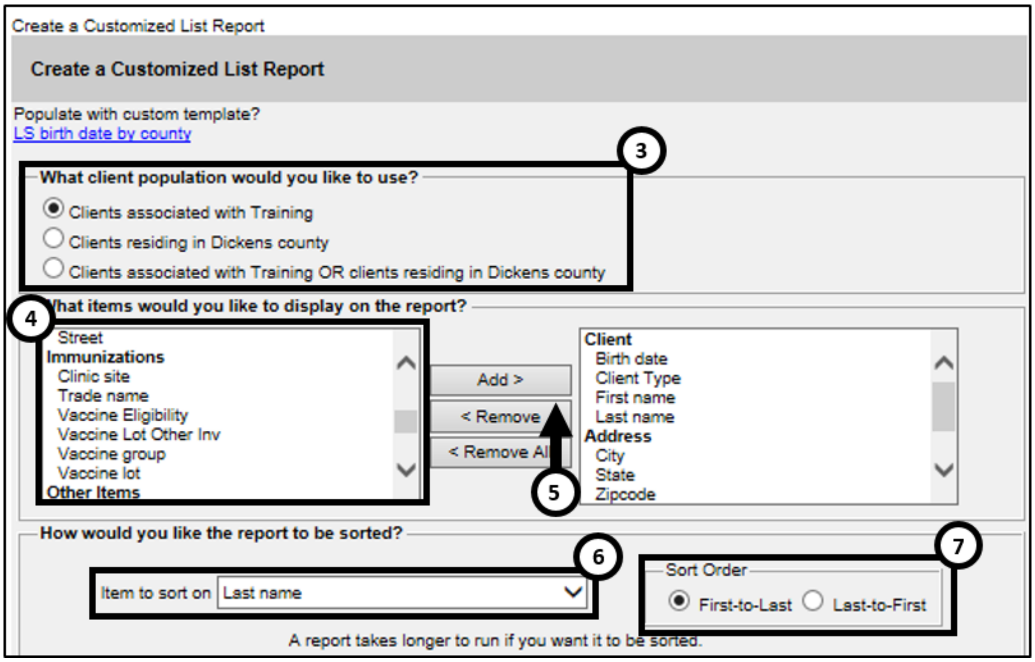


Figure 151 - Generate Ad Hoc List Report Steps 3-7

See Figure 151: Generate Ad Hoc List Report Steps 8-11.

8. Under the "How would you like to filter?" section, select the appropriate criteria for the report as needed.
   - *See Table 18: Ad Hoc Count Report Filter Data Options* for details about the filter options.
9. Click on "Add / Save Edit" to add the filter to the "Selected Filters" box.
   - Repeat Steps 6-7 to add additional filters.
10. Use the "Filter" button to add, edit, or configure the filter options.
    - *See Table 18: Ad Hoc Count Report Filter Data Options* for details about the filter options.
11. Click the "Generate" button. The Ad Hoc Report Status screen displays.

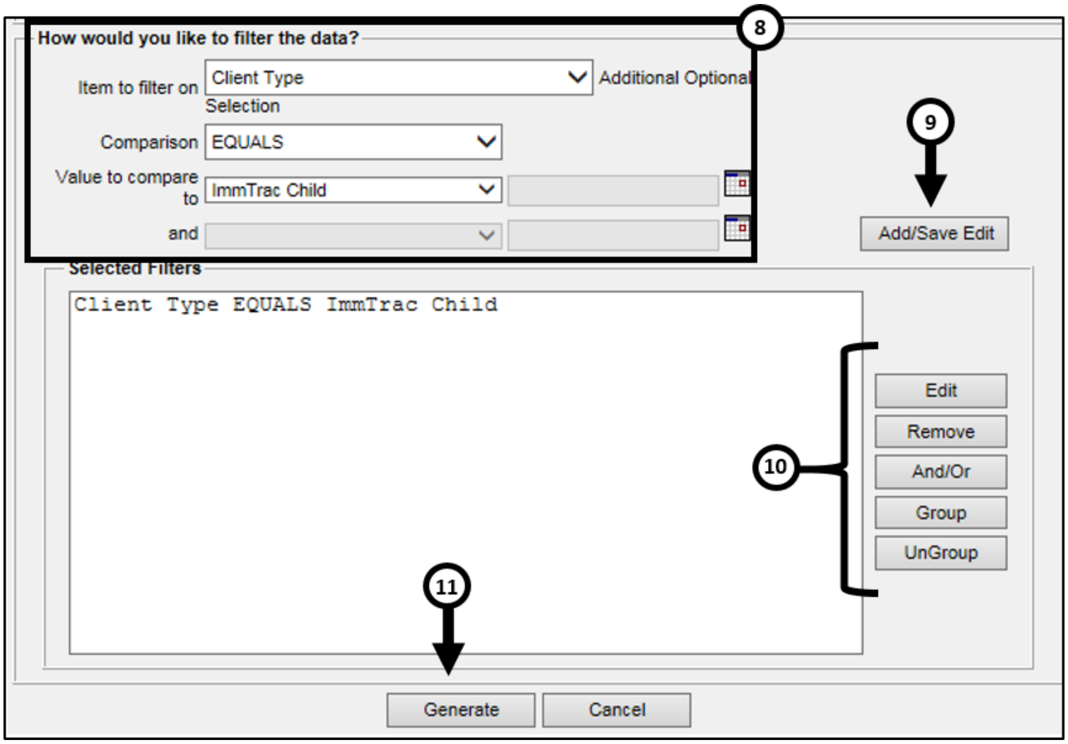


Figure 152 - Generate Ad Hoc List Report Steps 8-11

Note: *Ad Hoc Reports run against all clients associated with the user's organization. To disassociate a client from an organization their status in the organization information section of the client's record must be changed. Newly added clients will not appear on the Ad Hoc Reports until the following day.*

Table 19 - Ad Hoc Count Report Filter Data Options

Field	**Description**
Item to filter on	Select an item to add as a filter by using the drop down list. The filters are grouped by Client and Immunization factors. For example, Birth Date Range, Client ID, Gender, School, Zip, Trade Name Vaccine...etc.
Comparison	Select a comparison option from the drop down list that best describes the type of comparison to make. Options: Before, Equals, Not Equal to, After, Between, Is and Is Not. ***NOTE****: In some instances, depending on the "Item to Filter on", this field will auto select. For instance, if "State" is selected as a filter the comparison will auto update to "Equals". Some comparison options will trigger a text box in the Value to compare to field.*

Field	Description
Value to compare "to"	The "to" fields will be become active depending on the "Comparison" option that was selected. The first "to" field has a drop down list that is populated with the options relevant to the "Comparison" option. For instance, if "State" is selected as a filter the drop down list will contain state options. If "Ethnicity" is selected, the ethnicity options will list. The second field will either be used to enter a date, such as when the "Birth Date" filter is selected, or it will be used to enter free text when an options such as "Zip Code" is selected.
Value to compare "and"	The "and" fields will be become active depending on the "Comparison" option that was selected. In most cases only the second "and" field will become activated to allow for a comparison between two data points. For example, "Birth Date" is "between" XX/XX/XXXX and XX/XX/XXXX.
Selected Filters	This section will list all filters being applied to the report.
Edit (button)	Highlight a statement in the Selected Filters box and click "Edit". The filter data will display in the "How would you like to filter data" section to allow for edits.
Remove (button)	Highlight a statement and click "Remove" to delete it from the selected filters.
And / Or (button)	Change the AND to an OR statement by highlighting 'AND' and clicking the "And / Or" button. An OR statement can also be changed to an AND statement by clicking the "And / Or" button. ***NOTE****: Example – Zip Code Equals 78724 AND State Equals Texas.*
Group (button)	Group filters together by highlighting two filter statements and click the "Group" button. Filters that are grouped will be encompassed in parenthesis.
UnGroup (button)	Highlight a grouped statement and click on the "Ungroup" button to ungroup the statements.

Check Reminder List

The *Check Reminder List* screen is used to preview the list of clients that are configured from a reminder request notices. This report allows organizations to review the Reminder / Recall candidates before generating reminder recall notifications. A client is configured for reminders and recalls in the "Organization Information" section of the client information screen by selecting "Yes" in the "Allow Reminder and Recall Contact" field. *See Figure 152: Organization Information Tab.*

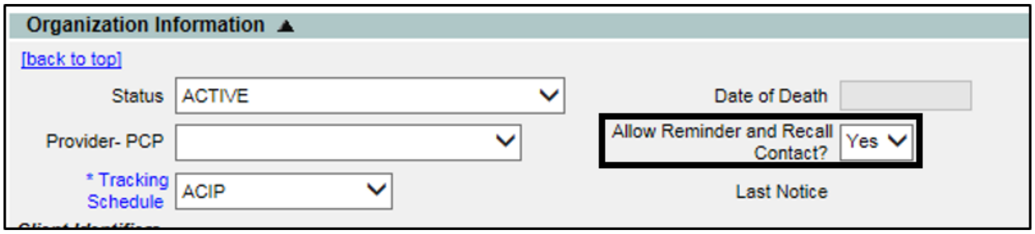


Figure 153 - Organization Information Tab

To view the Check Reminder List follow the steps below.

See Figure 153: Generate Check Reminder List Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Check Reminder List**.

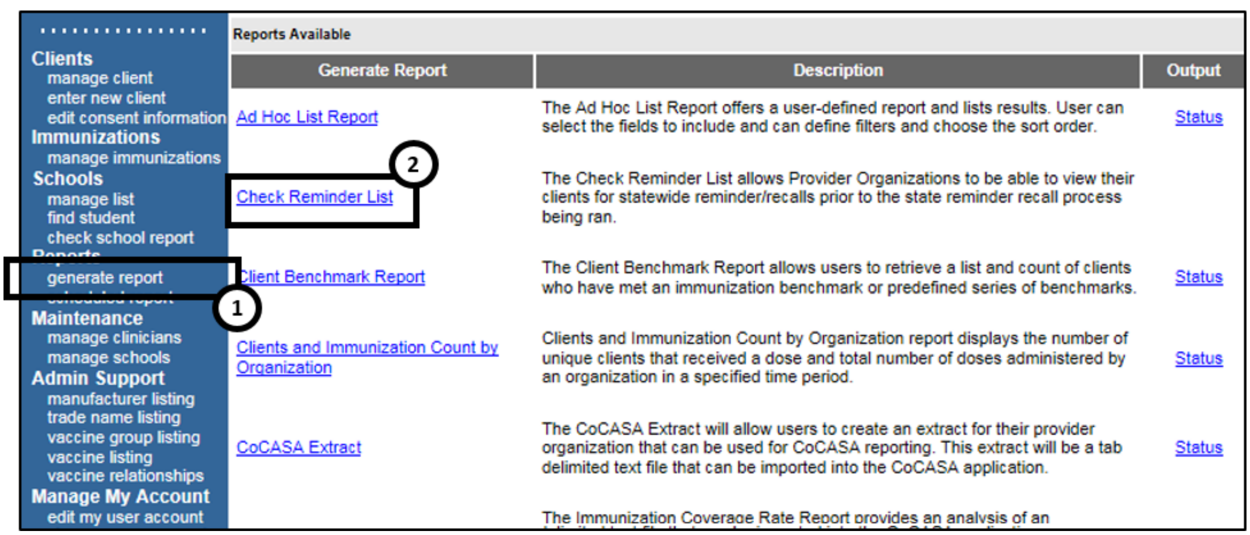
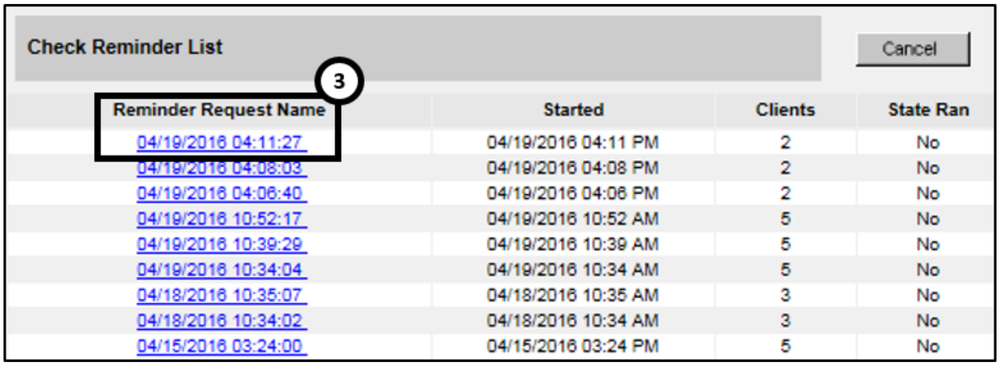


Figure 154 - Generate Check Reminder List Report Steps 1-2

See Figure 154: Generate Check Reminder List Report Step 3.

3. Click on the blue hyperlink reminder request list. *See Table 19: Check Reminder List Data* for details on the data columns.



Check Reminder List

Cancel

Reminder Request Name	Started	Clients	State Ran
04/19/2016 04:11:27	04/19/2016 04:11 PM	2	No
04/19/2016 04:08:03	04/19/2016 04:08 PM	2	No
04/19/2016 04:06:40	04/19/2016 04:06 PM	2	No
04/19/2016 10:52:17	04/19/2016 10:52 AM	5	No
04/19/2016 10:39:29	04/19/2016 10:39 AM	5	No
04/19/2016 10:34:04	04/19/2016 10:34 AM	5	No
04/18/2016 10:35:07	04/18/2016 10:35 AM	3	No
04/18/2016 10:34:02	04/18/2016 10:34 AM	3	No
04/15/2016 03:24:00	04/15/2016 03:24 PM	5	No

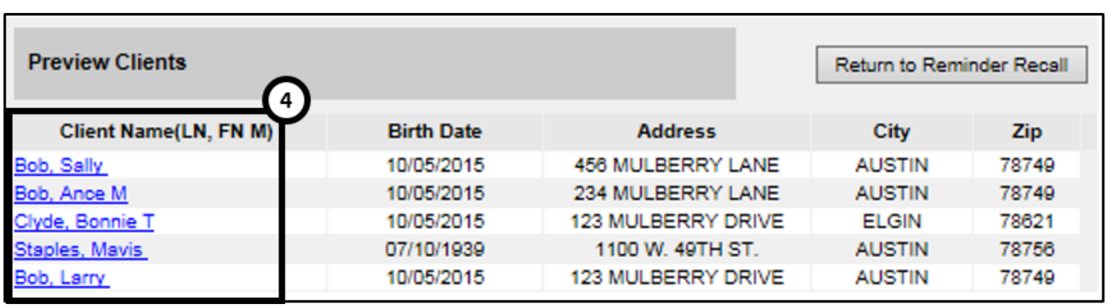
Figure 155 - Generate Check Reminder List Report Step 3

Table 20 - Check Reminder List Data

Field	Description
Reminder Request Name	Displays the date and time the Reminder Report was generated as a hyperlink that is ready to be previewed. Clicking the hyperlink displays the Preview Clients screen, which shows the organization's clients that displays for this report if it is generated.
Started	Displays starting date and time for report generation.
Clients	Displays the final Client count for the report.
State Ran	Displays whether the Reminder / Recall was generated by the State.
Cancel	This button takes users back to the Generate Report – Reports Available screen.

See Figure 155: Generate Check Reminder List Report Step 4.

4. The clients who are due for a reminder displays. Click on the hyperlink to go to the client information screen, and (or) view their immunization data.



Preview Clients

Return to Reminder Recall

Client Name(LN, FN M)	Birth Date	Address	City	Zip
Bob, Sally	10/05/2015	456 MULBERRY LANE	AUSTIN	78749
Bob, Ance M	10/05/2015	234 MULBERRY LANE	AUSTIN	78749
Clyde, Bonnie T	10/05/2015	123 MULBERRY DRIVE	ELGIN	78621
Staples, Mavis	07/10/1939	1100 W. 49TH ST.	AUSTIN	78756
Bob, Larry	10/05/2015	123 MULBERRY DRIVE	AUSTIN	78749

Figure 156 - Generate Check Reminder List Report Step 4

Client Benchmark Report

The *Client Benchmark Reports* allows ImmTrac2 users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be exported as a text file, spreadsheet, or PDF file.

To generate the Client Benchmark Report follow the steps below.

See Figure 156: Generate Client Benchmark Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Client Benchmark Report**.

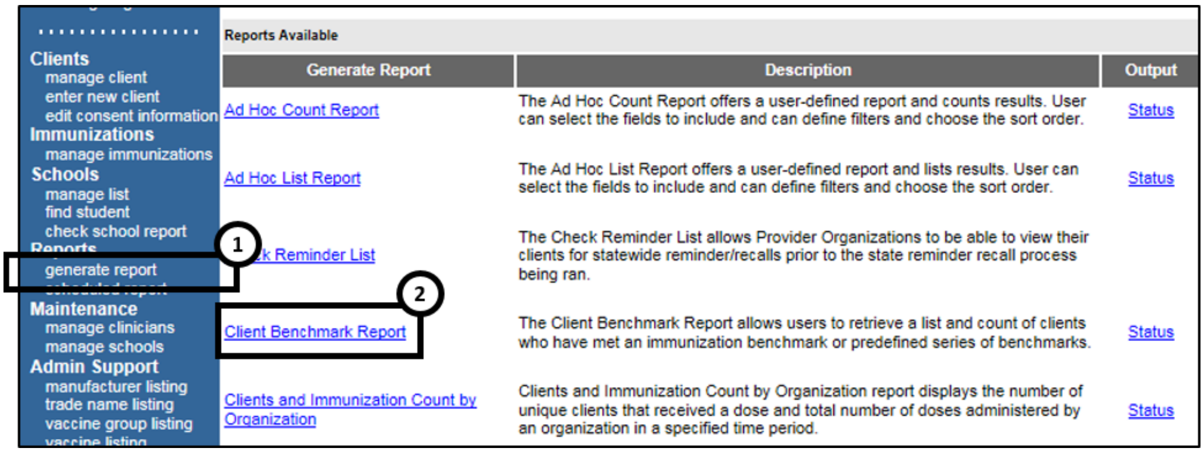


Figure 157 - Generate Client Benchmark Report Steps 1-2

See Figure 157: Generate Client Benchmark Report Steps 3-6.

3. Use the radio buttons to select the Report Grouping.
   - The top section allows users to select which clients will be queried against.
   - The bottom section allows users to select which clients display in the report.
     a. Clients who did NOT meet the benchmark: a list of clients met the criteria and but did not meet the benchmark(s) defined in the table.
     b. Clients who DID meet the benchmark: a list of clients who met the criteria and the benchmark(s) defined in the table.
     c. All clients meeting the criteria defined in the table.
4. Use the radio buttons to select an age or birth date range:
   - Less than or equal to 72 months old: all clients who are 72 months old or younger. Users may only enter up to age six years.
   - Birth date range: a range of birth dates.

- Age range: in age fields enter numeric date and then use the drop down list next to it to choose days, months, or years.

5. Use the radio buttons to select Options for Benchmarking.
    - Standard Assessment: will return a benchmark report based on clients who have or have not meet the selected benchmark requirements.
    - Assess Clients with Sufficient Refusal History as Covered: will return a benchmark report that also counts clients with a refusal comments and an "Applies-To-Date" entered in the client record on the Comments tab. For a list of the refusal comments see Appendix B – Client Comment Impacting the Tracking Schedule.
6. Enter a date in the MM/DD/YYYY format or use the calendar icon to select an Evaluation Date.

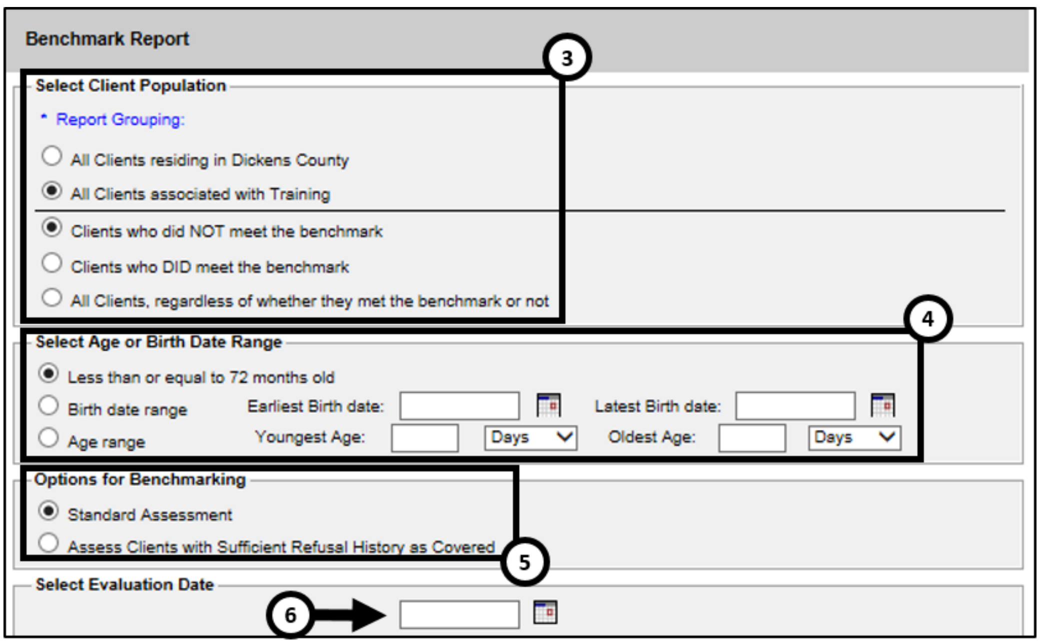


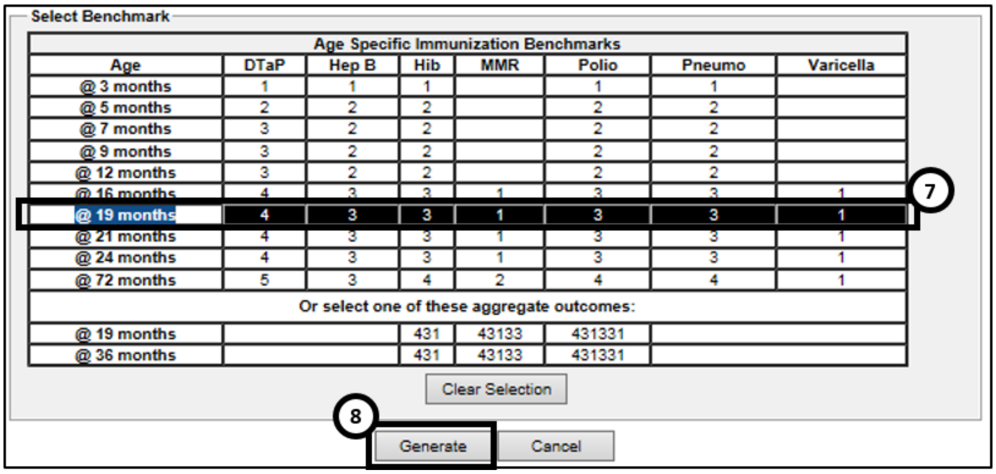
Figure 158 - Generate Client Benchmark Report Steps 3-6

See Figure 158: Generate Client Benchmark Report Steps 7-8.

7. Select the benchmark(s) to be used on the report:
    - To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.

- To select all benchmarks in a row, click on the first box in the row that indicates @ X months.
- To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.

8. Click the “Generate” button.

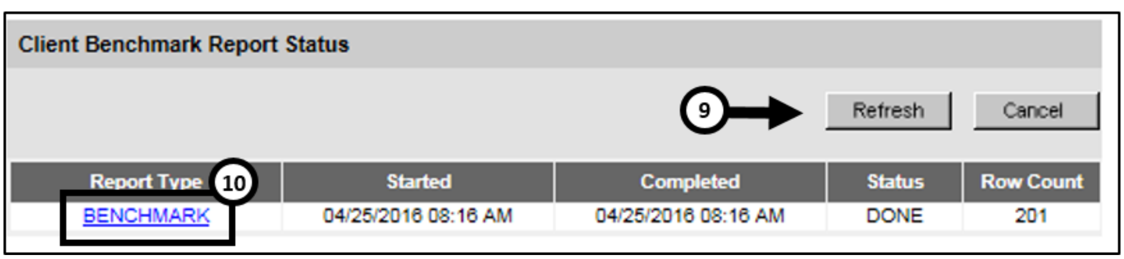

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

Figure 159 - Generate Client Benchmark Report Steps 7-8

See Figure 159: Generate Client Benchmark Report Steps 9-10.

9. The Benchmark Report Status screen displays. Click on **Refresh** until the status is “Done”.
10. When the report is ready, click on the blue “Benchmark” hyperlink to display the Benchmark report.


Client Benchmark Report Status

Report Type	Started	Completed	Status	Row Count
BENCHMARK	04/25/2016 08:16 AM	04/25/2016 08:16 AM	DONE	201

Figure 160 - Generate Client Benchmark Report Steps 9-10

The Benchmark Report lists all clients who met the filter criteria specified. The report gives a count and the percentage of clients who met the criteria. It lists clients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each client’s demographic information indicates whether the client met the criteria for that vaccine and benchmark age. *See Figure 160: Client Benchmark Report Example.*

Filter conditions used for this report:

Clients Associated with Provider: Training
Clients who did NOT meet the selected benchmark(s)
Just consider immunizations as meeting the benchmark
Age less than or equal to 72 months
Evaluation date: 04/25/2016
Benchmark age @ 16 months
Selected benchmarks: DTaP (4), HepB (3), Hib (3), MMR (1), Polio (3), Pneumo (3), Varicella (1)
Total clients: 201; 0 clients (0%) met all benchmark criteria, 201 clients did not

Report 13900 **Results 1 - 201 of 201**

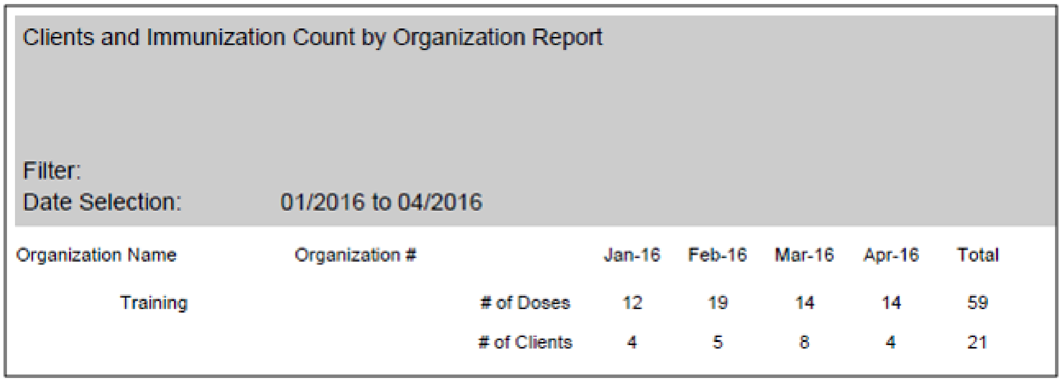
No	Client ID	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zip	DTaP (4)	HepB (3)	Hib (3)	MMR (1)	Polio (3)	Varicella (1)
1	6967924	AAAA	AAAA	01/01/2015		234 SDAF		TX		N	N	N	N	N	N
2	6968116	ATHENA	ATHENA	07/07/2013		OLIMPO		TX		N	N	N	N	N	N
3	6967471	BERNETTA	BARNES	10/10/2010		25 STONE RD		TX		N	N	N	N	N	N
4	6967400	HELEN	BARTOS	12/13/2010		12 MONROE AVE		TX		N	N	N	N	N	N
5	6968258	ANCE	BOB	10/05/2015		234 MULBERRY LANE	AUSTIN	TX	78749	N	N	N	N	N	N
6	6968252	BILLY	BOB	10/04/2015	(555) 666-6667	123 MULBERRY DRIVE	DALLAS	TX	78749	N	N	N	N	N	N
7	6968906	GRAGRA	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
8	6968616	LANI	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
9	6968596	LARRY	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
10	6969177	LARRY	BOB	10/05/2015		123 MULBERRY DRIVE	AUSTIN	TX	78749	N	N	N	N	N	N

Figure 161 - Client Benchmark Report Example

Note: *The size of the file is not limited when it's exported as text. However, to export it as a spreadsheet or PDF there is a character / line limit. The information message "file not loaded completely" displays to indicate that part of the report was truncated or a red error report banner displays.*

Clients and Immunization Count by Organization

The *Clients and Immunization Count by Organization* report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period. This does not include historical immunizations entered by the organization. *See Figure 161: Client and Imm Count by Organization Example.*


Clients and Immunization Count by Organization Report

Filter:
Date Selection: 01/2016 to 04/2016

Organization Name	Organization #		Jan-16	Feb-16	Mar-16	Apr-16	Total
Training		# of Doses	12	19	14	14	59
		# of Clients	4	5	8	4	21

Figure 162 - Client and Imm Count by Organization Example

To generate a Clients and Immunization Count by Organization report follow the steps below.

See Figure 162: Generate Client and Imm Count by Organization Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Clients and Immunization Count by Organization**.

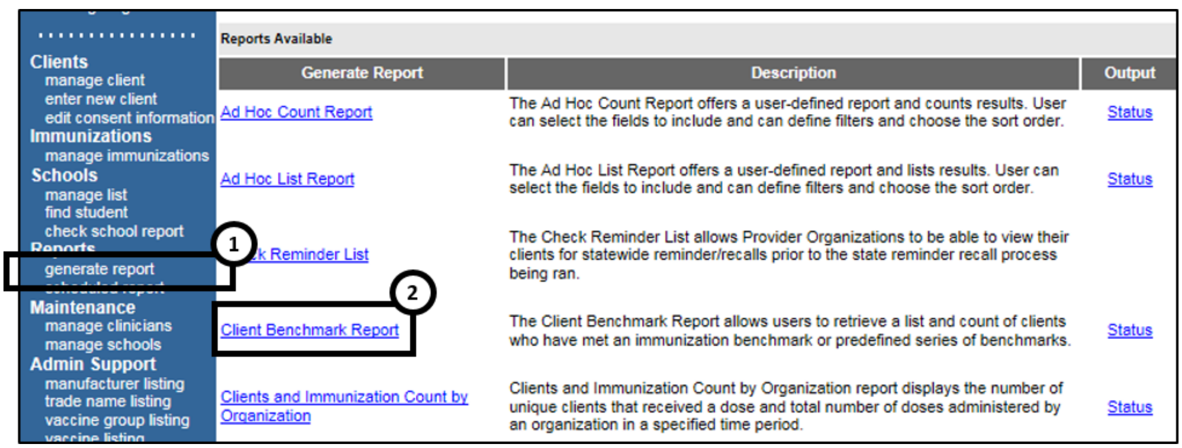


Figure 1632 - Generate Client and Imm Count by Organization Steps 1-2

See Figure 163: Generate Client and Imm Count by Organization Steps 3-4.

3. Enter Target Date Range using the MM/DD/YYYY format or use the calendar icon (up to 12 months).
4. Click **Generate Report** to generate a PDF format version of the report that can be viewed from the status link. Select Export to Excel to generate an Excel format version of the report that can be downloaded.

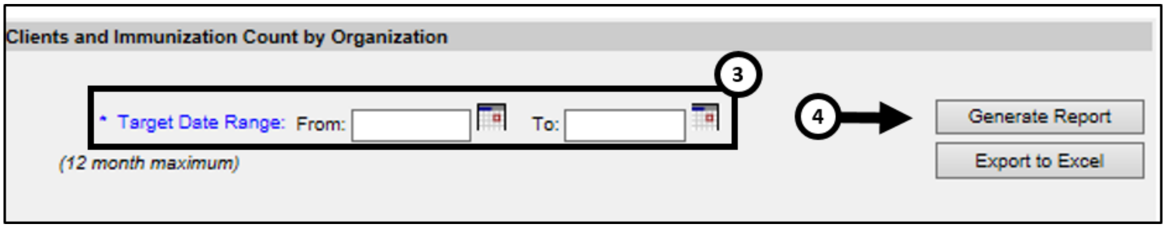


Figure 164 - Generate Client and Imm Count by Organization Steps 3-4

See Figure 164: Generate Client and Imm Count by Organization Steps 5-6.

5. On the Report Status screen click refresh until the status equals 100%.
6. When the report is ready, click on the blue hyperlink to open the report in a PDF file.

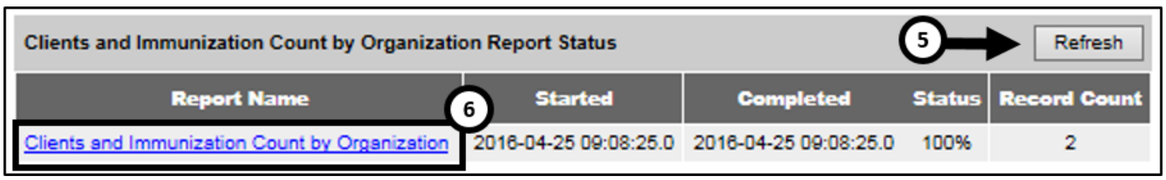


Figure 165 - Generate Client and Imm Count by Organization Steps 5-6

CoCASA Extract

The **CoCASA Extract Report** will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application. A batch process will create a zipped file that will be stored on our FTP server.

CoCASA stands for Comprehensive Clinic Assessment Software Application, a tool which is published by the Centers for Disease Control.

To generate the CoCASA Extract report follow the steps below.

See Figure 165: Generate CoCASA Extract Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **CoCASA Extract**.

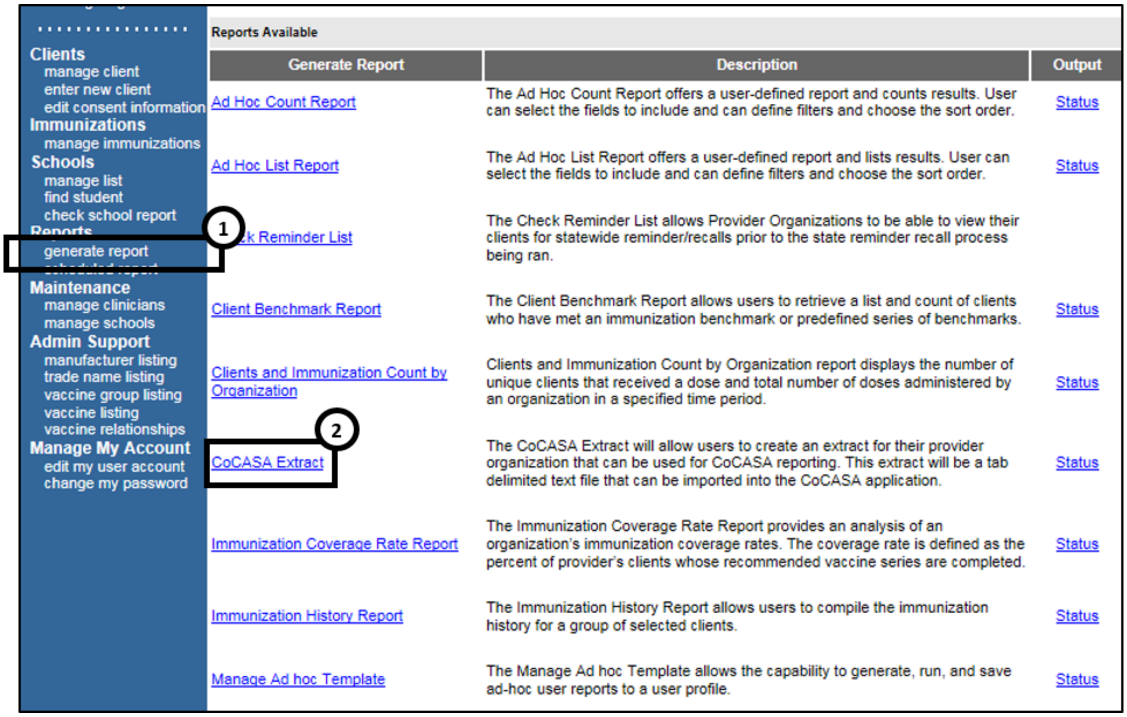


Figure 166 - Generate CoCASA Extract Report 1-2

See Figure 166: Generate CoCASA Extract Report Steps 3-6.

3. Enter an assessment date in the format 'MM/DD/CCYY' in the 'Common Review Date' text box, or click on the calendar icon to select a date. This is used to determine the client's age.
4. Users have the option to leave the default age ranges or elect additional date ranges.
5. Using the radio buttons select a client population.
6. Click the "OK" button.

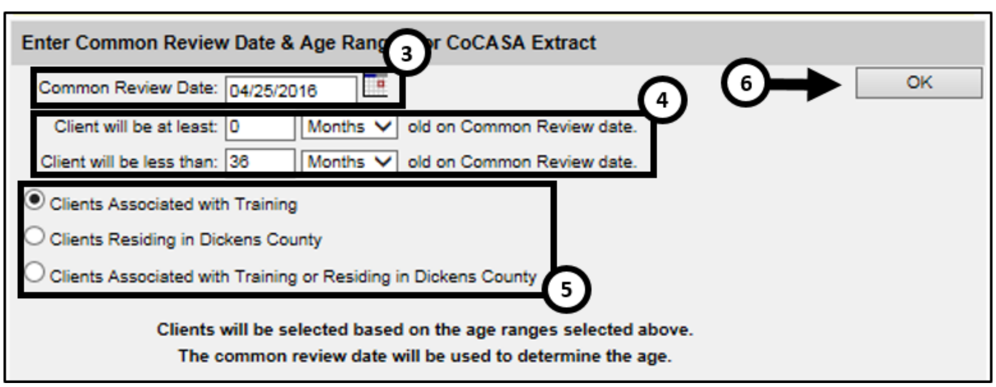


Figure 167 - Generate CoCASA Extract Report 3-6

7. On the request submitted screen, click the Download Status link.

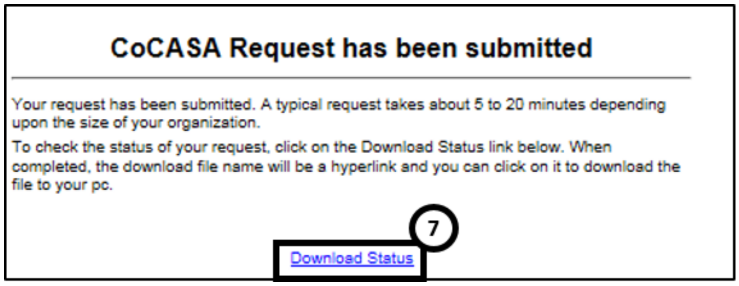


Figure 168 - Generate CoCASA Extract Report Step 7

See Figure 168: Generate CoCASA Extract Report Step 8-9.

8. On the status screen, click the "Refresh" button until the status is "complete".
9. Click on the blue hyperlink to open the report. *See Figure 170: Generate CoCASA Extract Report Example.*

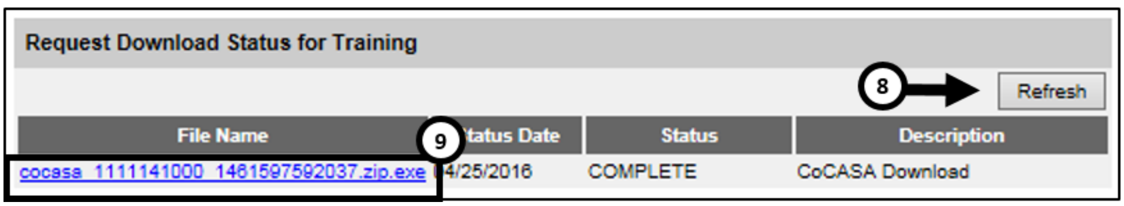
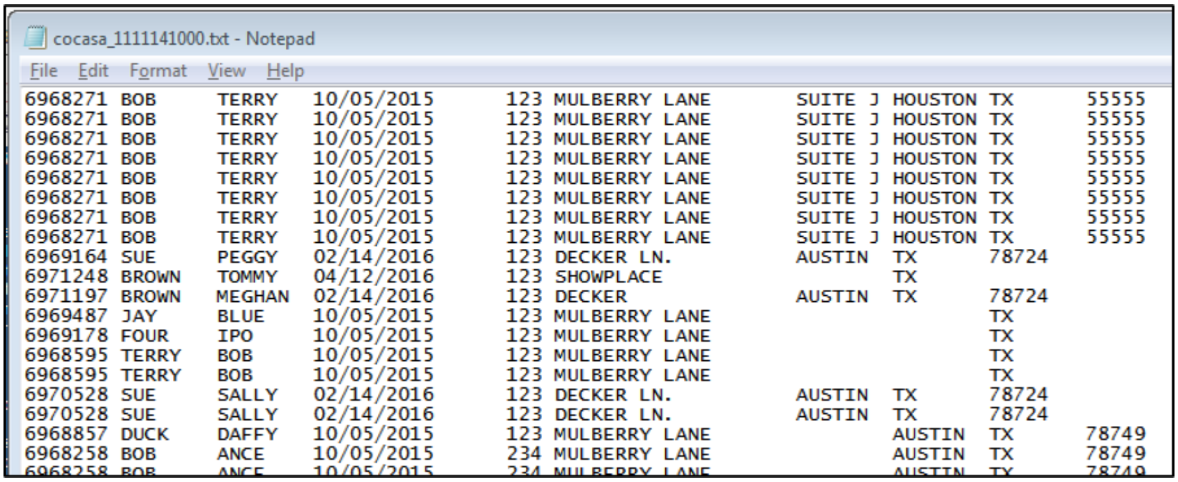


Figure 169 - Generate CoCASA Extract Report Step 8-9

***Note**: The file will be download as a self-extracting zip file. Click on it to extract the text file used in CoCASA. The text file extracted will include the following fields and will be located in the same directory where the original CoCASA file was downloaded.*

- *Unique Client Identifier*
- *Last Name*
- *First Name*
- *Date of Birth*
- *Address Line 1*
- *Address Line 2*
- *City*
- *State*
- *Zip*
- *Blank Field*
- *Blank Field*
- *Blank Field*
- *Shot Date*

- *Shot Type*
- *Moved or Gone Elsewhere*
- *Provider Organization Identifier*
- *Gender*
- *Ethnicity*
- *Vaccine Eligibility*



cocasa_1111141000.txt - Notepad

File Edit Format View Help

6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6968271	BOB	TERRY	10/05/2015	123 MULBERRY LANE	SUITE J	HOUSTON	TX	55555
6969164	SUE	PEGGY	02/14/2016	123 DECKER LN.	AUSTIN	TX	78724	
6971248	BROWN	TOMMY	04/12/2016	123 SHOWPLACE		TX		
6971197	BROWN	MEGHAN	02/14/2016	123 DECKER	AUSTIN	TX	78724	
6969487	JAY	BLUE	10/05/2015	123 MULBERRY LANE			TX	
6969178	FOUR	IPO	10/05/2015	123 MULBERRY LANE			TX	
6968595	TERRY	BOB	10/05/2015	123 MULBERRY LANE			TX	
6968595	TERRY	BOB	10/05/2015	123 MULBERRY LANE			TX	
6970528	SUE	SALLY	02/14/2016	123 DECKER LN.	AUSTIN	TX	78724	
6970528	SUE	SALLY	02/14/2016	123 DECKER LN.	AUSTIN	TX	78724	
6968857	DUCK	DAFFY	10/05/2015	123 MULBERRY LANE		AUSTIN	TX	78749
6968258	BOB	ANCE	10/05/2015	234 MULBERRY LANE		AUSTIN	TX	78749
6968258	BOB	ANCE	10/05/2015	234 MULBERRY LANE		AUSTIN	TX	78749

Figure 170 - Generate CoCASA Extract Report Example

Immunization Coverage Rate Reports

The *Immunization Coverage Rate Report* provides an analysis of an organization's immunization coverage rates within four different age categories among the Client population selected. Produces both the Assessment Report and Clients with Missed Opportunities. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.

To generate the Immunization Coverage Rate Report, follow the steps below.

See Figure 171: Generate Immunization Coverage Rate Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Immunization Coverage Rate Report**.

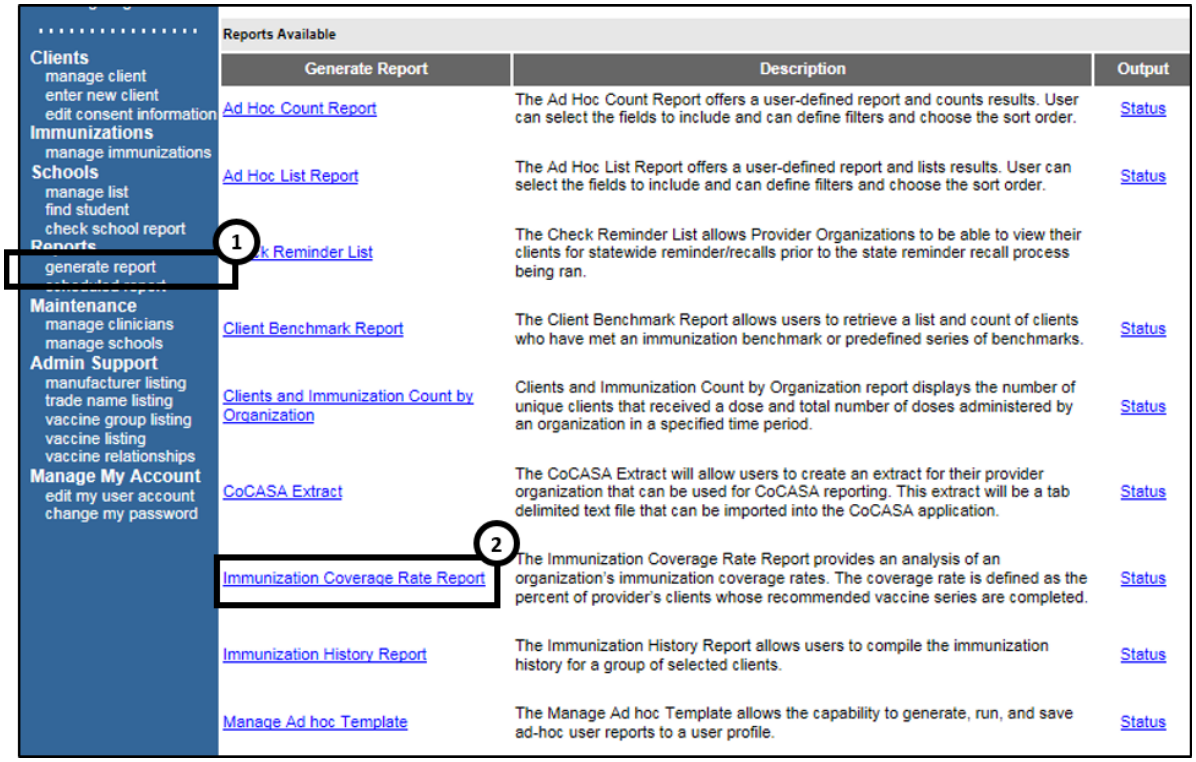


Figure 171 - Generate Immunization Coverage Rate Report Steps 1-2

See Figure 172: Generate Immunization Coverage Rate Report Steps 3-6.

As a provider organization, the Select Client Population section displays the provider organization name and the radio button will by automatically selected.

3. Select the age or DOB rage using the MM/DD/YYYY format for date, or click on the calendar icon to set the dates.
4. Using the radio buttons select an Options for Benchmarking.
    - Selecting the Assess Clients with Sufficient Refusal History counts clients with refusal comments as being up-to-date.
5. Select the report evaluation date by entering the date in a MM/DD/YYYY format or by using the calendar icon to enter the date. The evaluation date is what the Assessment Report uses to determine the cohort for the report. No immunizations given after the evaluation date are included in the evaluation.
6. Click the "Generate" button.
    - Click the "Cancel" button to return to the Generate Report screen.

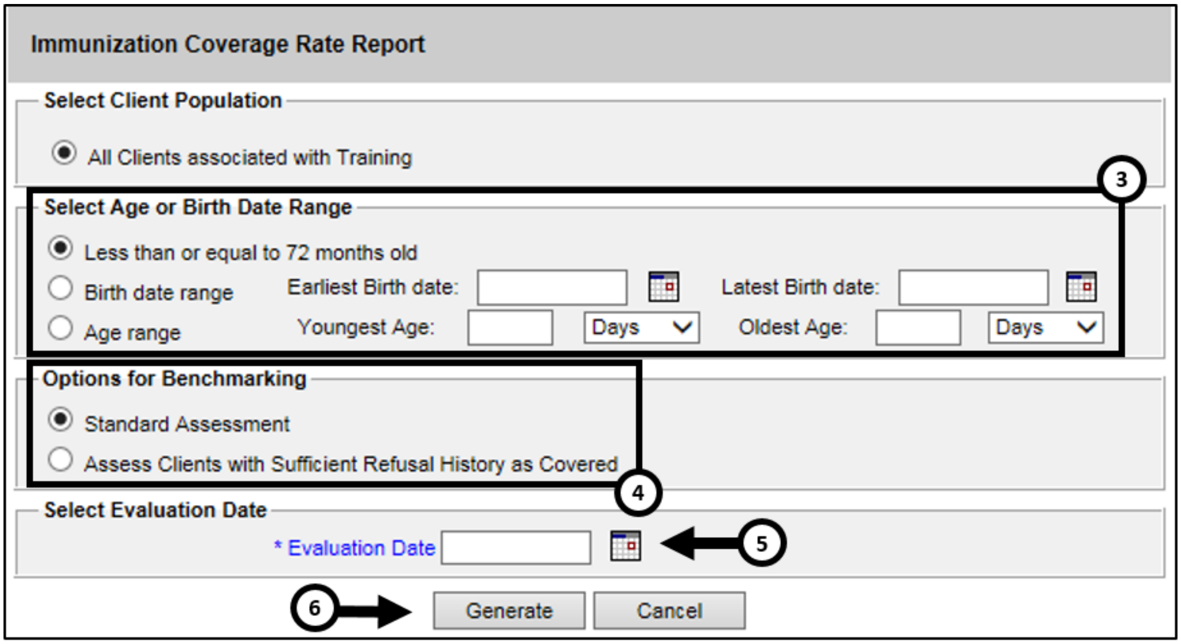


Figure 172 - Generate Immunization Coverage Rate Report Steps 3-6

See Figure 173: Generate Immunization Coverage Rate Report Step 7.

7. On the Immunization Cover Rate Report Status screen, click the “Refresh” button as needed until the output options have a status of “Complete”.
    - Output options will have a “Queue” status prior to a “Complete” status.

On the Immunization Coverage Rate Report Status screen some reports will automatically generate and will appear in the *Job Name – Evaluation Date* and *Age Range – Evaluation Date* sections. Click on the hyperlink to view the auto generated reports in a PDF file listing the clients who are within the specified range. This list will give the name, address, and telephone number for all clients meeting the record criteria. To view clients for all age ranges that meet the criteria, click the All Age Ranges link. The number of reports that will automatically generate will vary based on the age range of clients assessed.

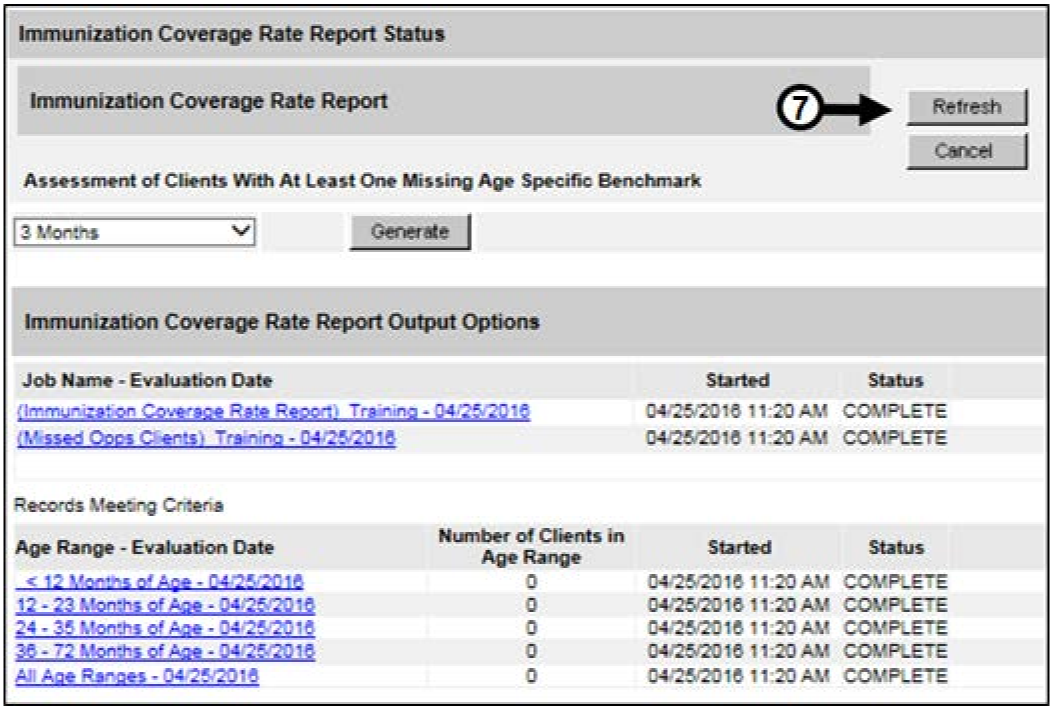


Figure 173 - Generate Immunization Coverage Rate Report Step 7

Users may also run additional reports for clients missing age specific benchmark by selecting an age from the drop down list in the top section of the screen and click on the “Generate” button. This report lists the client’s name, address, telephone number, and the vaccinations that they completed, did not complete, or refused by the benchmark age.

Immunization Coverage Rate Report Data

The following information outlines the data that displays in the *Immunization Coverage Rate Report*.

Records Analyzed

Age Group	Records Analyzed	Inactive	Records Meeting
36-72 Months of Age	51	0	51
24-35 Months of Age	38	1	37
12-23 Months of Age	35	0	35
< 12 Months of Age	78	0	
Total	202	1	123

Figure 174 - Records Analyzed Table

Table 21 - Records Analyzed Data Fields

Field	Description
Age Group	This column displays the age ranges used for evaluation.
Records Analyzed	This column displays the count of clients within the age group that are included in this report.
Inactive	This column displays the count of clients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Clients, for information on marking clients as inactive.
Records Meeting Criteria	Displays whether the Reminder / Recall was generated by the State.

Age Specific Immunization Benchmarks Requirements

The Age-Specific Immunization Benchmarks table shows how many doses of each vaccine are required for a client at the age listed at the left to be UP-TO-DATE (UTD). These counts are the criteria used in the Assessment of Clients Meeting Age-Specific Benchmarks report. *See Figure 175: Age Specific Immunization Benchmarks Table.*

Age Specific Immunization Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	2	1
@ 19 months	4	3	3	1	3	2	1
@ 21 months	4	3	3	1	3	2	1
@ 24 months	4	3	3	1	3	2	1
@ 72 months	5	3	4	2	4	2	1

Figure 175 - Age Specific Immunization Benchmarks Table

Assessment of Clients Meeting Age Specific Benchmarks

Assessment of Clients Meeting Age Specific Benchmarks									
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
@ 3 months	20	22	8		11	8		195	1.0%
@ 5 months	4	2	0		0	0		189	.0%
@ 7 months	4	1	0		1	0		129	.0%
@ 9 months	4	3	0		1	0		126	.0%
@ 12 months	4	2	0		2	0		123	.0%
@ 16 months	2	2	0	3	1	0	1	109	.0%
@ 19 months	2	1	0	3	0	0	1	105	.0%
@ 21 months	2	1	0	3	0	0	1	99	.0%
@ 24 months	1	0	0	2	0	0	1	88	.0%
@ 72 months	0	0	0	0	0	0	0	28	.0%

Figure 176 - Clients Meeting Age Specific Benchmarks Table

Table 22 - Clients Meeting Age Specific Benchmarks Information Table

Field	Description
UP-TO-DATE (UTD) Age	This column shows the maximum age the client has attained by the assessment date.
Vaccine Columns	These seven columns display the count of the clients who have met the vaccination criteria by the UP-TO-DATE age.
Total Meeting Age Criteria	Total Meeting Age Criteria: This column gives a count of all the clients who are at least the age listed under UP-TO-DATE Age. However, the 72 Months UP-TO-DATE Age category includes clients from 48 to 72 months of age.
% Coverage	This column displays the percentage of clients meeting all UP-TO-DATE criteria, out of a total of all clients at least the age listed under UP-TO-DATE Age.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations

These tables break down the children who could have been brought up to date into three tables, ≤12 months, 24-36 months, and 60-72 months.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	2	5.7%
<= 1 Months of Age	1	50.0%
<= 2 Months of Age	1	50.0%
<= 3 Months of Age	0	.0%
<= 4 Months of Age	0	.0%

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
24-36 Months	0	.0%
1 Vaccine Needed	0	
2 Vaccine Needed	0	
3 Vaccine Needed	0	
4 Vaccine Needed	0	

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
60-72 Months	0	.0%
1 Vaccine Needed	0	
2 Vaccine Needed	0	
3 Vaccine Needed	0	
4 Vaccine Needed	0	

Figure 177 - Children Who Could Have Been Brought Up-To-Date Tables

Table 23 - Children Who Could Have Been Brought Up-To-Date Fields

Field	Description
Column 1	In the first row of column one, the age range of clients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of clients is displayed.
Column 2	In the first row of column two, a count is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of clients for this age group who need 1, 2, 3, or 4 additional vaccinations to be up-to-date.
Column 3	In the first row of column three, a percent is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of clients for this age group). Subsequent rows within this column display a percentage of clients for this age group who need 1, 2, 3 or 4 additional vaccinations to be up-to-date.

Children Who Got a Late Start or Have Dropped Off Schedule After a Good Start

Late Start Rates: A client who did not receive one full dose of DTaP by 90 days of age is considered to have a late start. The values in column three of the late start row are the percentages of clients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of clients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart. *See Figure 178: Children Who Got a Late Start Table.*

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age [1]	*98.8%*	36-72 mo. age group
		95.7%	24-35 mo. age group
		91.9%	12-23 mo. age group
Drop Off Rates	60-72 Months	*.0%*	60-72 mo. age group [2]
	48-59 Months	*12.5%*	48-59 mo. age group
	36-47 Months	*8.3%*	36-47 mo. age group
	12-23 mo. age	*4.3%*	24 month status
	24-35 mo. age	*5.4%*	12 month status [3]

Figure 178 - Children Who Got a Late Start Table

1) A client who did not receive dose 1 of DTAP by 90 days is considered to have gotten a “Late Start”.
2) Drop off rate @ 24 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 4 DTaP by 24 Months.
3) Drop off rate @ 12 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 3 DTaP by 12 Months.

Note*:* DTaP is the equivalent of a DTaP, a DTP, or a DT.

Parents Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series

The HepB chart gives the number and percentage of clients who did not receive a birth dose of the HepB vaccination and who did not complete the three-dose series. Clients evaluated are between six and 72 months old and have at least one immunization in ImmTrac2. *See Figure 179: Children Who Do Not Have Birth Dose of HepB Table.*

Clients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number [4]	Per Cent [5]
Clients Missing Birth Dose of Hep B	*42*	*79.2%*

Figure 179 - Children Who Do Not Have Birth Dose of HepB Table

Missed Opportunity Assessment

The missed opportunities report lists all an organization's clients who have missed opportunities to be vaccinated. This report lists the client's first and last names, birth date, and date of each missed opportunity by vaccine group. *See Figure 180: Children Who Do Not Have Birth Dose of HepB Table.*

Missed Opportunity Assessment					
Age Group on Evaluation Date	Total Clients in Age Group	Clients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
< 12 months 7 month benchmark	35	0	0.0%	4	11.4%
12-23 months 12 month benchmark	37	0	0.0%	9	24.3%
24-35 months 24 month benchmark	23	0	0.0%	9	39.1%
36-72 months 36 month benchmark	80	0	0.0%	20	25.0%

Figure 180 - Children Who Do Not Have Birth Dose of HepB Table

Table 24 - Clients Meeting Age Specific Benchmarks Information Table

Field	***Description***
Age Group on Evaluation Date	This column lists the age group of the selected clients and the immunization benchmark used for evaluation.
Total Clients in Age Group	This column gives the total number of clients within the age group listed in the first column.
Clients Not Up to Date	This column gives the count and percentage of clients who are not up to date for the benchmark listed in column one.
Missed Op on Last Visit	This column gives the count and percentage of clients who are ***not*** up to date ***and*** who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

Note: ImmTrac2 only identifies clients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in ImmTrac2 does not include any clients that were treated at the user's organization for any other reason.

Immunization History Report

The *Immunization History Report* allows users to retrieve client immunization histories for a group of selected clients within their organization. This is the same immunization report available for each client, but it is generated for multiple clients in one report.

To generate the Immunization History Report, follow the steps below.

See Figure 181: Generate Immunization History Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Immunization History Report**.

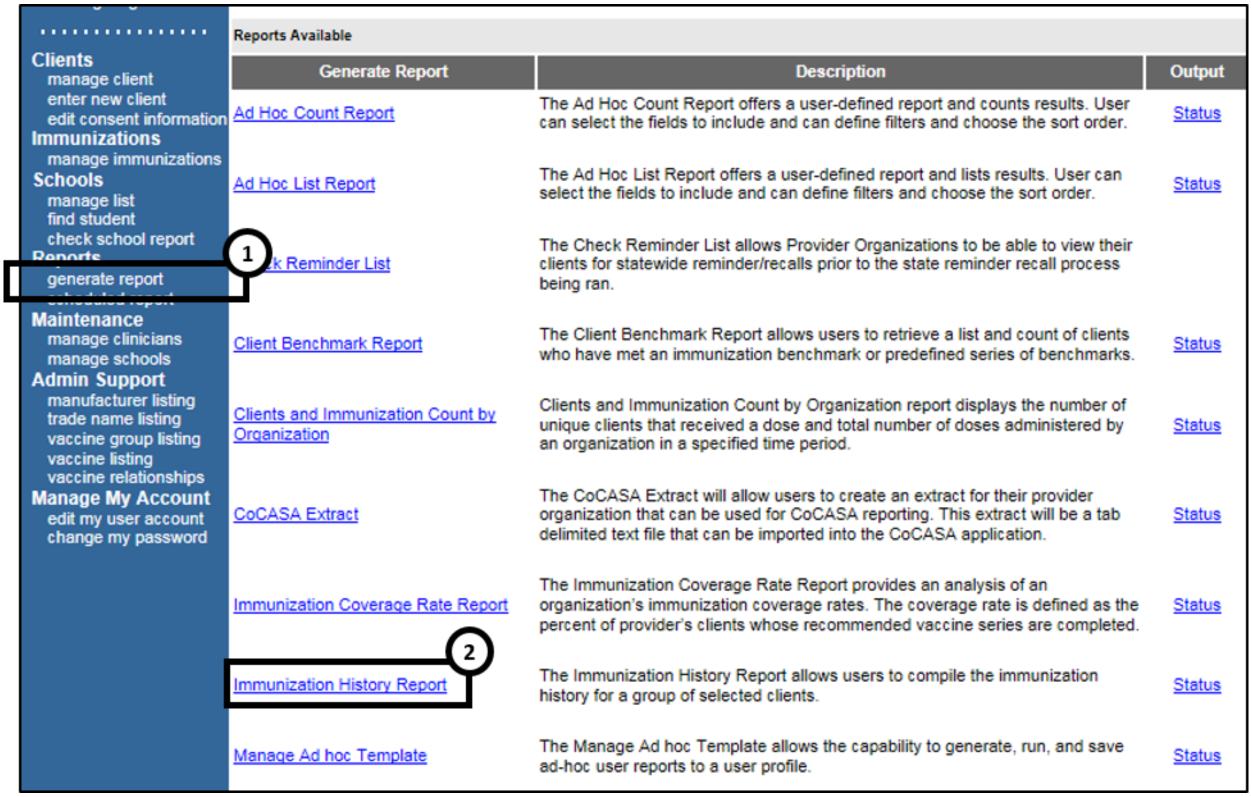


Figure 181 - Generate Immunization History Report Steps 1-2

See Figure 182: Generate Immunization History Report Steps 3-5.

3. Select the appropriate criteria: any combination of the criteria can be selected.
   - All patients within date of birth range: runs a report for clients in a specific birth date range by entering a "from" and "to" birth date in the MM/DD/YYYY format or use the calendar icon. This is the default when the Immunization History Reports screen opens.
   - All patients with immunization(s) administered by selected site: as a provider user, this field will auto populate with the user organization name and cannot be changed. Selecting this option alone will include all clients with immunization(s) administered by the user's organization.
   - All patients who received immunization(s) within these dates: includes in the report the clients who have an immunization in a specific date range. Enter a "from" and "to" date in MM/DD/YYYY format or use the calendar icon.

4. Choose a sort order.
    - The options are by “Last Name, then Age” or by “Age, then Last Name”.
5. After criteria has been selected, click the “Generate” button.
    - Click the “Reset” button to restore default selections.
    - Click the “Cancel” button to return to the Generate Report screen.

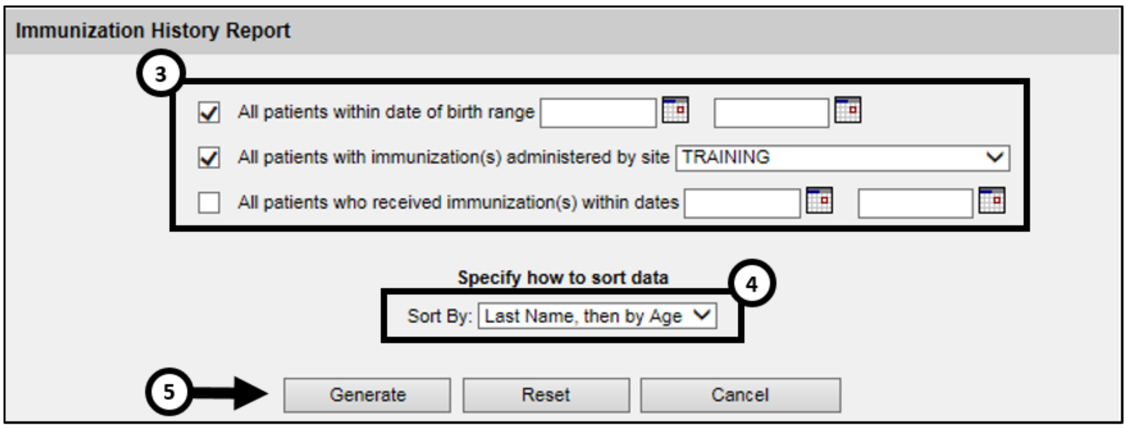


Figure 182 - Generate Immunization History Report Steps 3-5

See Figure 183: Generate Immunization History Report Steps 6-7.

6. When redirected to the History Report Request Status screen, click the “Refresh” button until the status is 100%.
7. When the report is ready, click on the blue hyperlink to open the Immunization History Report.
    - The report will open in a new browser tab in a PDF file. *See Figure: Generate Immunization History Report Example.*
    - The report will include the immunization history for all clients who meet the selected criteria.
    - The Immunization History Report(s) will be available on the History Report Request Status screen for up to 7 days.

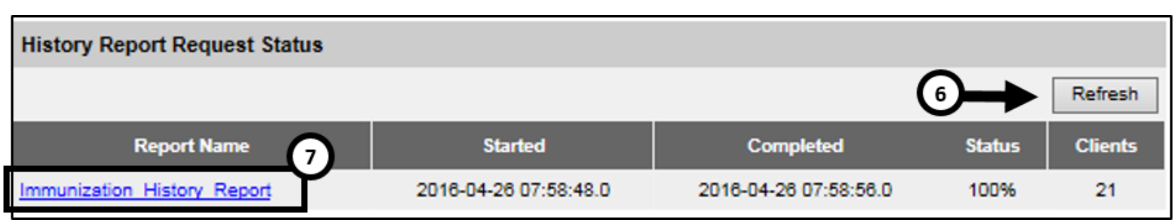


Figure 183 - Generate Immunization History Report Steps 6-7

26 April 2016

ImmTrac2, the Texas Immunization Registry

Training

Immunization History Report

Client ID: Tracking Schedule: ACIP

Client Name: **MARY BOB**

Birth Date: 10/05/2015 Gender: **Female**

Age: 6 months, 21 days

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
Anthrax	03/30/2016		Anthrax [Anthrax]	Full					Training	
DTP/aP	01/10/2016	1 of 5	DTaP,5 pertussis antigens [DAPTACEL]	Full			PO		Training	
HepA	01/05/2016	Not Valid	HepA-Ped 2 Dose [Havrix-Peds 2 Dose]	Full			ID		Training	
HepB	01/05/2016	Not Valid	HepB-Adult [Engerix-B Adult]	Full			PO		Training	
	01/05/2016	1 of 3	HepB-Hib [Comvax]	Full			PO		Training	
Hib	01/05/2016	1 of 3	HepB-Hib [Comvax]	Full			PO		Training	
Ig	01/05/2016		RIg [BayRab]	Full					Training	
	03/30/2016		RIg [BayRab]	Full					Training	
Influenza-seasnl	04/11/2016	1 of 2	Flu trivalent injectable [AFLURIA]	Full					IR Physicians	
TBTest	01/05/2016		TBTest-PPD-ID [Aplisol]	Full					Training	
	04/11/2016		TBTest-PPD-ID [Aplisol]	Full					IR Physicians	

Reaction Descriptions:
No Records Found.

Client Comments: **Start Date:** **End Date:**
No Records Found.

Primary Physician:

Address:

-

Physician's Signature

MARY BOB **10/05/2015**

Figure 184 - Generate Immunization History Report Example

Manage Ad Hoc Templates

The *Manage Ad Hoc Template* menu option allows users to create, edit, and delete pre-defined ad hoc report templates. Templates can be used to run popular ad hoc reports without re-entering filters each time. Creating a template is unique to each user profile, and is not shared within an organization.

These templates displays on the Ad Hoc Report screens under the "Populate with customer template?" section for selection when generate an AD Hoc report. *See Figure 185: Select a Customer Template Example.*

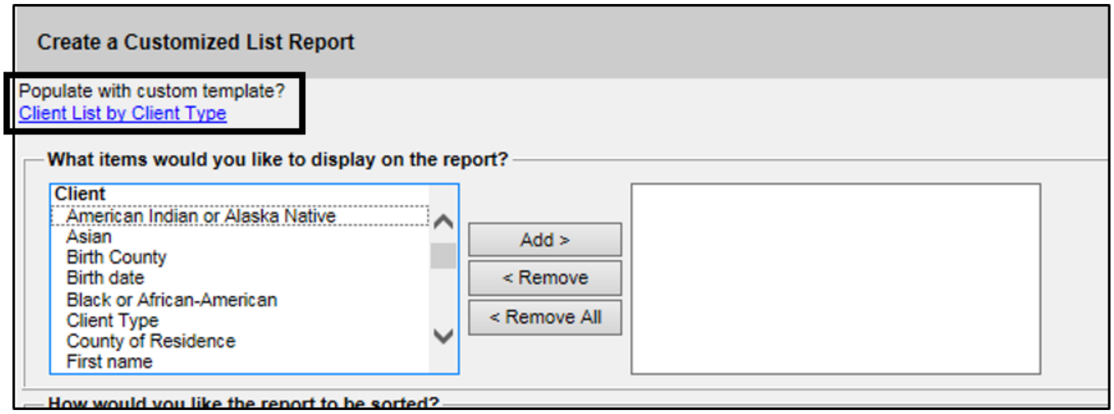


Figure 185 - Select a Customer Template Example

Create a New Ad Hoc Template

To create a new Ad Hoc Template, follow the steps below.

See Figure 186: Create Ad Hoc Template Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

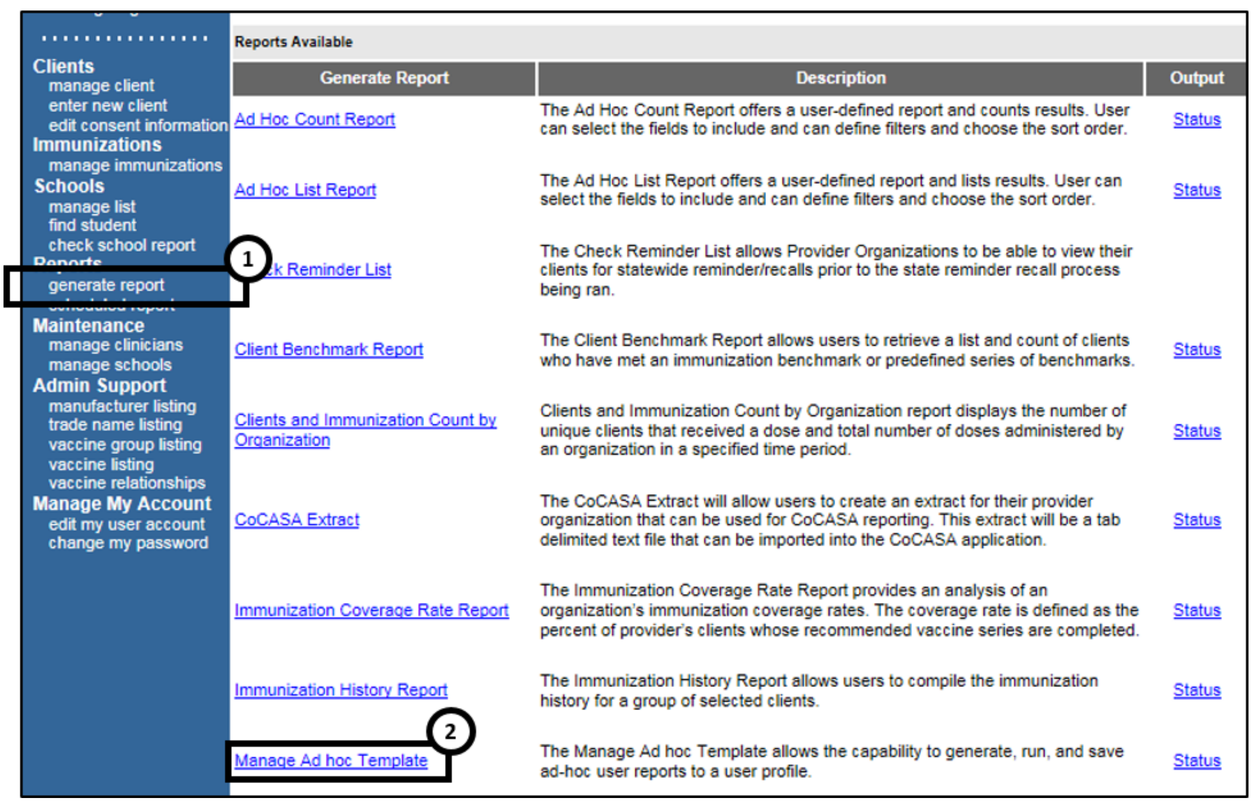


Figure 186 - Create Ad Hoc Template Steps 1-2

See Figure 187: Create Ad Hoc Template Steps 3-4.

3. Use the drop down arrow to “Pick a report to begin”. Choose to create either an Ad Hoc Count Template or an Ad Hoc List Template.
4. Depending on the selection, click the “New Ad Hoc Count” button or the “New Ad Hoc List” button to select the criteria for the template.
    - All existing templates displays as a link below the “Manage Ad Hoc Templates” section.

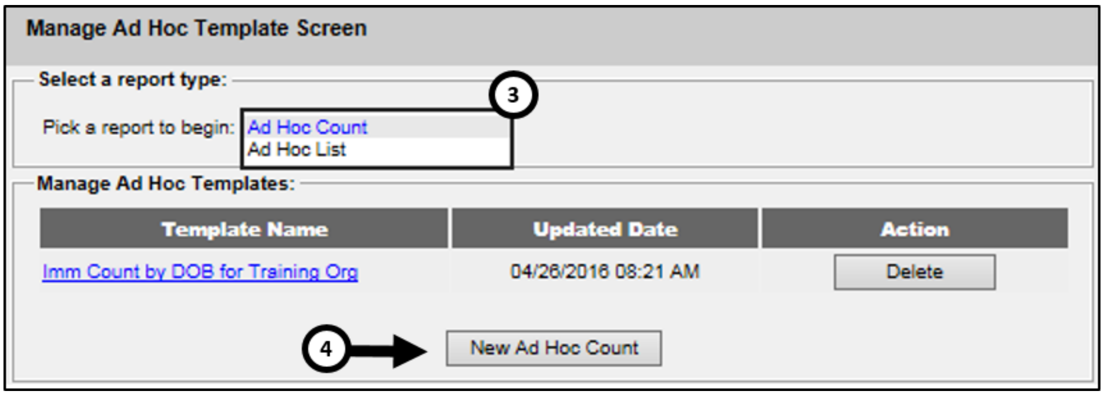


Figure 187 - Create Ad Hoc Template Steps 3-4

See Figure 188: Create Ad Hoc Template Steps 5-7.

5. On the Create Customize Report screen, select the template criteria. For details on the Ad Hoc Count or List report data fields, see the Ad Hoc Count Report section and the Ad Hoc List Report section.
6. Enter the template name in the “Name your template” box.
7. Click the “Save” button.
    - Click the “Cancel” button to return to the Generate Report screen.

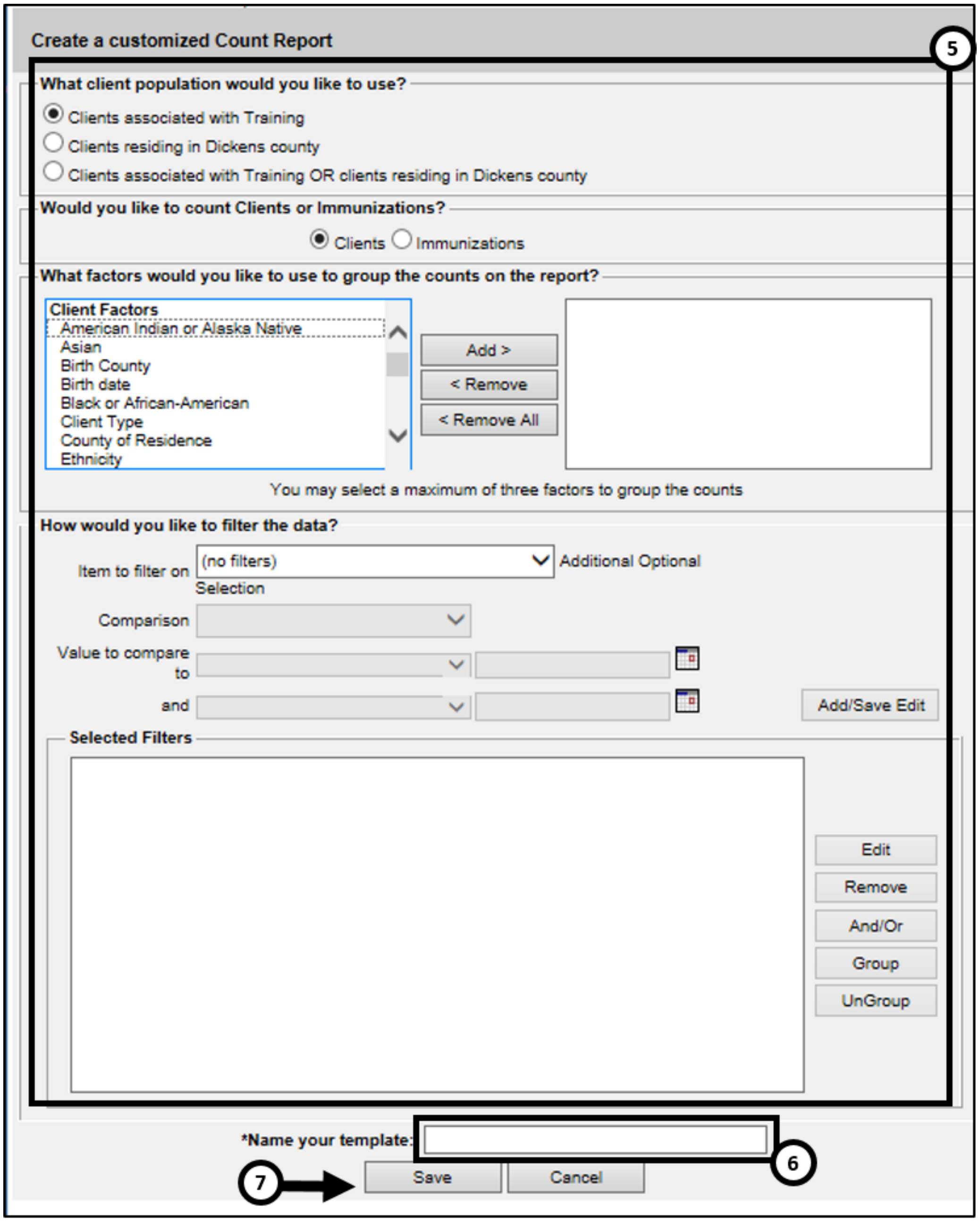


Figure 188 - Create Ad Hoc Template Steps 5-7

Edit an Ad Hoc Template

To edit an Ad Hoc Template, follow the steps below.

See Figure 189: Edit Ad Hoc Template.

1. After opening the Manage Ad Hoc Template Screen, use the drop down arrow to “Pick a report to begin”. Select the Ad Hoc Count Template or an Ad Hoc List Template depending on which template needs to be edited.

2. When the list of templates display, click on the hyperlink of the template to edit.
3. Make edits to the template criteria based on information listed in the Manage Ad Hoc Template section. For details on how to use the Ad Hoc Count or List report, See the Ad Hoc Count Report section and the Ad Hoc List Report section.
4. Click the "Save" button.
   - Click the "Cancel" button to return to the Generate Report screen.

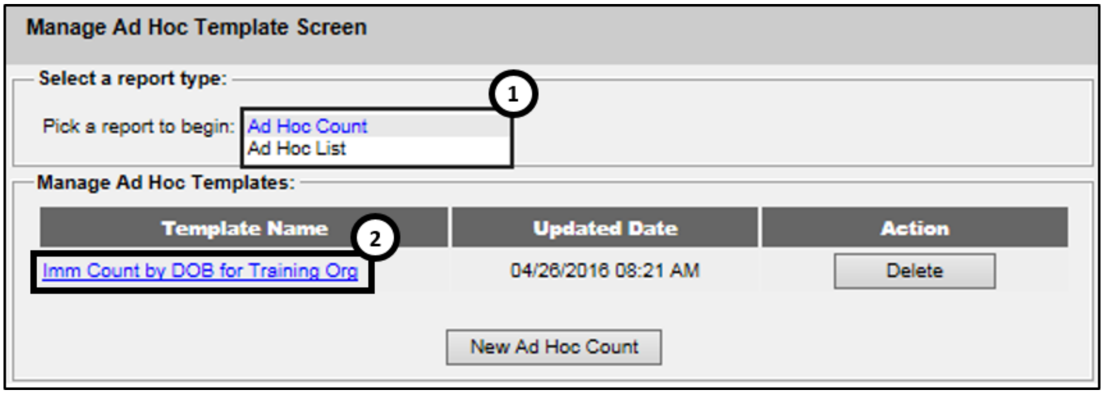


Figure 189 - Edit Ad Hoc Template

Delete an Ad Hoc Template

To delete an Ad Hoc Template, follow the steps below.

See Figure 190: Delete Ad Hoc Template Steps 1-3.

1. On the Manage Ad Hoc Template Screen, use the drop down arrow to "Pick a report to begin". Select the Ad Hoc Count Template or an Ad Hoc List Template depending on which template needs editing.
2. When the list of templates display, click the "Delete" button in the Action column corresponding to the template to be deleted.
3. Click "OK" when asked "Are you sure you want to delete?"
   - Users are returned to the Manage Ad Hoc Template Screen and the template will be deleted.

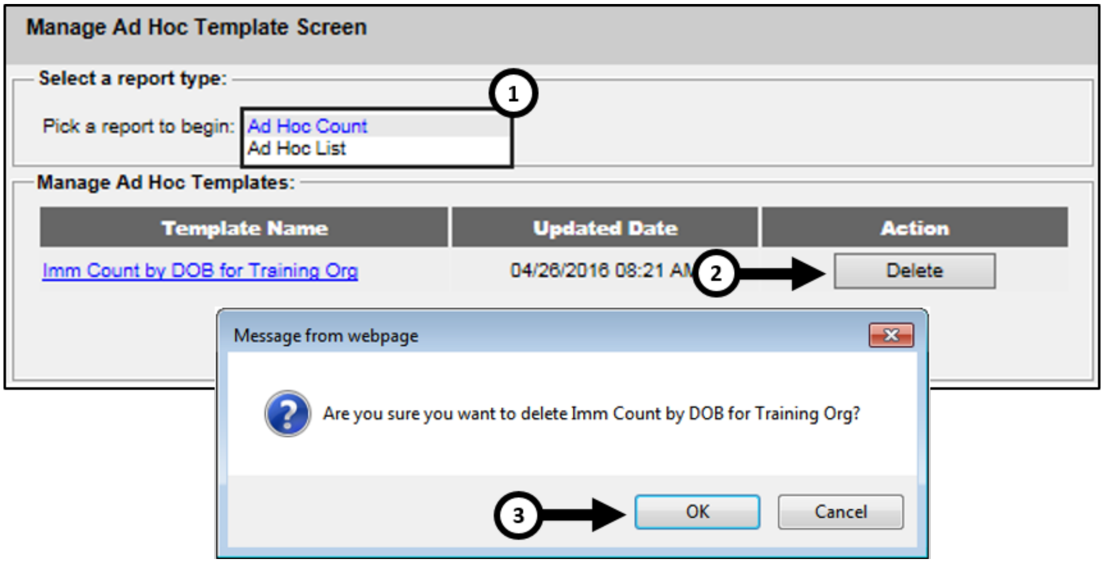


Figure 190 - Delete Ad Hoc Template Steps 1-3

Reminder / Recall Custom Letters

In addition to the standard letter, ImmTrac2 allows users to create and store up to three custom letters to be used for reminders and recalls. Once a custom letter is created it is available for selection on the Reminder Request Output Option screen for the Reminder Report. *See Figure 191: Generate Reminder / Recall Custom Letters.*

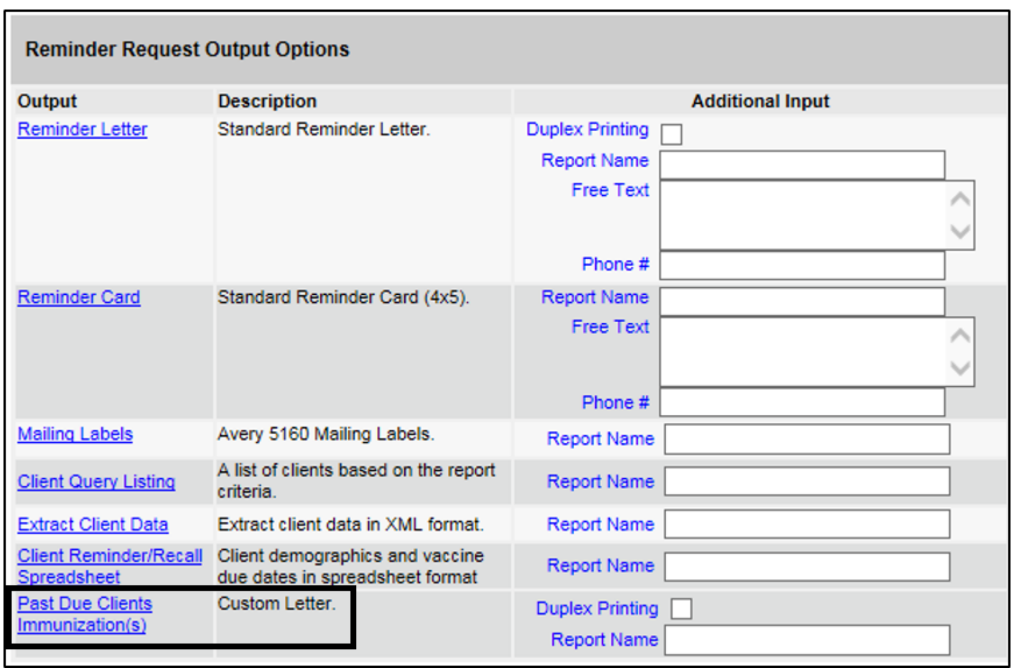


Figure 191 - Generate Reminder/Recall Custom Letters

Create a New Reminder / Recall Custom Letter

To create Reminder / Recall Custom Letters, follow the steps below.

See Figure 192: Generate Reminder / Recall Custom Letters Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

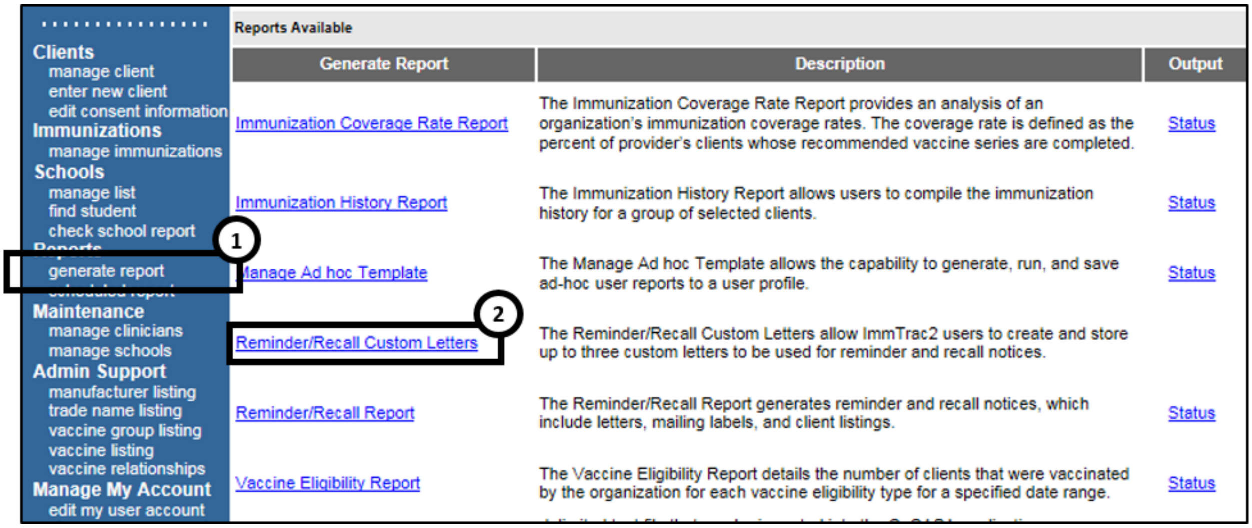


Figure 192 - Generate Reminder / Recall Custom Letters Steps 1-2

See Figure 193: Reminder / Recall Custom Letters Step 3.

3. On the Reminder / Recall Custom Letter screen, click the New Custom Letter link to begin creating the custom letter.

Figure 193 - Generate Reminder / Recall Custom Letters Step 3

See Figure 194: Reminder / Recall Custom Letters Steps 4-5.

4. Use the *Reminder / Recall Custom Letters Data* table to help complete the customized template.
5. Enter the Custom Letter Name, and then Click the “Save” button.
   - The screen will refresh, but no message displays.
   - Click the “Cancel” button to return to the previous Reminder / Recall Custom Letters screen as seen in step 3, where the newly create letter displays as a hyperlink.

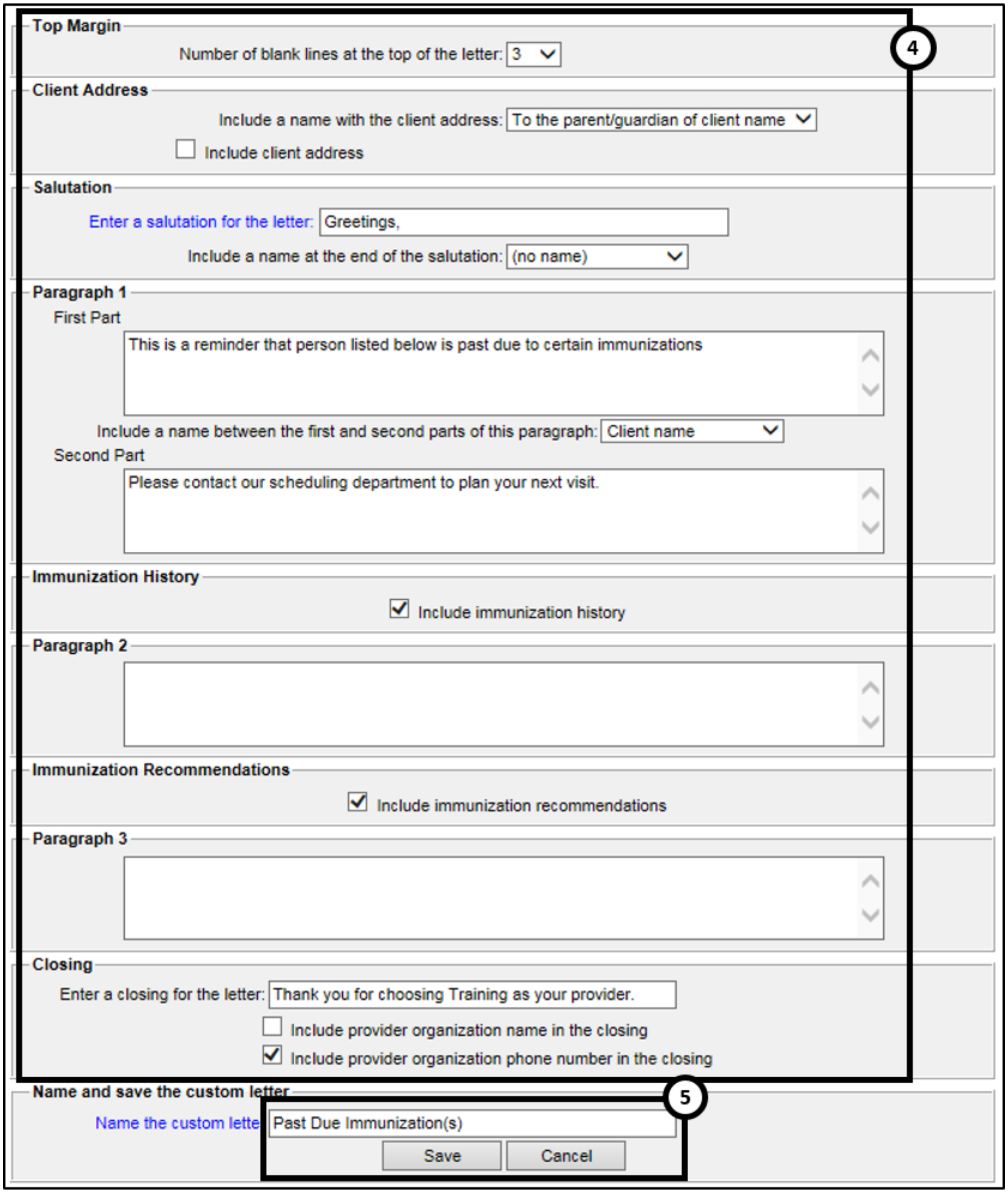


Figure 194 – Reminder / Recall Custom Letters Data Steps 4-5

Table 25 – Reminder / Recall Custom Letters Data Fields

Field	Description
Top Margin	From the drop down list provided, choose the number of blank lines at the top of the letter. **These blank spaces will leave room for your office letterhead.** This field will default to 3.
Client Address	Check the box to include the client's address at the top of the letter.
Salutation (1 of 2)	Enter a greeting in the text box to begin the letter. For example, "Dear" or "Greetings".
Salutation (2 of 2)	Use the drop down arrow to determine if you want to **Include a name at the end of the salutation**. • If "Name" is selected, the name of the client will show up after the salutation. • If "Responsible Person" is chosen, the letter will read <salutation> Parent / Guardian of <client name>. For example, "Dean Parent / Guardian of Peggy Sue".
Paragraph 1 (1 of 2)	First Part: Enter desired text. Enter up to 4,000 characters of text in this field.
Paragraph 1 (2 of 2)	Include a name between the first and second part of this paragraph: Choose the name to appear within the paragraph from the drop down list. Select either parent / guardian, client name or no name.
Paragraph 1 (3 of 2)	Second Part: If it was chosen to enter a name, add the remaining text for the first paragraph in this field.
Immunization History	Check the box to include the client's immunization history in the letter.
Paragraph 2	Enter desired text. Enter up to 4,000 characters of text in this field.
Immunizations Recommended	Check this box to include the immunization forecast for the client in the letter.
Paragraph 3	Enter desired text. Enter up to 4,000 characters of text in this field.
Closing (1 or 2)	Enter a closing word or statement for the letter in this field.
Closing (2 or 2)	If the provider's organization name and / or telephone number are included after the closing, make a selection using the appropriate check boxes.

Edit a Reminder / Recall Custom Letter

To edit an existing Reminder / Recall Custom Letter, follow the steps below.

See Figure 195: Edit Reminder / Recall Custom Letters.

1. Once users have navigated to the Reminder / Recall Custom Letter screen, click the custom letter link.

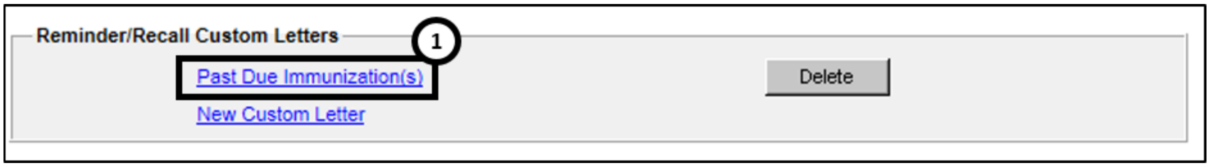


Figure 195 - Edit Reminder/Recall Custom Letters

Update the custom letter data or letter name as needed, and then click the "Save" button. See the Reminder / Recall Custom Letters Data Fields for details on the each date field.

- The screen will refresh, but no message displays.
- Click the "Cancel" button to return to the previous Reminder / Recall Custom Letters screen. If the letter name was updated, the new name displays.

Delete a Reminder / Recall Custom Letter

To delete an existing Reminder / Recall Custom Letter, follow the steps below.

See Figure 196: Delete Reminder / Recall Custom Letters.

1. Once users have navigated to the Reminder / Recall Custom Letter screen, click the "Delete" button next to the letter to be deleted.

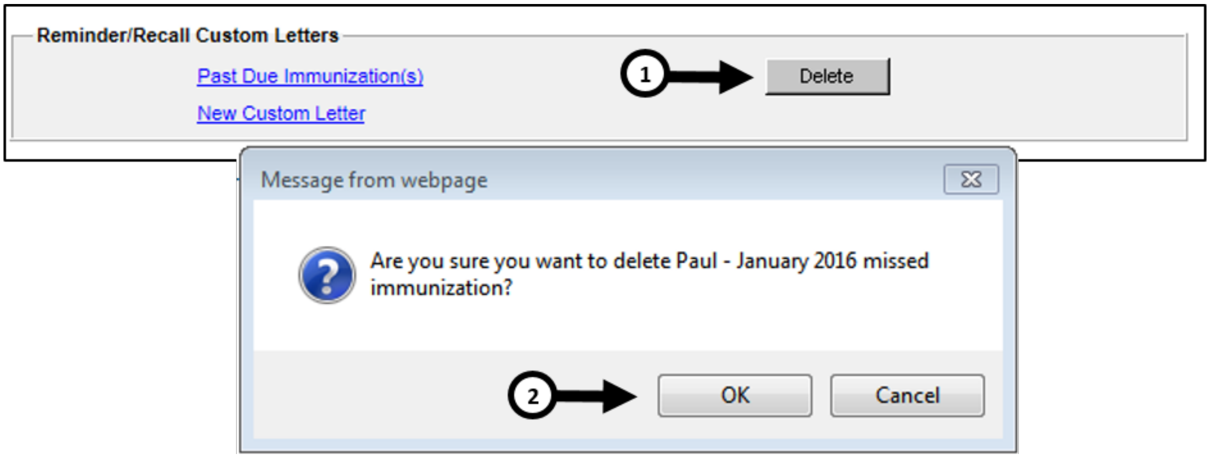


Figure 196 - Delete Reminder / Recall Custom Letters

Reminder / Recall Reports

The Reminder / Recall Report generates client notices, which include letters, cards, mailing labels, and client listings.

Reminder and Recall notices can be generated for each client if the following conditions are met:

- The client status is "Active" in the Client Information Section for your organization.
- The "Allow Reminder and Recall Contact?" indicator in the Client Information Section is "Yes".
- The client has complete address information listed in the Address Information Section.

To generate the Reminder / Recall Report, follow the steps below.

See Figure 197: Generate Reminder / Recall Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

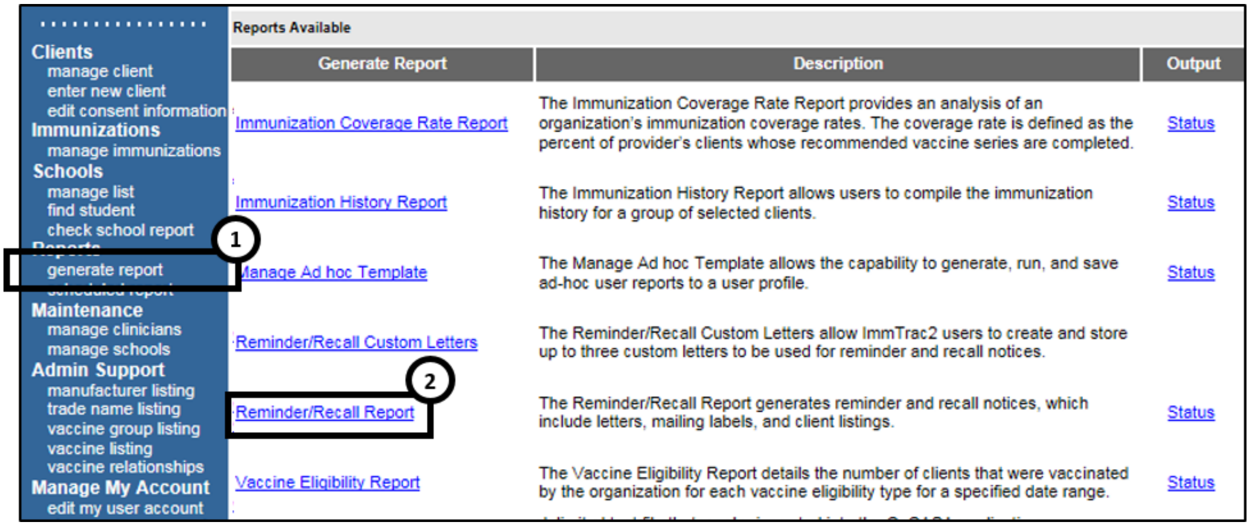


Figure 197 - Generate Reminder / Recall Report Steps 1-2

See Figure 198: Generate Reminder / Recall Report Steps 3-7.

3. The Create New List Section gives users the option of selecting saved reminder / recall request criteria or creating a new reminder recall request.
    - **Enter new Reminder / Recall Request Criteria:** Selecting the radio button and supplying a list name will generate a new reminder / recall request report that can be generated as a report or saved as a template and later generated as a report.
    - **Use a previous Reminder / Recall Request Criteria:** Selecting the "Use a previous Reminder / Recall Request Criteria" radio button and selecting a list name displays that template's criteria. Once the criteria displays, users can edit the criteria from the previous list before generating the report.
4. **Select a Client Population:** this enables reporting of a specific population.
5. **Indicate the Tracking Schedule**: choose which set of recommended immunizations and corresponding dates will be compared to each client's immunization history.
6. **Select the Vaccine Group to Report on**: choose which vaccines will be included in the report by selecting a vaccine and clicking the “Add” button. Also select which vaccines to include, vaccines that are *Due Now, Past Due,* or *Both*.
7. **Selecting Subpotent Recall**: This filters will show the clients with Sub-potent vaccinations recorded.

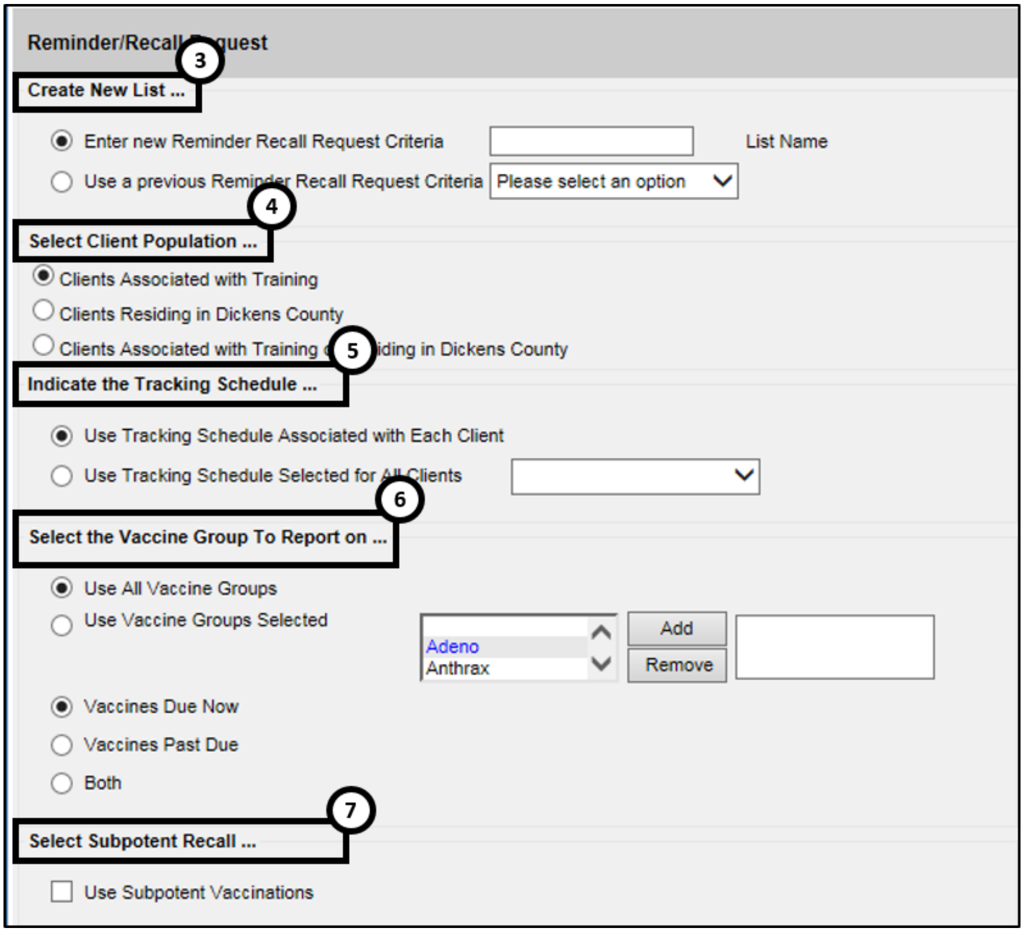


Figure 198 - Generate Reminder / Recall Reports Steps 3-7

See Figure 199: Generate Reminder / Recall Report Steps 8-13.

8. **Selecting a School or Primary Care Provider**: This filters clients who have been assigned to the selected school or physician.
9. **Enter Additional Demographic Information**: Entering and / or selecting these options allows filtering of clients whose records match specific demographic information.
10. **Enter the Date criteria**: Select a Date Ranges to filter clients.
    - Target Date – Entering a target date range will return clients who are due now, are past due, or will be due for the selected vaccine within the specified date range.

- Birth Date - Entering a birth date range will return clients who have a birth date that falls between the dates entered.
- Age Range - Entering an age range will return clients who age falls between the dates entered.

11. **Select Vaccine Groups to Display**: Selecting Vaccine Groups to display will filter for the vaccine groups that displays on the report as being recommended. By default, all vaccine groups that are due now or past due displays on the report.
12. **Specify How to Sort the Report Data**: Allows a choice of sorting options. The default is last name in ascending order, then first name in ascending order.
13. Click the “Save & Generate” button to save the request criteria and to generate the report.
    - If previous Reminder / Recall Request Criteria was selected, this will save any changes made to template.
    - Click the “Generate” button to generate the report and not save as a template or save changes to the criteria list.
    - Click the “Cancel” button to return to the Generate Reports screen.

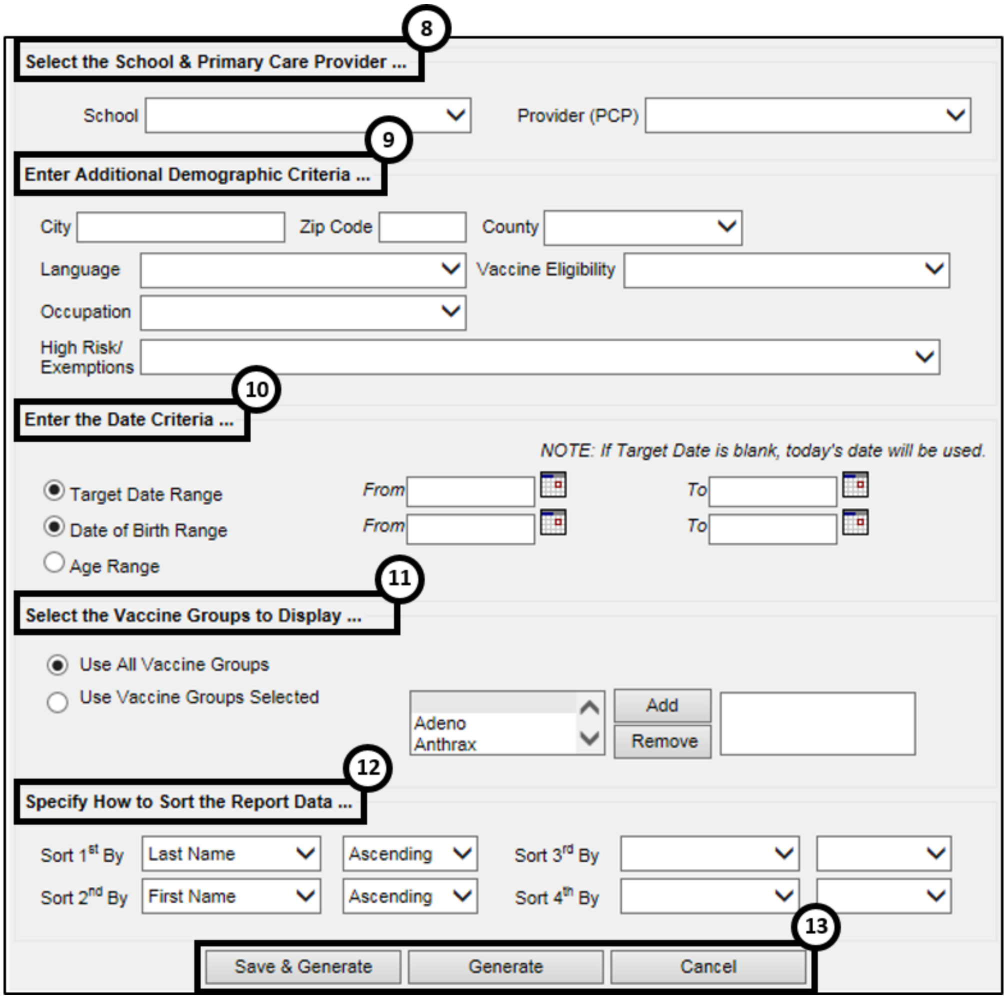


Figure 199 - Generate Reminder / Recall Report Steps 8-13

Reminder Request Status Screen

Once the reports are generates, the **Reminder Request Status** screen displays. This screen will only retain one report at a time, and as new reports are generate the previous report will no long be accessible. The status indicates the percentage of completion for the report. Periodically click on **Refresh** to update the completion percentage information. The time it will take for the report to generate will depend upon the number of clients associated with the provider organization.

This screen will also display all the reminder output options that were generate for the specific report.

See Figure 200: Generate Reminder / Recall Reports – Status Screen Steps 1-2.

1. When redirected to the Reminder Request Status screen, you can click the “Refresh” button until the status is 100%.
2. When the report is ready, click on the blue hyperlink to go to the Reminder Request Process Summary screen.

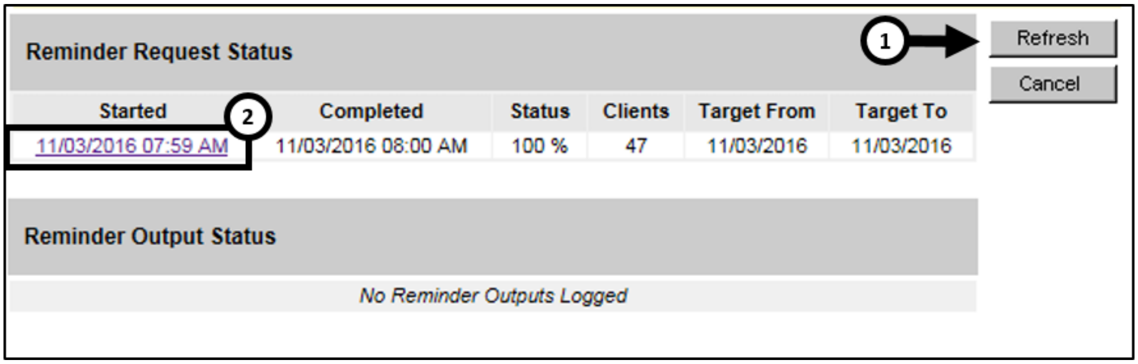


Figure 200 - Generate Reminder / Recall Reports – Status Screen Steps 1-2

***Note**: The report will run in the background similar to other reports, allowing users to exit ImmTrac2 or work on other ImmTrac2 tasks until it completes. To go to “generate report” on the menu panel and click the Status link next to the Reminder / Recall Report link.*

Reminder Request Process Summary Screen

The Summary screen is broken up into three sections: Reminder Request Criteria, Reminder Request Output Options, and Last Notice Date Options. From the Summary screen, users may create various reminder output options.

Reminder Request Criteria: This section lists the number of clients involved in the search and the criteria used to define the search. The *Total Number of Clients Eligible for Reminder* is dependent upon the search criteria and is narrowed down by each criteria step. *See Figure 201: Reminder Request Criteria.*

Reminder Request Process Summary

Reminder Request Criteria

Step	Criteria Evaluated at this Step	Clients
1	Clients **associated** with *Training*.	171
2	Clients **immunized** by *Training*.	160
3	Clients that are **active** within *Training* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **School** is not specified; • **Provider** is not specified.	135
4	Clients that have a **Valid Address**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified.	47
5	Clients that meet the following criteria regarding vaccination status: • Clients that are **Past Due** for one or more vaccinations **as of 11/03/2016**; • Use all **vaccine groups**; • Use **ACIP** for all clients.	47
	Total Number of Clients Eligible for Reminder	**47**

Figure 201 - Reminder Request Criteria

Reminder Request Output Options: This section lists the various output options available, including both standard outputs and custom outputs. *See Table 26: Reminder Request Output Data* and *Figure 202: Reminder Request Output Options.*

Table 26 - Reminder Request Output Data

Column	***Description***
Output	This column displays the types of reports that can be produced. These reports are described in detail in the table below. Clicking the Hyperlink in the Output column will generate the report that was selected.
Description	This column provides a brief description of the output option.
Additional Input	This column displays options for including additional information on the output report and defining a report. • **Report Name:** Enter the Name to describe the output report. • **Free text:** Enter in text that will appear on the report. • **Phone#:** Enter in the phone number that will appear on the output report.

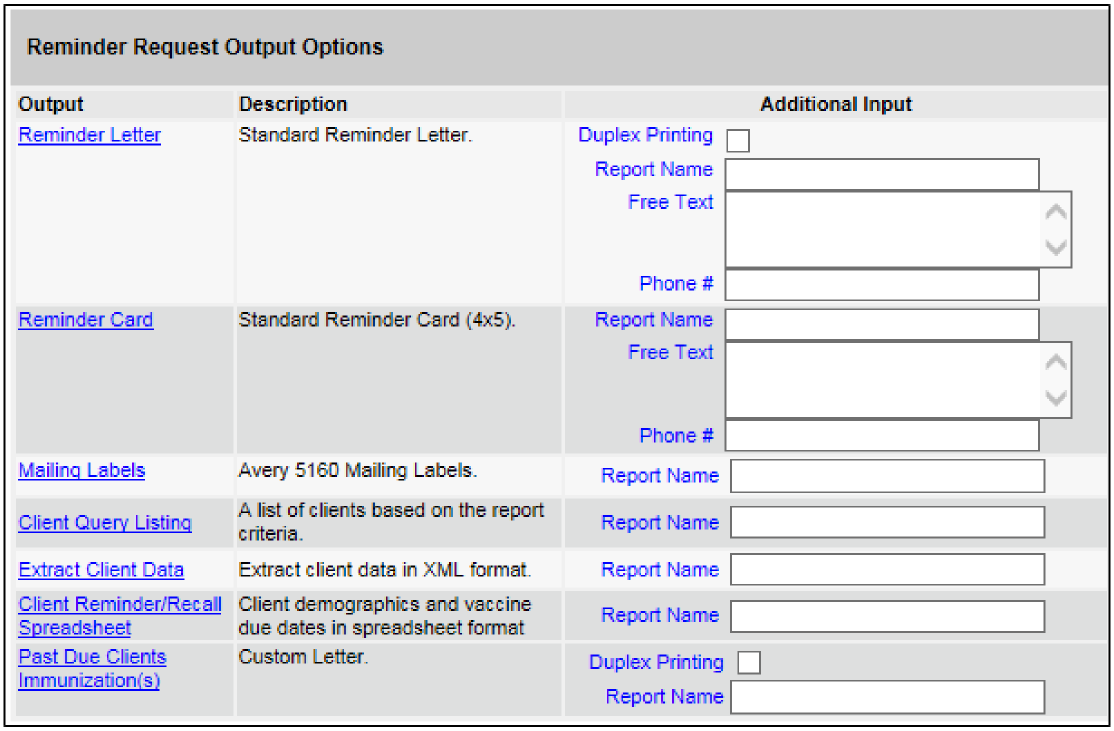


Figure 202 - Reminder Request Output Options

Reminder Letter

The letter output option allows users to generate a standard form letter to the parent / guardian for each client returned on the query. The letter allows room at the top for the organization's letterhead. The body of the letter includes the client's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number.

To generate Reminder Letters, follow the steps below.

See Figure 203: Generate Reminder Letter Steps 1-2.

1. Under the *Additional Input* column, there are options to enter the following:
    - **Duplex printing** – inserts a blank page between each letter to accommodate two-sided printing.
    - **Report Name** - if a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.

- **Free Text** - include a maximum of 400 characters in this field. This information will be displayed as the closing for each letter.
- **Phone** - the telephone number is presented in the closing for each of the letter.

2. Click the "Reminder Letter" hyperlink.

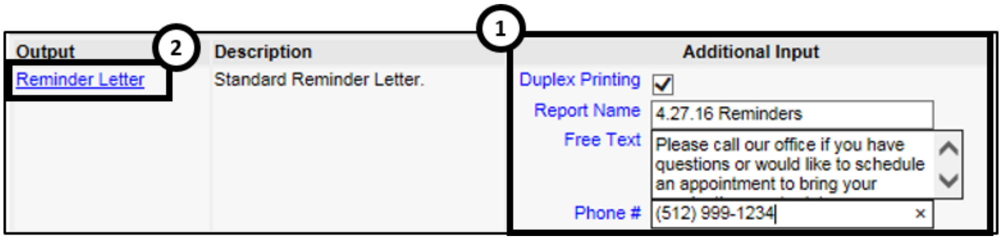


Figure 203 - Generate Reminder Letter Steps 1-2

See Figure 204: Generate Reminder Letter Steps 3-4.

3. Users are redirected back to the Reminder Request Status screen. If needed click the "Refresh" button until the status is "Ready".
4. The "Reminder Letter" will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish.
    - Clients who have selected Spanish as their "Language Spoken" option in the Client Information tab of the client's record, will appear on the Spanish output option.
    - Click on the "Reminder Letter" hyperlink to view or print the letters in a PDF file. Reminder Letter Example - *See Figure 205: Generate Reminder Letter Example.*

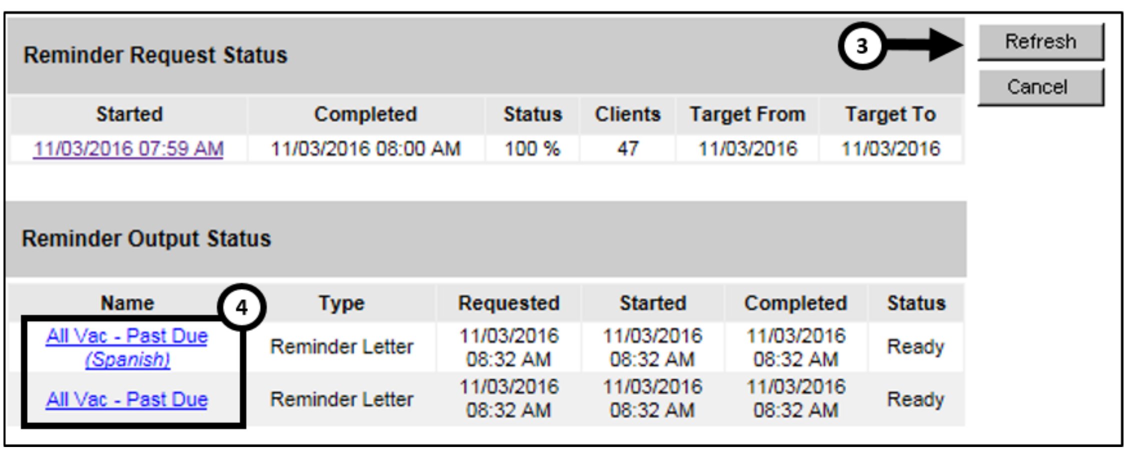


Figure 204 - Generate Reminder Letter Steps 3-4

Dear Parent/Guardian of Brian Blue,

Our records indicate that Brian Blue has received the following immunizations:

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	09/28/2016	1 of 5	DTaP
HepB	09/28/2016	1 of 3	HepB-Peds
Hib	09/28/2016	1 of 3	Hib-HbOC
Influenza-seasnl	09/28/2016	1 of 2	Flu injectable MDCK

Our records also show that Brian Blue may be due for the following immunizations. If Brian received these or other immunizations from another health care provider, please call our office so that we can update Brian's record. Otherwise please take Brian to a health care provider to receive them.

Immunizations Due
Flu NOS
HepA, NOS
HepB, NOS
Hib, NOS
MMR
PCV13
Polio, NOS
Varicella

Please call our office if you have questions or would like to schedule an appointment to

The number for our office is: (512) 999-1234

Figure 205 - Generate Reminder Letter Example

Reminder Card

The Reminder Card output option allows users to generate a standard reminder card for the parent / guardian for each client returned on the query. The card allows room at the top for a greeting. The body of the card includes the client’s recommended immunizations and due dates. There are up to two lines for free text and / or a telephone number.

To generate Reminder Cards, follow the steps below.

See Figure 206: Generate Reminder Card Steps 1-2.

1. Under the *Additional Input* column, users have the option of entering:
   a. **Report Name** - if a Report Name is not indicated, the report will simply be named "Reminder Card" on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
   b. **Free Text** - include a maximum of 400 characters in this field. This information will be displayed as the closing for each card.
   c. **Phone** - the telephone number is presented in the closing for each of the card.
2. Click the "Reminder Letter" hyperlink.

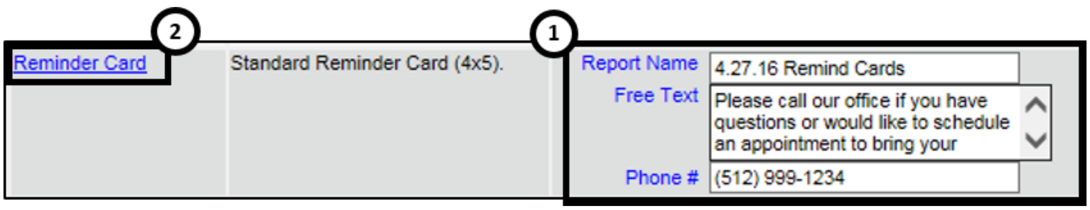
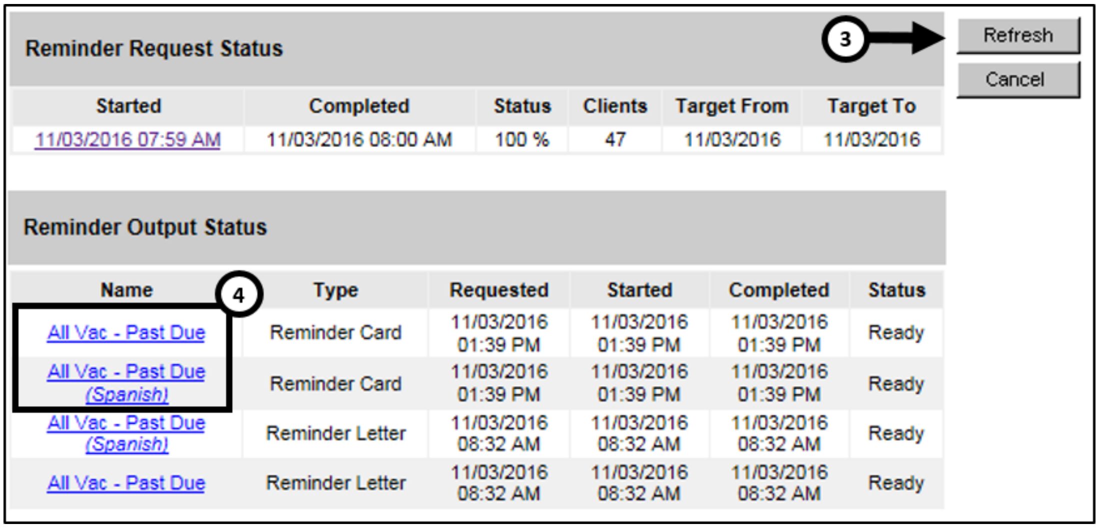


Figure 206 - Generate Reminder Card Steps 1-2

See Figure 207: Generate Reminder Card Steps 3-4.

3. Users are redirected back to the Reminder Request Status screen, and if needed click the "Refresh" button until the status is "Ready".
4. The Reminder Card will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish. Click on the "Reminder Card" hyperlink to view or print the letters in a PDF file. *See Figure 208: Generate Reminder Card Example.*



Reminder Request Status

Refresh

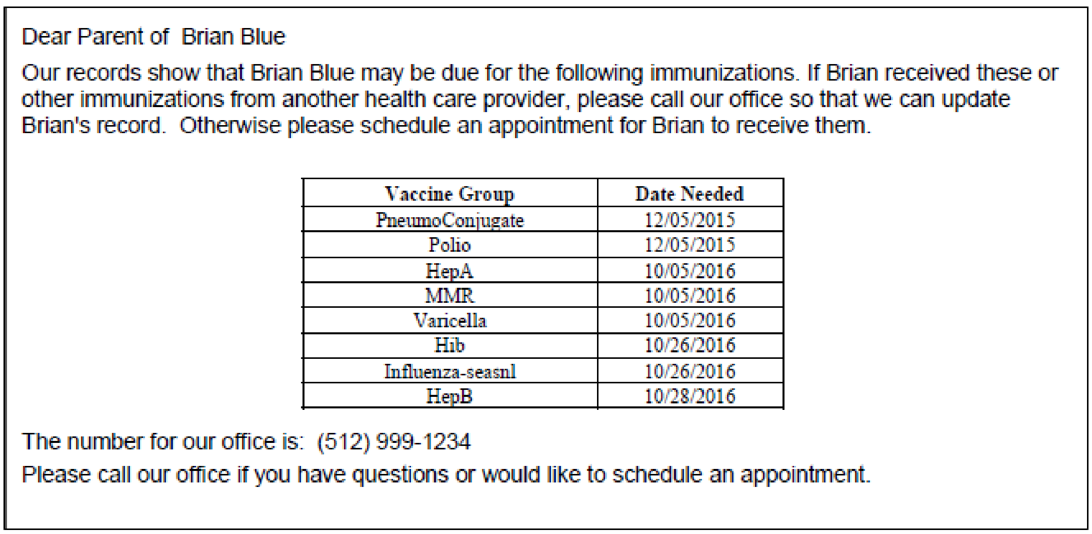
Cancel

Started	Completed	Status	Clients	Target From	Target To
11/03/2016 07:59 AM	11/03/2016 08:00 AM	100 %	47	11/03/2016	11/03/2016

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
All Vac - Past Due	Reminder Card	11/03/2016 01:39 PM	11/03/2016 01:39 PM	11/03/2016 01:39 PM	Ready
All Vac - Past Due *(Spanish)*	Reminder Card	11/03/2016 01:39 PM	11/03/2016 01:39 PM	11/03/2016 01:39 PM	Ready
All Vac - Past Due *(Spanish)*	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready
All Vac - Past Due	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready

Figure 207 - Generate Reminder Card Steps 3-4



Dear Parent of Brian Blue

Our records show that Brian Blue may be due for the following immunizations. If Brian received these or other immunizations from another health care provider, please call our office so that we can update Brian's record. Otherwise please schedule an appointment for Brian to receive them.

Vaccine Group	Date Needed
PneumoConjugate	12/05/2015
Polio	12/05/2015
HepA	10/05/2016
MMR	10/05/2016
Varicella	10/05/2016
Hib	10/26/2016
Influenza-seasnl	10/26/2016
HepB	10/28/2016

The number for our office is: (512) 999-1234

Please call our office if you have questions or would like to schedule an appointment.

Figure 208 - Generate Reminder Card Example

Mailing Labels

The labels output option produces 30 labels per screen on Avery Mailing Labels #5160. *See Figure 209: Generate Reminder Mailing Labels Example.*

To the Parent/Guardian of:	To the Parent/Guardian of:	To the Parent/Guardian of:
ANCE MARLIN BOB	LANI BOB	LARRY BOB
234 MULBERRY LANE	123 MULBERRY LANE	123 MULBERRY DRIVE
AUSTIN TX 78749	AUSTIN TX 78723	AUSTIN TX 78749

Figure 209 - Generate Reminder Mailing Labels Example

Client Query Listing

The Client Query Listing displays contact information for those clients identified as being due / overdue in the Reminder / Recall output in a report format. This report lists every client that was returned in the report query process. See Figure 210: Client Query Listing Example.

Report run on : 04/27/2016 **Client Query Listing** Page 1 of 1

Client Name (FML)	Phone Number	Address	City/State/ZIP
ANCE MARLIN BOB - 10/05/2015		234 MULBERRY LANE	AUSTIN, TX 78749

Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	02/02/2016	1) 01/05/2016 (NV)
HepA	10/05/2016	
HepB	03/23/2016	1) 02/23/2016
Hib	04/03/2016	1) 02/03/2016
Influenza-seasnl	04/05/2016	1) 02/23/2016 (NV)
MMR	10/05/2016	1) 02/23/2016 (NV)
PneumoConjugate	04/23/2016	1) 02/03/2016 2) 02/23/2016 (NV)
Polio	04/03/2016	1) 02/03/2016
Rotavirus	03/23/2016	1) 02/03/2016 2) 02/24/2016 (NV)
Varicella	10/05/2016	

Figure 210 - Client Query Listing Example

Extract Client Data

The Client Extract Data displays in an XML format, and contains every client and their demographic information that was returned in the report query process.

Client Reminder / Recall Spreadsheet

The Client Extract Data displays client demographic information, immunization history, and recommendations for those clients identified as being due / overdue in the Reminder / Recall output in an Excel spreadsheet. This report lists every client that was returned in the report query process. See Figure 211: Reminder/Recall Spreadsheet Example.

Client Reminder/Recall Spreadsheet
Filters:
Type Clients that are **Due Now or Past Due** for one or more vaccinations **as of 04/27/2016**
To and From 04/27/2016 to 04/27/2016
Birthdate range is not specified
TXIIS 1111141000
Organization Name: Training
TVFC PIN: null

Client First Name	Client Last Name	Client Date of Birth	Parent/Guardian First Name	Parent/Guardian Last Name	Client Address 1	Client Address 2	Client City
ANCE	BOB	2015-10-05			234 MULBERRY		AUSTIN
LANI	BOB	2015-10-05			123 MULBERRY		AUSTIN
LARRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
MARY	BOB	2015-10-05			123 MULBERRY		AUSTIN
SALLY	BOB	2015-10-05			456 MULBERRY		AUSTIN
TERRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
TYLER	BOB	2015-10-05			123 MULBERRY		AUSTIN
BONNIE	CLYDE	2015-10-05	BOBBIE	MAGEE	123 MULBERRY		ELGIN
MAVIS	STAPLES	1939-07-10	OCEOLA	STAPLES	1100 W. 49TH ST		AUSTIN
AMANDA	SUE	2016-02-14			123 DECKER LN.		AUSTIN
MAX	SUE	2016-02-14			123 SHOWPLACE		AUSTIN
MYRTLE	TURTLE	2015-10-05			123 MULBERRY	34456	SIMCITY

Figure 211 – Reminder / Recall Spreadsheet Example

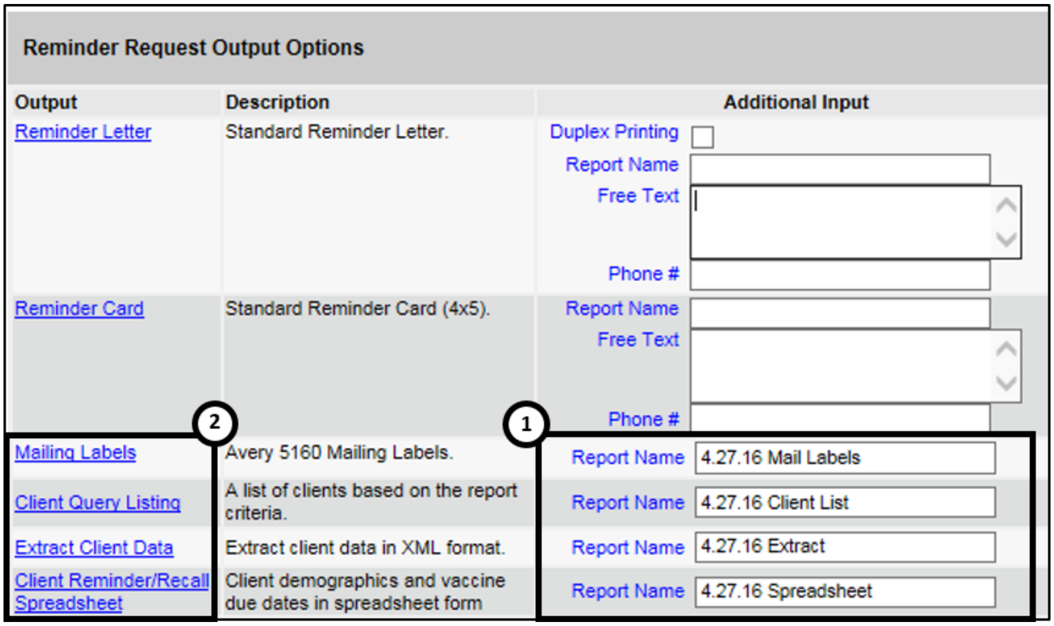
To generate the Mailing Labels, Client Query Listing, Extract Client Data, and Client Reminder / Recall Spreadsheet, follow the steps below.

***Note**: The reminder output options are generated one at a time.*

See Figure 212: Generate Reminder Output Options Steps 1-2.

Under the Additional Input column enter a **Report Name**. If a Report Name is not indicated, the report will simply be named for the output option listed on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in each file name field.

1. Click the applicable output option hyperlink.



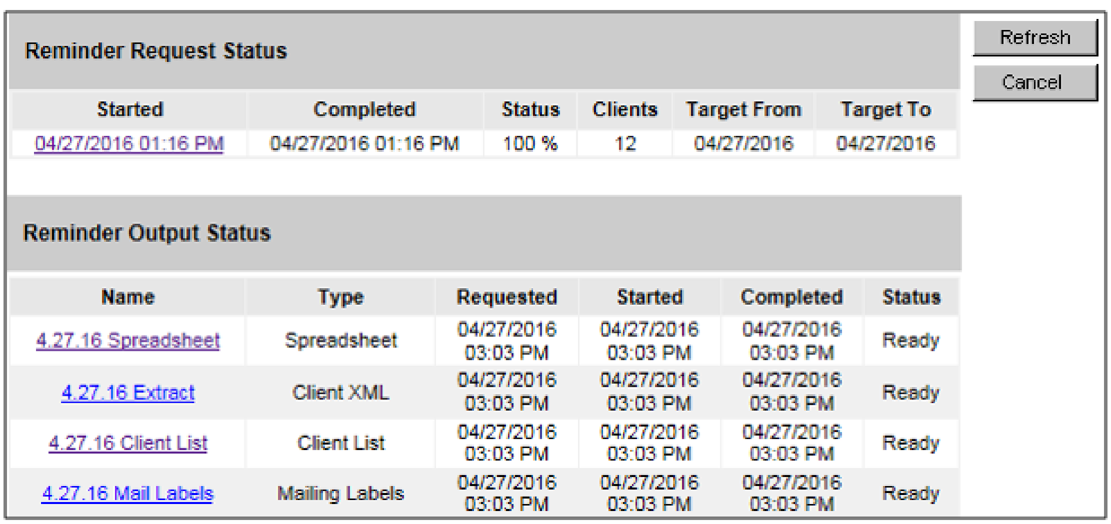
Reminder Request Output Options

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing Report Name Free Text Phone #
Reminder Card	Standard Reminder Card (4x5).	Report Name Free Text Phone #
Mailing Labels	Avery 5160 Mailing Labels.	Report Name: 4.27.16 Mail Labels
Client Query Listing	A list of clients based on the report criteria.	Report Name: 4.27.16 Client List
Extract Client Data	Extract client data in XML format.	Report Name: 4.27.16 Extract
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet form	Report Name: 4.27.16 Spreadsheet

Figure 212 - Generate Reminder Output Options Steps 1-2

See Figure 213: Generate Reminder Output Options Steps 3-4.

2. Users are redirected back to the Reminder Request Status screen. Click the “Refresh” button until the status is “Ready”.
3. Each reminder output will be listed in the Output Status section as an active hyperlink. Click on the applicable option to open the output file.



Reminder Request Status

Started	Completed	Status	Clients	Target From	Target To
04/27/2016 01:16 PM	04/27/2016 01:16 PM	100 %	12	04/27/2016	04/27/2016

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
4.27.16 Spreadsheet	Spreadsheet	04/27/2016 03:03 PM	04/27/2016 03:03 PM	04/27/2016 03:03 PM	Ready
4.27.16 Extract	Client XML	04/27/2016 03:03 PM	04/27/2016 03:03 PM	04/27/2016 03:03 PM	Ready
4.27.16 Client List	Client List	04/27/2016 03:03 PM	04/27/2016 03:03 PM	04/27/2016 03:03 PM	Ready
4.27.16 Mail Labels	Mailing Labels	04/27/2016 03:03 PM	04/27/2016 03:03 PM	04/27/2016 03:03 PM	Ready

Figure 213 - Generate Reminder Output Options Steps 3-4

Last Notice Date Options

The Reminder Request Process Summary screen allows users to reset the last notice date, which will affect future reminder / recall notices generated using this information. *See Figure 214: Reminder / Recall Last Notice Date Options.*

Preview Clients: view a list of clients included in the Reminder / Recall Report. This information includes a hyperlink to each client's demographic record. This is the same screen that display if the Check Reminder List is selected from the *Generate Report* menu option.

Increment Eligible: used to reset the last notice date for all clients eligible for this reminder. The last notice date is viewable on the client's demographic record under the organization information section.

Increment Immunized: used to increment the last notice date for all clients immunized by your organization.

Cancel: to return to the Reminder Request Status screen.

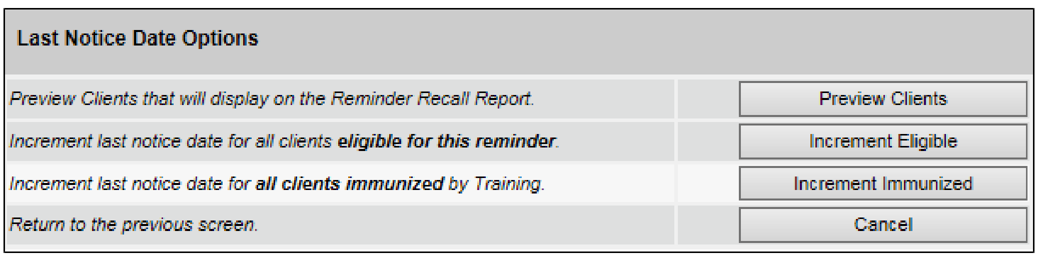


Figure 214 – Reminder / Recall Last Notice Date Options

Vaccine Eligibility Report

The Vaccine Eligibility Report details the number of clients that were vaccinated by an organization for each vaccine eligibility type or age group for a specified date range.

To generate the Vaccine Eligibility Report, follow the steps below.

See Figure 215: Generate Vaccine Eligibility Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Vaccine Eligibility Report**.

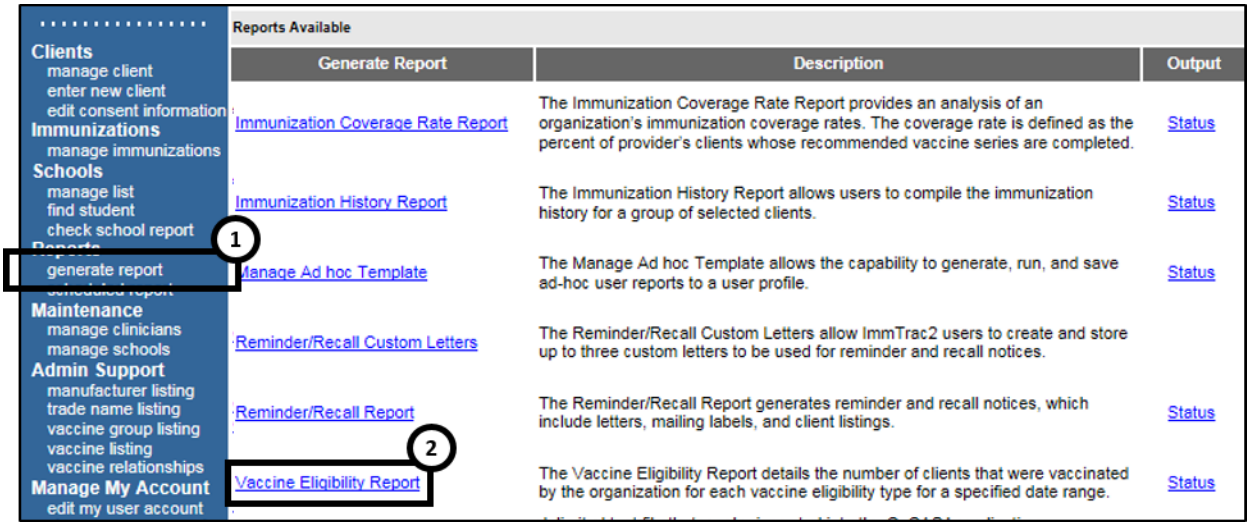


Figure 215 - Generate Vaccine Eligibility Report Steps 1-2

See Figure 216: Generate Vaccine Eligibility Report Steps 3-6.

3. Select an organization from the drop-down list.
4. Enter **From** and **To** dates under the Report Date Range using the MM/DD/YYYY format or use the calendar icon to select date.
5. Using the radio buttons select a Report Type:
   - The **Age Group** report displays a summary of clients by vaccine eligibility and four specific age ranges: <1 year of age, 1-6 years of age, 7-18 years of age, and 19 years and older.
   - The **Vaccine Group** report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the "Generate Report" button. The reports will be set to run. Click "Refresh" to see the current completion percentage.

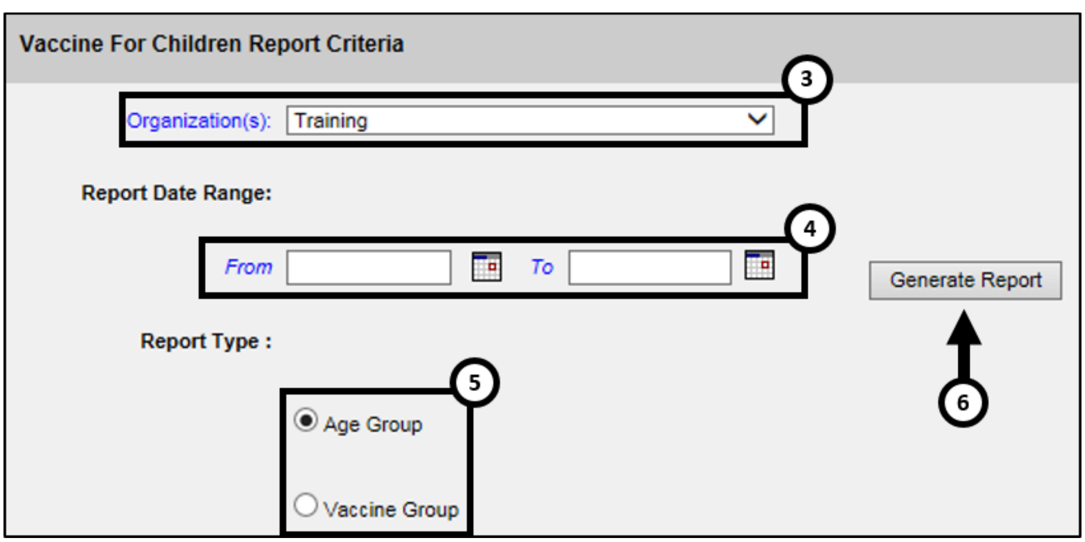
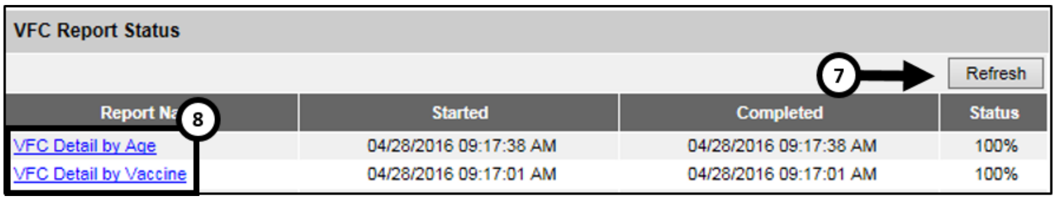


Figure 216 - Generate Vaccine Eligibility Report Steps 3-6

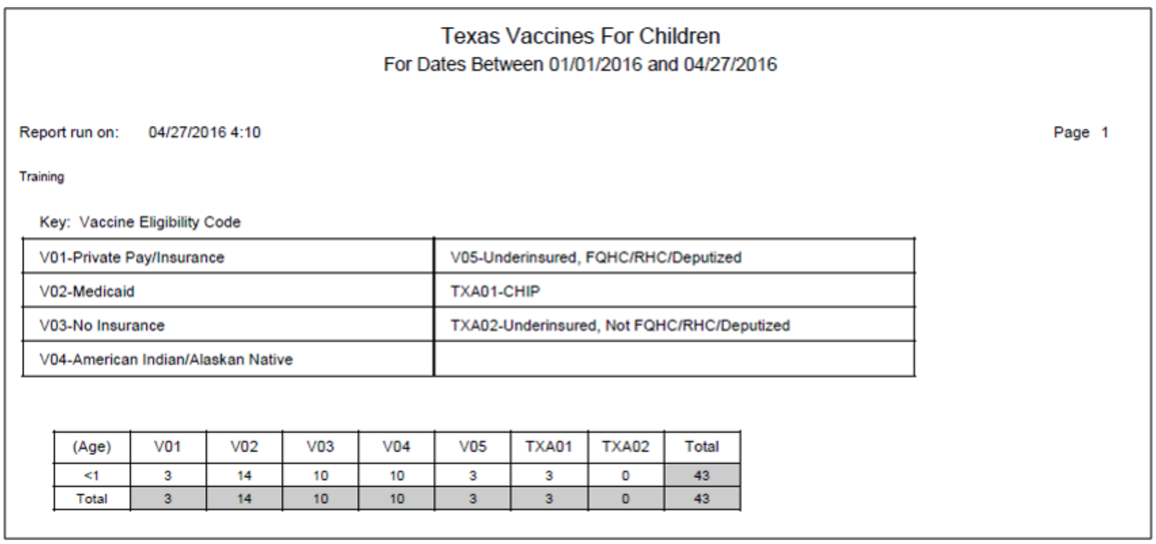
See Figure 217: Generate Vaccine Eligibility Report Steps 7-8.

7. Once users are redirected to the VFC (Vaccines for Children) Report Status screen, click the “Refresh” button until the status is 100%.
8. When the report is ready, click on the blue hyperlink to open the Vaccine Eligibility Report. *See Figure 218: Generate VFC Detail by Age Report Example* and *Figure 219: Generate VFC Detail by Vaccine Report Example.*



Report Name	Started	Completed	Status
VFC Detail by Age	04/28/2016 09:17:38 AM	04/28/2016 09:17:38 AM	100%
VFC Detail by Vaccine	04/28/2016 09:17:01 AM	04/28/2016 09:17:01 AM	100%

Figure 217 - Generate Vaccine Eligibility Report Steps 7-8



Texas Vaccines For Children
For Dates Between 01/01/2016 and 04/27/2016

Report run on: 04/27/2016 4:10 Page 1

Training

Key: Vaccine Eligibility Code

V01-Private Pay/Insurance	V05-Underinsured, FQHC/RHC/Deputized
V02-Medicaid	TXA01-CHIP
V03-No Insurance	TXA02-Underinsured, Not FQHC/RHC/Deputized
V04-American Indian/Alaskan Native	

(Age)	V01	V02	V03	V04	V05	TXA01	TXA02	Total
<1	3	14	10	10	3	3	0	43
Total	3	14	10	10	3	3	0	43

Figure 218 - Generate VFC Detail by Age Report Example

Texas Vaccines for Children

For Dates Between 01/01/2016 and 04/28/2016

Report run on: 04/28/2016 9:17

Organization: Training

Key: Vaccine Eligibility Code

V01-Private Pay/Insurance	V05-Underinsured, FQHC/RHC/Deputized
V02-Medicaid	TXA01-CHIP
V03-No Insurance	TXA02-Underinsured, Not FQHC/RHC/Deputized
V04-American Indian/Alaskan	

Vaccine	V01	V02	V03	V04	V05	TXA01	TXA02	Total
TBTest	0	0	5	0	0	0	0	5
DTP/aP-HepB-	0	1	0	0	0	0	0	1
Polio	0	4	4	0	0	0	0	8
Td/Tdap	0	0	4	0	0	0	0	4
Yellow Fever	0	0	1	0	0	0	0	1
Measles	0	1	0	0	0	0	0	1
Influenza-	0	1	0	0	0	0	0	1
DTP/aP	1	5	1	3	0	1	0	11
HPV	0	1	0	0	0	1	0	2
Influenza-	1	0	1	0	1	0	0	3
Meningo	0	0	0	0	1	0	0	1
Hib	0	0	2	1	0	2	0	5
PneumoConjug	1	3	2	1	0	1	0	8
HepB	1	4	3	1	0	2	0	11

Figure 219 - Generate VFC Detail by Vaccine Report Example

Chapter 16: Maintenance

The Maintenance section of the Menu Panel allows ImmTrac2 Providers and Provider Supervisor users to add and update information on clinicians and schools. Providers and Provider Supervisors may have limited access to the clinician options, but may contact ImmTrac2 Customer Support for additional help in modifying additional information.

Adding and maintaining this information is optional; however, these components will allow organizations to utilize more functionality when generating reports.

Manage Clinicians

Clinicians are the individuals administering immunizations at ImmTrac2 provider locations such as doctors' offices, clinics, and hospitals. Clinicians can be physicians, physician assistants, and nurses, and they can be associated with one or more clinic sites and organizations. Full Access Providers and Provider Supervisors can view clinicians associated to their organization(s).

Clinicians display as selection options in the Add Immunization process to identify who administered the vaccine. Certain clinicians (designated by license type) display as selection options for the Primary Care Provider (PCP) on the *Organization Information* tab in the client's record.

Within "Clinicians" records, there is a distinction between terms: Clinician and Prescribing Authority.

> **Clinician**: The Clinician role is used for an individual within a provider organization who is legally authorized to physically **administer a vaccine** to a client. When a listed individual is designated a Clinician, his or her name will be available for selection in the 'Administered By' drop down option field when entering new immunizations.
>
> **Prescribing Authority:** The Prescribing Authority role is used for an individual within a provider organization who is licensed by the State of Texas to order the **prescribing** of vaccines to a client. When a listed individual is designated a Prescribing Authority, his or her name will be made available for selection in the 'Prescribing Authority' field when editing an immunizations record.

Prescribing Authority / Clinician: When the individual within the organization serves as both the Clinician and Prescribing Authority, the Prescribing Authority / Clinician role is selected. In addition, his or her name will be made available for selection in both the 'Administered By' and Prescribing Authority' option fields.

View / Edit Clinician

Full Access Providers can only view clinician information. Provider Supervisor users have edit capability to change the clinician's Employee ID. Click the "Clinician List" button to display all active clinicians for the organization in a view only screen.

To view or edit a clinician, follow the steps below.

See Figure 220: View / Edit Clinician Info Steps 1-2.

1. Click the "Manage Clinician" option from the menu panel and a list of active clinicians displays.
2. Click a clinician's name to view the clinician information in the Edit Clinician screen. *See Figure 220: View / Edit Clinician Info Steps 1-2.*
   - If the list of clinician is too long to locate a name, use the "Find Clinician" button to perform a Clinician Search.
   - The "Clinician List" button displays a list of all clinicians and their role, but the clinician name is NOT an active hyperlink.

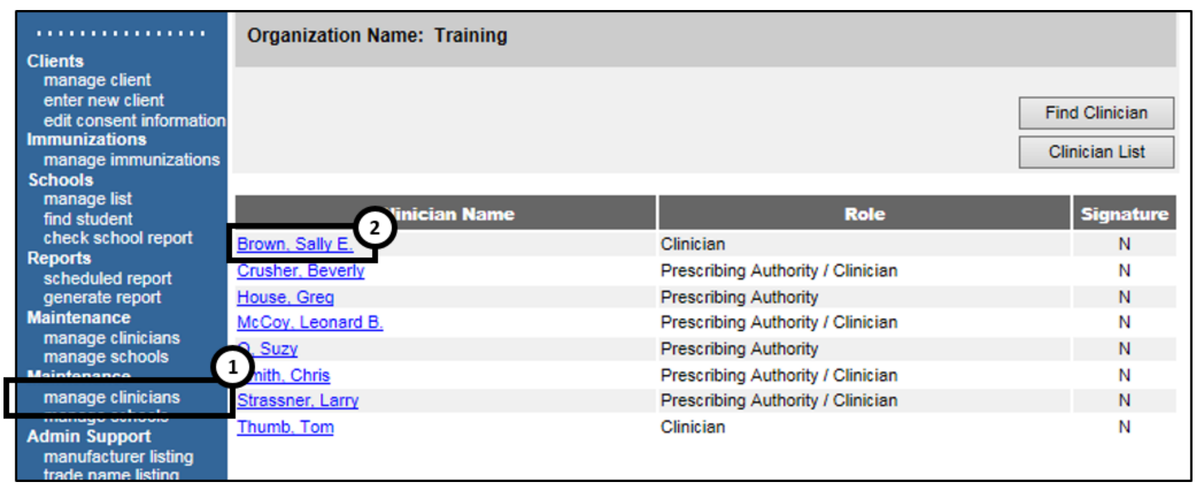


Figure 220 – View / Edit Clinician Info Steps 1-2

***Note**: The **Signature** column displays "N" dignifying the clinician's signature is not on file. Capturing signatures for the clinicians has not been implemented for ImmTrac2.*

See Figure 221: View / Edit Clinician Info Steps 3-4.

3. Update the Employee ID information.
4. Click the “Save” button. A “Record Updated” message displays at the top of the screen.

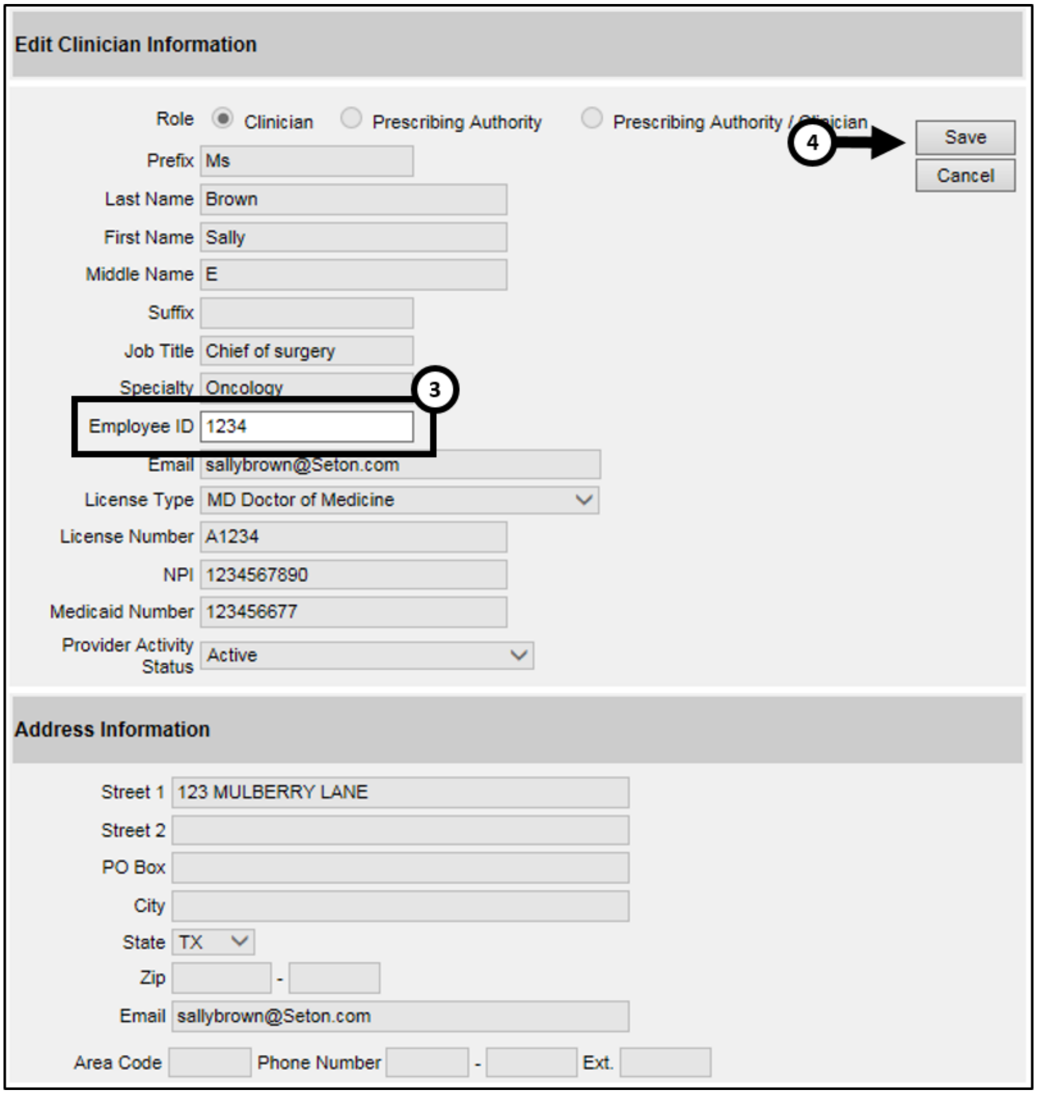


Figure 221 – View / Edit Clinician Info Steps 3-4

Clinician Search

The Clinician Search screen allows user to enter specific search criteria to find a clinician, and is helpful when organizations have a long clinician list. This screen will also list all active and inactive clinicians.

To search for a clinician, follow the steps below.

See Figure 222: Clinician Search Step 1.

1. After clicking the Manage Clinician option from the menu panel, click the “Find Clinician” button.

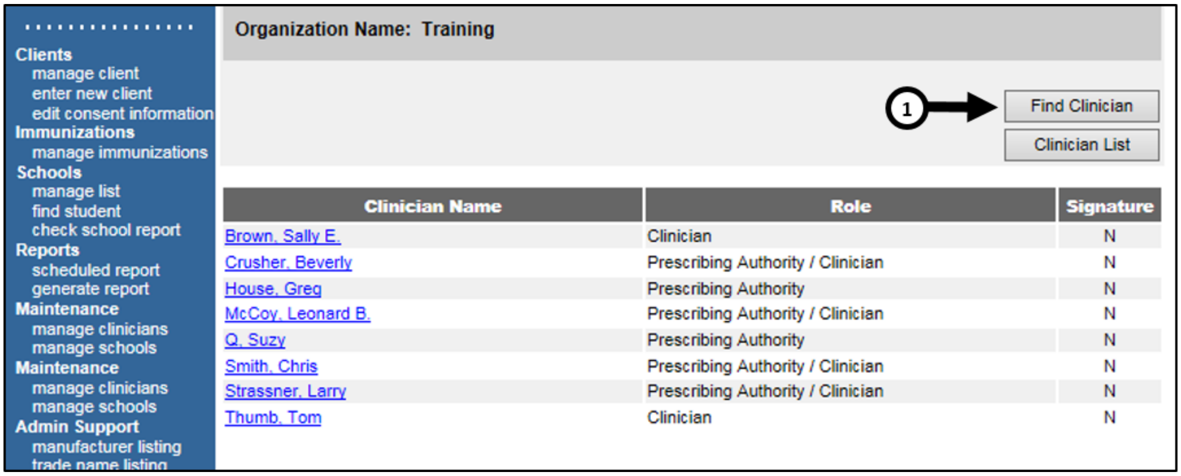


Figure 222 - Clinician Search Step 1

See Figure 223: Clinician Search Steps 2-3.

2. On the Clinician Search screen, enter the first and last name search criteria to limit search results.
   - It is only required to enter at least one letter of the first or last name to perform a search.
3. Click the “Find” button to view search results.
   - Clicking the “Find” button without entering search criteria will list all active and inactive clinicians for the organization.

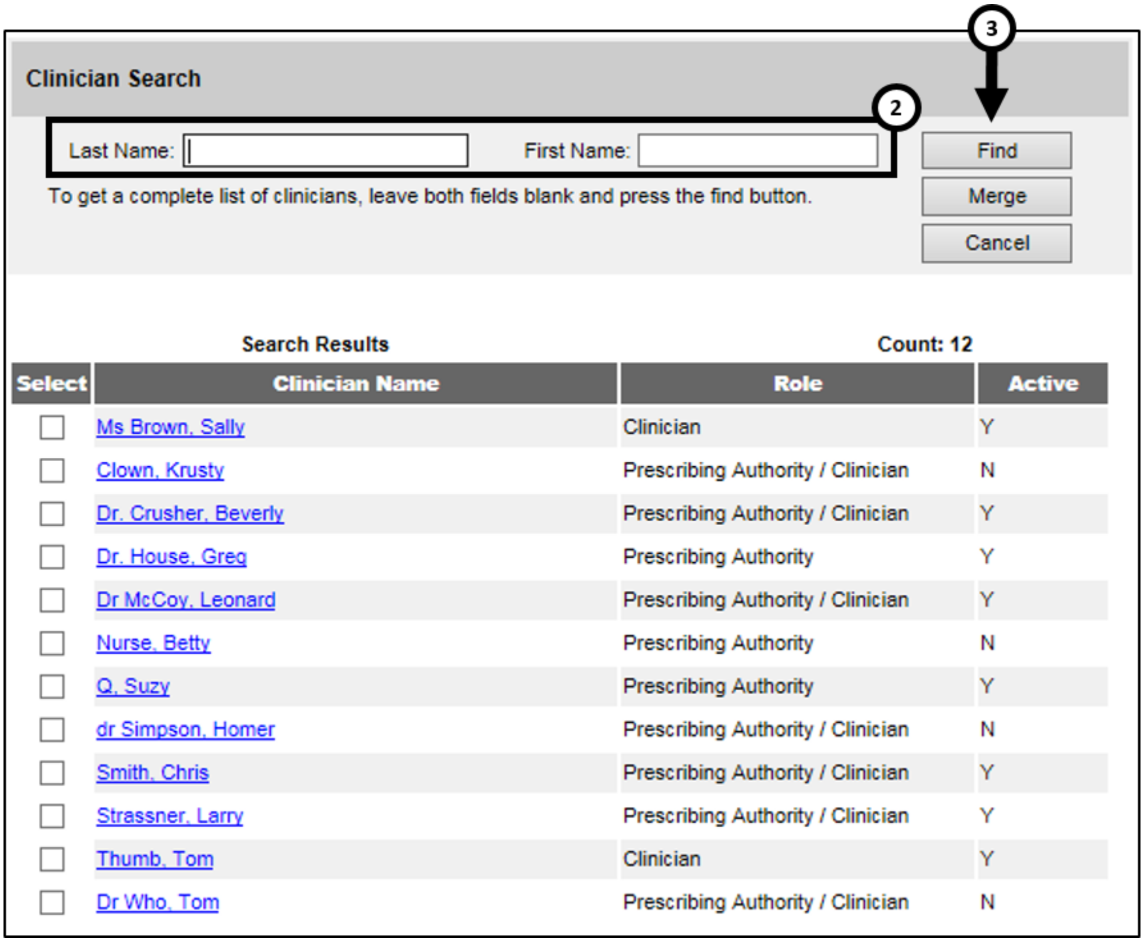


Figure 223 - Clinician Search Steps 2-3

Merge Clinicians

The Merge Clinician function is available only after searching for clinicians on the Manage Clinician screen. Users can merge two or more clinicians into one record. Always review the clinician information very closely to ensure the records are truly duplicates before completing a merge. After merging clinicians, all references to the other clinician will be redirected to the kept clinician.

To Merge Clinicians, follow the steps below.

See Figure 224: Merge Clinicians Steps 1-2.

1. On the Clinician Search screen, enter the first and last name search criteria to limit search results.
    - It is only required to enter at least one letter of the first or last name to perform a search.

2. Click the “Find” button to view search results.
    - Clicking the “Find” button without entering search criteria will list all active and inactive clinicians for the organization.

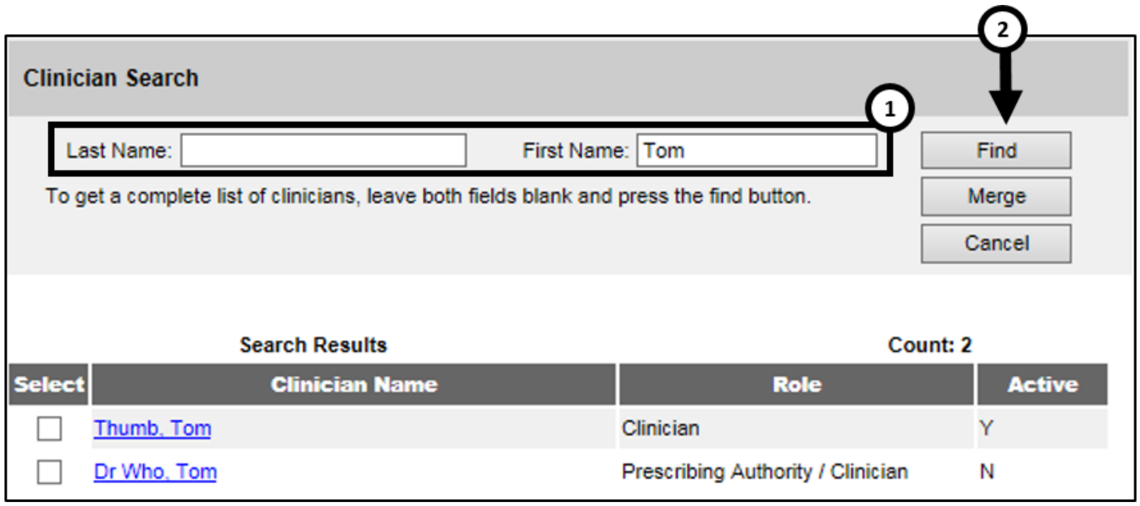


Figure 224 - Merge Clinicians Steps 1-2

See Figure 225: Merge Clinicians Steps 3-4.

3. Select the clinicians you intend to merge by clicking the associated check boxes.
4. Click the “Merge” button.

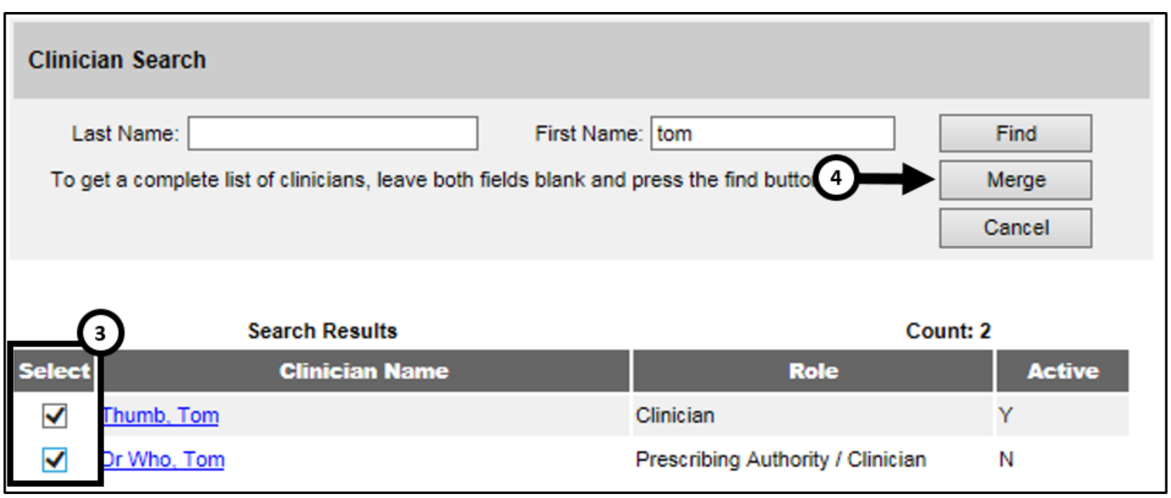


Figure 225 - Merge Clinicians Steps 3-4

See Figure 226: Merge Clinicians Steps 5-6.

5. The Clinician Merge screen displays. Select the clinician to keep.
6. Click the “Keep Selected” button. If needed, verify that the Clinician who was not selected is no longer on the Clinician list.

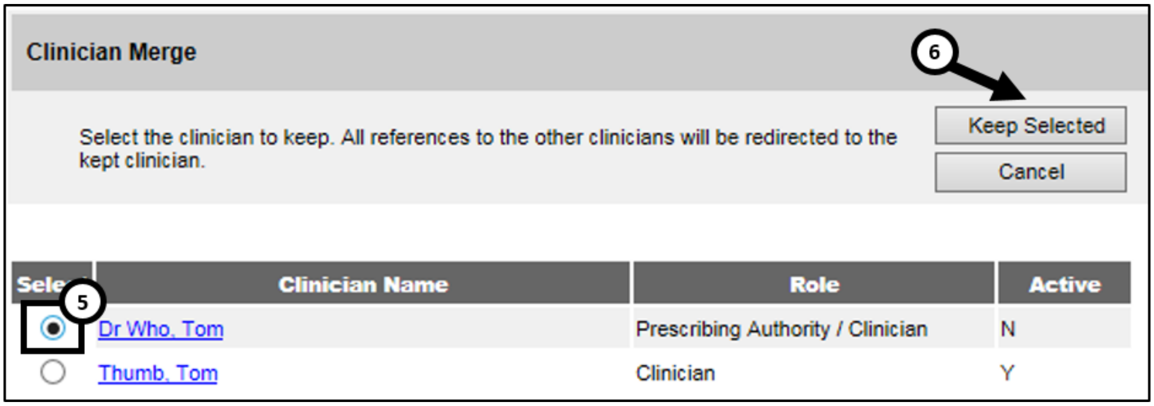


Figure 226 - Merge Clinicians Steps 5-6

Manage Schools

If an organization would like to include the client's school information in their record, this is done by selecting a school from the drop down arrow on the Client Information tab. *See Figure 227: Client Information – Assign a School.*

Schools added from the Manage School menu option will be available for selection in a drop down list in the Client Information section screen.

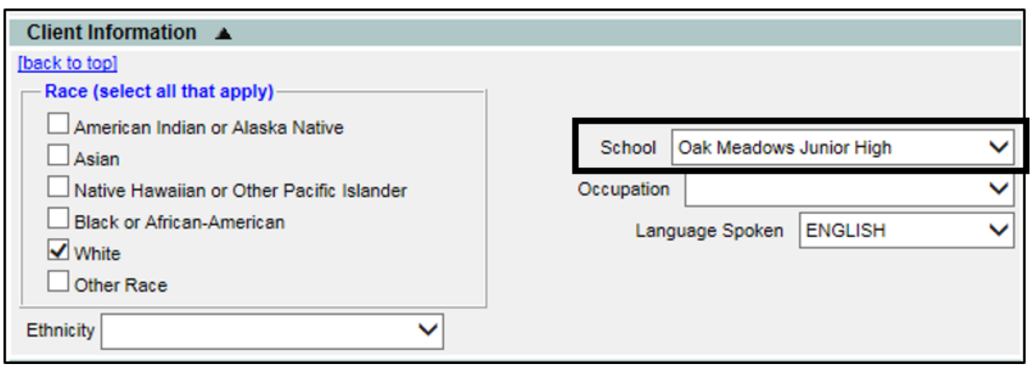


Figure 227 - Client Information – Assign a School

Add a New School

When attempting to update the client's record with their school information, and there is no option for that particular school, a Full Access Provider user can add the school.

To add a new school, follow the steps below.

See Figure 228: Add New School Steps 1-2.

1. Click the **Manage School** option from the menu panel.
2. Click the "Add School" button.

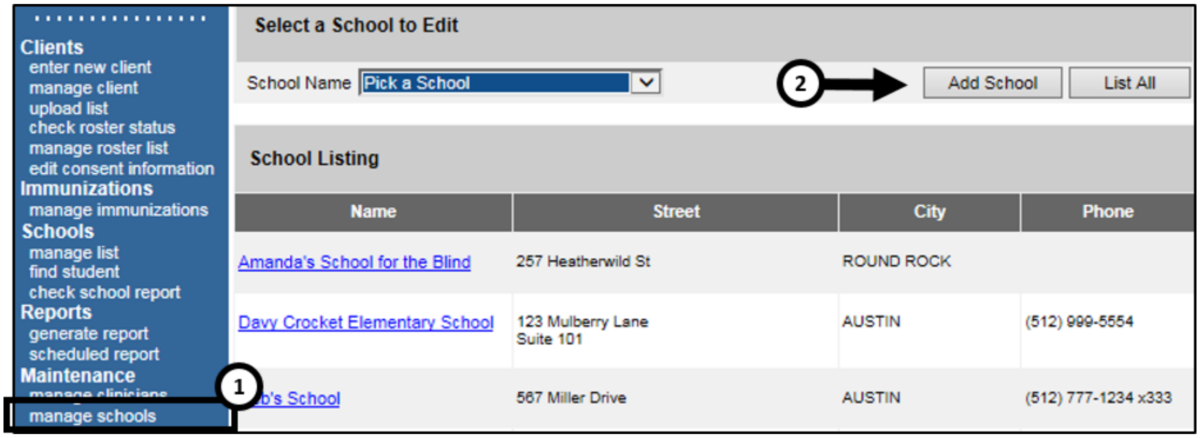


Figure 228 - Add New School Steps 1-2

See Figure 229: Add New School Steps 3-4.

3. On the next screen, enter the school information in the Add School section. Enter at least the school name.
4. Click the "Save" button. A "School Added" message will display to confirm the update.

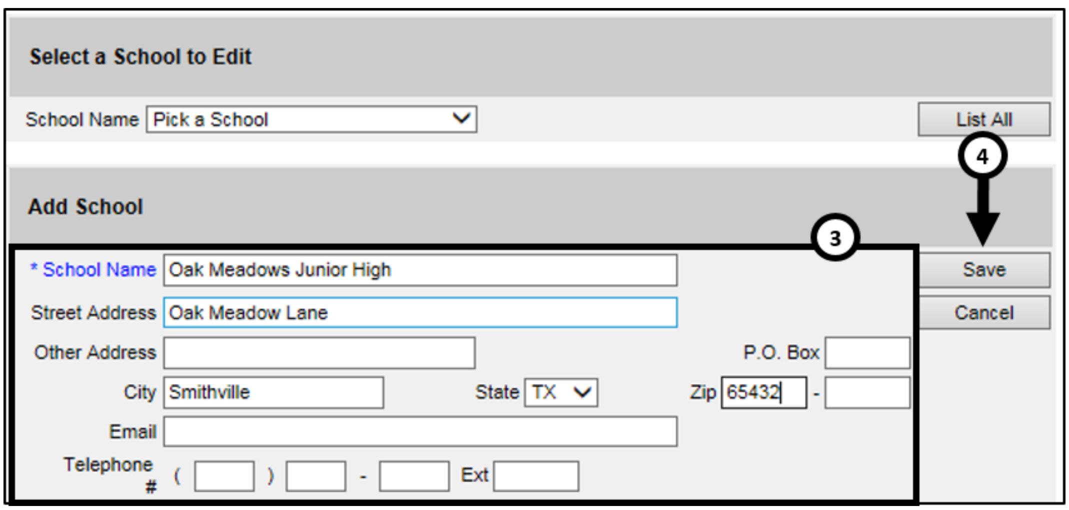


Figure 229 - Add New School Steps 3-4

After the school has been successfully added, click the "List All" button to return to the previous screen. Users can locate the newly added school in the School Listings. Schools are listed in alphabetical order.

Edit a School

To edit school information, follow the steps below.

See Figure 230: Edit School Step 1.

1. Click on a school name from the School Listing section.

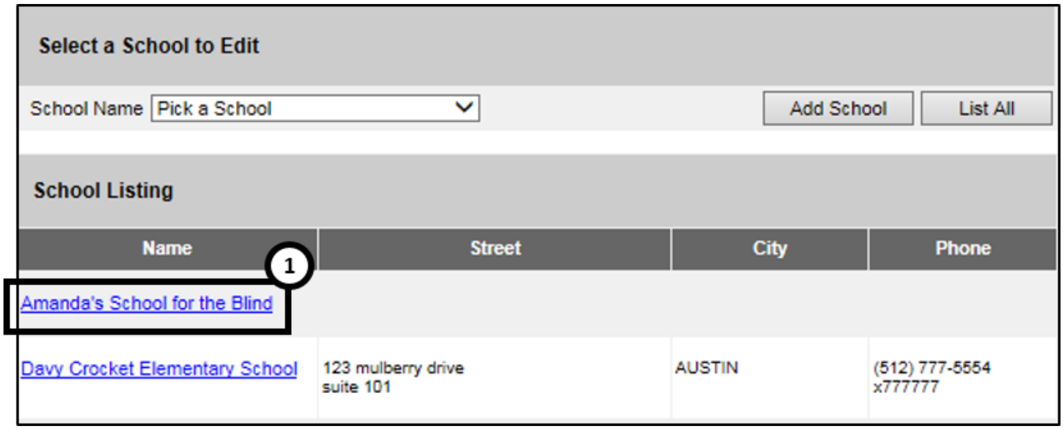


Figure 230 - Edit School Step 1

See Figure 231: Edit School Steps 2-3.

2. Edit the school's information as needed.
3. Click the "Save" button. A "School Updated" message displays to confirm the updates.

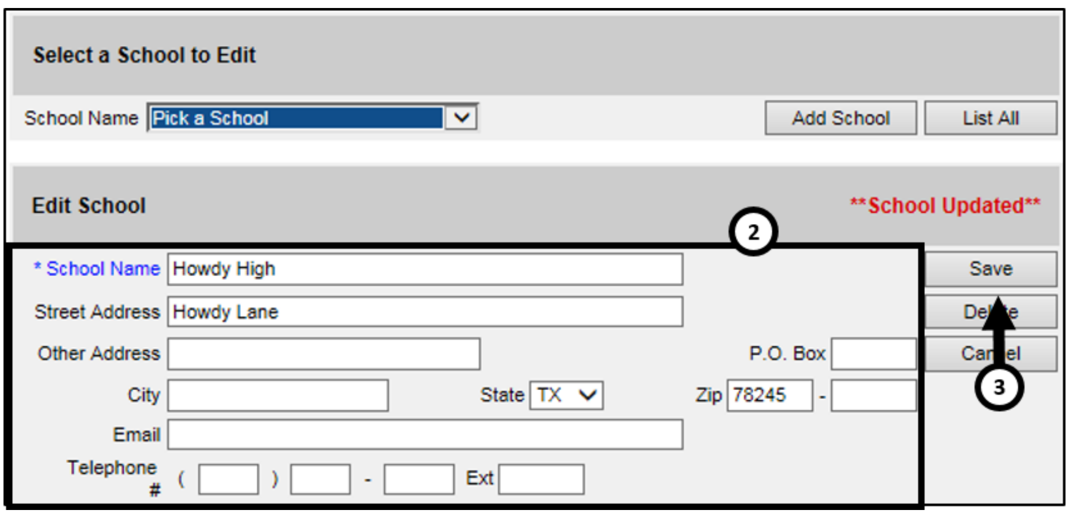


Figure 231 - Edit School Steps 2-3

Delete a School

To delete a school, follow the steps below.

See Figure 232: Delete School Step 1.

1. Click on a school name from the School Listing section.

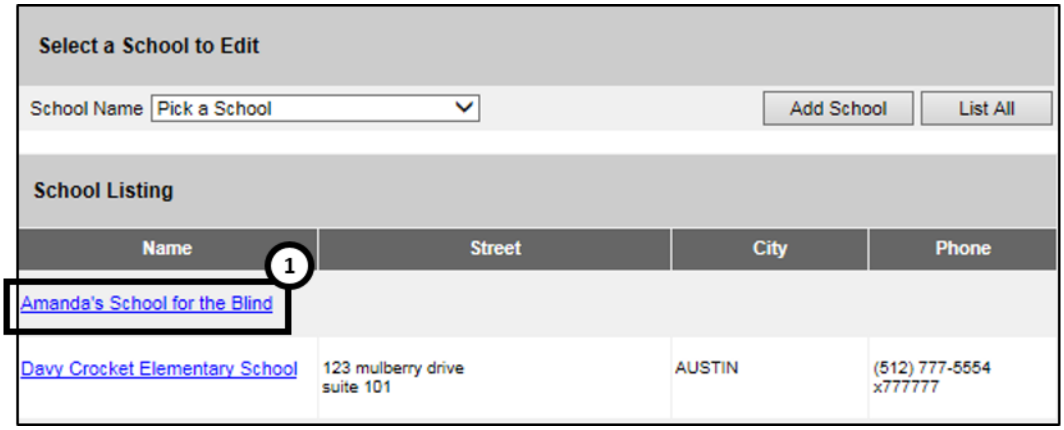


Figure 232 - Delete School Step 1

See Figure 233: Delete School Steps 2-3.

2. Click the “Delete” button on the same screen.
3. When the message dialog box appears, click “Yes” to delete.

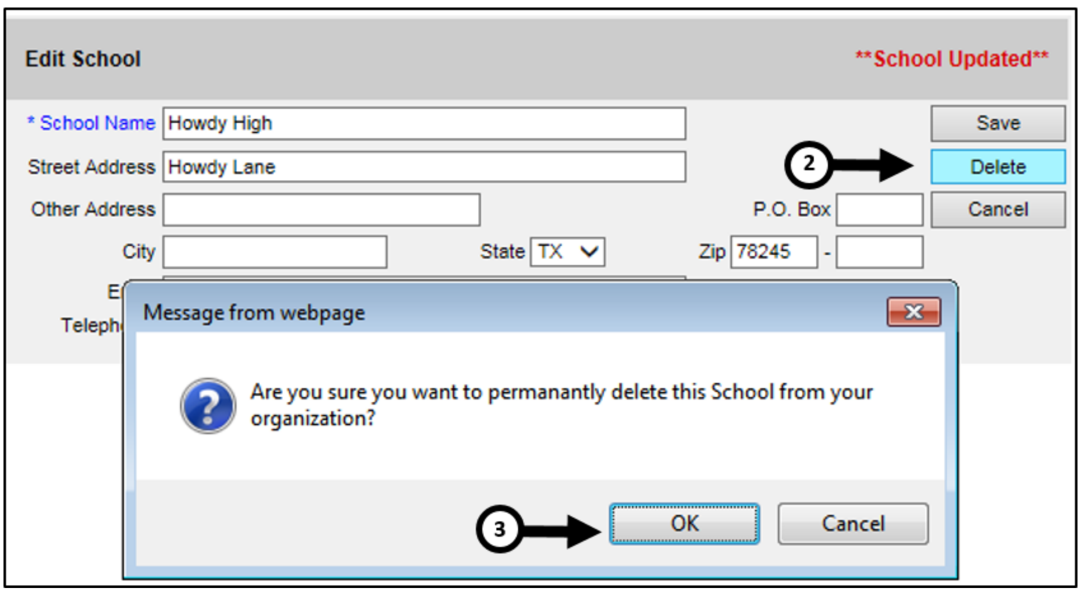


Figure 233 - Delete School Steps 2-3

Chapter 17: Manage Access

Only users assigned the role of Provider Supervisor can Manage Access. This includes Managing Users and Managing Organization information. *See Figure 234: Manage Access.*

Provider Supervisors have the role of adding users, assigning and editing user roles, assigning and editing organizational access, resetting user passwords, and editing organizational information. A Provider Supervisor should be the first level of contact for a user who needs access to ImmTrac2 or who needs a password reset.

Managing Access is performed from the Portal View. To get to the Portal View from the Application screen, click the Manage Access / Account tab on the top menu bar.

If users have access to multiple organizations, click the “Manage Access” button for the applicable organization.

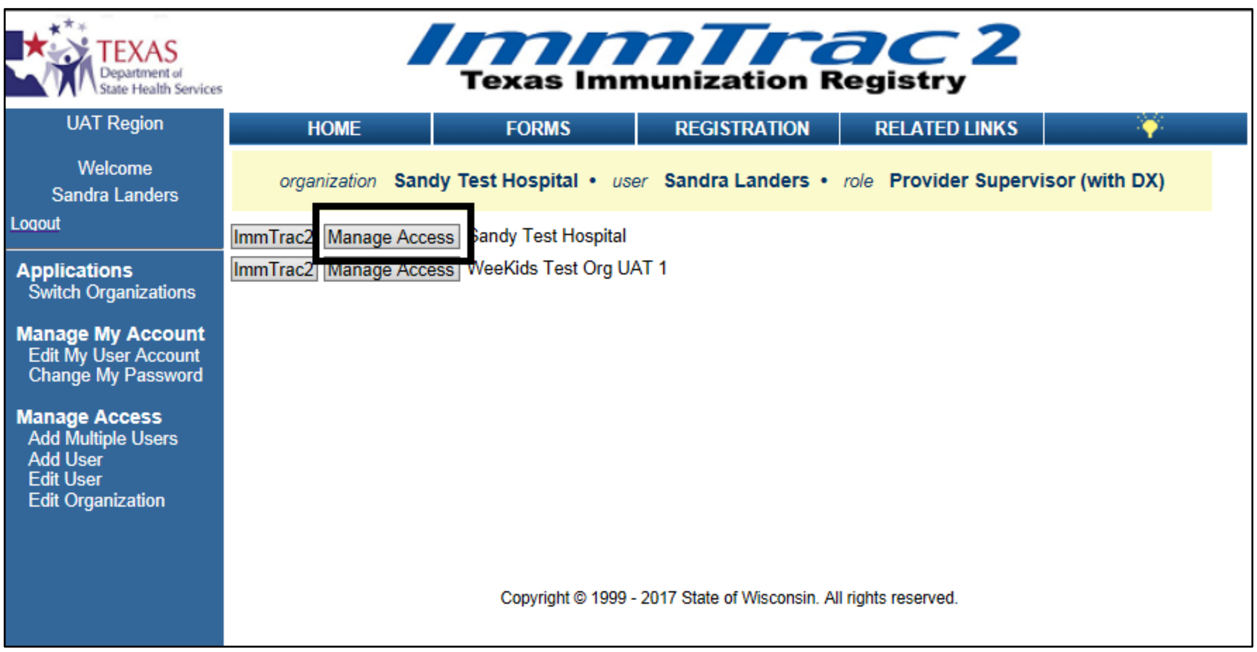


Figure 234 - Manage Access

Add Multiple Users

The Add Multiple Users screen provides users with the ability to create multiple user accounts and associate multiple new and existing users to an Organization once the ImmTrac2 Program Status has been set to “Approved”. This is the quickest way to create user accounts after a Registration or Renewal is approved.

User account changes that are not associated with the Registration and / or Renewal process, should be managed on the Add User and Edit User screens.

To add multiple users to an organization after an approved registration or renewal, follow the steps below.

See Figure 235: Add Multiple Users Steps 1-5.

1. Click the **Add Multiple Users** option from the menu panel.
2. Select an Organization using the drop down arrow. Most users will only be able to select their own organization as an option. (User information will auto populate below based on the selection.)
3. In the **Select** column, check the user(s) to be updated.
    - The *New Users on Registration or Renewal* section contains users who do not currently have an ImmTrac2 account.
    - The *Existing Users on Registration or Renewal* section contains "Newly added users" who already have access to ImmTrac2 but will now have access to this organization. *(Not shown in this example.)*
4. In the **Role** column select the role to assign to the user.
5. Click the "Add" button.

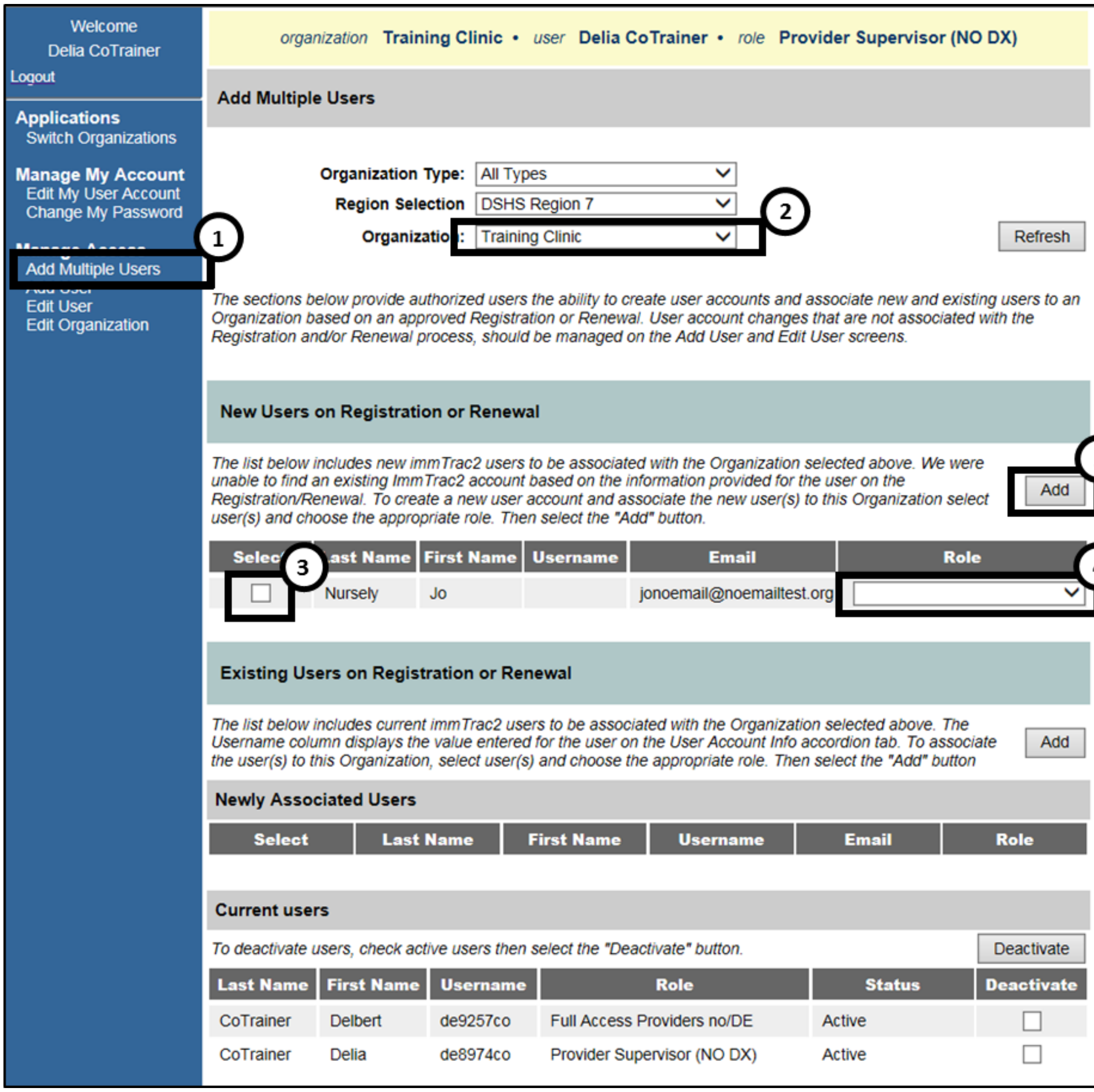


Figure 235 - Add Multiple Users Steps 1-5

The bottom section of the *Add Multiple Users* screen displays a list of **Current Users**. From this screen a user can quickly see all users associated to the organization. A user's status can be changed to Inactive by selecting the associated check box and then clicking the "Deactivate" button. *See Figure 236: Add Multiple Users – Current Users.*

Current users

To deactivate users, check active users then select the "Deactivate" button. [Deactivate]

Last Name	First Name	Username	Role	Status	Deactivate
Ard	Tim	ti9824ar	ImmTrac2 Developer	Disabled	
baron	green	gr2492ba	View Only Non-Providers w/DE	Inactive	
bob	big	bi9666bo	Modified Access Sub-state	Disabled	
bob	bill	bi2797bo	View Only Non-Providers w/DE	Inactive	
Copas	Deborah	de8588co	Full Access Providers w/DE	Active	☐
DE	PS	ps8969de	Provider Supervisor (with DX)	Active	☐
gay	amanda	am6949ga	Full Access Providers no/DE	Active	☐
hood	robin	ro5385ho	View Only Non-Providers no/DE	Active	☐
Horse	Work	wo4358ho	View Only Non-Providers w/DE	Inactive	
Jones	Larry Bob	la8239jo	View Only Non-Providers w/DE	Inactive	

Figure 236 - Add Multiple Users – Current Users

Add User

A Provider Supervisor can add users to their organization and assign the user any lower-level access user role. If a Provider Supervisor has access to multiple organizations, they must first navigate to the Manage Access Portal view for the organization in which the user needs to be added.

To add a user to an organization, follow the steps below.

See Figure 237: Add User Steps 1-3.

1. Click the **Add User** option from the menu panel.
2. Enter all required user information marked with an asterisks.
   - The email address must be unique.
   - If the email address is not unique, a pop-up box will appear with the following error validation message: “An existing user was found with this email address. Press OK to associate that user to your organization, or Cancel to enter a different email address to create a new user.” *See Figure 238: Add User – Email Address Validation Error.*
3. Click the “Save” button.

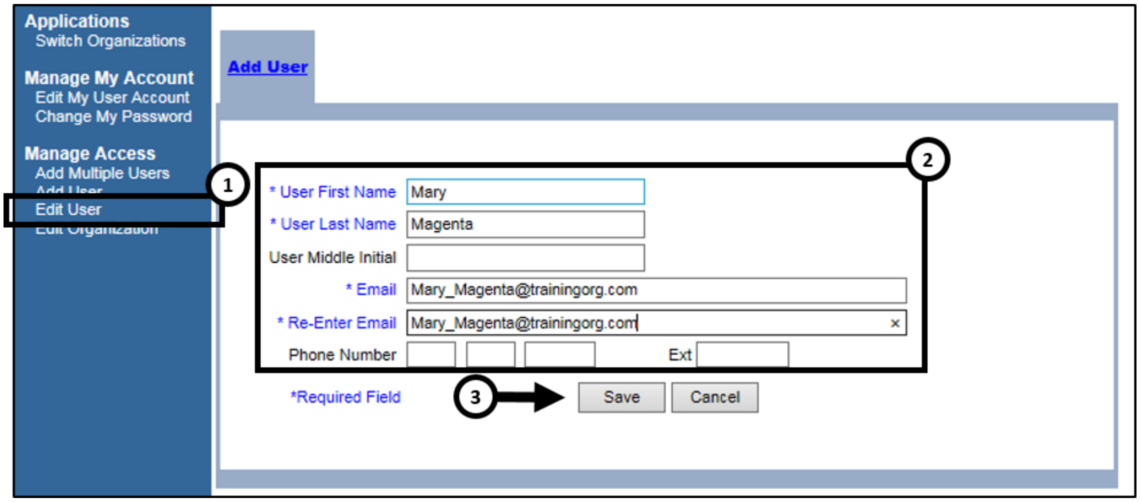


Figure 237 - Add User Steps 1-3

If an existing user was found with the email address entered, click the "OK" button to navigate to the user account with that email address. Updates can be made to the user's account giving them access to the needed organization.

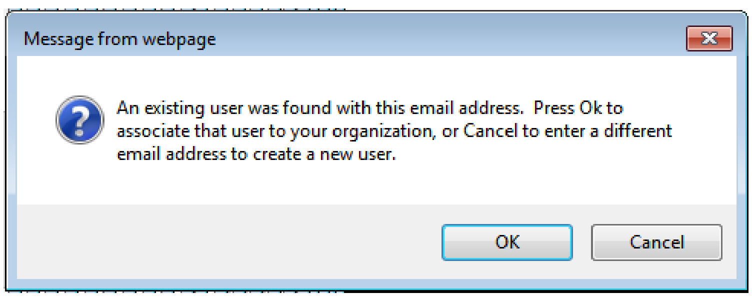


Figure 238 - Add User – Email Address Validation Error

If the email address is unique the screen will refresh displaying the additional data information below and the following message: "The new user has been added to ImmTrac2. **<u>They will not have access</u>** until you modify their access privileges. To continue and complete their access privileges click the Modify Access tab." Users will not receive a welcome email and temporary password until they have been given access privileges to a specific organization. *See Table 27: User Account Data Fields* and *Figure 239: User Added.*

Table 27 - User Account Data Fields

Column	Description
User ID	Systematically generated ID.
Username	Systematically generated Username needed for ImmTrac2 log in purposes.
Current Status	The current status of the users ImmTrac2 account. • **Active** – account is active. • **Disabled** – account is disabled and users cannot access their account. • **Admin** – a user's account has been locked by a Full Access State user for security reasons and should not be unlocked unless authorized. • **Inactive** – user's account has been inactive for 90 days (View Only and Full Access Provider users) or 60 days (Provider Supervisor, Modified Access Sub-State, and Full Access State users) without logging in. These accounts will have the "Disabled" radio button selected. • **Password** – a user attempted to login multiple times with a wrong password. These accounts will have the "Disabled" radio button selected. • **Unused** – a new user that has not logged into the system to activate their account in 90 days (View Only and Full Access Provider users) or 60 days (Provider Supervisor, Modified Access Sub-State, and Full Access State users). **No Org** – a user's account is not associated to an organization.
Status	Different status options that can be selected for the user. A Full Access State user has the ability to change the status to "Active", "Disabled", or "Admin". The "State" option will be greyed out and available to developers only.
Send Password Reset Email	Can be used at any time to send a password reset email to the user's email address on file. If an account is in a Disabled status and the current status displays "Password", "Inactive", or "Unused", the Send Password Reset Email will reset the account as active. For more details see the Password Reset section.

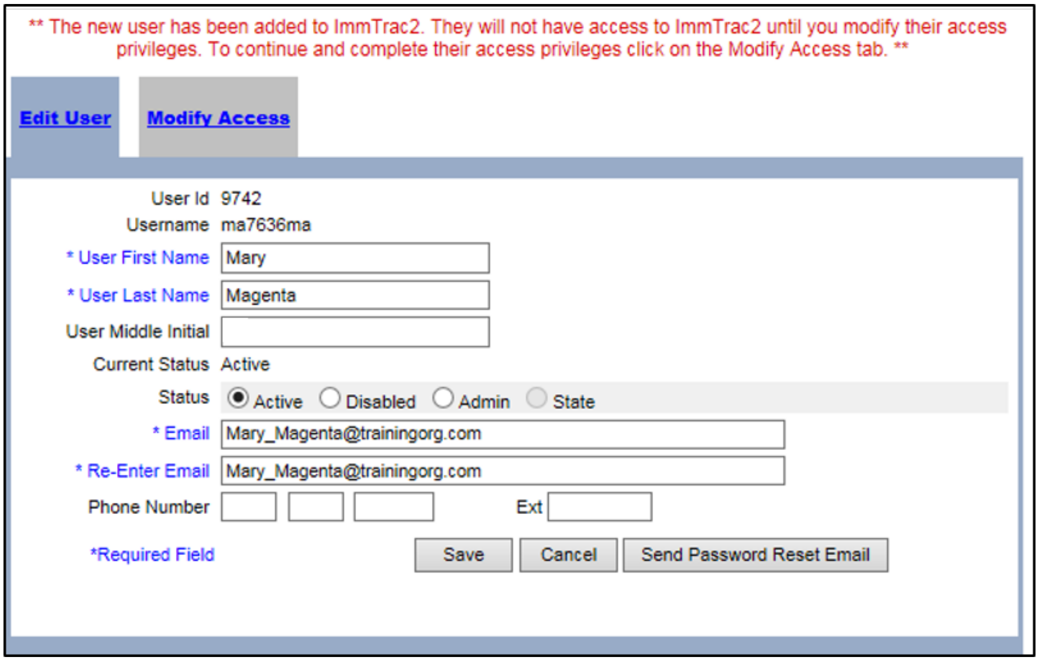


Figure 239 - User Added

See Figure 240: Add User Steps 4-7.

4. Click the **Modify Access** tab at the top of the add user section.
5. Select the user role.
    - A Provider Supervisor will only have the following user role options to select from: View Only Non-Provider and Full Access Provider.
6. Click the “Add” button. An “Update in progress, press Save to keep” message with display in the center of the screen.
7. Click the “Save” button. A “User Updated” message displays at the top of the page.

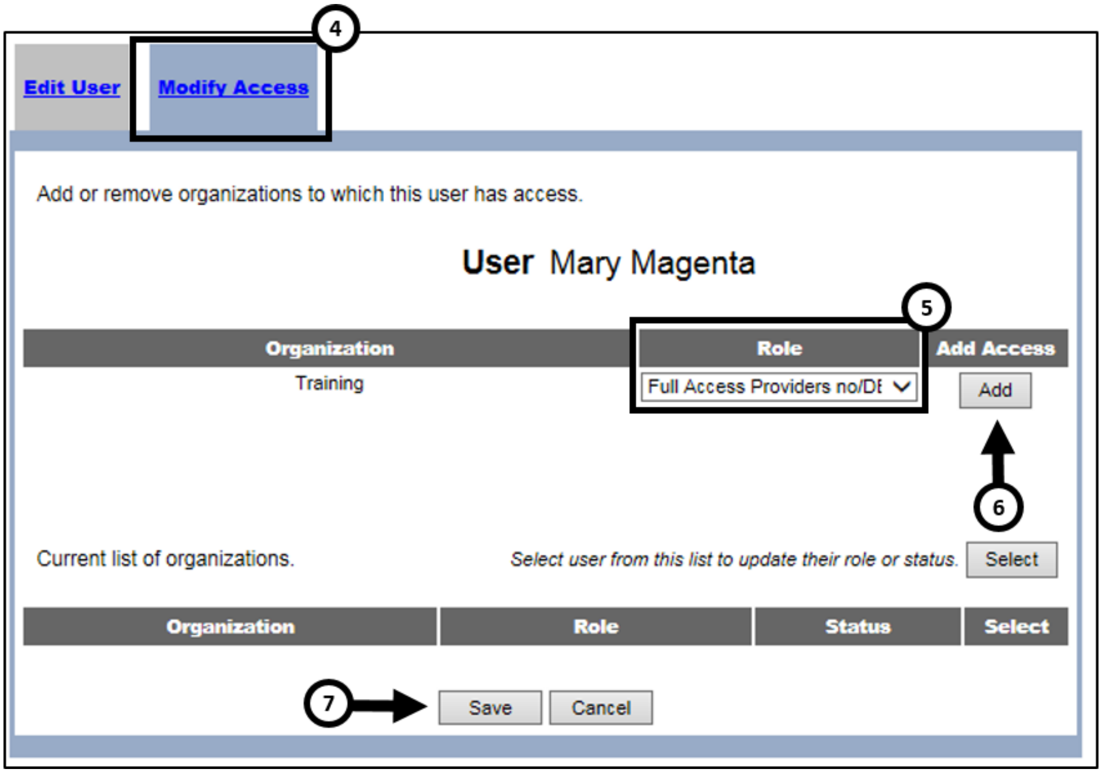


Figure 240 - Add User Steps 4-7

The bottom portion of the screen will be updated with the current list of organizations and application. Follow the same steps above if the user needs access to more than one organization, or to give existing users access to additional organizations. *See Figure 241: Add User –Access Granted.*

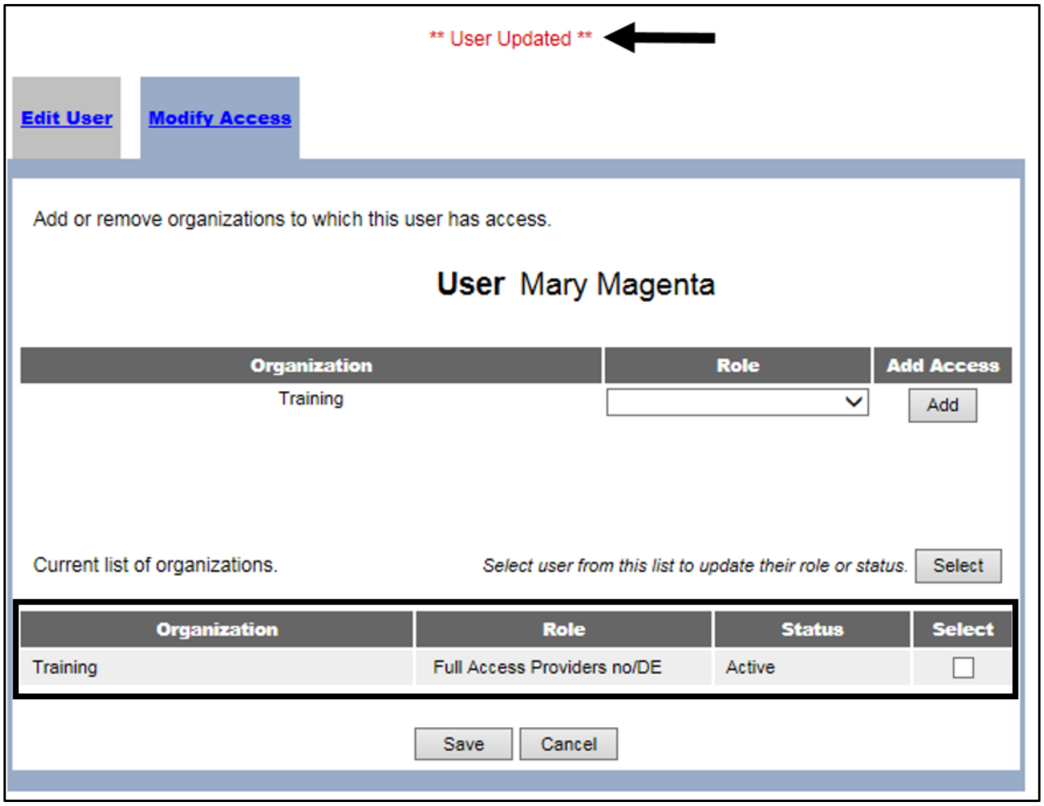


Figure 241 - Add User – Access Granted

New users will receive a "Welcome to ImmTrac2!" email with their login credentials, their Username and Org Code, and a link to the ImmTrac2 application. The organization's POC will also be copied on the email. *See Figure 242: Welcome to ImmTrac2 Email*

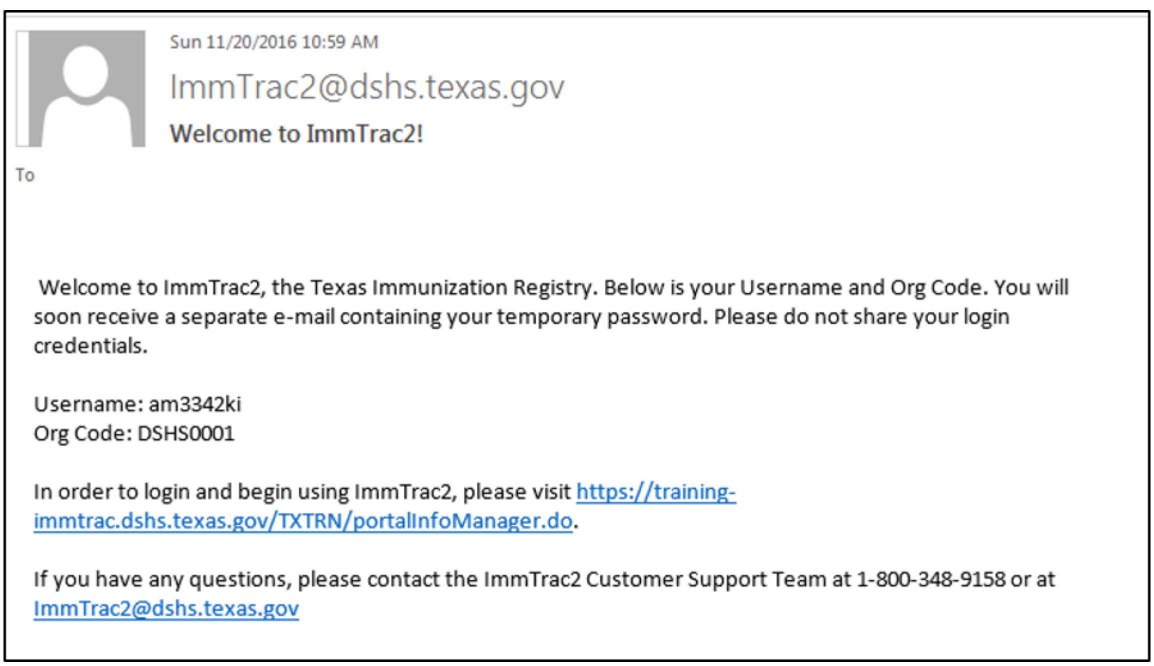
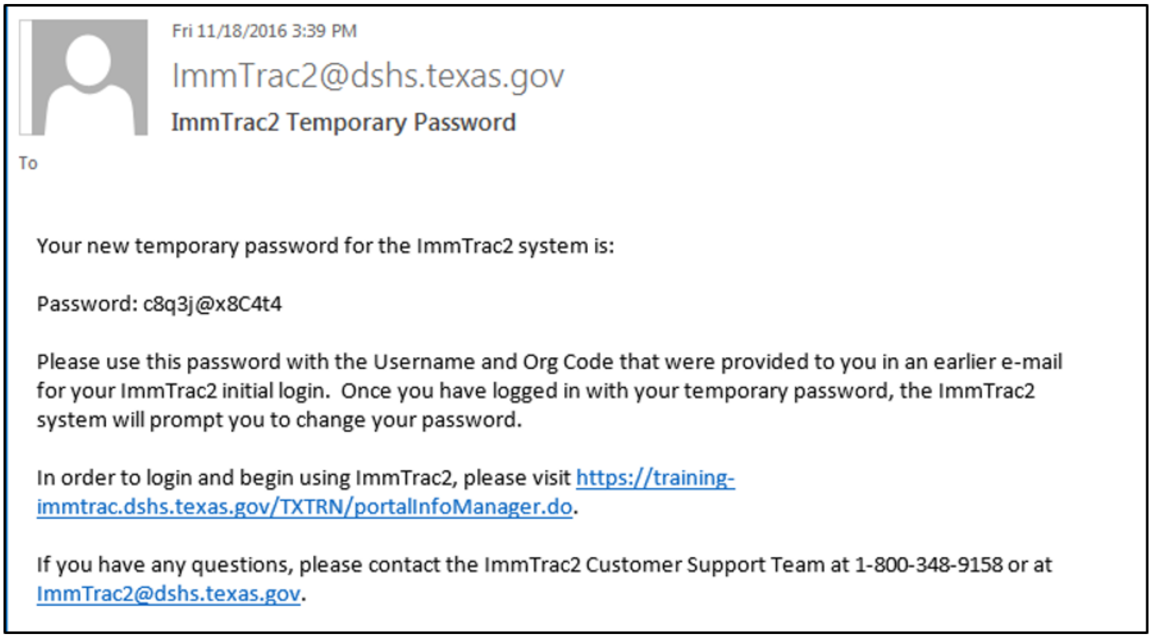


Figure 242 - Welcome to ImmTrac2 Email

New users will also receive an ImmTrac2 Temporary Password email. Once users have logged in with the temporary password, the system will prompt the user to change the password. For more details on changing a password, reference the Section 1 - Change Password section. *Figure 243 - ImmTrac2 Temporary Password Email*



Fri 11/18/2016 3:39 PM

ImmTrac2@dshs.texas.gov

ImmTrac2 Temporary Password

To

Your new temporary password for the ImmTrac2 system is:

Password: c8q3j@x8C4t4

Please use this password with the Username and Org Code that were provided to you in an earlier e-mail for your ImmTrac2 initial login. Once you have logged in with your temporary password, the ImmTrac2 system will prompt you to change your password.

In order to login and begin using ImmTrac2, please visit https://training-immtrac.dshs.texas.gov/TXTRN/portalInfoManager.do.

If you have any questions, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov.

Figure 243 - ImmTrac2 Temporary Password Email

Edit User

This process is for existing users that require changes to their account information or access to additional organizations. Provider Supervisors can add or delete access to an organization, change the user's role, update the user's status, or assist with a password reset for organizations to which they are assigned.

The Provider Supervisor must first navigate to the Manage Access Portal view for the organization of the user they wish to edit, by selecting the *Switch Organization* menu panel option.

To edit user's account information and access, follow the steps below.

See Figure 244: Edit User Step 1-4.

1. Click the **Edit User** option from the menu panel.
2. Select the search criteria as needed.
   - **Organization Account Status** – Both the Active and the Disabled boxes will be checked as a default but users can

    uncheck them to show just one or the other to narrow the search.
    - **Username** – Enter the user unique login name to find an exact match.
    - **First / Last Name** – Enter the users name to limit the search result / find an exact match.
3. Click the “Find” button to run the search.
    - Clicking the “Find” button without entering search criteria will list all the users assigned to that organization.
4. When search results display, click the “Username” hyperlink to open the Edit User screen.

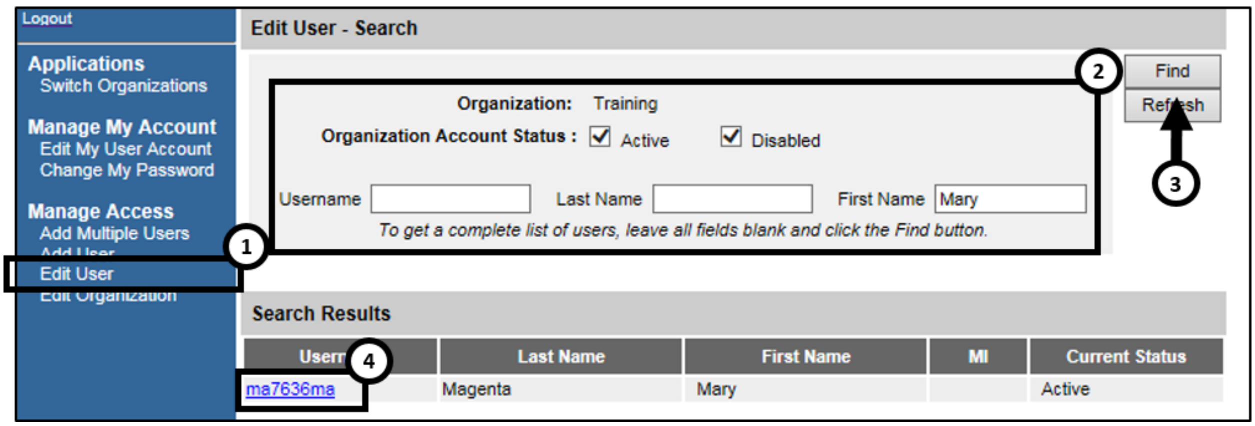


Figure 244 - Edit User Steps 1-4

See Figure 245: Edit User Step 5-6.

5. On the **Edit User** tab, make any necessary changes to the user’s account info.
    - If the user’s association to an organization needs to be edited, skip to the next section **Modify Access**.
    - The Username cannot be edited.
    - **Status**: A Provider Supervisor can update a user from ‘Disabled’ to ‘Active’ only. If a user is locked out of their account their status will be disabled. The status will automatically change to Active during the Forgot Password process and should not require manual intervention. See the Section 1 - Password Reset section for additional information on resetting the user’s password.
6. Click the “Save” button. The “User Updated” message will appear at the top of the screen.

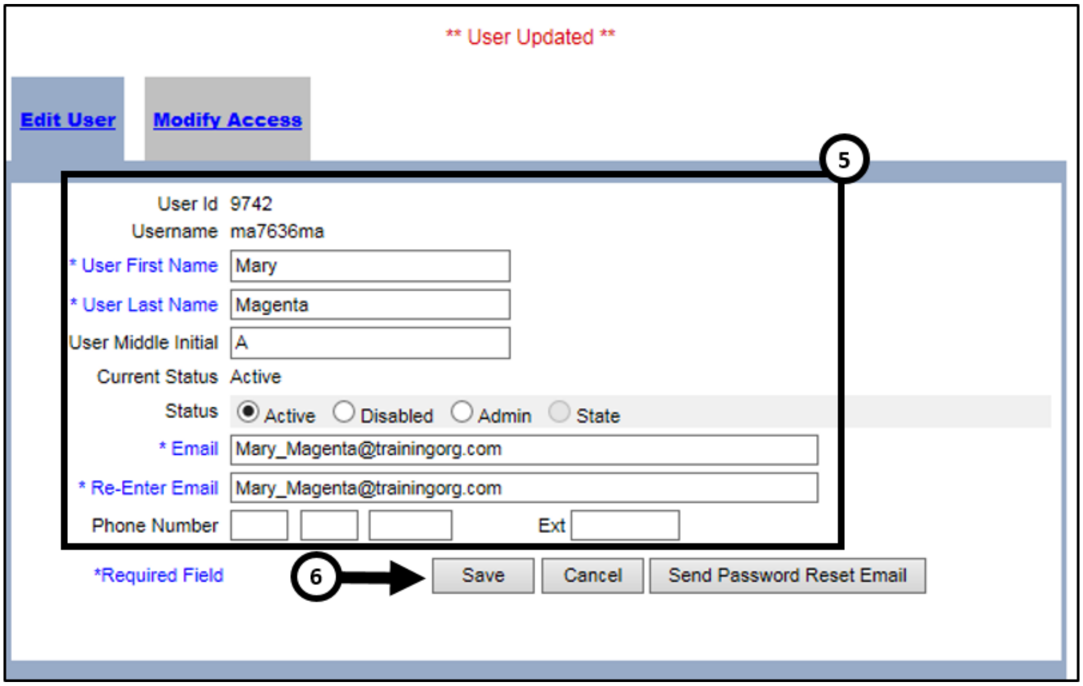


Figure 245 - Edit User Steps 5-6

Modify Access

The *Edit User* menu option is also used to modify a user's access to different organizations. The *Modify Access* screen can be used to assign access to additional organizations, edit a user's role, disassociate a user from an organization, or to temporarily disable a user associated with a specific organization. To give existing users access to additional organizations follow steps 4-7 under the Adding User section.

To modify a user's organizational access, follow the steps below.

See Figure 246: Modify Access Steps 1-3.

1. In the Edit User screen, click the **Modify Access** tab.
2. Select the Organization / Role to modify using the check box.
3. Click the "Select" button.

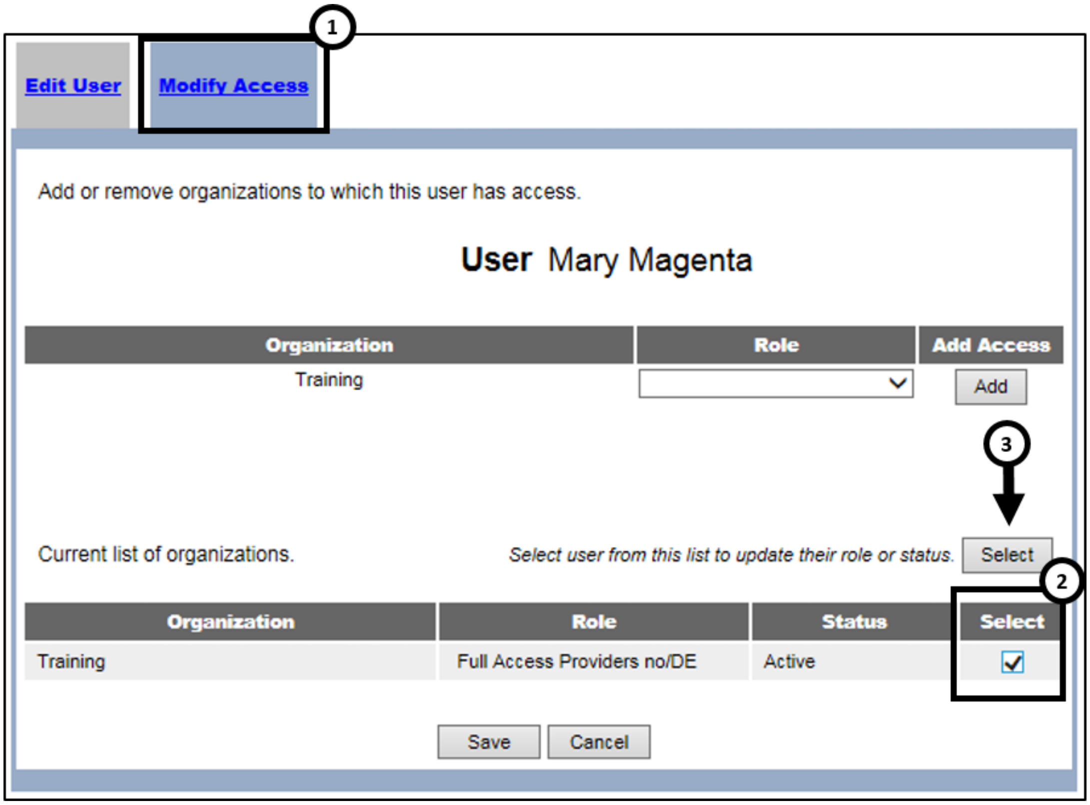


Figure 246 - Modify Access Steps 1-3

See Figure 247: Modify Access Steps 4-5.

4. Update the user Role and (or) Status as applicable. The following status options are available:
    - **Activate**: the user has access to perform task within ImmTrac2 for that specific organization.
    - **Disable**: the user no longer has access to perform task within ImmTrac2 for that specific organization. The user is still associated to the org, but cannot perform tasks.
    - **Disassociate**: this option removes a user's access to that specific organization.
5. Click the "Update" button.
6. The "Update in progress" message displays in the center of the screen, click the "Save" button to keep.

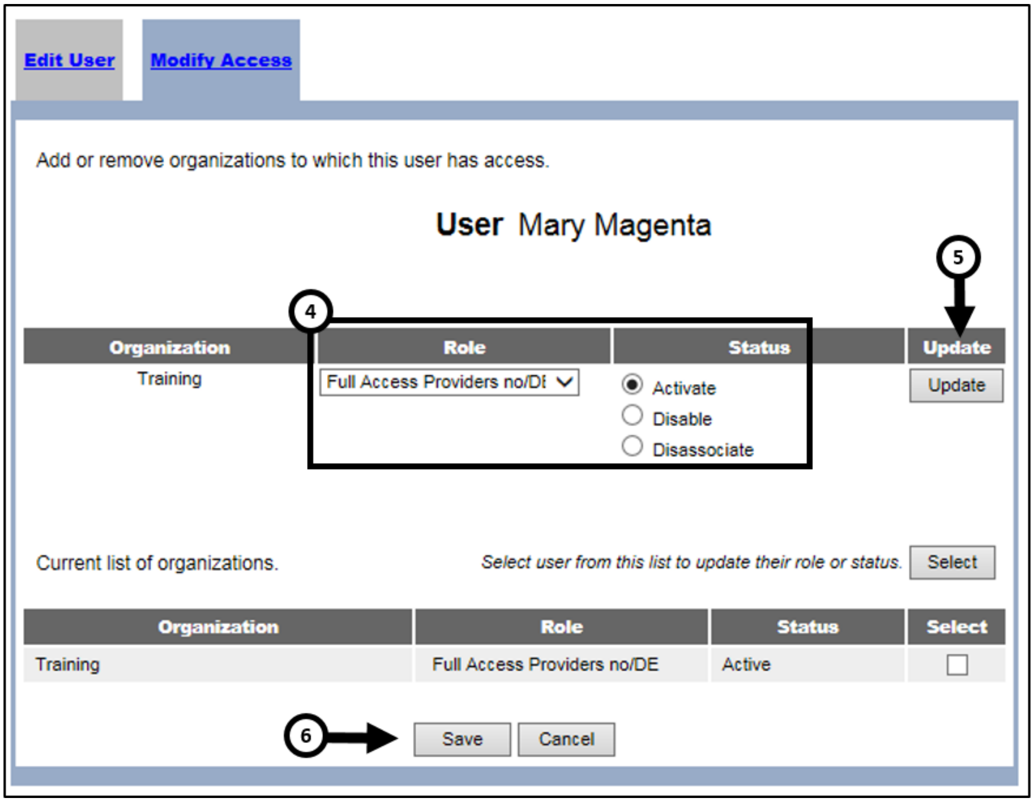


Figure 247 - Modify Access Steps 4-6

Send Password Reset Email

In some instances a user may require a password reset if they have forgotten their password or are locked out after too many log in attempts. The user can use the Forgot Password option on the log in screen at any time. If additional help is needed, the user should attempt to contact their organization's Provider Supervisor first but at any time a Full Access State user can assist using the Send Password Reset Email option.

Clicking the "Send Password Reset Email" button will send an email to the user's email address listed in the user's account. Clicking this button will automatically change a "Disabled" account to an "Active" account. This is true for all accounts that have a Current Status of "Password", "Inactive", or "Unused". *See Figure 248: Password Reset – Inactive Status.*

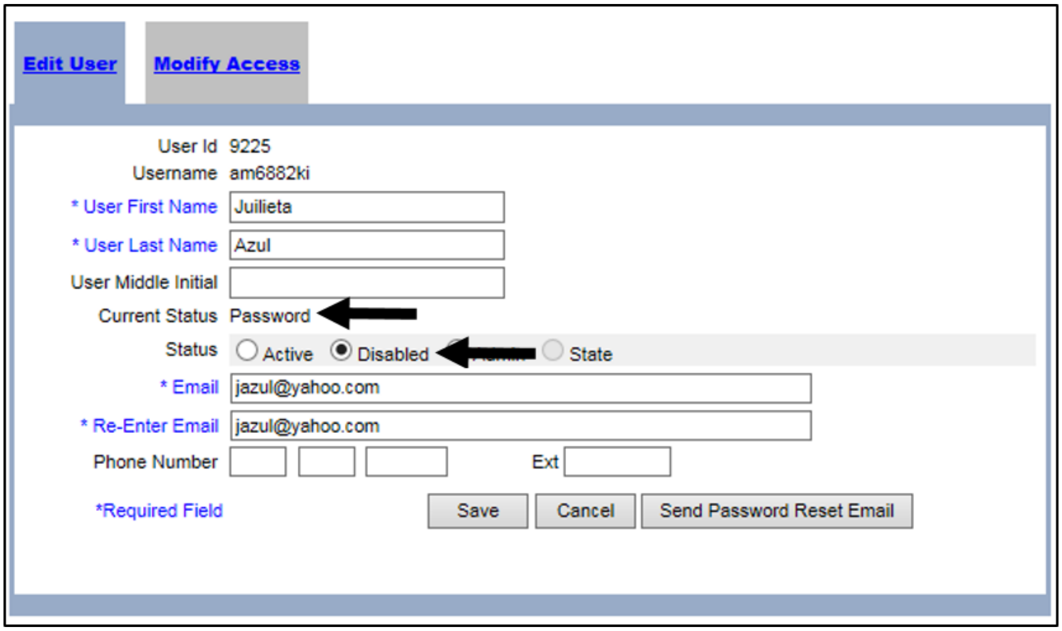


Figure 248 - Password Reset – Inactive Status

To reset a user password, follow the steps below.

See Figure 249: Send Password Reset Email Step 1.

1. While in the Edit User screen, click the “Send Password Reset Email” button.
    - Depending on initial status, the user will receive an email from ImmTrac2 with a temporary password or a link to reset their password within seconds of clicking the button.
    - For instructions on how to log in using a password reset link, see the Forgot Password section steps 4-6. For instructions using the temporary password continue to next step.
    - Click the “Save” button and return to the Edit User – Search screen. The user’s status will display “Active”.

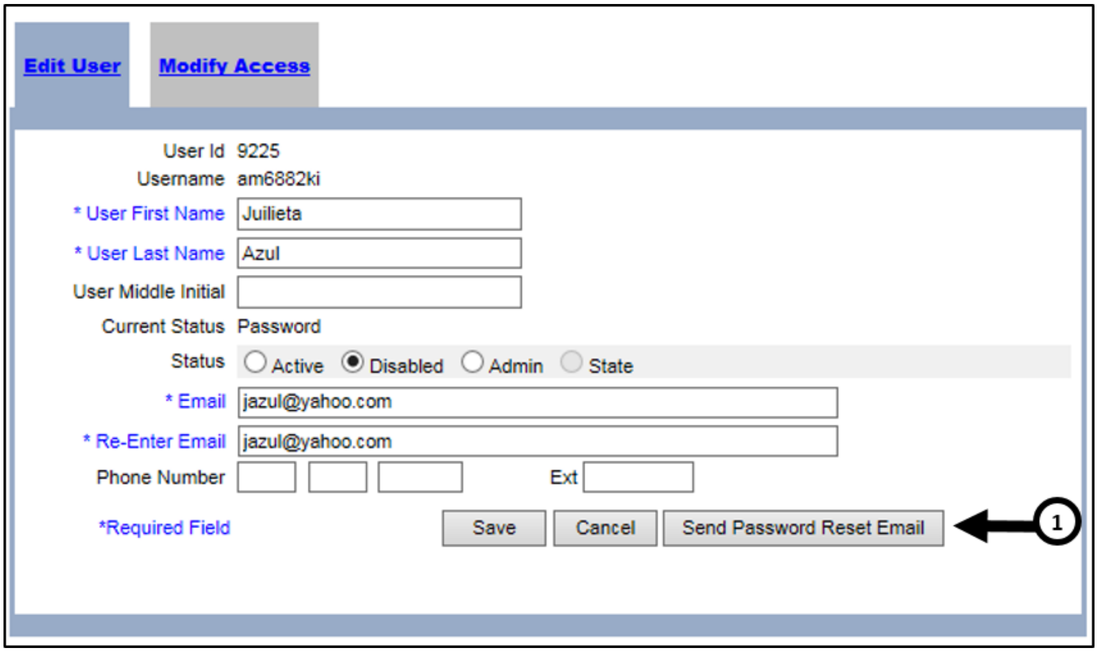


Figure 249 - Send Password Reset Email Step 1

See Figure 250: Send Password Reset Email Step 2.

2. Once the password reset email is received, copy the temporary password and log into ImmTrac2.

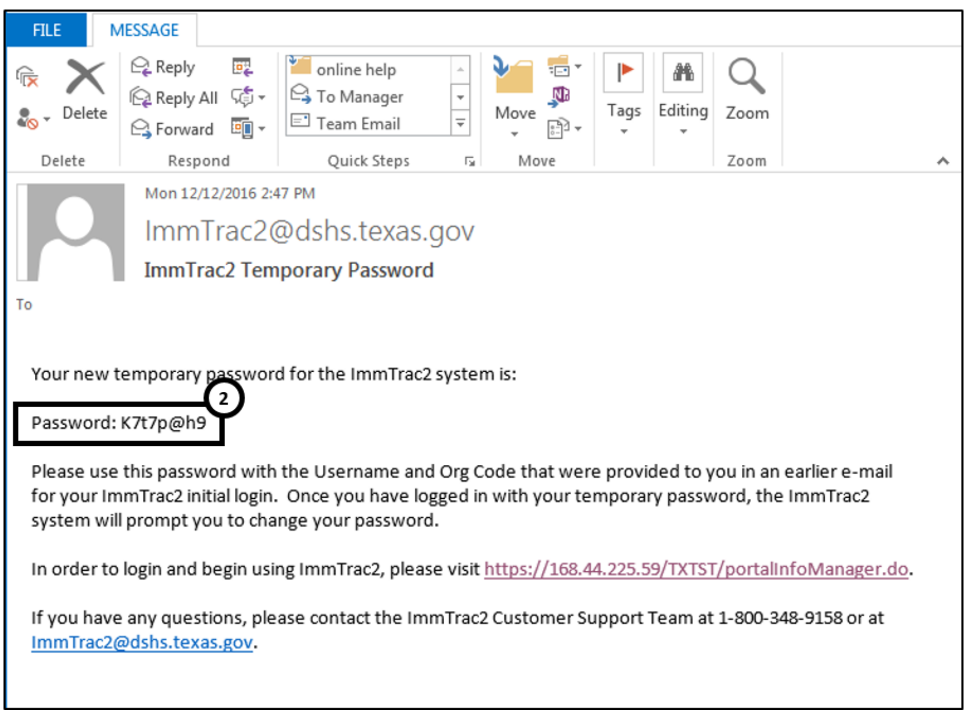


Figure 250 - Send Password Reset Email Step 2

See Figure 251: Send Password Reset Email Step 3.

3. Upon successful login using the temporary password, users will received a validation error stating your password has expired. Click ok.

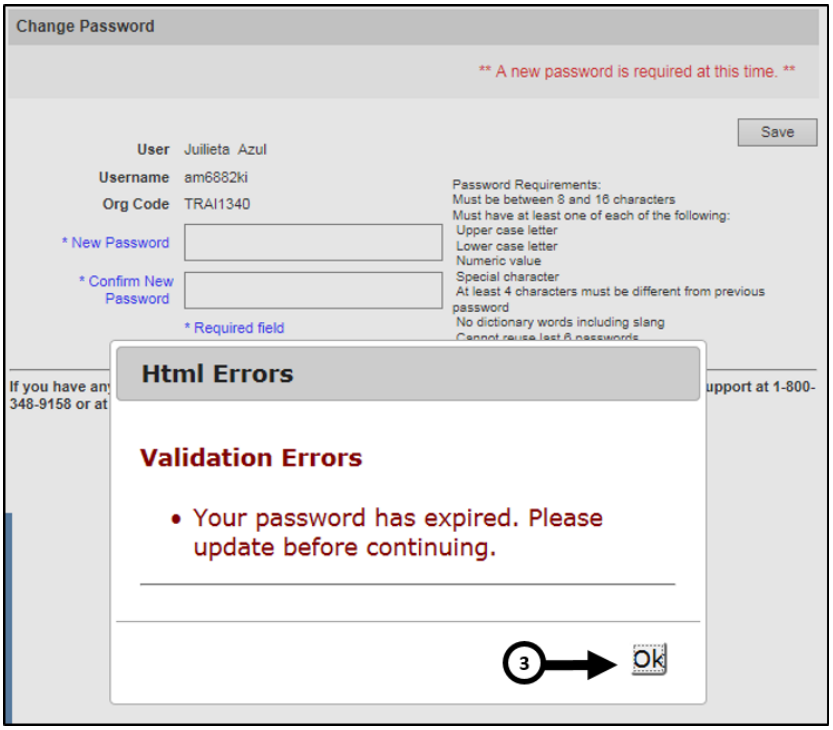


Figure 251 - Send Password Reset Email Step 3

See Figure 252: Send Password Reset Email Steps 4-5.

4. User are directly immediately to the Change Password screen. Enter a new password using the Password Requirements.
5. Click the "Save" button.

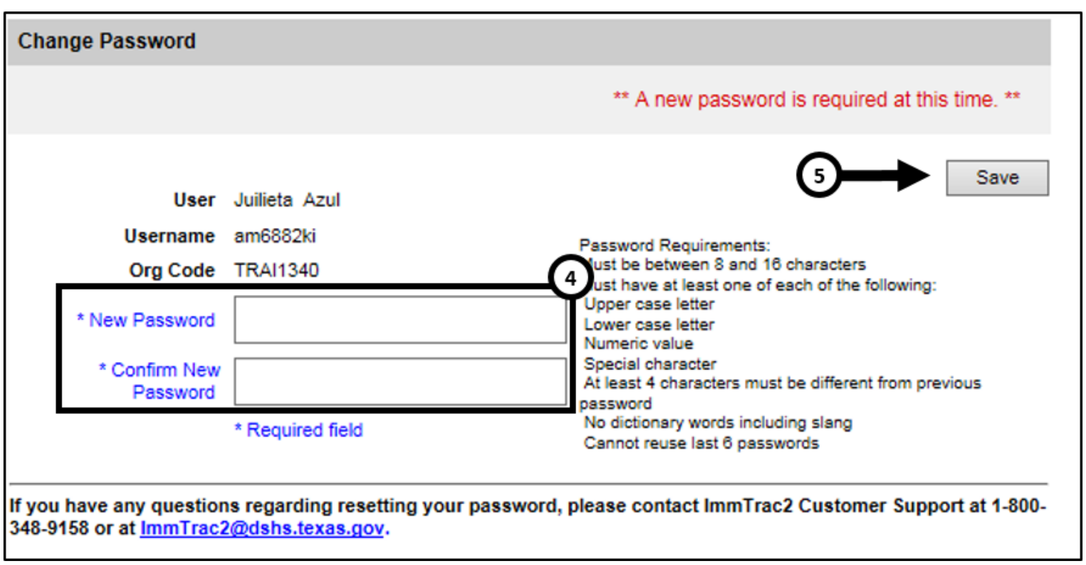


Figure 252 - Send Password Reset Email Steps 4-5

__Note__: Notice the Password Requirements listed on the Change Password screen when creating a new password.

Edit Organization

Provider Supervisors also have access to edit organizational information using the *Edit Organization* menu panel option. A Provider Supervisor user has limited access to make edits, but can call ImmTrac2 Customer Support for additional assistance. In many cases an ImmTrac2 Renewal may be required.

Remember, if a Provider Supervisor has access to multiple organizations they must use the *Switch Organization* menu option to first access the organization in which edits need to be made.

The following fields can be edited by a Provider Supervisor:

Table 28 - Edit Organization – Editable Fields

Field	Description
Vaccines Offered	Use the radio button to select "ALL ACIP Recommended Vaccines" or "Offers Select Vaccines" (if available). If the "Offers Select Vaccines" option is selected, use the check boxes to select the vaccines that will be offered by the organization.
Contact Information	Users can edit the Phone, Ext., Fax, and Organization Email fields.
Address Information	This section contains the organization's Physical, Mailing, and Vaccine Delivery address. Users can edit the address information, with the exception of the State field.
Organization's Client Demographic Information	All fields are editable using the radio button and check boxes. Multiple options can be selected. Select which age groups the Organization vaccinates, and how vaccinations are paid for: Privately Insured, Medicaid, and (or) Chip.
Organization Point of Contact	Users can edit the Middle Name, Job Title, Phone and Ext. fields.
Primary Registry Contact	Users can edit the Middle Name, Job Title, Phone and Ext. fields.

Field	Description
Email Notification Type	General: Users cannot opt out of this notification. Account Updates: When selected, this provides notification of any updates made to the Organization's existing profile.
Account Updates	The Primary Registry Contact has the option to receive email notifications of any updates made to the Organization's existing profile. Select the check box to activate email notification for Account Updates.
Primary Vaccine Coordinator	*These contacts will only be populated for TVFC organizations.* Users can edit the Job Title, Phone and Ext. fields.
Secondary Vaccine Coordinator	*These contacts will only be populated for TVFC organizations.* Users can edit the Job Title, Phone and Ext. fields.
Contact Listing - Optional Contacts	A list of additional contacts identified for the organization. Click the Edit or Delete icon to update these contacts. See the following sections for more details.

To edit organization information, follow the steps below.

See Figure 253: Edit Organization Steps 1-3.

1. Click the "Edit Organization" option from the menu panel.
2. Click the "Search" button to generate the link for the organization.
3. Click on the hyperlink of the organization to edit.

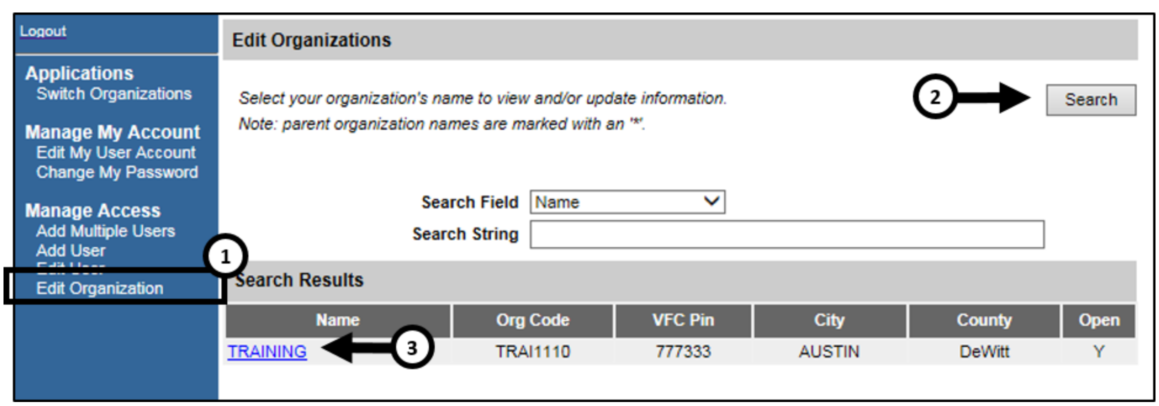


Figure 253 - Edit Organization Steps 1-3

See Figure 254: Edit Organization Steps 4-5.

4. Edit information as needed. Editable information is designated by a white and active field. (*Note: All editable fields are not shown in figure.)*
5. Click the “Save” button at the top of the screen.

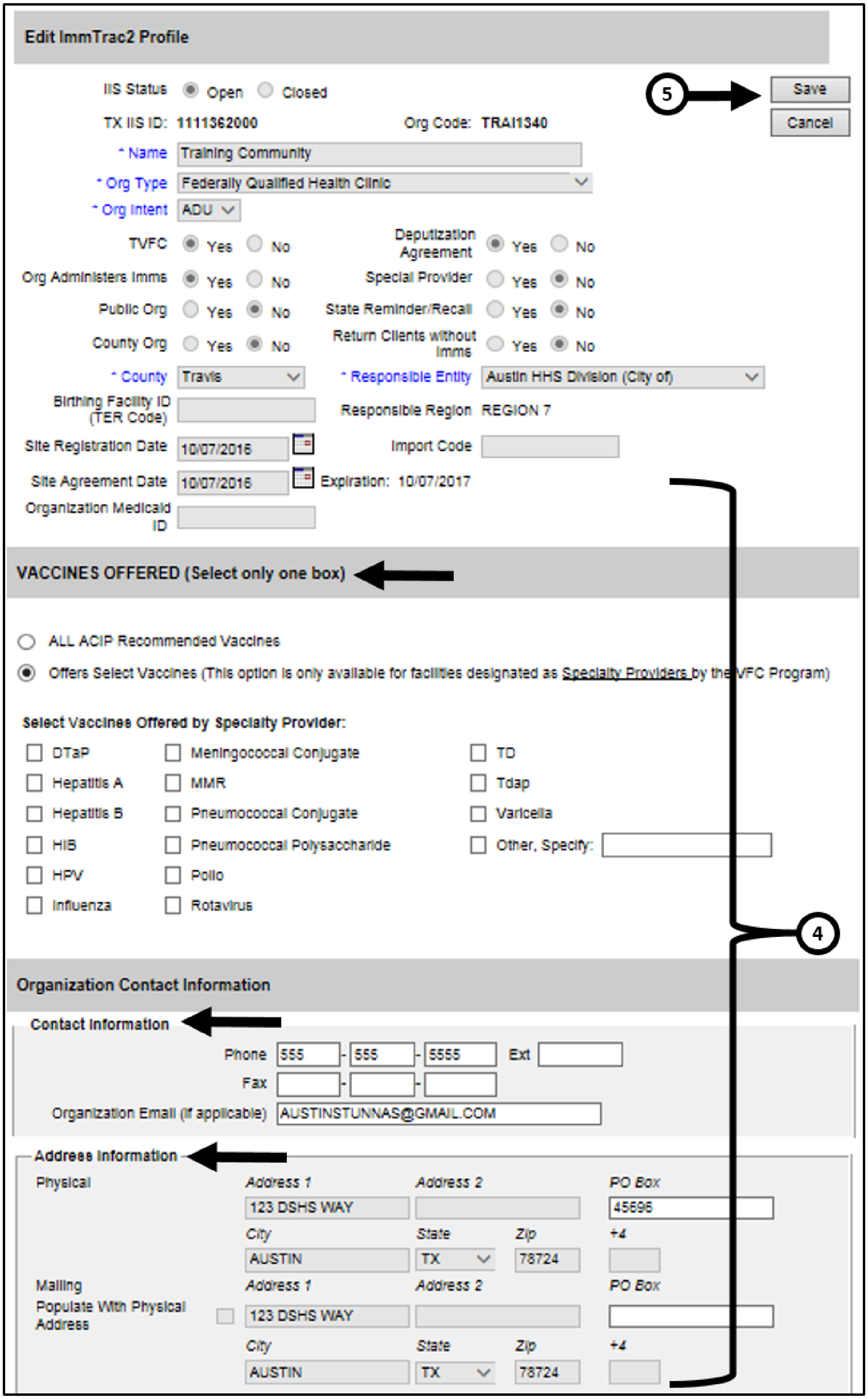


Figure 254 - Edit Organization Steps 4-5

Edit Organization Optional Contacts

To edit organization contacts, follow the steps below.

See Figure 255: Edit Organization Contacts Steps 1-3.

1. Click the **Edit** icon for the contact that needs updating.
2. The Edit Contact section will populate with the contact's information. Make changed as needed.
3. Click the "Apply" button.
4. Click the "Save" button at the top of the screen.

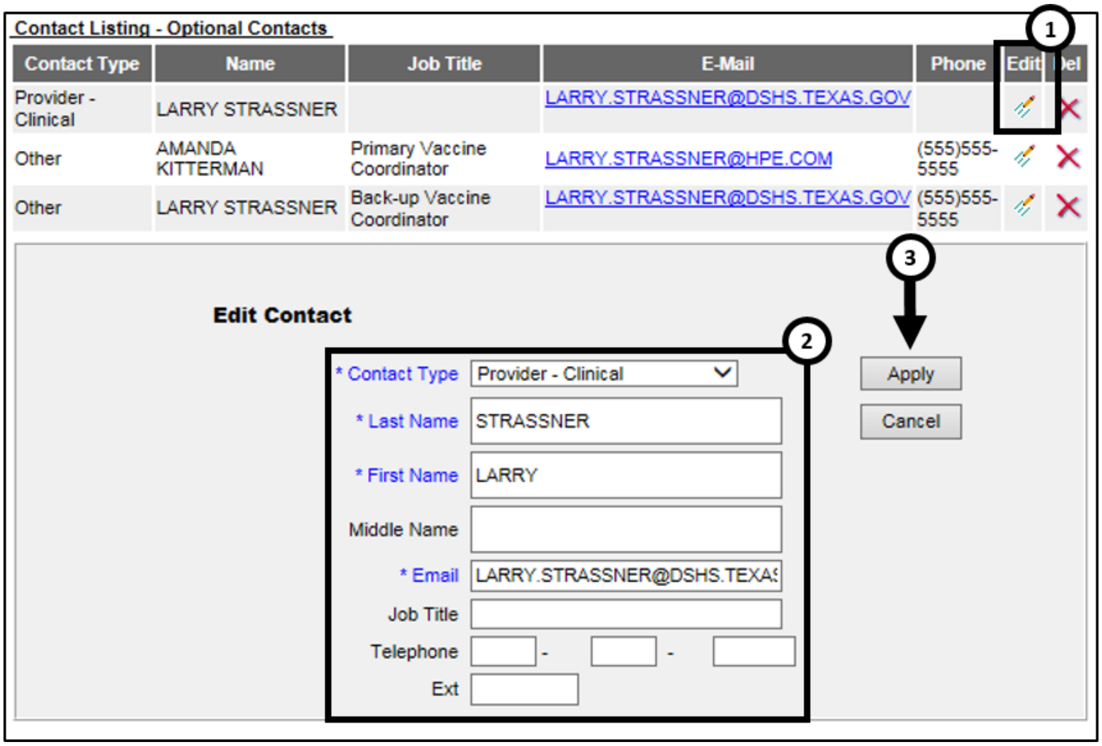


Figure 255 - Edit Organization Contacts Steps 1-3

Delete Organization Optional Contacts

To delete organization contacts, follow the steps below.

See Figure 256: Delete Organization Contacts Steps 1-2.

1. Click the "Delete" icon for the contact that need to be deleted.
2. Click "OK" when the "Are you sure you would like to DELETE this Contact?" message appears.
   - The contact will be removed from the option contact list.
3. Click the "Save" button at the top of the screen.

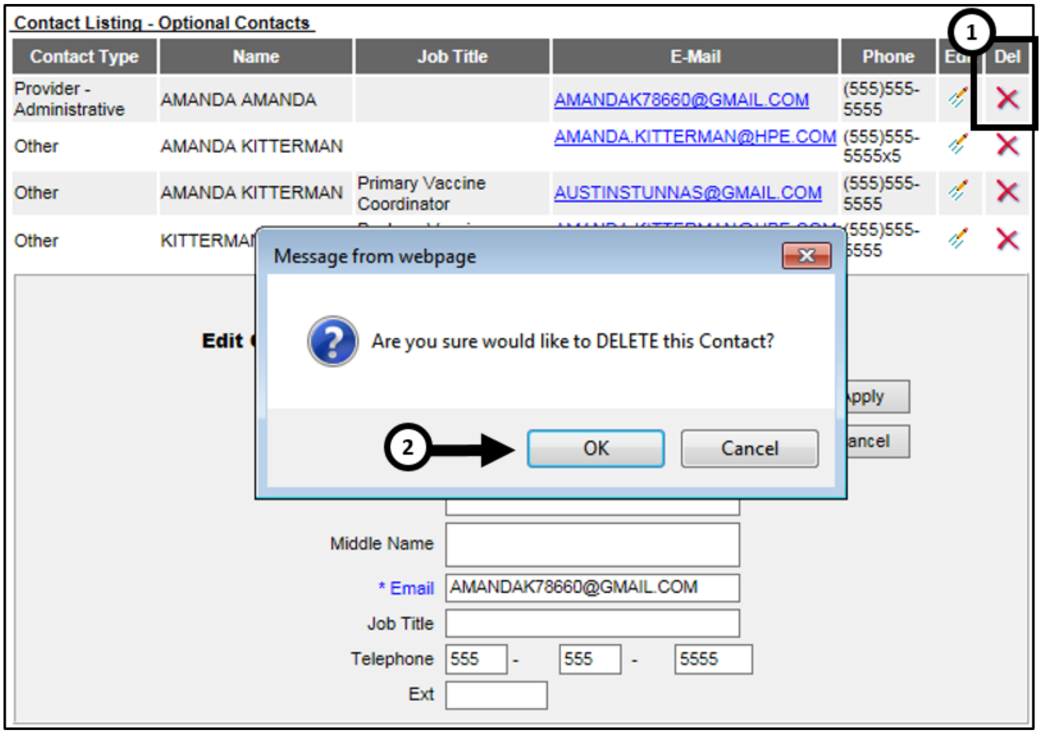


Figure 256 - Delete Organization Contacts Steps 1-2

Add Organization Optional Contacts

To add organization contacts, follow the steps below.

See Figure 257: Add Organization Contacts Steps 1-2.

1. In the Add Contact section, enter all required fields in blue marked with an asterisk.
2. Click the “Apply” button.
    - The contact will be added from the option contact list.
3. Click the “Save” button at the top of the screen.

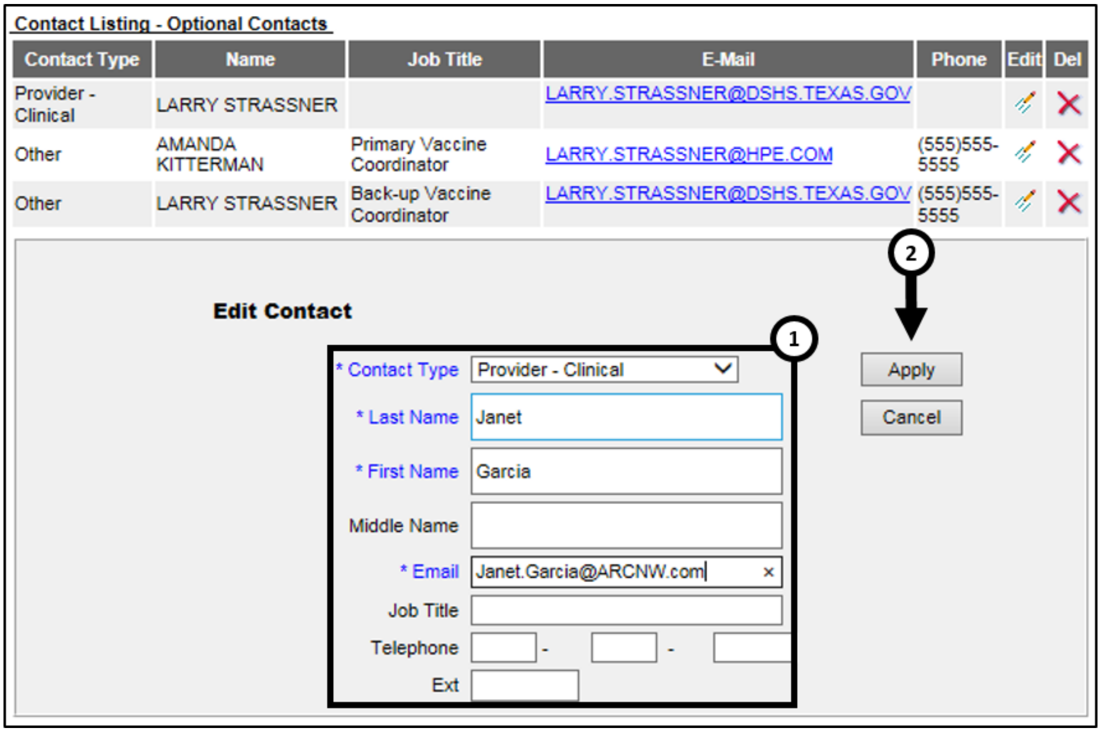


Figure 257 -Add Organization Contacts Steps 1-2

ImmTrac2

Texas Immunization Registry

Section IV

Modified Access Sub-State

Section IV: Modified Access Sub-State Users

Certain users who are Texas government employees in the Health Service Regions or who are employees of local health departments will have access to ImmTrac2 in the Modified Access Sub-State user role. These users can perform all the same tasks as a Providers or Provider Supervisor, but have more advanced capabilities.

After logging into ImmTrac2 the user role is displayed at the top of the screen in the user header. After logging in, the left-side menu panel displays options designed specifically for these tasks.

The Application Screen that consists of the a top Menu Bar and left Menu Panel looks the same as all other user roles, except there are more options available in the Menu Panel for Modified Access Sub-State Users. *See Figure 258: Modified Access Sub State – Application View.*

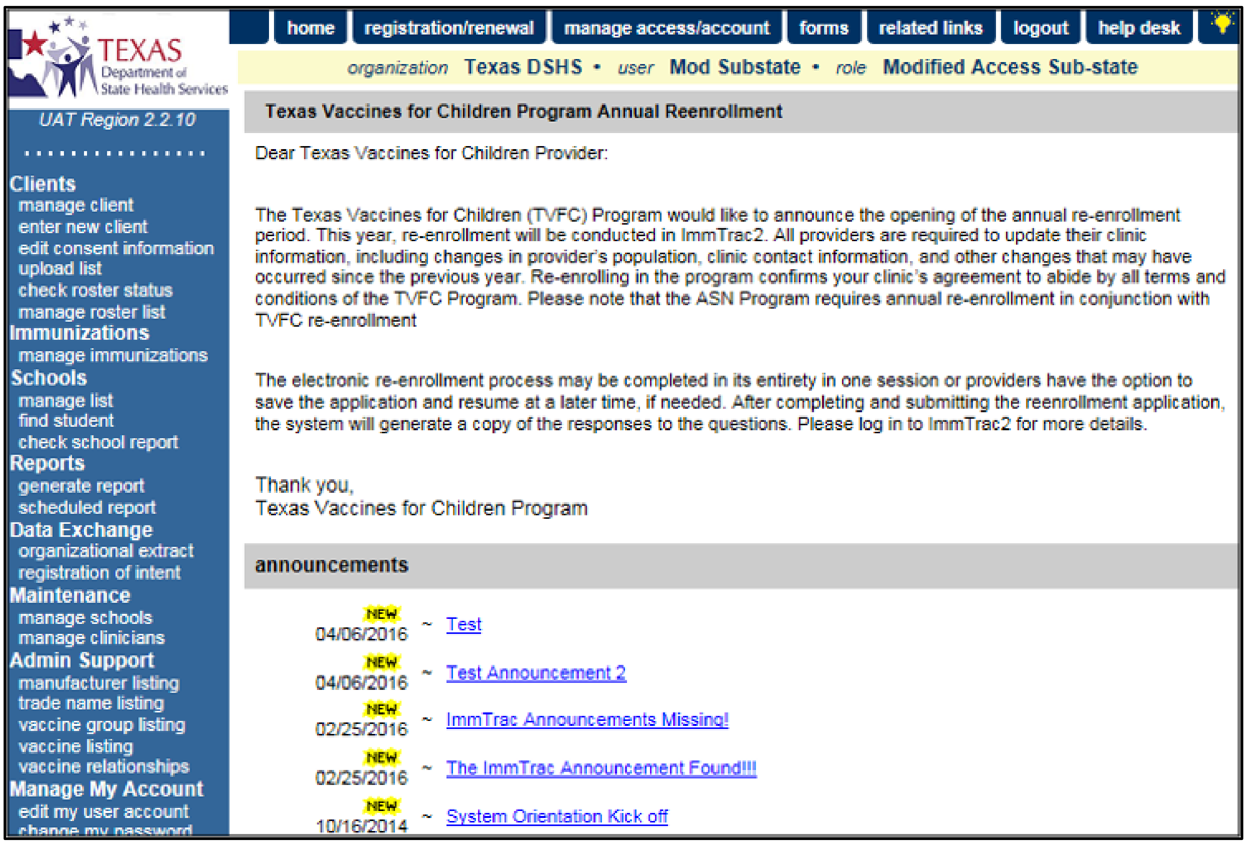


Figure 258 - Modified Access Sub State – Application View

The same is true for the **Portal Screen**. It looks the same as all other user roles, except there are more options available in the Menu Panel for Modified Access Sub-State Users. *See Figure 259: Modified Access Sub State – Portal View.*

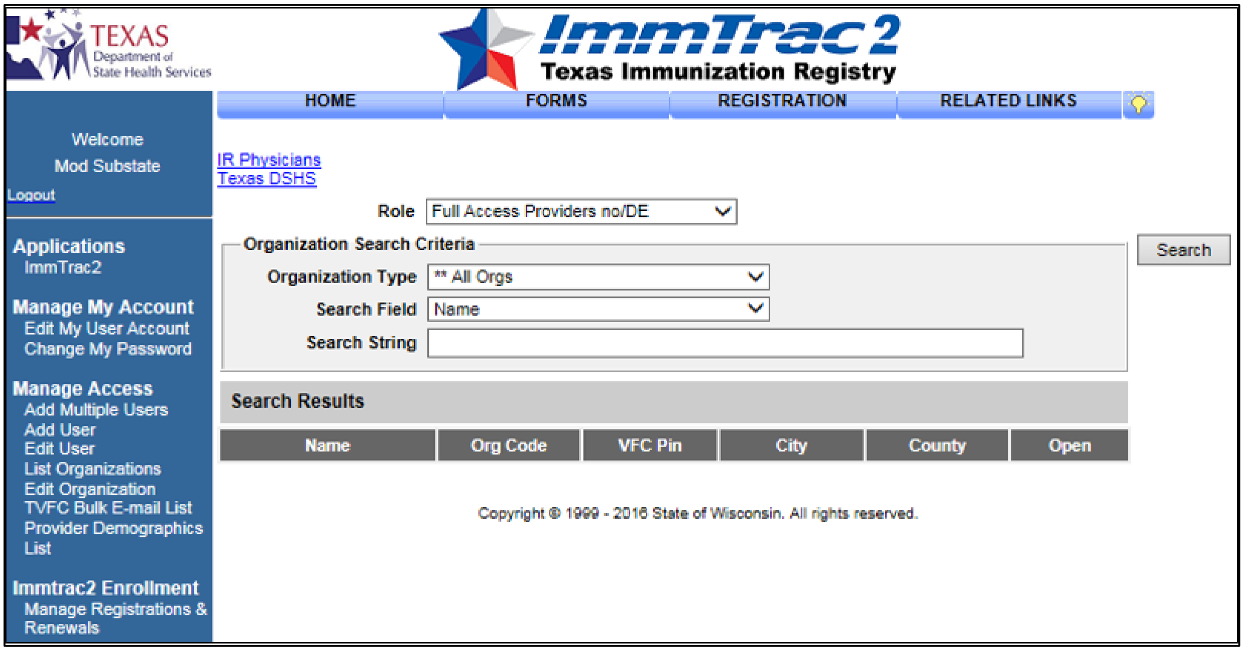


Figure 259 - Modified Access Sub State – Portal View

Chapter 18: Clients

Clients are individuals who have provided consent, or whose parent or legal guardian has provided consent, to participate in the statewide immunization registry. ImmTrac2 receives client immunization information from multiple sources, including birth record downloads. Under the *Clients* category in the menu panel user can view, add, and edit client information.

Manage Clients

The *Manage Client* menu option is used to search for existing clients and edit client information. There are different combinations of search criteria that can be used to locate clients in ImmTrac2. Remember, performing a client search accesses records across the entire statewide registry and not just records within an organization. More information and accurate information used to query will provide the best results. See Section 1 – Client Search for more details on how to use the Quick Search, Basic Search, and Smart Search functions.

Client Search

To search for a client in ImmTrac2, follow the steps below.

See Figure 260: Client Search Steps 1-4.

1. Click the **Manage Client** menu option.
2. Select a search option. (Quick, Basic, or Smart Search)
3. Enter the search criteria.
    - Required information is in blue text marked with an asterisk.
4. Click the “Find” button to display the search results.
    - If multiple results are found, review the client information and select the appropriate option.
    - When an exact match is found, the *View Client* screen will open immediately.

Note*: For more information on search results see Section 1 Search Results.*

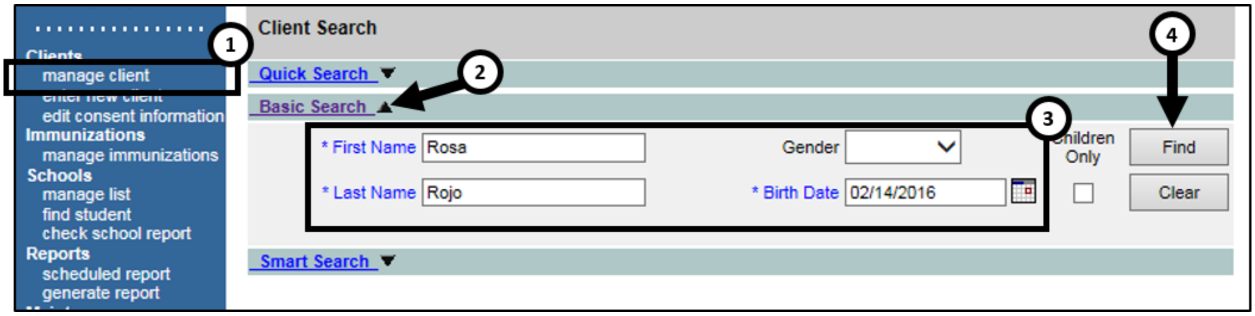


Figure 260 - Client Search Steps 1-4

View Client

The View Client screen displays the client record in a "view only" mode. The screen is divided into the following demographic sections: *Personal Information, Consent Information, Client AKA, Organization Information, Client Information, Address Information, Responsible Persons, Client Comments*, and *Client Notes*. Certain section headings include a quick count in parenthesis of the number of saved entries for that topic. To view the detail in a section, click the arrow next to the heading to expand the section. *See Figure 261: View Client Record.*

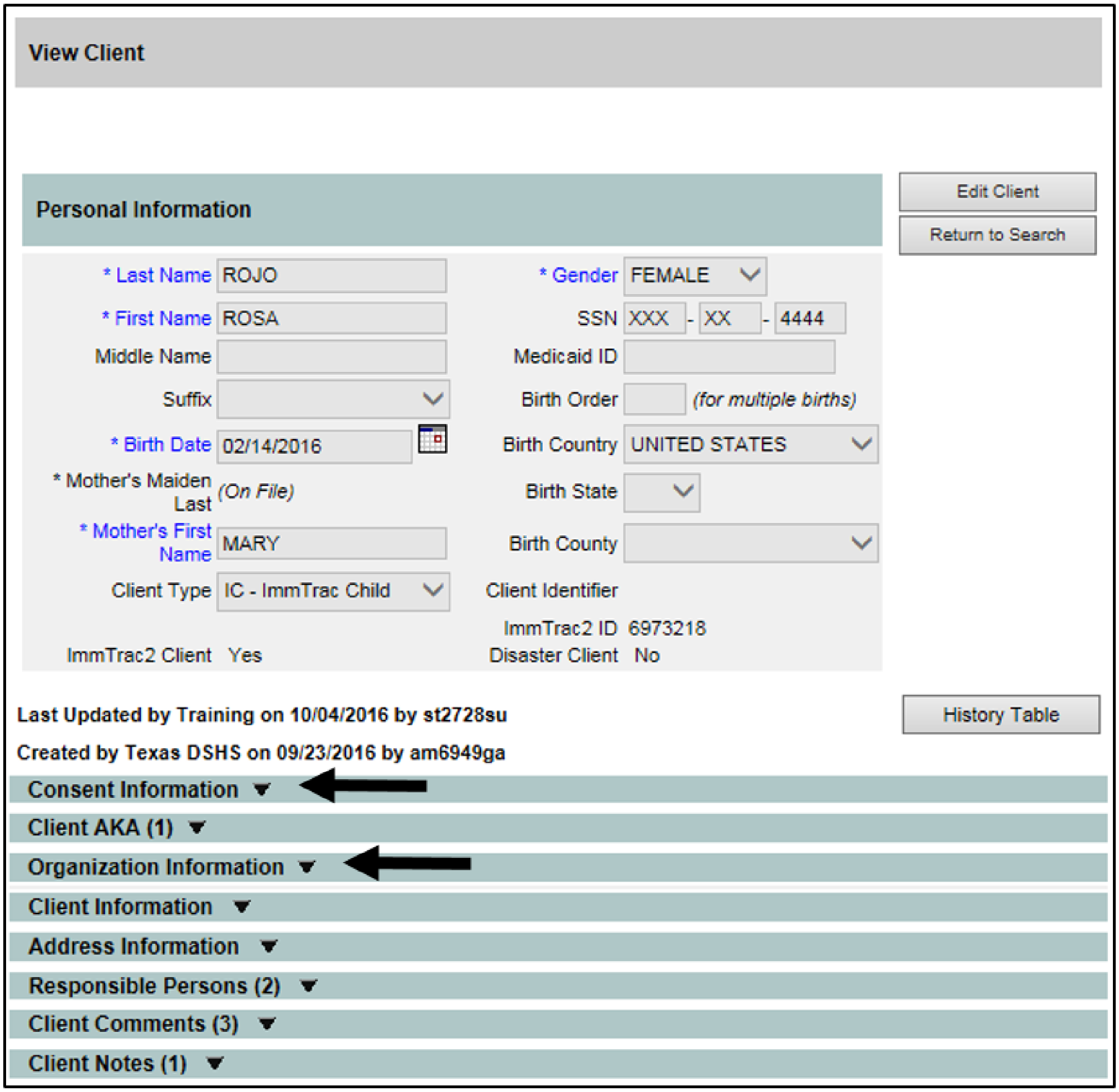


Figure 261 - View Client Record

Edit Client Information

The Update Client screen allows users to edit client information in the demographic tabs. All fields in white can be edited but are optional. If information is entered into a particular section, fields marked with asterisks are required in order to save that section's information.

Users must save changes by clicking the "Save" button located at the top right of the *Update Client* screen once all changes are made.

To edit client information, follow the steps below.

See Figure 262: Edit Client Information Step 1.

1. From the *View Client* screen, click the “Edit Client” button.
    - The screen will refresh to the *Update Client* screen.

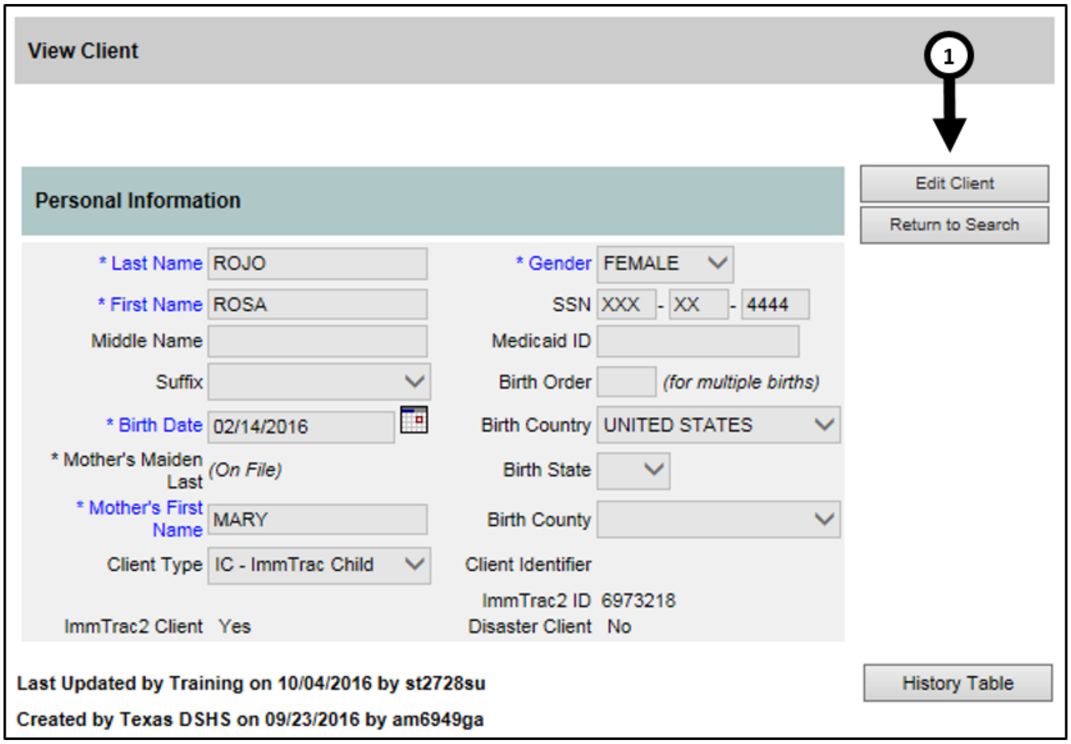


Figure 262 - Edit Client Information Step 1

See Figure 263: Edit Client Information Steps 2-3.

2. Click the arrow next to each section header to expand the specific section. Make edits as needed.
    - All fields in white can be edited.
    - See the following sections for details on each client demographic tab, starting with the Personal Information tab.
3. Click the “Save” button.

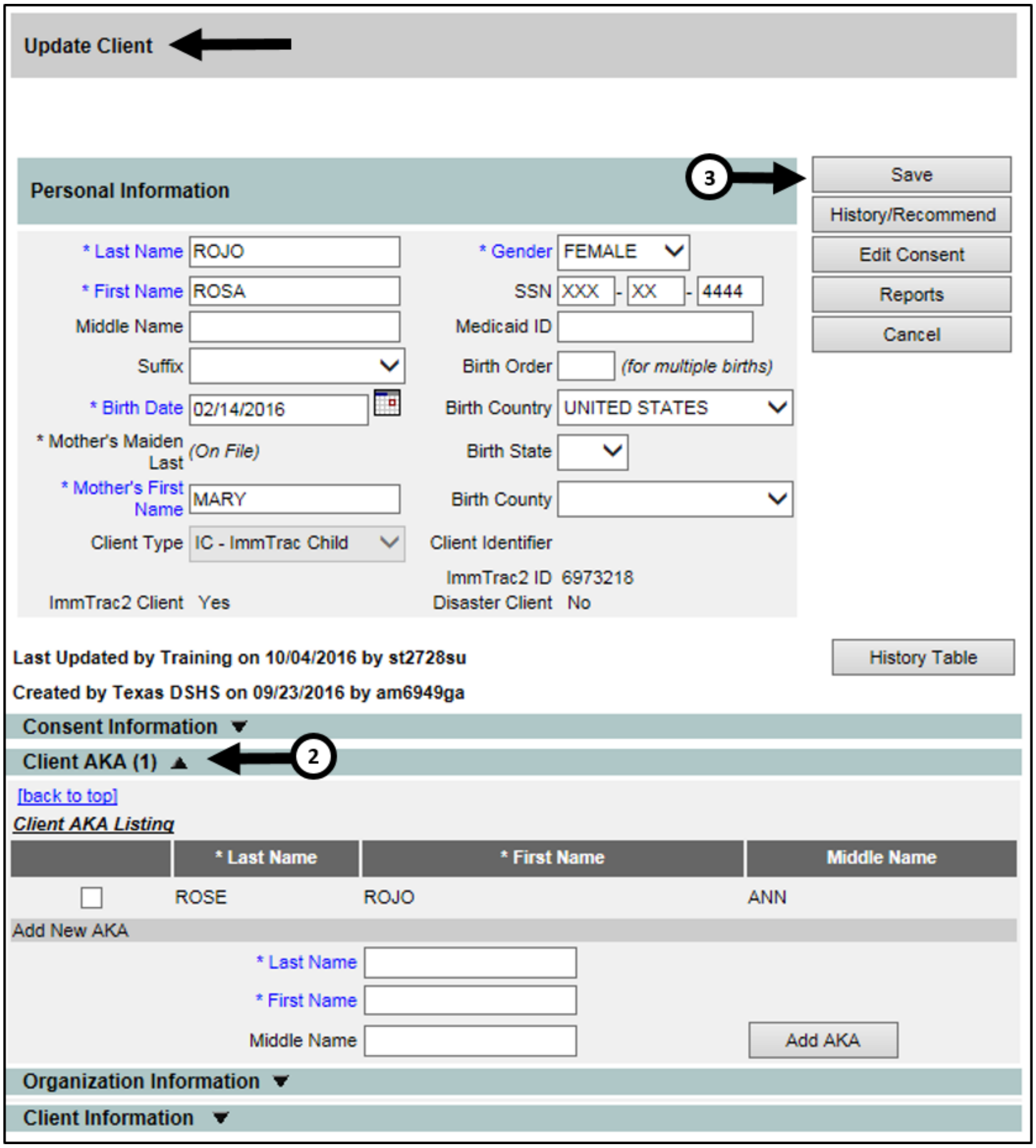


Figure 263 - Edit Client Information Steps 2-3

Personal Information

The *Personal Information* section at the top of the Update Client screen contains the individual's identifying information that is used to identify a client when conducting a search. *See Figure 264: Personal Information.*

See the Table 29: *Personal Information – Data Fields* for details about the Personal Information section.

***Note**: See Appendix A of this manual for information on allowable characters and names for these fields.*

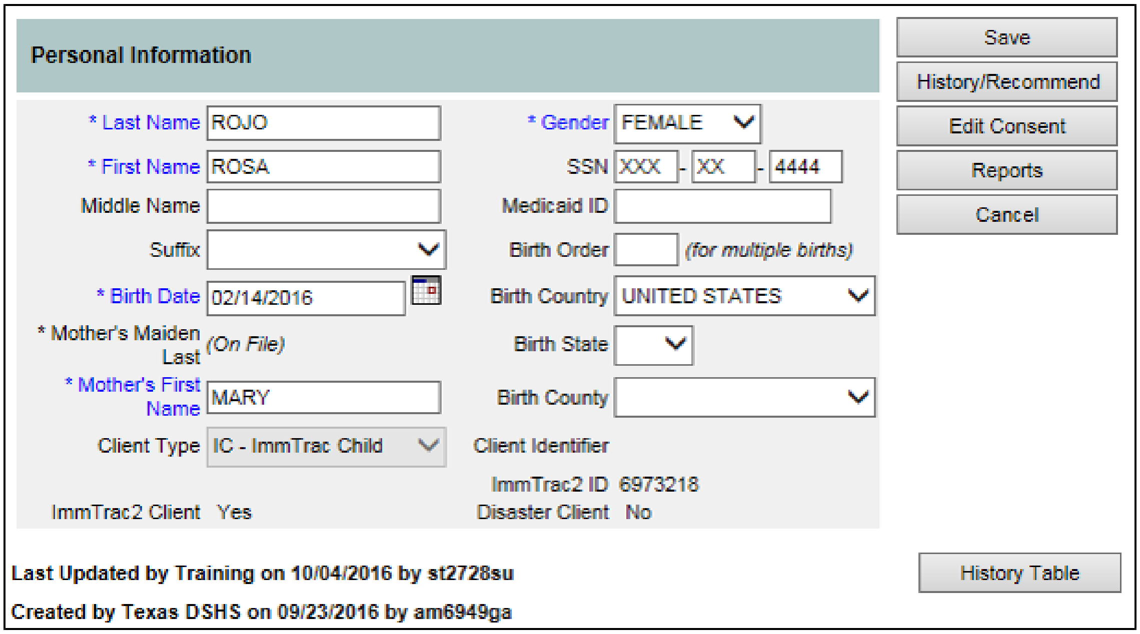


Figure 264 - Personal Information

Table 29 - Personal Information – Data Fields

Field	Description
Last Name	*Required*. The client's last name.
First name	*Required*. The client's first name.
Middle name	The client's middle name.
Suffix	The client's suffix. *Example: Jr. or III.*
Birth Date	*Required*. The client's date of birth. Complete the field using the MM/DD/YYYY format or use the pop-up calendar. ***Note**: Children entered by the Vital Records program do not have editable birth dates. The parent / guardian must contact the Vital Records program in the event a birth date is wrong. Contact ImmTrac2 Customer Support to obtain the Vital Records phone number.*
Mother's Maiden Last Name	*Required*. The client's mother's maiden last name. This information is required when adding a client, but once entered the field displays the words *(On File)*.
Mother's First Name	*Required*. The client's mother's first name.
Client Type	The client type is automatically updated based on the type of affirmed consent processed in the system. *Review the Client Types Table for a list of client types.*

Field	Description
ImmTrac2 Client	Indicate "Y" (Yes) if the client has signed a consent form to participate in ImmTrac2. All disaster only clients (DU and DC clients) will be indicated as "N" (No) for this field.
Gender	*Required*. The client's gender.
Social Security Number (SSN)	The client's social security number. Once entered this field will only display the last 4 digests of the SSN. *Example: XXX-XX-1234.*
Medicaid ID	The client's Medicaid ID number.
Birthing Order	The client's birthing order. This identifies the birth order of the client and should only be used for multiple births. *Example: twins, triplets.*
Birth Country	The client's birth country. This field defaults to United States. Use the drop-down list to select a different country of birth, if applicable.
Birth State	The client's birth state. Use the drop-down list to select a state of birth.
Birth County	The client's birth county. Use the drop-down list to select a county of birth.
Client Identifier	Displays the primary client identifier listed in the Organization Information demographic tab. *See the Organization Information section for more details.*
ImmTrac2 ID	The systematically generated ImmTrac2 ID.

Table 30 - Client Types

Client Type Code and Description	***Age Restriction***
IC = ImmTrac Child.	Younger than age 18
IA = ImmTrac Adult.	Age 18 or older
FR = First Responder.	Age 18 or older
FM = Adult Family Member of a First Responder.	Age 18 or older
DC = Disaster Related Client – has given consent to retain information.	None
DU = Disaster Related Client – has not given consent to retain information.	None

Consent Information

This section displays the First Responder and Disaster Information Retention (DIR) attributes. *See Figure 265: Consent Information* and *Table 31 - Consent Attributes.*

First Responder Attribute: A public safety employee or volunteer whose duties include responding rapidly to an emergency.

Disaster Information Retention (DIR) Attribute: If a DIR consent is not signed, ImmTrac2 will retain disaster-related information for a period of five years. At the end of the five-year retention period, disaster-related information will be removed from the registry unless consent is granted to retain the client information in ImmTrac2 beyond the five-year retention period.

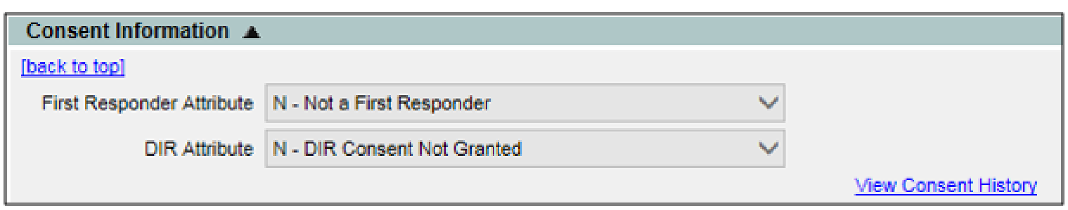


Figure 265 - Consent Information

Table 31 - Consent Attributes

Consent Type	**Code**	**Description**
First Responder Attribute	F	First Responder
First Responder Attribute	A	Adult Family Member of a First Responder
First Responder Attribute	M	Minor Family Member of a First Responder
First Responder Attribute	N	Not a First Responder
Disaster Information Retention Attribute (DIR)	Y	Yes, DIR consent granted
Disaster Information Retention Attribute (DIR)	N	No, DIR consent not granted

Client AKA (Also Known As)

This section lists other names that the client may also be known as and can be used to validate a client when performing a search. A client can have several AKA listings.

Add Client AKA

To add an AKA, follow the steps listed below.

See Figure 266: Add Client AKA Steps 1-2.

1. Enter the required information.
2. Click the “Add AKA” button.
3. Click the “Save” button at the top of the screen.

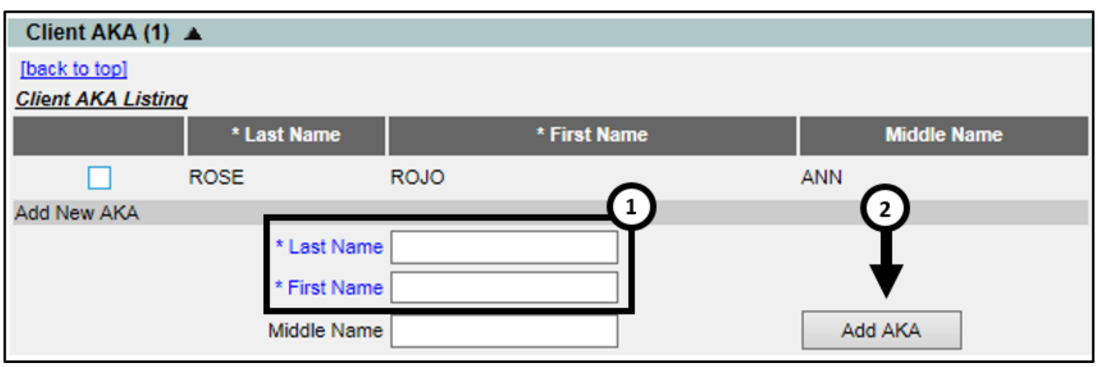


Figure 266 - Add Client AKA Steps 1-2

Organization Information

This section includes organization-specific information about the client. *See Figure 267: Client Organization Information.*

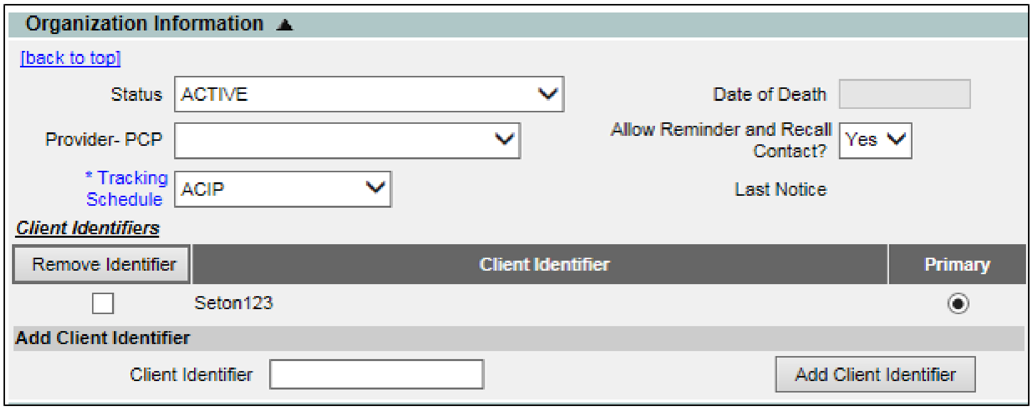


Figure 267 – Client Organization Information

Status: Select Active from the drop-down list if the client is actively receiving services from the user's organization. The Active or Inactive status on this screen applies only in relationship to the user's organization. *See Table 32: Client Status.*

Table 32 - Client Status

Status	***Description***
ACTIVE	Client is actively associated with the user's organization.
INACTIVE - LOST TO FOLLOW UP	Client has not responded to follow up contact.
INACTIVE - MOGE	Moved or gone elsewhere.
INACTIVE - MOOSA	Moved out of service area.
INACTIVE - ONE TIME ONLY	Received an immunization once but is not a regular.
INACTIVE - OT EHR	Select when all other options do not apply.
INACTIVE - PERMANENTLY (DECEASED)	Client is deceased. If this status is selected, the client's status displays deceased for all organizations.
INACTIVE - UNKNOWN	An individual made inactive by an electronic interface, perhaps with demographic and historical data, but without that individual's status specified. This situation can occur because of health insurance companies or Providers providing historical data by an electronic interface. (AIRA Definition)

Provider-PCP: Fill in the client's primary care physician (PCP) or health care organization from the drop-down list, as applicable. The list of names available in the drop-drown list is managed from the Manage Clinicians option of the menu panel.

Tracking Schedule: This required field initially defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects ImmTrac2 recall and reminder notices and the Comprehensive Clinic Assessment Software Application (CoCASA). See the Recall and Reminder Reports section for more details.

Note: *If the Tracking Schedule option is changed, when navigating away and returning later it does not reset to the default ACIP schedule. You must manually change it back to the ACIP option.*

Date of Death: This field becomes active when the “INACTIVE-PERMANENTLY (DECEASED)” option is selected as the client’s Status.

Allow Reminder and Recall Contact: Choose “Yes” from the drop-down list to allow reminder / recall notices to be sent to the client when the reminder / recall report is generated. Choose **No** from the drop-down list to exclude the client from being contacted. See the Recall and Reminder Reports section for more details.

Client Identifiers: The ImmTrac2 system-generated ID is the default primary identifier. However, a client may have another associated *Client Identifier* that is specific to an organization. For example, this could be the organization’s Patient ID. To save a primary client identifier simply select the “Primary” radio button option.

Add Client Identifier

To **add** a client identifier, follow the steps below.

See Figure 268: Add Client Identifier Steps 1-2.

1. Enter the Client Identifier.
2. Click the “Add Client Identifier” button.
    - Repeat steps to add multiple client identifiers.
3. Click the “Save” button at the top of the screen.

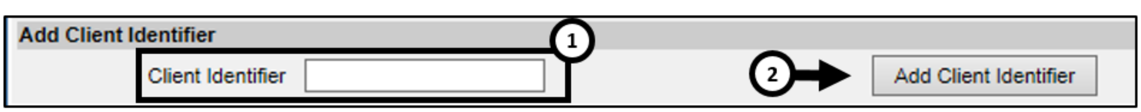


Figure 268 - Add Client Identifier Steps 1-2

Delete Client Identifier

To **delete** a client identifier, follow the steps below.

See Figure 269: Delete Client Identifier Steps 1-2.

1. Select the Client Identifier to be deleted (using the check box).
2. Click the "Remove Identifier" button.
3. Click the "Save" button at the top of the screen.

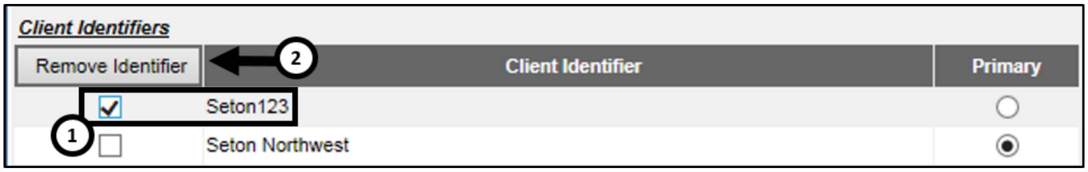


Figure 269 - Delete Client Identifier Steps 1-2

Client Information

The Client Information section gives additional information about the client. *See Figure 270: Client Information.*

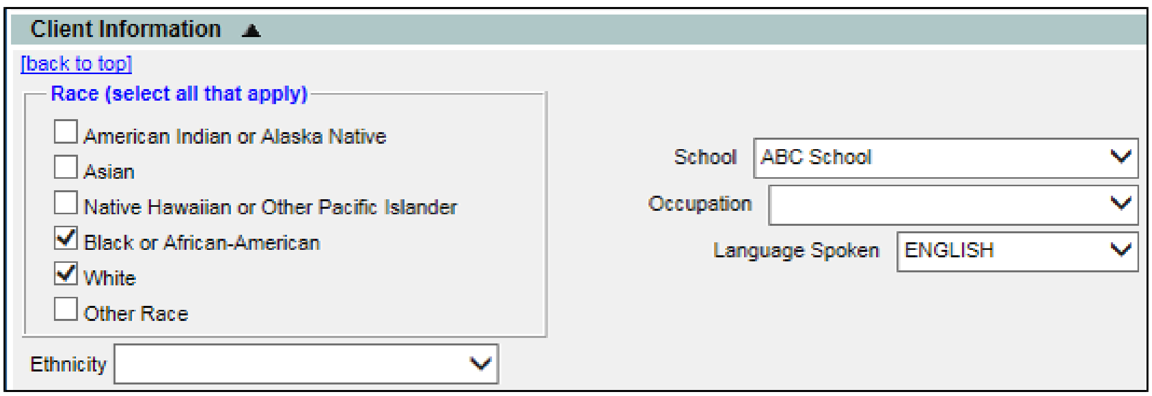


Figure 270 - Client Information

Table 33 - Client Information – Data Fields

Status	***Description***
Race	Select the client's race by clicking the appropriate boxes. Multiple races may be selected.
Ethnicity	Select the client's ethnic background from the drop-down list provided.
School	Select the client's school from the drop-down list, if applicable and available. This information is used only for reporting purposes and is optional. See the Manage Schools section for details on how to add, edit, or delete schools from the drop-down list.

Status	Description
Occupation	Select the client's occupation from the drop-down list, if applicable. This field can be used in emergency response situations when certain occupation groups are selected for vaccination.
Language Spoken	Select the primary language as English or Spanish; this determines the language of the Reminder / Recall letters.

Address Information

This section is used to identify the current address of the client and to view previous addresses. *See Figure 271: Address Information.*

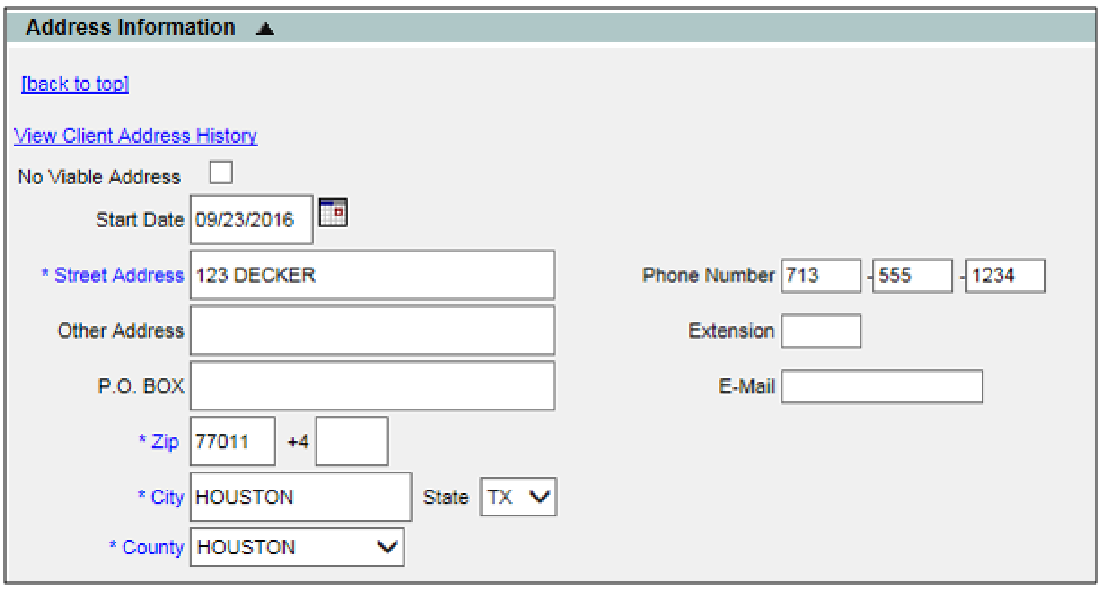


Figure 271 - Address Information

Table 34 - Client Information – Data Fields

Status	Description
View Client Address History	Click this link to open a window with the client's address history, if available.
No Viable Address	Mark this check box if information was mailed to the client and later returned as not deliverable.
Start Date	The start date of the client's new address. Enter the start date using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon.
Street Address	*Required*. The client's Street address.
Other Address	The client's additional address information, such as for a suite number or apartment number if applicable.
P.O. Box	The client's Post Office Box if applicable.
Zip	*Required*. The client's Zip Code.
+4	The client's extended Zip Code if available.
City	*Required*. The client's City (or town).
State	The client's State. This will default to Texas.
County	*Required*. The client's County.
Phone Number	The client's phone number.
Extension	The client's phone extension.
Email	The client's email address.

Responsible Persons

This section allows the user to identify the contact information for a client's responsible person, such as a parent or legal guardian. User may also select the primary contact using the radio button as needed, but it is not required.

If the client has more than one responsible person and one is selected as the primary contact, they will be listed first in the Responsible Person Listing section. If no person is designated as the primary contact, the names will be listed alphabetically.

Add Responsible Persons

To **add** a Responsible Person, follow the steps below.

See Figure 272: Add Responsible Person Steps 1-3.

1. Click the “Add New” button as needed to clear the data fields.
   - This will clear the prepopulated information that is display in the Details for Responsible Person Section. If there are no existing person, these fields will be blank.
2. Enter the details for the new Responsible Person.
   - Required information is in blue text marked with an asterisks.
3. Click the “Apply Changes” button.
   - The screen will refresh and the name will be added to the *Responsible Person Listing* section.
4. Click the “Save” button at the top of the screen.

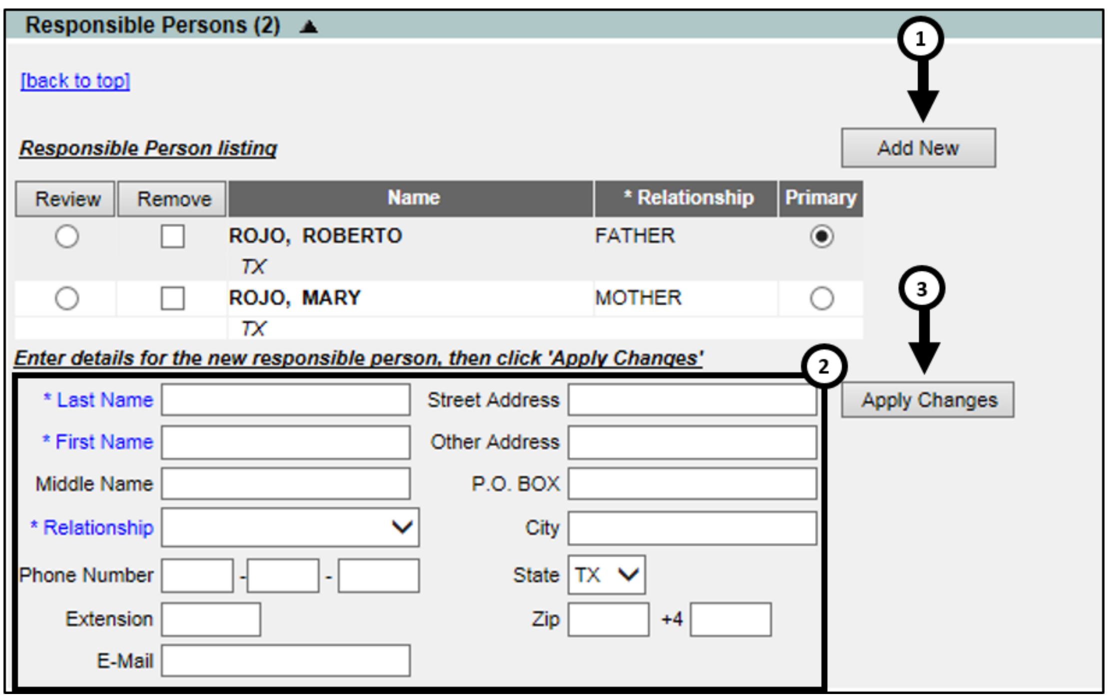


Figure 272 - Add Responsible Person Steps 1-3

Edit Responsible Persons

To **edit** a Responsible Person, follow the steps below.

See Figure 273: Edit Responsible Person Steps 1-3.

1. Select the radio button of the person that needs to be edited, as needed, and then click the “Review” button.
    - The first name in the list will be selected by default.
2. Change or add necessary information.
3. Click the “Apply Changes” button.
4. Click the “Save” button at the top of the screen.

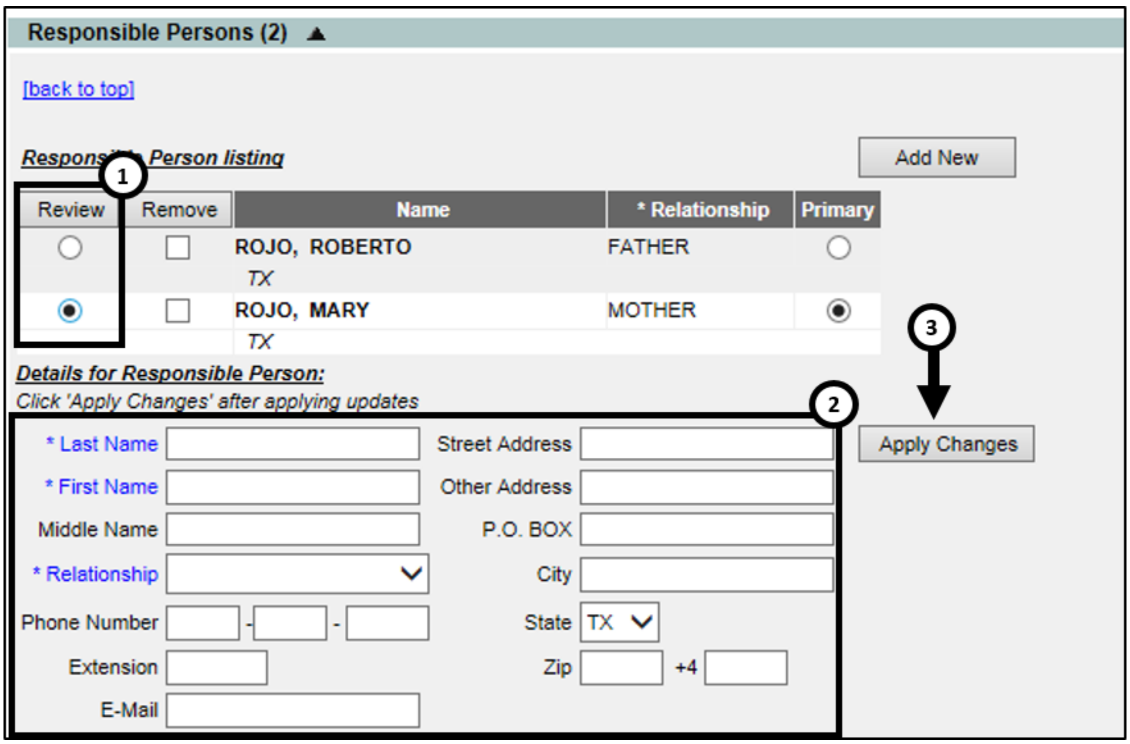


Figure 273 - Edit Responsible Person Steps 1-3

Remove Responsible Persons

To **remove** a Responsible Person, follow the steps below.

See Figure 274: Remove Responsible Person Step 1.

1. Select the check box of the person that needs to be removed, then click the “Remove” button.
    - The screen will refresh and the name will no longer display in the *Responsible Person Listing* section.
2. Click the “Save” button at the top of the screen.

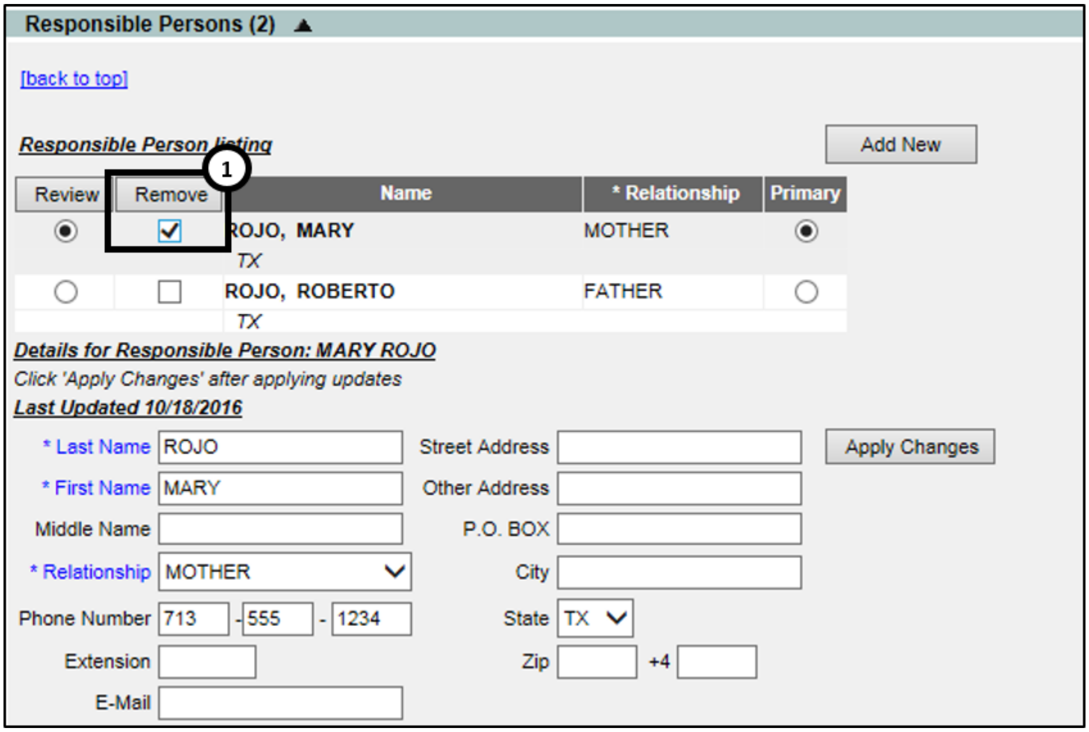


Figure 274 - Remove Responsible Person Step 1

Client Comments

In this section users can enter immunization-related comments for a client, such as contraindication information and refusals of a vaccine. The client comments list is derived from a CDC-standardized set of options and displays as a drop-down list.

The client comments are visible in the *Client Information* section on various screens, such as the client immunization record. All users, excluding View-Only users, can add, edit, or delete any comment regardless of the user that entered it. When using the “Print” button on the Immunization History screen, the comments are displayed on separate lines in the Comments box.

Immunity Comments: These comments are linked to vaccine group recommendations. If a client has a reaction to a vaccine, select an immunity comment and a specific Start Date. This will ensure that the recommendation for that vaccine group will not display on the client’s record.

Client Refusal of Vaccine Comments: Enter refusal comments with an appropriate Start Date to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular client in ImmTrac2. Refusal of vaccine will not affect the recommendations display on the client’s record.

Add Client Comments

To add a Client Comment, follow the steps below.

See Figure 275: Add Client Comments Steps 1-3.

1. Select the appropriate comment / contraindication from the Client Comment drop-down list.
2. Enter the start date and end date as needed. (Complete the field using the MM/DD/YYYY format or using the calendar icon .)
   - Some comment will not require an end date, and if a date is entered it will be automatically removed when the record is saved displaying the following message: “Selected Comment does not permit an End Date. The date entered has been ignored”.
3. Click the “Add Comment” button.
   - The screen will refresh and the comment will be displayed in the Client Comment Listing.
4. Click the “Save” button at the top of the screen.

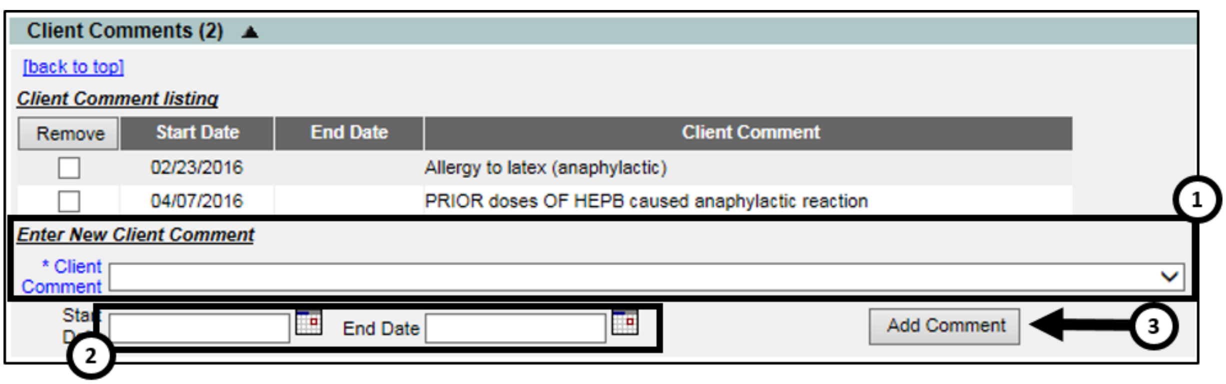


Figure 275 - Add Client Comments Steps 1-3

Important: *Although the Start Date is not a required field,* ***<u>a start date must be entered with a contraindication comment</u>*** *in order to properly interact with the immunization schedule for the specified vaccine group.* ***If a start date is not entered, the contraindicated vaccine group will still be listed on the Recommended Tracking Schedule.*** *See Figure 276: Comment Impacting the Tracking Schedule Example.*

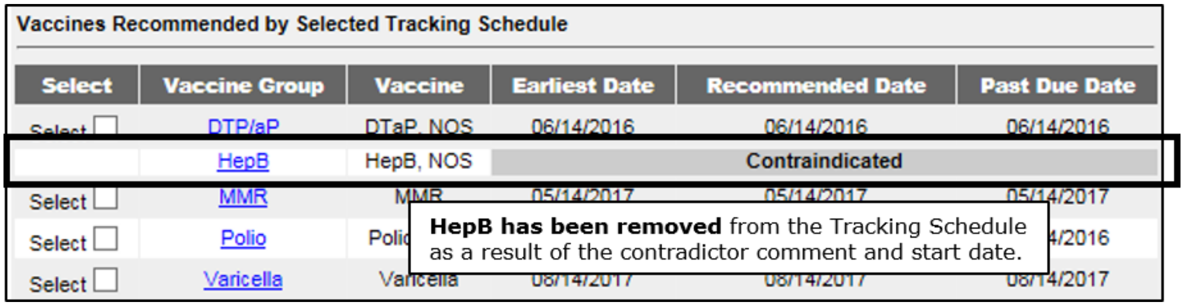


Figure 276 - Comment Impacting the Tracking Schedule Example

Remove Client Comment

To remove a client comment, follow the steps below.

See Figure 277: Remove Client Comment Step 1.

1. Select the check box of the comment to be removed in the Client Comment listing, then click the “Remove” button.
    - The screen will refresh and the comment will be removed from the Client Comment Listing.
2. Click the “Save” button at the top of the screen.

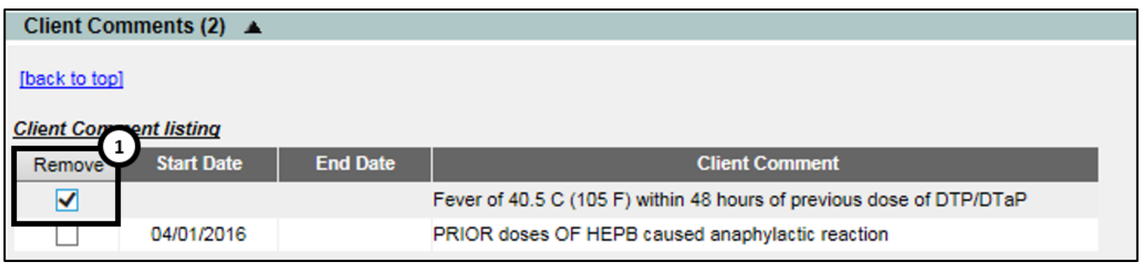


Figure 277 - Remove Client Comment Step 1

Client Notes

The Client Notes section allows users to enter notes for a client that may be useful to other clinicians and are visible to all organizations. Client notes can also be accessed from the client’s immunization record. Confidential information should not be noted in this section.

Add Client Notes

To add a client note, follow the steps below.

See Figure 278: Add Client Notes Steps 1-2.

1. Enter text up to 300 characters in length in the text box.
2. Click the “Add New Note” button.

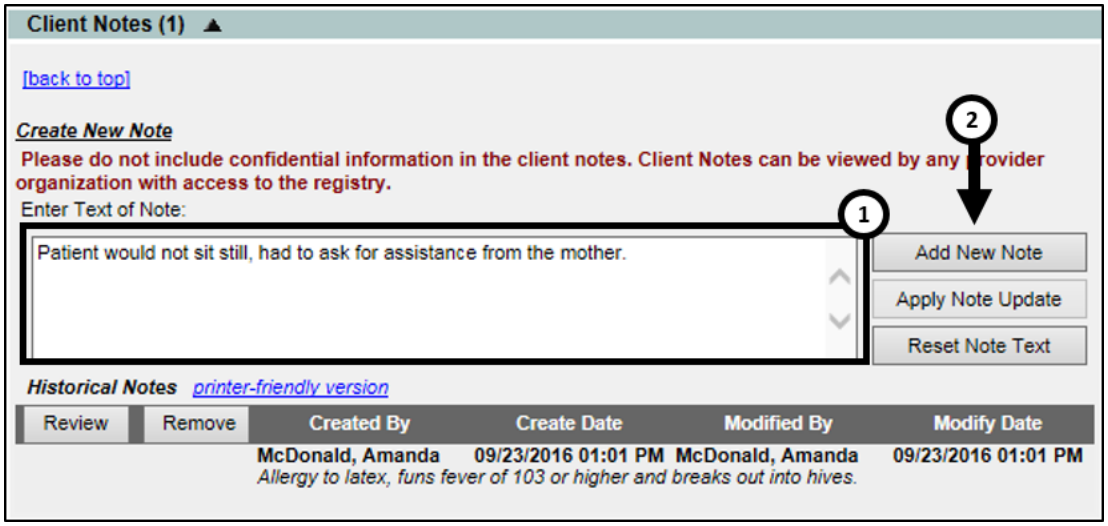


Figure 278 - Add Client Notes Steps 1-2

The screen will refresh and the note displays in the Notes table in a pending status until the "Save" button is clicked at the top of the page. Once saved, the "Created By", "Create Date", "Modified By", and "Modify Date" information will be populated. *See Figure 279: Add Client Notes – Note Pending.*

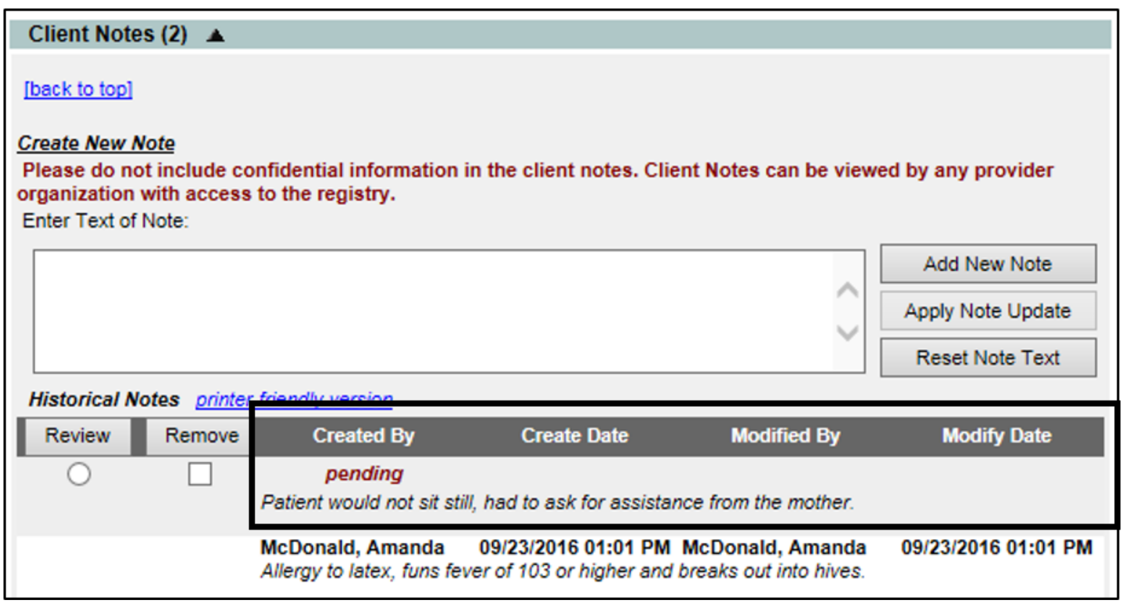


Figure 279 - Add Client Notes – Note Pending

Edit Client Notes

Even though Client Notes are viewable by all users, they can only be edited by the user who entered the note.

To edit a client note, follow the steps below.

See Figure 280: Edit Client Notes Steps 1-3.

1. Select the radio button in the Review column of the note to edit, then click the "Review" button.
    - Only notes that were entered by the user displays a radio button for editing.
2. Make the edit in the *Enter Text of Note* section.
3. Click the "Apply Note Update" button.

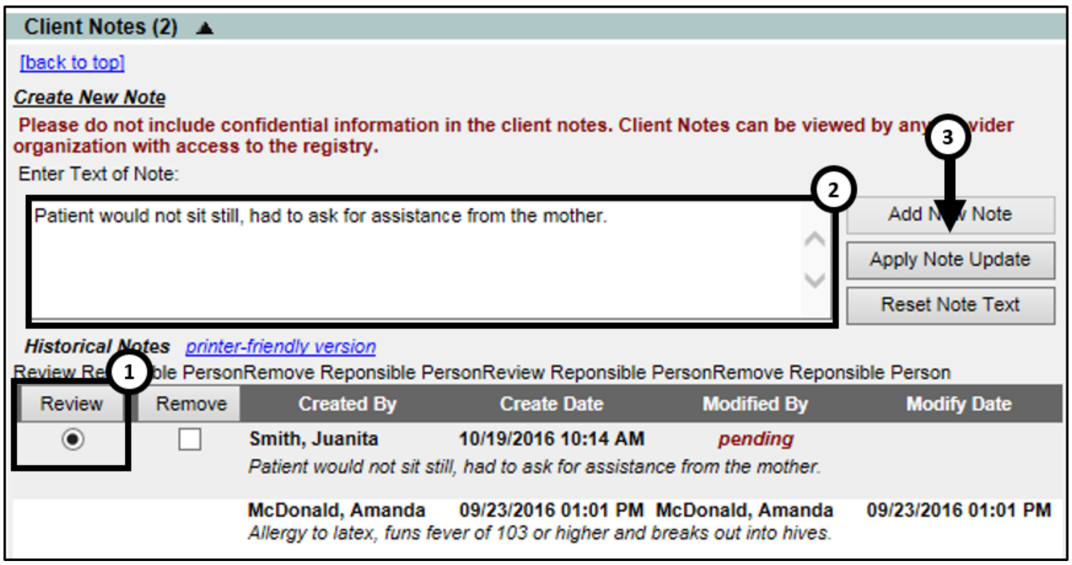


Figure 280 - Edit Client Notes Steps 1-3

The screen will refresh and the updated note displays in the Notes table in a pending status until the "Save" button is clicked at the top of the page. Once saved, the "Modified By" and "Modify Date" information will be populated. *See Figure 281: Edit Client Note – Note Pending.*

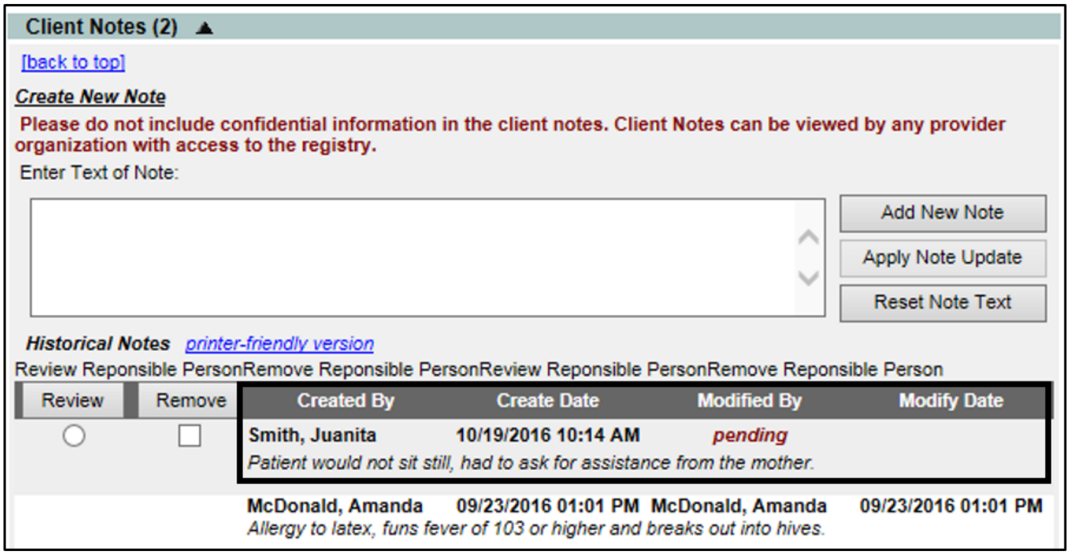


Figure 281 - Edit Client Note – Note Pending

Delete Client Notes

Client Notes can only be deleted by the user who entered the note.

To delete a client note, follow the steps below.

See Figure 282: Delete Client Notes Steps 1-2.

1. Select the check box in the Remove column of the note to delete, then click the “Remove” button.
    - Only notes that were entered by the user displays a check box for deletion.
2. Click “OK” when asked “Are you sure you want to delete this information?”
    - The screen will refresh and the notes will no long be displayed.
3. Click the “Save” button at the top of the screen.

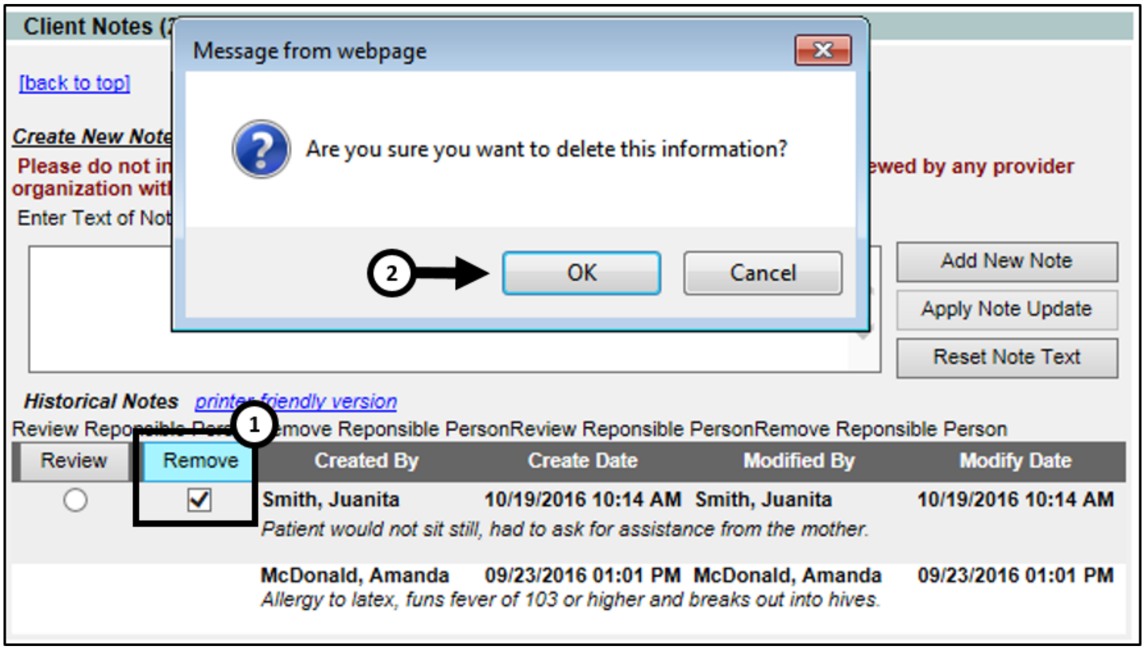


Figure 282 - Delete Client Notes Steps 1-2

Saving Client Information

Listing below are several ways to save information on the Edit Client screen. After clicking one of the below command buttons, if there are any errors in the entered information or required fields are missing, a validation error message will appear in red at the top of the screen. Make corrections as needed and continue with the save.

Save: When clicked, the "Save" button at the top of the screen will save all information fields within each demographic section. The message "Client record successfully saved" will appear at the top of the screen if no validation errors are found.

History / Recommend: As with the "Save" button, the "History / Recommend" button will save the client's information and redirects the user to the *Client Immunization History* screen. See Section 2 – Manage Immunizations for more details on this screen.

Reports: As with the "Save" button, the "Reports" button will save the client's information and redirects the user to the *Reports Available for this Client* screen. See Section 1 - Client Reports for more details this screen.

Cancel: When clicked, the "Cancel" button clears all entered information and **does not save to ImmTrac2** and the user is returned to the application home screen.

Enter New Clients

When entering a new client, ImmTrac2 requires users to search existing client records to prevent a duplicate entry of the same individual in the system. ImmTrac2 will compare and attempt to match entered information against existing client records before completing the steps to save the information entered on the screen.

Remember, Smart Search uses a more sophisticated matching process for locating a client in ImmTrac2. See Section 1 – Client Search for more details on how to use the Smart Search option. If a client records is identified with the same or similar person information, review each record to determine if you should continue with the Enter New Client process.

To enter a new client, follow the steps below.

See Figure 283: Enter New Client Steps 1-3.

1. Click the "Enter New Client" menu option.
2. Enter as much client information as possible to perform a search.
    - Required information is in blue text marked with an asterisk.
3. Click the "Find" button.

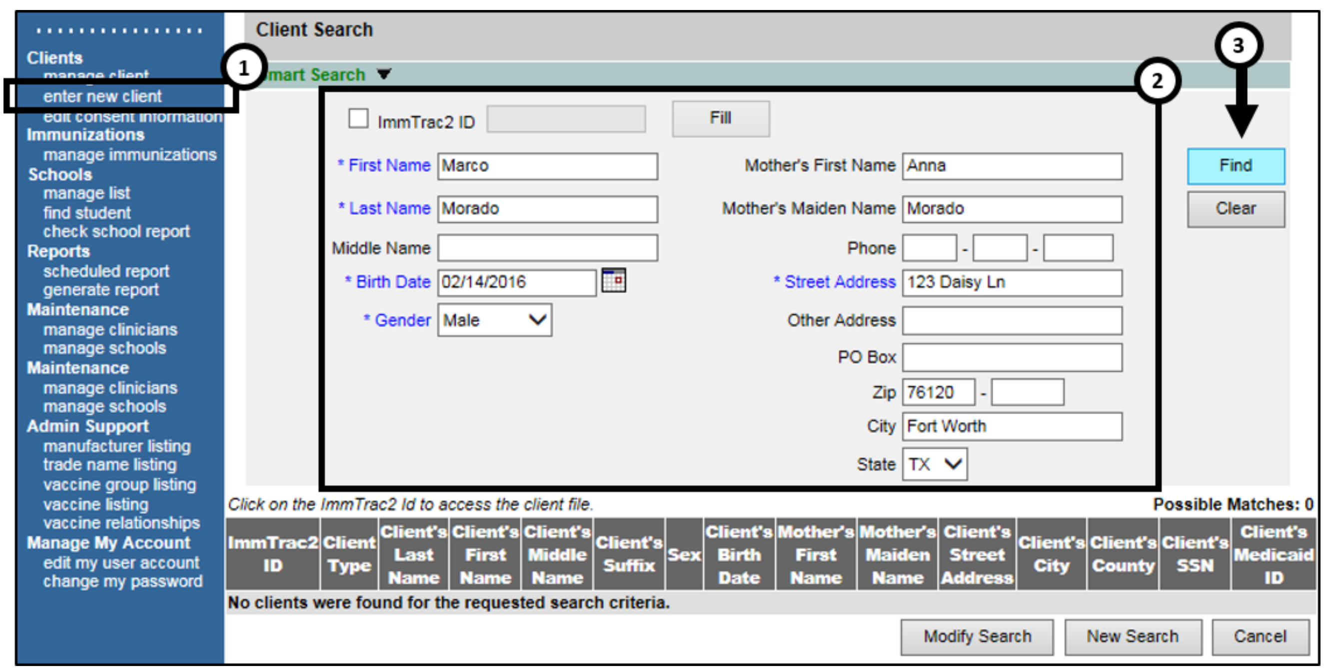


Figure 283 - Enter New Client Steps 1-3

4. If there are no *Possible Matches*, continue by selecting one of the two consent options. *See Figure 284: Enter New Client Steps 4-5.*

- Yes – Add a client (Yes the client does have a signed consent form on file).
- No – Request a Consent Form.

5. Click the "Submit" button.

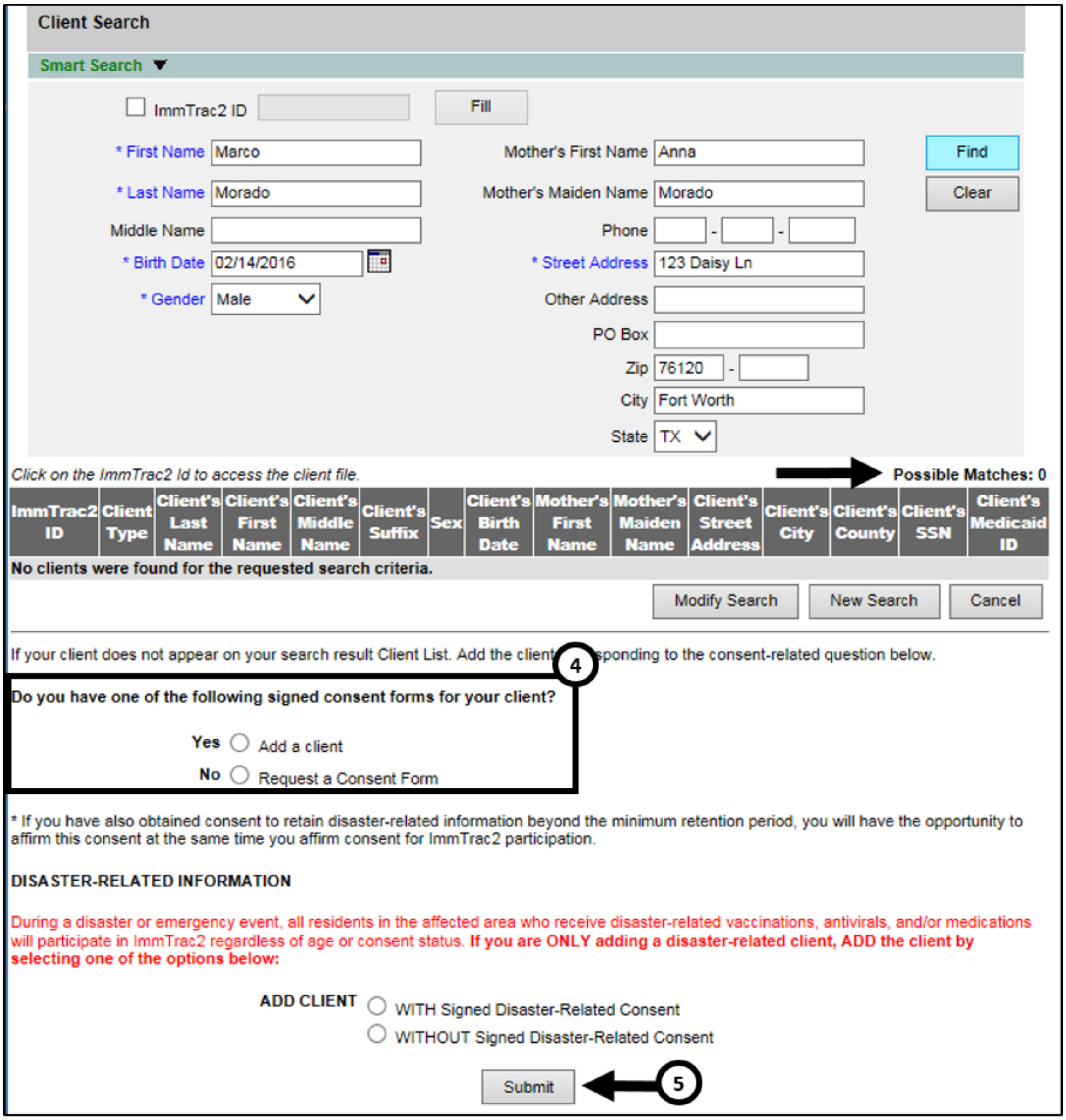


Figure 284 - Enter New Client Steps 4-5

If the "No - Request a Consent Form" option is selected in step 4, after clicking submit the Print Consent Documentation screen displays giving options to display and print a pre-populated consent form with the client's information from the Smart Search fields. Available options are determined by the client date of birth. *See Figure 285: Print Consent Forms.*

Table 35 - Print Consent Documentation – Command Button Data

Command Button	**Description**
Display Form	Select the appropriate form to display using the radio buttons then click this button to open a pre-populated form.
Continue with Client Add	Will proceed with the “Enter New Client” process and open the *Add Client* screen.
Cancel	Returns users back to the previous Enter New Client screen.

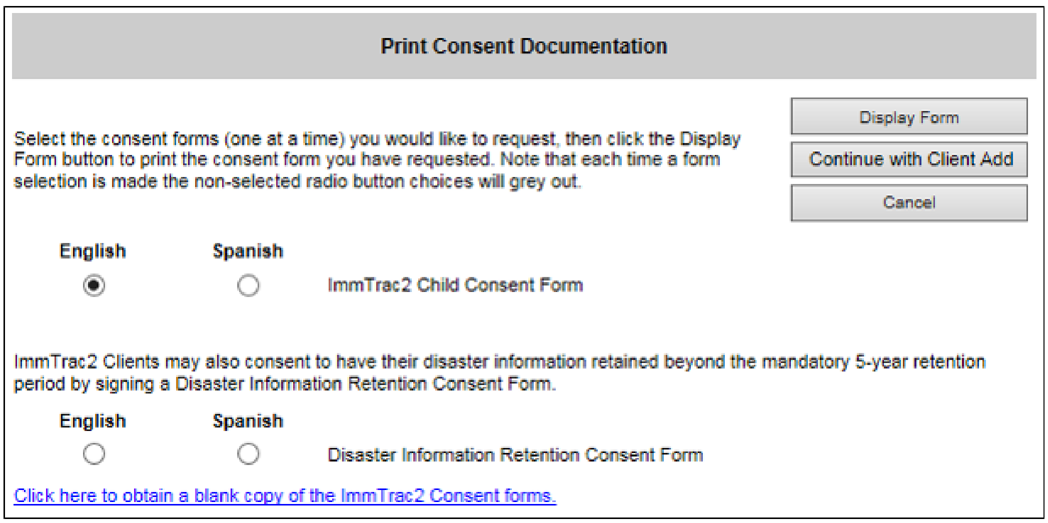


Figure 285 - Print Consent Forms

See Figure 286: Enter New Client Steps 6-8.

6. If the “Yes – Add a Client” option is selected, or the “Continue with Client Add” button is clicked on the print consent screen, the *Add Client* screen will open.
    - The *Personal Information* fields are pre-populated with the information entered in the search screen.
    - Enter any additional information as needed. Be sure to add the complete street address including apt or lot numbers.
    - Required information is in blue text marked with an asterisk.
7. Enter all additional client information under each demographic tab as needed, using the arrow to expand a demographic section.
    - In the *Address Information* section, the County is a required field and must be selected using the drop down arrow to continue with the Enter New Client process.

- For a detailed review of each section, see the [Update / Edit Client Information] section.

8. Click the “Continue Add” button.

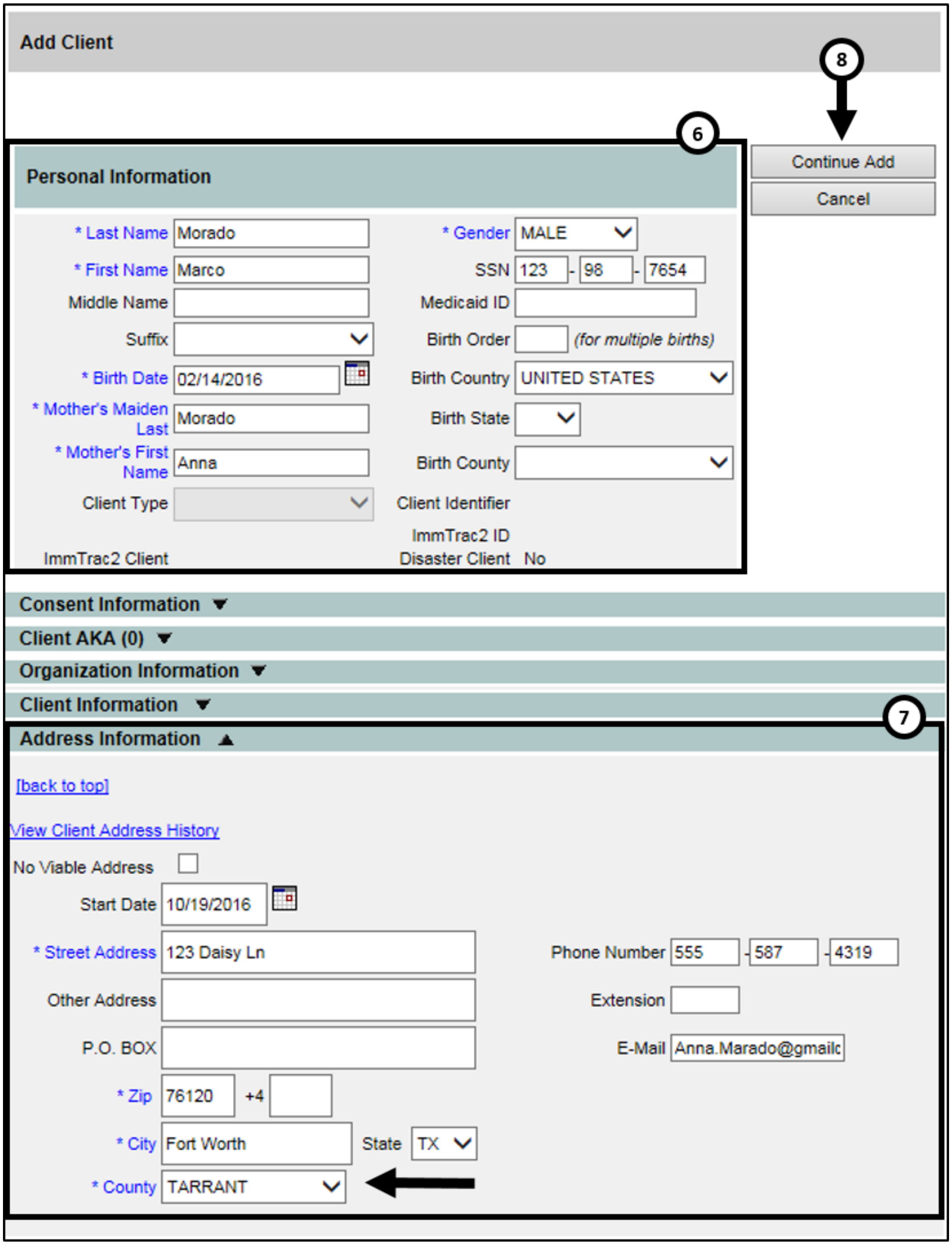


Figure 286 - Enter New Client Steps 6-8

See Figure 287: Enter New Client Step 9.

9. Review the client information on the *Client Summary* screen and if no edits need to be made click the “Continue” button.
   - Click the “Edit Client Info” option if the client information needs to be edited, or the “Cancel” button to return to the home page without saving.

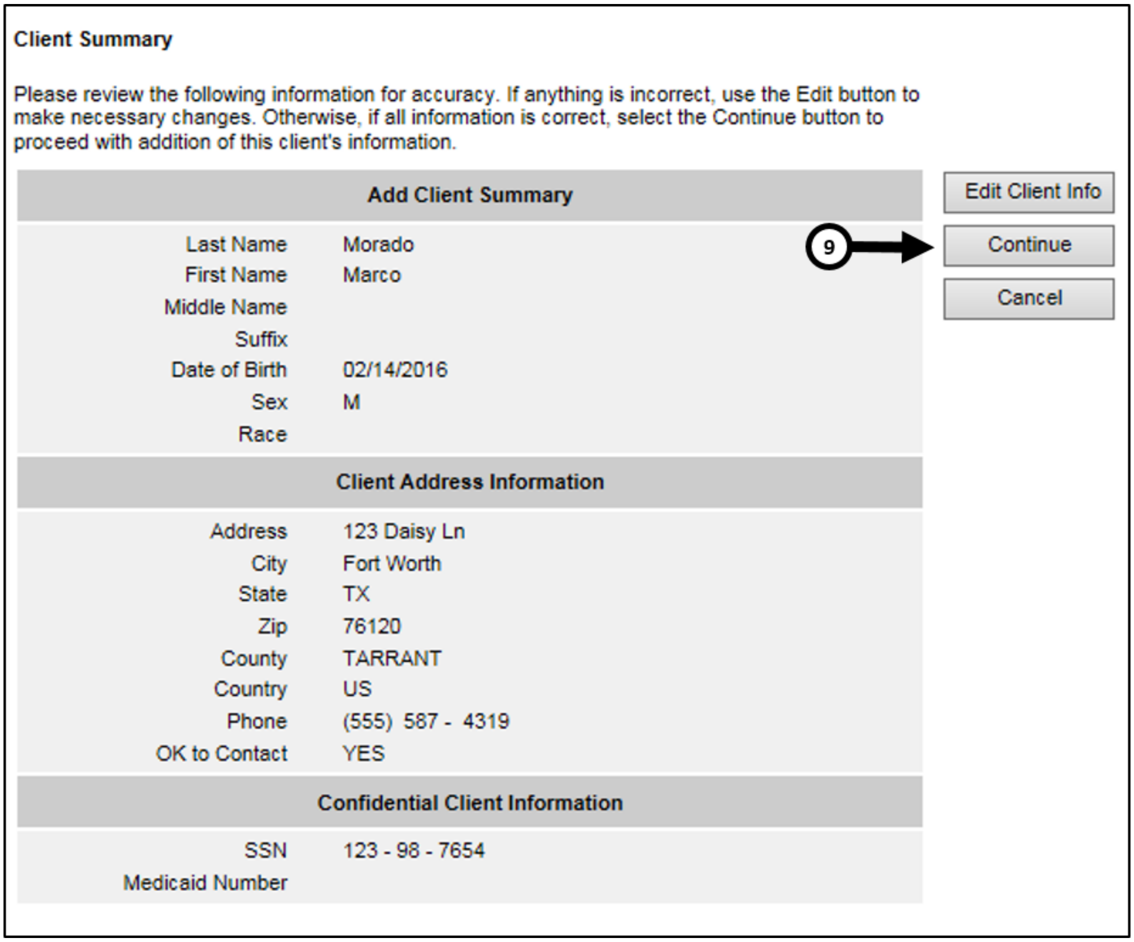


Figure 287 - Enter New Client Step 9

See Figure 288: Enter New Client Steps 10-11. (Child Consent Options)

10. Select the appropriate check box or radio button on the *Consent Verification* screen.
    - Available options are determined by client date of birth.
11. Click the “Affirm” button.

Important: *For more information on the different consent options please See [Section 1 – Consent Forms](#).*

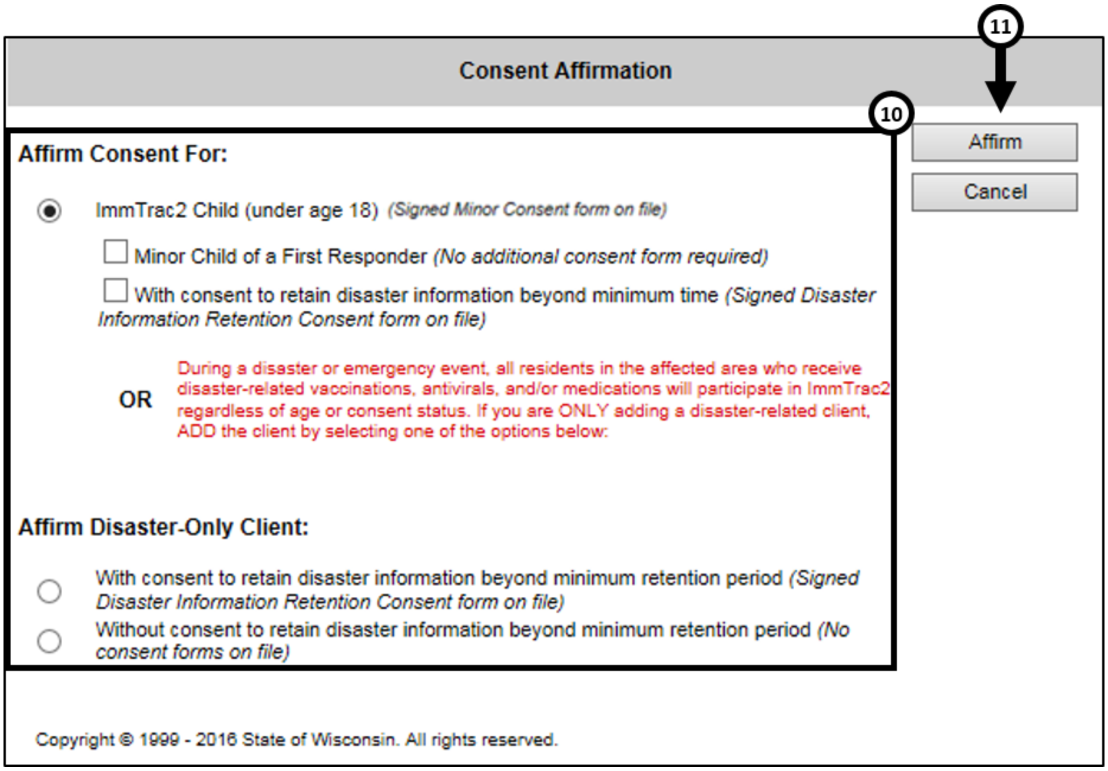


Figure 288 - Enter New Client Steps 10-11

The below consent option displays for adult clients. *See Figure 289: Enter New Client – Adult Consent Affirmation.*

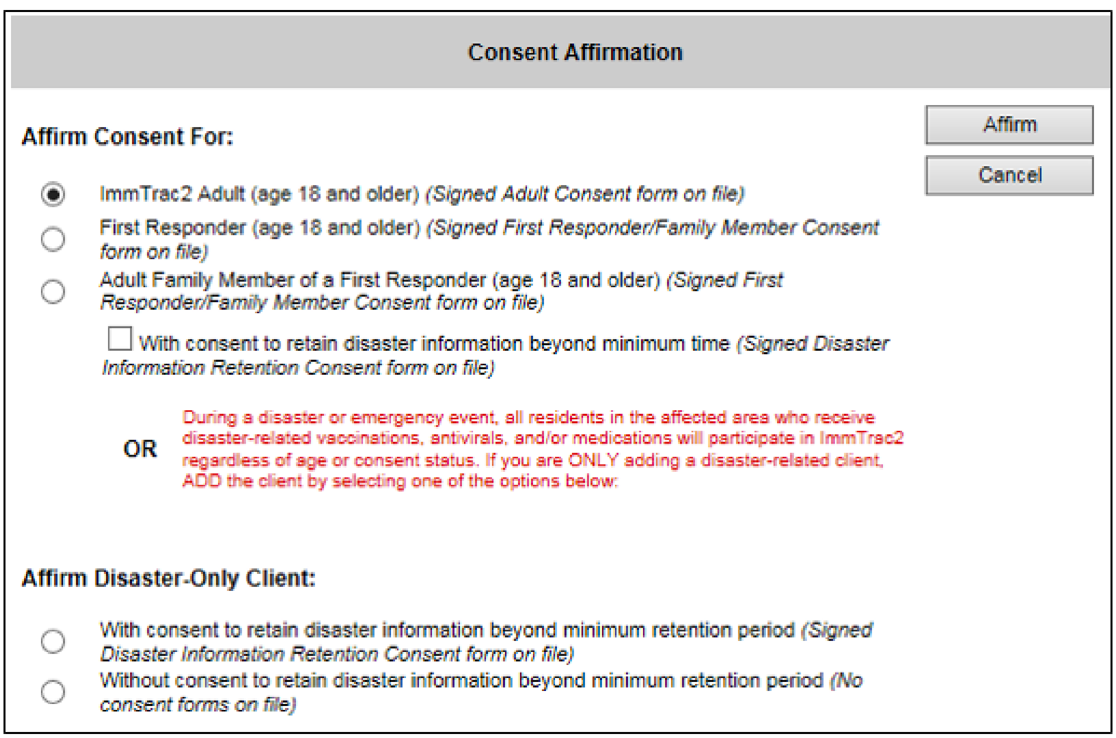


Figure 289 - Enter New Client – Adult Consent Affirmation

After clicking the "Affirm" button, the *Consent Affirmation Confirmation* screen displays with the client's information and the client record has been created. Click a command button to continue or simply use the menu panel option to navigate to another screen. *See Figure 290: Enter New Client Step 12.*

Table 36 - Consent Verification Confirmation – Command Buttons

Command Button	**Description**
Go To Client	Navigates user to the *View Client* screen.
Add Next	Navigates the user to the *Enter New Client* screen.
Cancel	Navigates the user to the application home page.

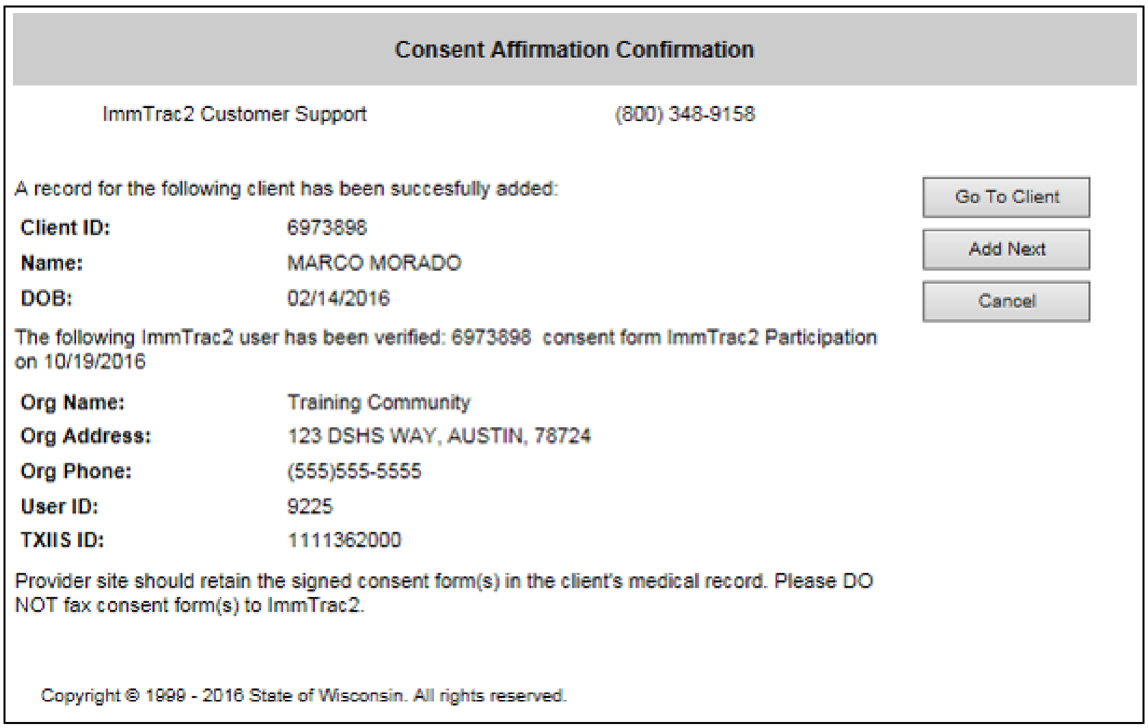


Figure 290 - Enter New Client Step 12

Potential Match List – System Match Override

When entering a new client, if a potential duplicate match is found users will see the *Potential Match List* screen after step 9 of the Enter New Client process. This screen shows a list of clients that could be a possible duplicate match to the client that is being entered, but does not include Pending Adult (PA) clients.

Select the ImmTrac2 ID link to view the client's information. If the potential match client(s) do not match the client being entered, proceed by clicking the "Create New Client" button. If one of the clients listed is the same as the one being entered, click the “Cancel” button or the “ImmTrac2 ID” hyperlink of the matching client. *See Figure 291: Enter New Client – Potential Match List.*

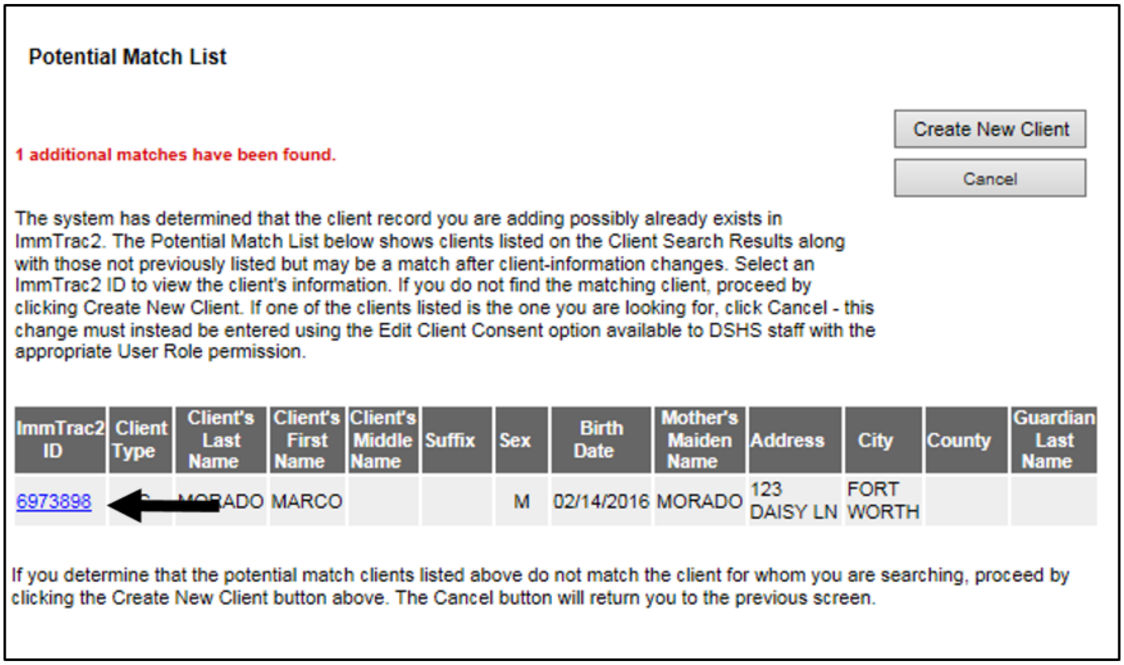


Figure 291 - Enter New Client – Potential Match List

After clicking the “Create New Client” button, click the “OK” button when the “Are you sure you would like to OVERRIDE the System Match” message is displayed. This will create the new client record. *See Figure 292: Enter New Client – System Match Override.*

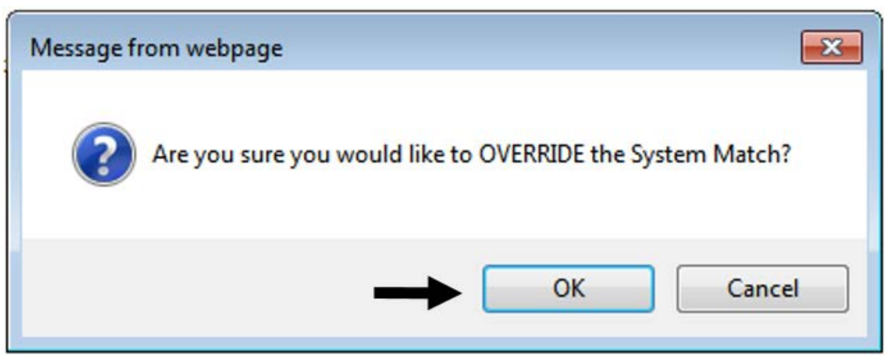


Figure 292 - Enter New Client – System Match Override

Edit Consent Information

To update a client’s consent information use the *Edit Consent Information* menu option. The consent options that display will depend on the client type (current consents on file). When consent information is updated the client type and consent attributes will change accordingly to reflect the updates. For more information on the different consent options and when they are required, see Section 1 – Consent Forms.

To edit the client's consent information, follow the steps below.

See Figure 293: Edit Consent Information Steps 1-3.

1. Click the "Edit Client Consent" menu option.
2. Enter search criteria.
    - Required information is in blue text marked with an asterisk.
3. Click the "Find" button.

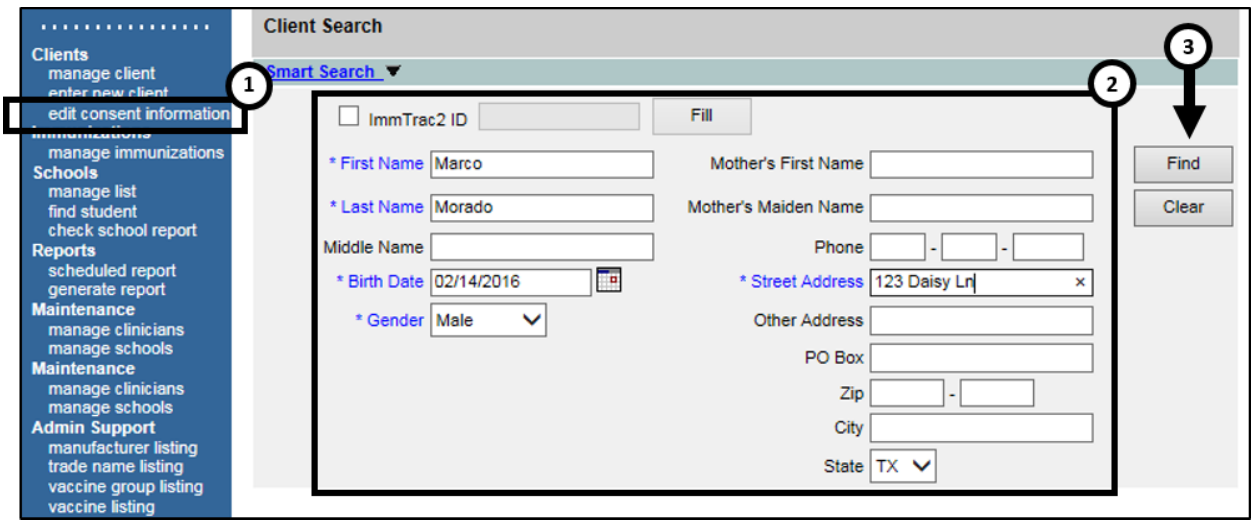


Figure 293 - Edit Consent Information Steps 1-3

See Figure 294: Edit Consent Information Step 4.

4. Once the client is located, click the "Select Client" button.

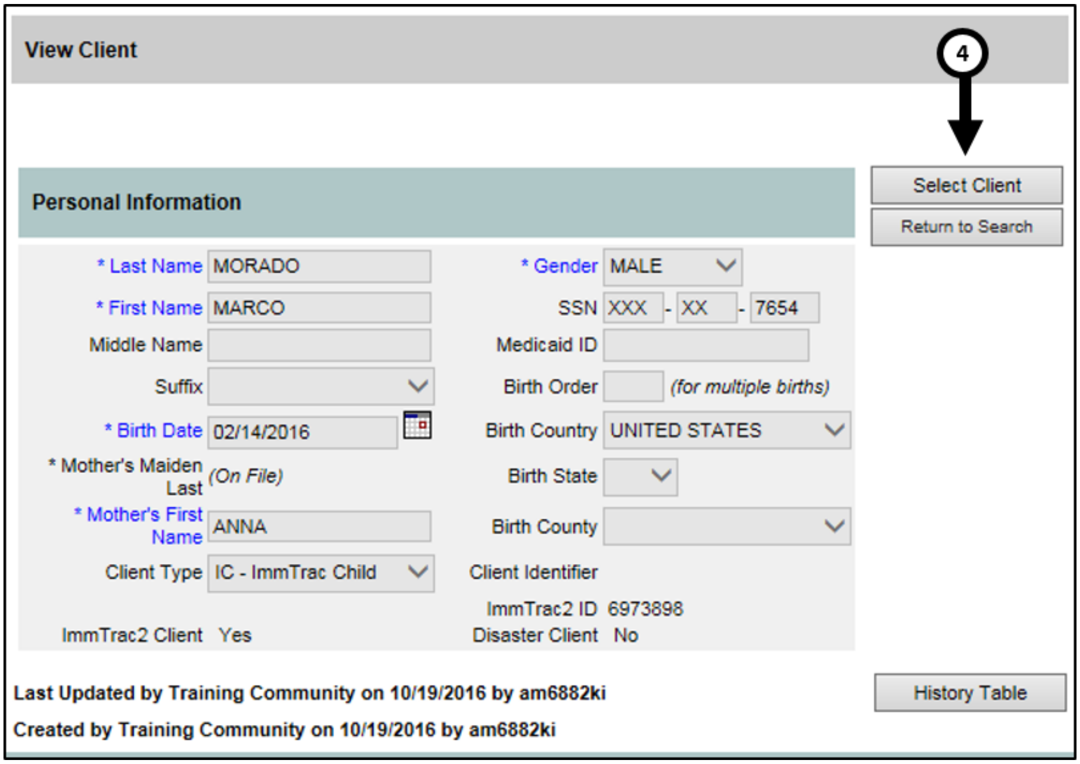


Figure 294 - Edit Consent Information Step 4

See Figure 295: Edit Consent Information Steps 5-6.

5. On the *Edit Consent Information* screen, select the applicable radio button and checkbox(es) for the needed update.
6. Click the "Update Client" button to save.

The *Edit Consent Information – Add a Form* screen displays the client's name, date of birth, and consent attributes. See the Consent Information Attributes Table in the [Consent Information](#) section for more details.

This screen also offers multiple command buttons for navigation and a "Click here to obtain a blank copy of the ImmTrac2 Consent form" hyperlink that will navigate users to the *Form* tabs in the menu bar where a blank copy of all consent forms are located.

Table 37 - Edit Consent Information – Command Buttons

Command Button	Description
Display Form	Opens the selected consent form pre-populated with the client's information.
Update Client	Save the updated consent information.
Edit Client	Navigates user to the *View Client* screen where the "Edit" button can be selected to edit the client record.
Cancel	Navigates the user to the application home page.

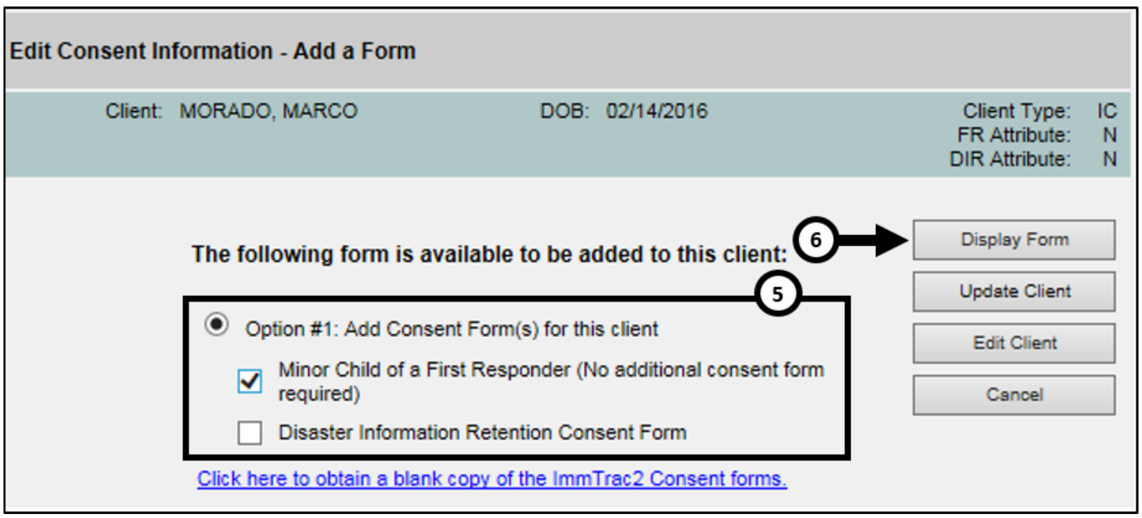


Figure 295 - Edit Consent Information Steps 5-6

See Figure 296: Edit Consent Information Step 7.

7. When the affirm message displays click the "Affirm" button to continue with the updates if the appropriate consent form has been signed.
   - The consent information in blue corresponds with the option selected in the previous screen.

Figure 296 - Edit Consent Information Step 7

After clicking the "Affirm" button, the screen will refresh and the "Client Updated" message will appear at the top of the screen. *See Figure 297: Edit Consent – Update Confirmation.*

Click the "Edit Client" button to navigate to the Update Client screen, or click the "Cancel" button to navigate to the application home page.

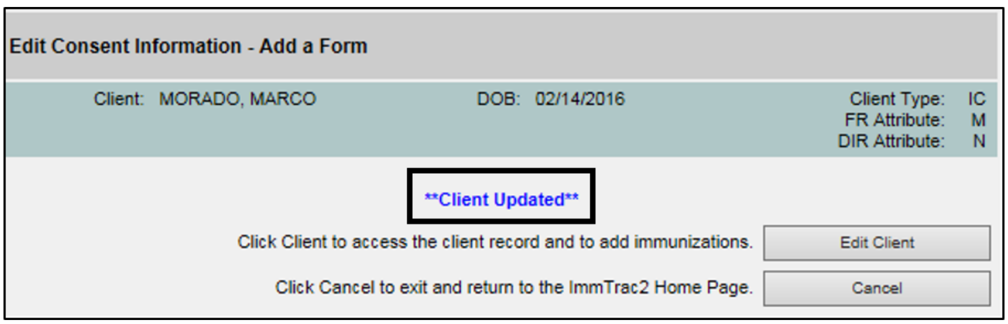


Figure 297 - Edit Consent Information – Update Confirmation

Chapter 19: Immunizations

ImmTrac2 allows users to manage client immunization information using the *Manage Immunization* option on the left menu panel. Managing immunizations consist of viewing, adding, editing, and deleting existing immunization records for a client's record.

Manage Immunizations

Immunization information for a specific client may be accessed one of two ways:

> Click "Manage Client" under the *Clients* section of the menu panel. This displays the *Client Search* screen. For information on finding clients, see Section 1 – Client Search. Once a client is retrieved, click the "Edit Client" button, then click the "History / Recommend" button to display the client's Immunization Record screen.
>
> Or
>
> Click "Manage Immunizations" under the *Immunizations* section of the menu panel. This will bring up the *Client Search* screen. For information on finding clients, see Section 1 – Client Search. When the "Find" button is clicked from the search screen, the client's Immunization Record displays immediately if accurate information was entered and only one record was found. This is the quickest way to view a client's immunization information.

View Immunization Records

The immunization record has three sections: Client Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule. *See Figure: View Client Immunization Steps Example.*

This screen will look very similar to the screen described in Section 1 – View Immunizations, but Full Access Provider or Provider Supervisor users can add new immunizations, add historical immunizations, edit client information, and edit and delete immunization information. For details on the "Reports" and the "Print Official Immunization Record" buttons, see the Section 1 – View Immunizations section.

To view client immunization records, follow the steps below.

See Figure 298: View Client Immunization Steps 1-4.

1. Click the “Manage Immunization” menu option.
2. Select a Search option. (Quick, Basic, or Smart Search)
3. Enter the search criteria.
    - Required information is in blue text marked with an asterisk.
4. Click the “Find” button. Once the client is located, the client immunization record displays.

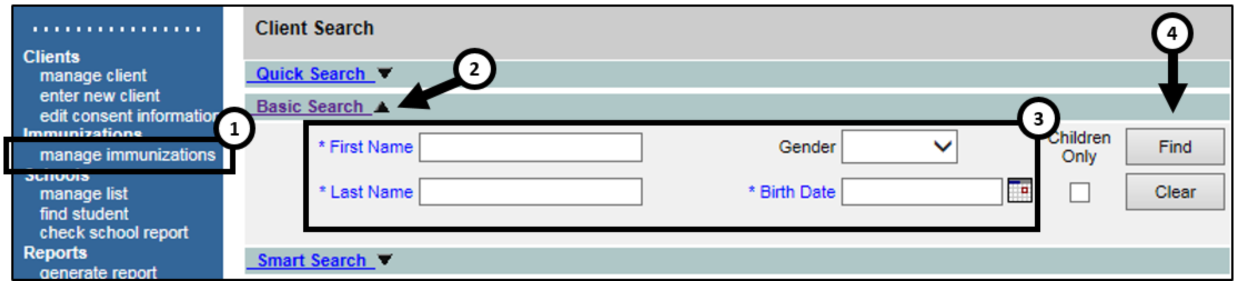
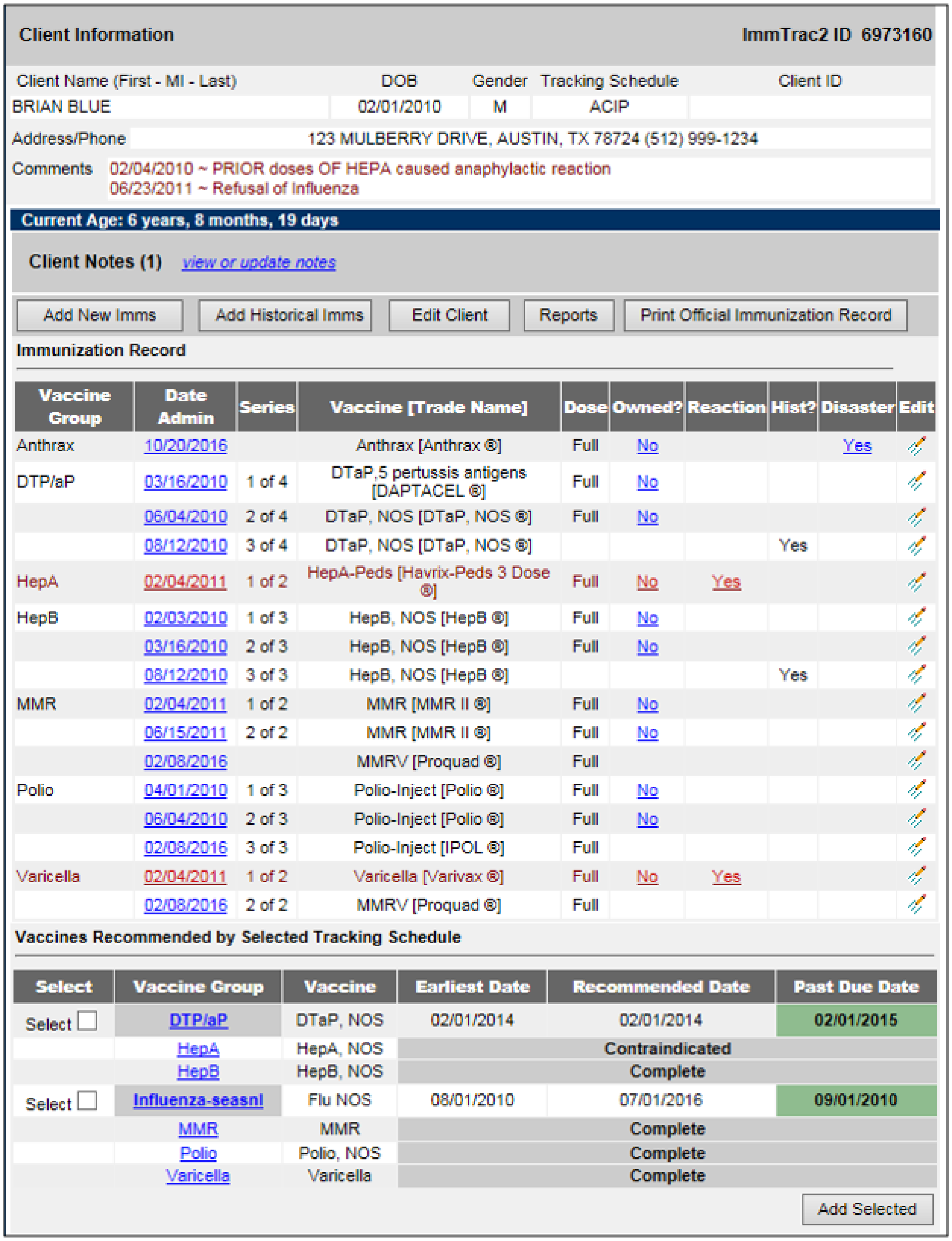


Figure 298 - View Client Immunization Steps 1-4



Client Information ImmTrac2 ID 6973160

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
BRIAN BLUE	02/01/2010	M	ACIP	

Address/Phone 123 MULBERRY DRIVE, AUSTIN, TX 78724 (512) 999-1234

Comments 02/04/2010 ~ PRIOR doses OF HEPA caused anaphylactic reaction
06/23/2011 ~ Refusal of Influenza

Current Age: 6 years, 8 months, 19 days

Client Notes (1) view or update notes

Add New Imms | Add Historical Imms | Edit Client | Reports | Print Official Immunization Record

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full	No				
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full	No				
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]				Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full	No	Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full	No				
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full	No				
	08/12/2010	3 of 3	HepB, NOS [HepB ®]				Yes		
MMR	02/04/2011	1 of 2	MMR [MMR II ®]	Full	No				
	06/15/2011	2 of 2	MMR [MMR II ®]	Full	No				
	02/08/2016		MMRV [Proquad ®]	Full					
Polio	04/01/2010	1 of 3	Polio-Inject [Polio ®]	Full	No				
	06/04/2010	2 of 3	Polio-Inject [Polio ®]	Full	No				
	02/08/2016	3 of 3	Polio-Inject [IPOL ®]	Full					
Varicella	02/04/2011	1 of 2	Varicella [Varivax ®]	Full	No	Yes			
	02/08/2016	2 of 2	MMRV [Proquad ®]	Full					

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Select	DTP/aP	DTaP, NOS	02/01/2014	02/01/2014	02/01/2015
	HepA	HepA, NOS	Contraindicated		
	HepB	HepB, NOS	Complete		
Select	Influenza-seasnl	Flu NOS	08/01/2010	07/01/2016	09/01/2010
	MMR	MMR	Complete		
	Polio	Polio, NOS	Complete		
	Varicella	Varicella	Complete		

Add Selected

Figure 299 - View Client Immunization Example

The client's Immunization Record is separated into four sections. For more detailed information on this screen, see Chapter 8 – View Immunization Record.

Client Information

The Client Information section at the top of the Immunization Record screen displays information about the client, such as Name, DOB, Gender, Tracking Schedule, Client ID, Address, Phone, and a scrollable list of comments derived from vaccine records. Review this information to verify that the correct client record has been accessed. To edit this information, click the "Edit Client" button. See the Editing Client Information section for details on how to edit client information.

Client Notes

This section links to a pop-up window that allows users to view or update Client Notes. Each note includes a record of the user who created it and the date it was saved. Client Notes can be viewed by any provider organization with access to the registry. As notes are saved, the cumulative record count displays in parentheses on the *Client Immunization History* screen.

Immunization Record

This table lists all the immunizations the client has received to date that have been entered into ImmTrac2. Immunizations are listed alphabetically by Vaccine Group and the Series is ordered by Date Administered. For each row in this section users can select the Edit icon to edit the immunization record or delete an immunization, if appropriate. Users may only edit or deleted immunizations that are owned by their organization. Users can also click the "Add New Imms" and "Add Historical Imms" buttons to add records of administered vaccines.

Vaccines Recommended by Selected Tracking Schedule

This section lists all the vaccines recommended by the ACIP tracking schedule associated with the client. As a provider users can use this section to quickly select an immunization to add to the client's record by using the check box and clicking the "Add Selected" button.

Important: *For more information how to read the Vaccines Recommended by the Selected Tracking Schedule see Section 1 – Vaccines Recommended by the Selected Tracking.*

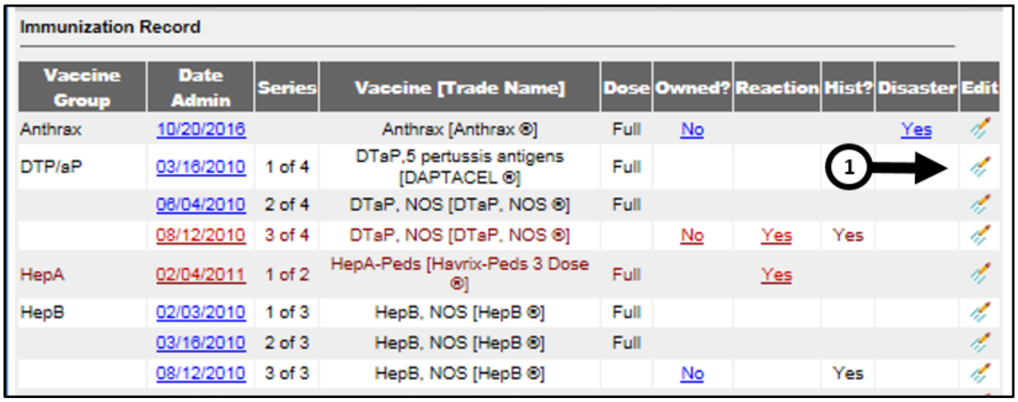
Edit Immunizations

Users have the ability to edit historical immunizations and immunizations that are owned by their organization. If the "Owned" column of the immunization record displays "No", the vaccine record cannot be edited by the user.

To edit an immunization record, follow the steps below.

See Figure 300: Edit Immunization Step 1.

1. After searching and locating the client, click the edit icon next to the immunization that needs to be edited.



Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full					
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full					
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]		No	Yes	Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full		Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full					
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full					
	08/12/2010	3 of 3	HepB, NOS [HepB ®]		No		Yes		

Figure 300 - Edit Immunization Step 1

See Figure 301: Edit Immunization Steps 2-3.

2. To edit, make updates as needed to the immunization data.
3. Click the “Save” button.
    - Users are redirected back to the client immunization record.

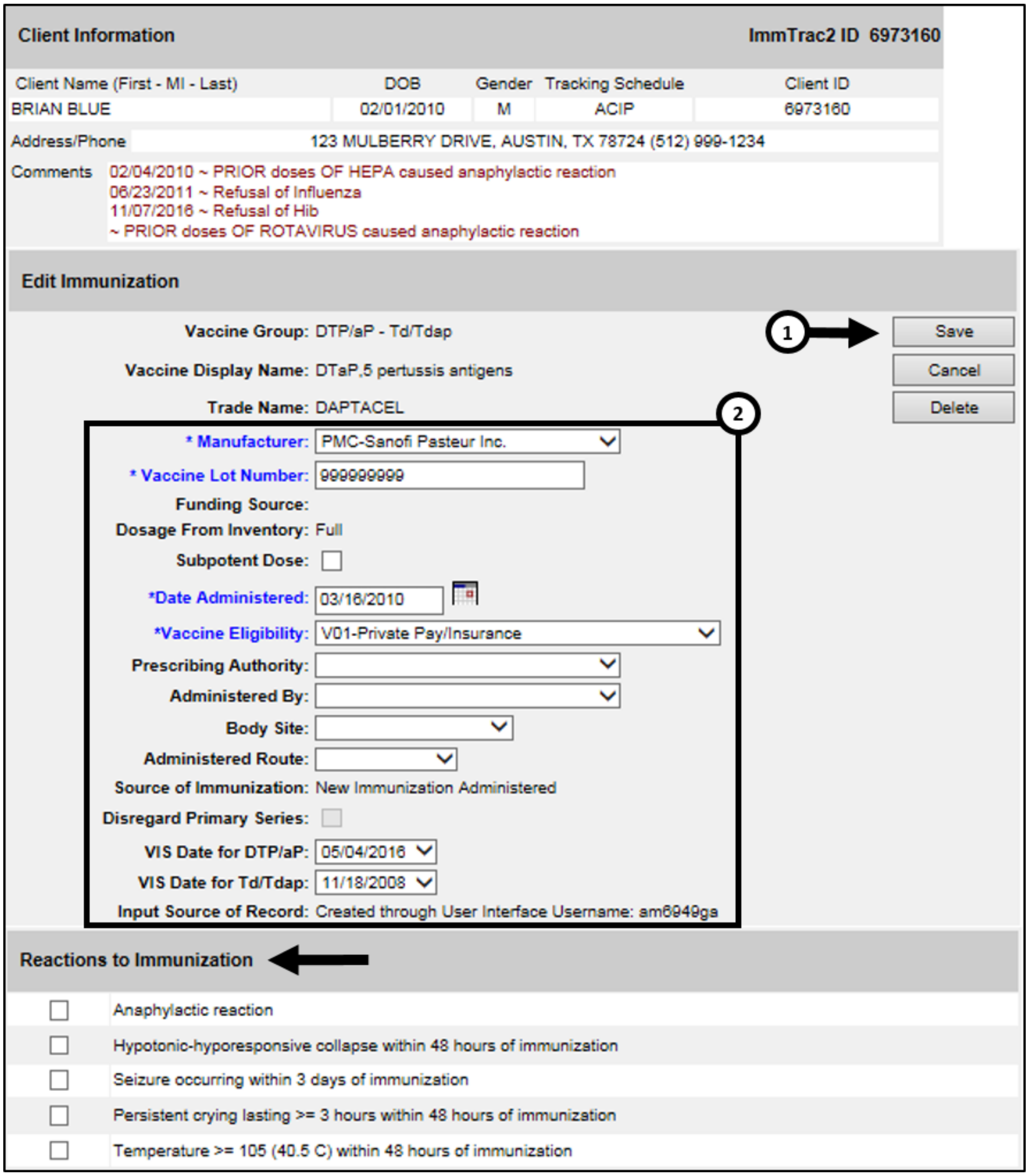


Figure 301 - Edit Immunization Steps 2-3

Delete Immunization

Users have the ability to delete historical immunization and immunizations that are owned by their organization and the ability to delete any Historical Immunization. If the "Owned" column of the immunization record displays "No", the vaccine record cannot be deleted by the user.

To delete an immunization record, follow the steps below.

See Figure 302: Delete Immunization Step 1.

1. After searching and locating the client, click the **Edit** icon next to the immunization that needs to be deleted.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
Anthrax	10/20/2016		Anthrax [Anthrax ®]	Full	No			Yes	
DTP/aP	03/16/2010	1 of 4	DTaP,5 pertussis antigens [DAPTACEL ®]	Full	No				
	06/04/2010	2 of 4	DTaP, NOS [DTaP, NOS ®]	Full	No				
	08/12/2010	3 of 4	DTaP, NOS [DTaP, NOS ®]			Yes	Yes		
HepA	02/04/2011	1 of 2	HepA-Peds [Havrix-Peds 3 Dose ®]	Full	No	Yes			
HepB	02/03/2010	1 of 3	HepB, NOS [HepB ®]	Full	No				
	03/16/2010	2 of 3	HepB, NOS [HepB ®]	Full	No				
	08/12/2010	3 of 3	HepB, NOS [HepB ®]				Yes		
MMR	02/04/2011	1 of 2	MMR [MMR II ®]	Full	No				
	06/15/2011	2 of 2	MMR [MMR II ®]	Full	No				
	02/08/2016		MMRV [Proquad ®]	Full				1	
Polio	04/01/2010	1 of 3	Polio-Inject [Polio ®]	Full	No				
	06/04/2010	2 of 3	Polio-Inject [Polio ®]	Full	No				

Figure 302 - Delete Immunization Step 1

See Figure 303: Delete Immunization Steps 2-3.

2. Click the “Delete” button.
3. Click “Yes”, when the message dialog box displays asking “Are you sure you want to delete this immunization?”
    - Users are redirected back to the client immunization record.

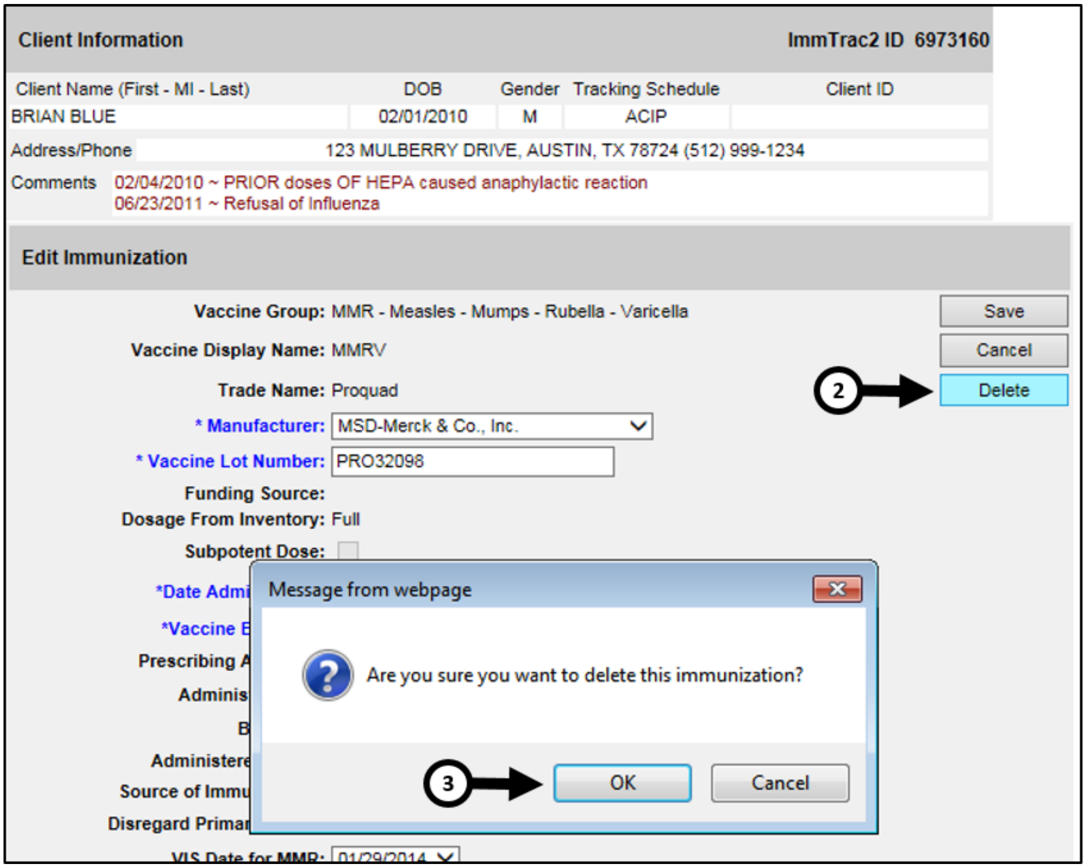


Figure 303 - Delete Immunization Steps 2-3

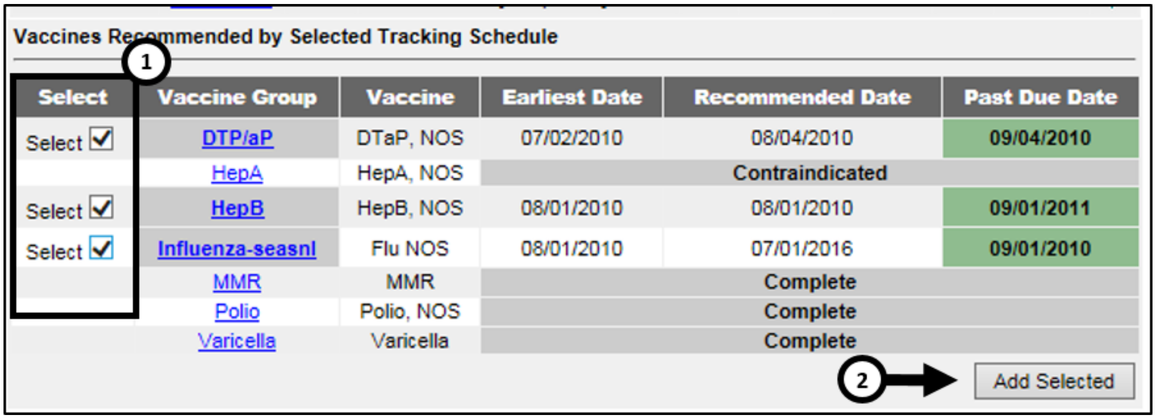
Add New Scheduled Immunizations

Any vaccine administered by the user's organization should be added to the client's immunization information record. There are two different ways to add new immunization. For clients receiving vaccines as part of the recommended tracking schedule, the easiest way to add an administered vaccine is to use the *Vaccines Recommended by Select Tracking Schedule* section.

To add a new scheduled immunization, follow the steps below.

See Figure 304: Add New Scheduled Imm Steps 1-2.

1. From the *Client Immunization History* screen, use the check box under the *Vaccines Recommended by Selected Tracking Schedule* to select one or more immunizations.
2. Click the "Add Selected" button.



Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Select	DTP/aP	DTaP, NOS	07/02/2010	08/04/2010	09/04/2010
	HepA	HepA, NOS	Contraindicated		
Select	HepB	HepB, NOS	08/01/2010	08/01/2010	09/01/2011
Select	Influenza-seasnl	Flu NOS	08/01/2010	07/01/2016	09/01/2010
	MMR	MMR	Complete		
	Polio	Polio, NOS	Complete		
	Varicella	Varicella	Complete		

Figure 304 - Add New Scheduled Imm Steps 1-2

When the next screen displays, the selected vaccines will auto populate in the Enter New Immunization section. The "Remove" checkbox will be selected for each vaccines, but as the required information is entered for each immunization the checkbox will automatically be de-selected.

See Figure 305: Add New Scheduled Imm Steps 3-5.

3. In the *Enter New Immunization* section, enter the date in a MM/DD/YYYY format or use the calendar icon to select a date in the *Date Administered* field.
4. Enter the immunization data.
   - Blue fields marked with an asterisks are required.
   - Review the following table for details about each data field. See Table 38: New Immunization Data Field.
5. Click the "Save" button.
   - Users are redirected back to the client immunization record.

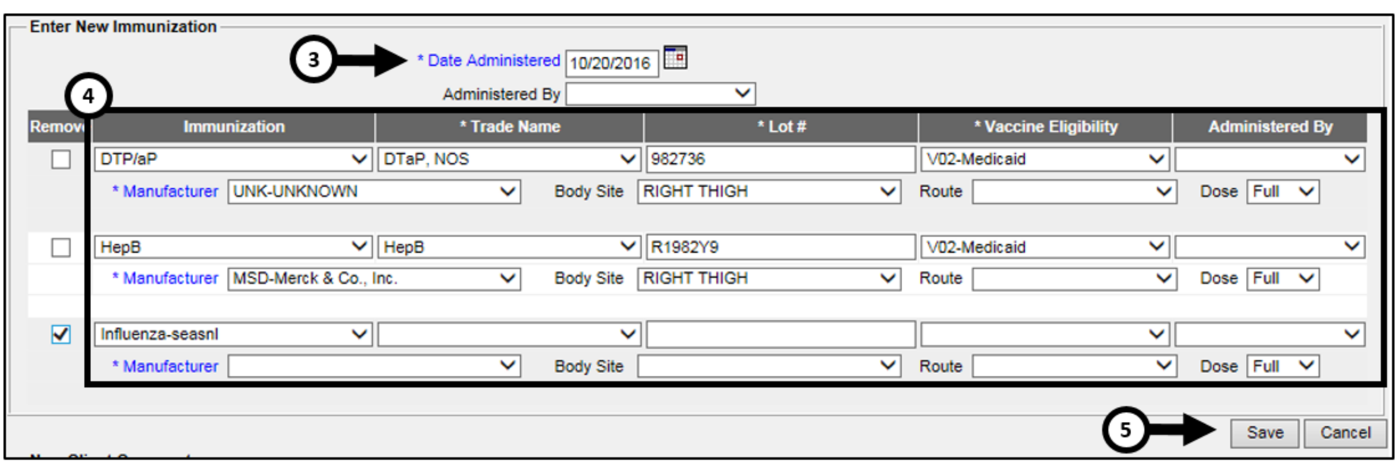


Figure 305 - Add New Scheduled Imm Steps 3-5

Table 38 - New Immunization Data Fields

Field Name	Description
Date Administered	Enter the date the vaccine was administered using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon.
Administer By	Select a name from the drop down list to identify the person who administered the vaccine. The names listed in the drop down box are maintained by a user with higher access. To have a name added, please contact ImmTrac2 Customer Support using the information in the *Contact Us* menu bar tab.
Immunization	When using the *Selected Tracking Schedule* to add an immunization, this field will auto populate based on the selected immunization. If the "Add New Imms" button was clicked, users will need to use the drop down arrow to manually select the immunization to add.
Trade Name	Use the drop down arrow to select the Trade Name. This list displays only the vaccine trade names associated with the selected immunization.
Lot #	Use this field to manually enter the vaccine's lot identification number.
Vaccine Eligibility	Use the drop down arrow to select the applicable reimbursement eligibility (client's insurance status) for this client's immunization.
Body Site	Use the drop down arrow to select the body site where the vaccine was given.
Route	Use the drop down arrow to select the route by which the vaccine was given.
Dose	Use the drop down arrow to select the dose for the vaccine. This is how much of the dose was given or which dose in a series was given.

Add New (Non-Scheduled) Immunizations

If a vaccine needs to be added to a client's immunization record that is not listed under the *Vaccines Recommended by Select Tracking Schedule* section, use the "Add New Imms" button to enter a nonscheduled immunization.

To add a new non-scheduled immunization, follow the steps below.

See Figure 306: Add New Non-Scheduled Immunization Step 1.

1. From the *Client Immunization History* screen, chick the “Add New Imms” button.

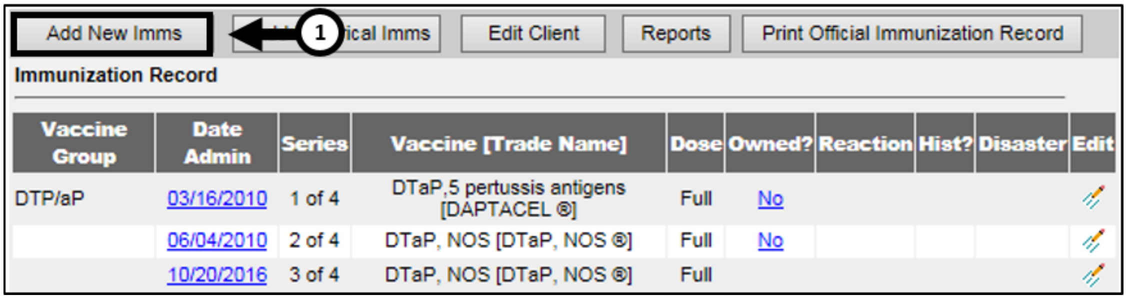


Figure 306 - Add New Non-Scheduled Immunization Step 1

When the next screen displays, multiple rows will be available to enter immunization data in the Enter New Immunization section. Each row with have the “Remove” checkbox selected, but as vaccine data is entered the checkbox will automatically be de-selected.

See Figure 307: Add New Non-Scheduled Imm Steps 2-4.

2. In the Enter New Immunization section, enter the date in a MM/DD/YYYY format or use the calendar icon to select a date in the Date Administered field.
3. Enter the immunization data.
    - Blue fields marked with an asterisks are required.
    - Review the following table for details about each data field. *See Table 38: New Immunization Data Fields*.
4. Click the “Save” button.
    - Users are redirected back to the client immunization record.

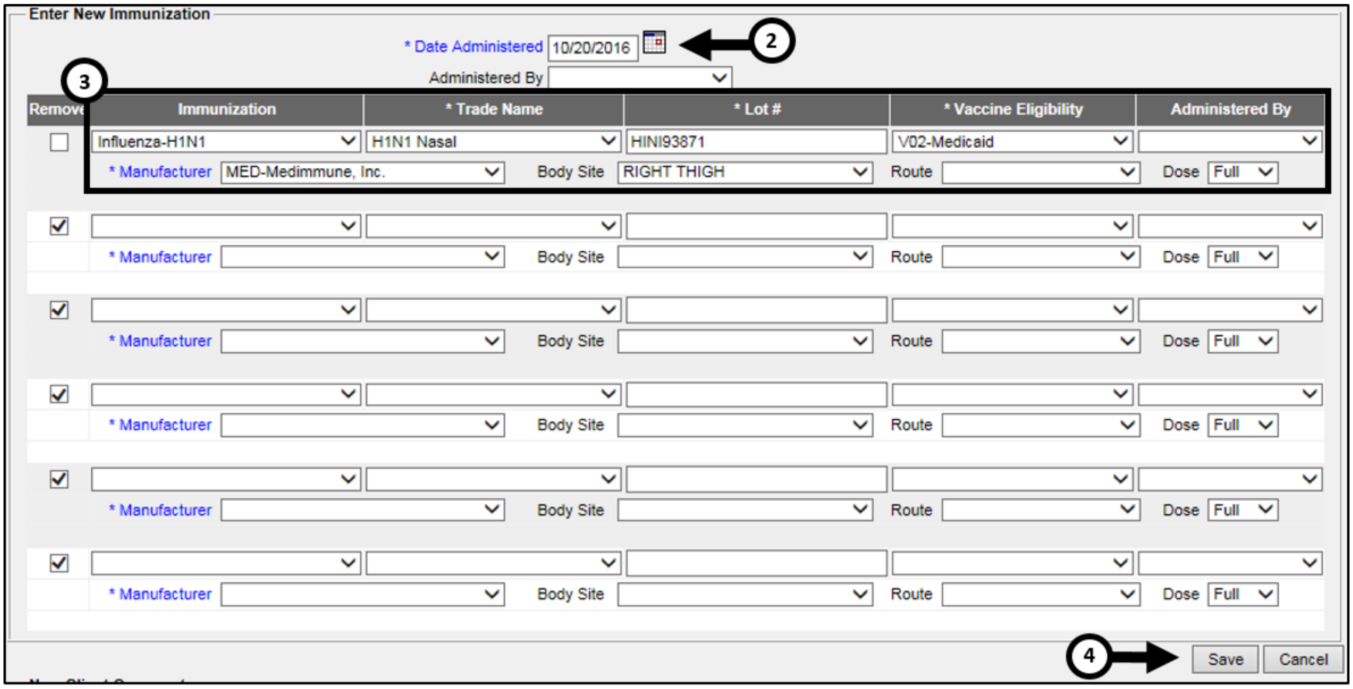


Figure 307 - Add New Non-Scheduled Imm Steps 2-4

Add Historical Immunizations

Historical immunizations are records of administered vaccine doses that the client received in the past. This data may be submitted to ImmTrac2 by any organization and may not accurately reflect which organization in the registry, if any, actually administered the dose. In other words, the immunization may have been administered at one organization but the data was submitted to ImmTrac2 by a different organization.

To add an historical immunizations, follow the steps below.

See Figure 308: Add Historical Imm Step 1.

1. From the *Client Immunization History* screen, click the "Add Historical Imms" button.

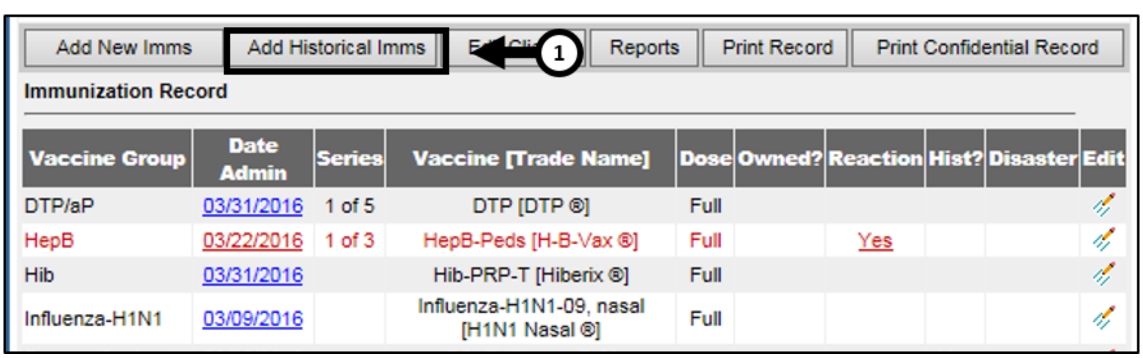


Figure 308 - Add Historical Imm Step 1

See Figure 309: Add Historical Imm Steps 2-4.

2. On the next screen in the Enter Historical Immunization section, locate the applicable vaccine row or use the drop down option (select additional types of immunizations) at the bottom of the screen to select a vaccine.
3. Enter the date in a MM/DD/YYYY format in the appropriate Dose field.
4. Click the "Save" button or click "Add Details" to add additional information.

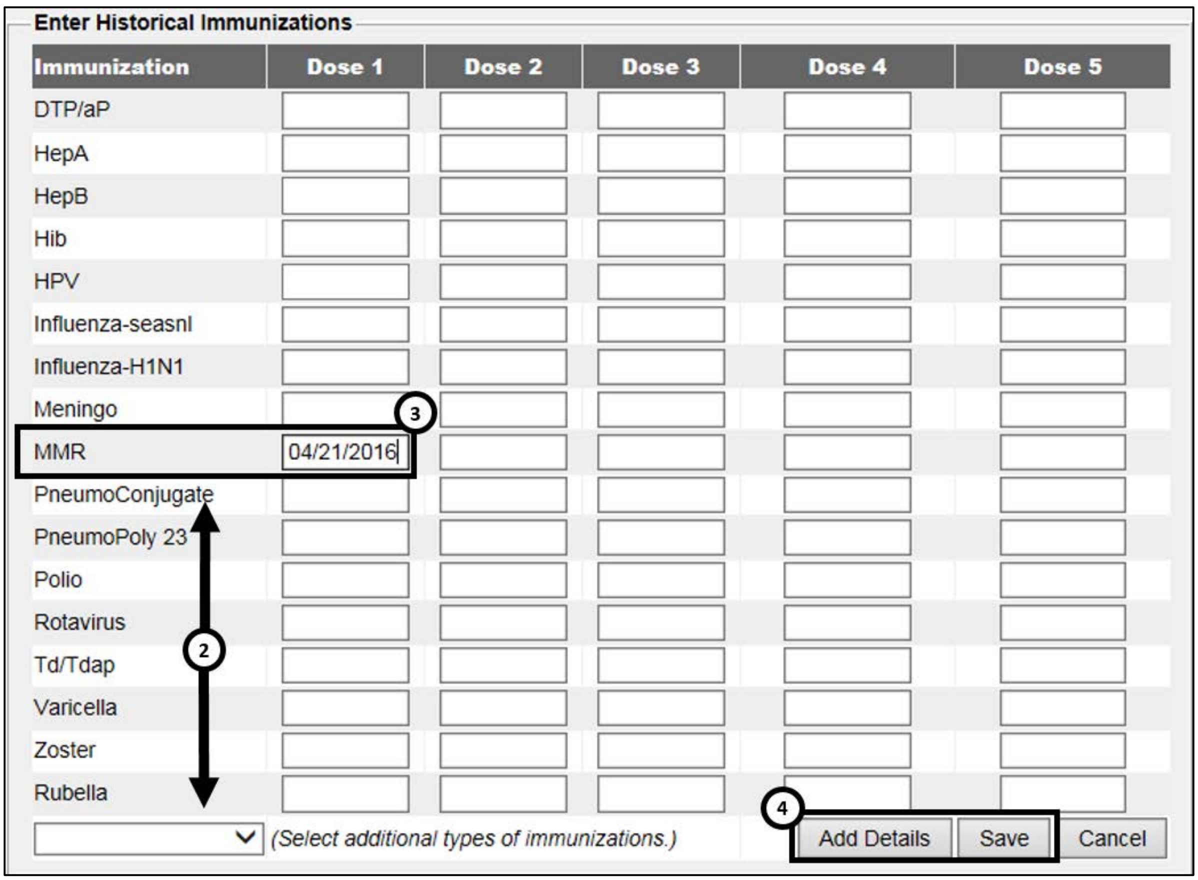


Figure 309 - Add Historical Imm Steps 2-4

See Figure 310: Add Historical Imm Steps 5-6.

5. If the "Add Details" button was clicked, enter any additional information as needed. (Trade Name, Lot Number, Provider Org, Source of Imm.) *See Table 39: Historical Immunization Data Fields.*
6. Click the "Save" button.
   - Users are redirected back to the client immunization record.

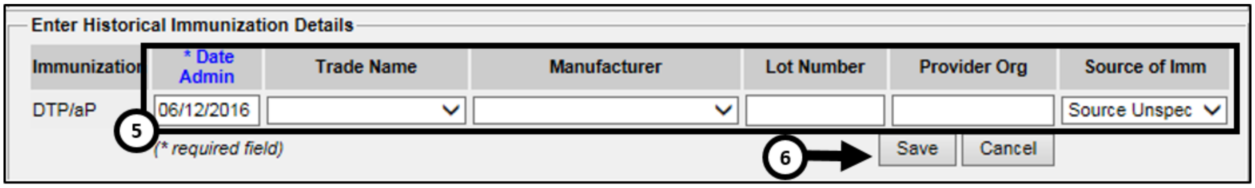


Figure 310 - Add Historical Imm Steps 5-6

Table 39 - Historical Immunization Data Fields

Field Name	Description
Date Administered	This field will auto populate based on the date selected on the previous screen.
Trade Name	Use the drop down arrow to manual select a Trade Name. This list options displays only the Trade Names associated to the vaccine selected in the Immunization field.
Lot #	Use this field to manually enter the vaccine's identification number of up to 30 characters.
Provider Org	A free text field to enter the name of the provider that administered the historical immunization.
Source of Imm	Use the drop down arrow to manually select the source of the immunization.

Duplicate Immunizations

If a user attempts to enter a duplicate immunization(s) the Duplicate Immunization Override pop-up window displays. Users can override the warning and proceed to save the immunization information, or they make edits. A duplicate immunization is determined by the following and applies to both new and historical imms. *See Figure 311: Duplicate Immunization Override.*

- If the incoming immunization is within 14 days before or 14 days after the existing immunization, or if entered on the same day.
- If a vaccine group matches, regardless of presence of trade name, lot number, or historical indicator.

To override the warning and save, check the "Selected" check box for the immunization to override and then click the "Save Selected" button.

Click the "Make Edits" button to return to the Enter New Immunization screen to update the information.

Figure 311 - Duplicate Immunization Override

Add Client Notes

If Client Notes need to be added when updating the client's immunization records, this can be done quickly from the Immunization Record screen. However, notes can also be added on the Update Client screen under the *Manage Client* menu option.

To add a **Client Note**, follow the steps below.

See Figure 312: Add Client Notes Step 1.

1. Click the "view or update notes" hyperlink above the Immunization Record.

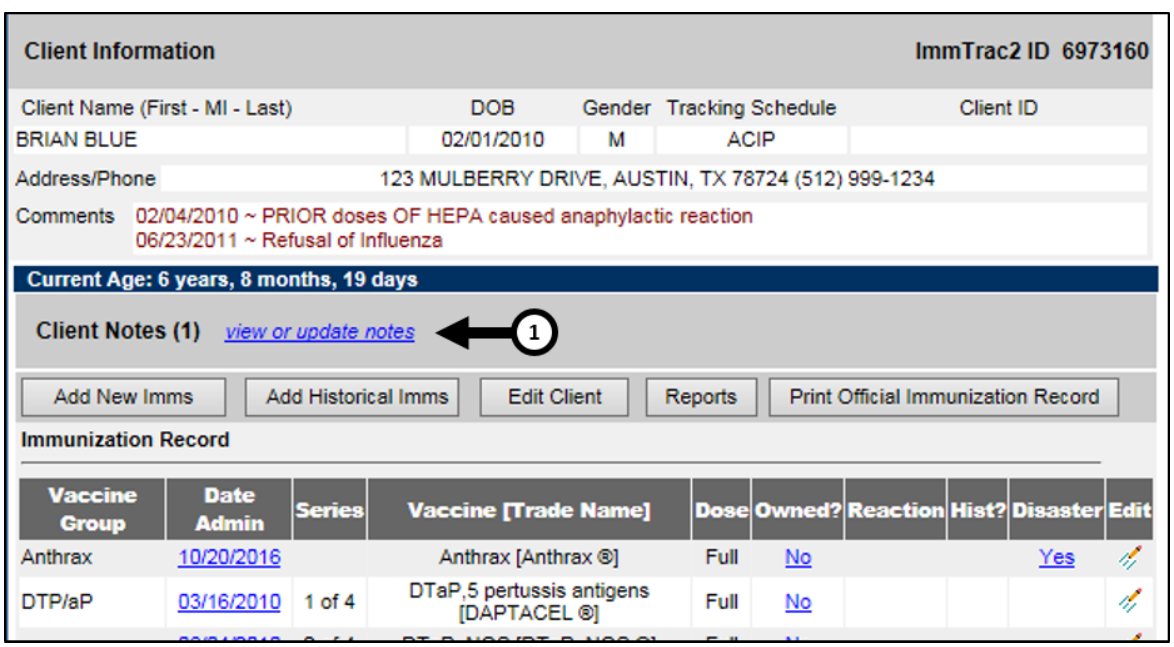


Figure 311 - Add Client Notes Step 1

See Figure 313: Add Client Note Steps 2-3.

2. The client notes will open in a new pop-up window. Enter the note information.
3. Click the "Save Note" button and a "Note successfully saved" message displays in the center of the screen.
    - The note will appear at the bottom of the pop-up window in the notes table and will also be visible in the client record on the *Client Notes* demographic tab.
    - For more details on the *Client Notes* see the Client Notes section.

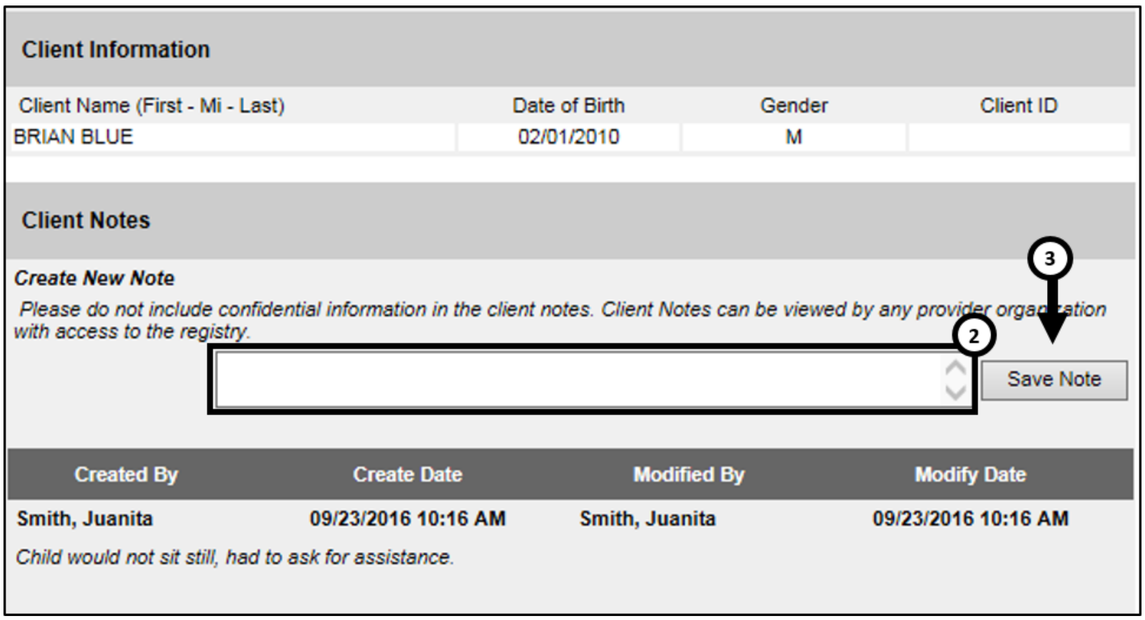


Figure 312 - Add Client Note Steps 2-3

Add Client Comments

If Client Comments need to be added when updating the client's immunization records, this can be done quickly from the Enter New Immunization screens when immunization data is saved.

Comments can also be added on the Update Client screen under the *Manage Client* menu option.

To add a **Client Comments** on the Enter New Immunization screen, follow the steps below.

See Figure 314: Enter New Client Comments Steps 1-4.

1. At the bottom of the Enter New Immunization screen, use the drop down arrow to select a Client Comment.

2. Enter a date using the calendar icon or enter the date in an XX/XX/XXXX format.
3. Click the “Add” button. The newly added note displays above in the Client Comment section.
    - The comment will also be visible in the client record on the *Client Comments* demographic tab.
    - For more details on the *Client Comments* see the Client Comments section.
4. Click the “Save” button to add the immunization data and the comment(s).

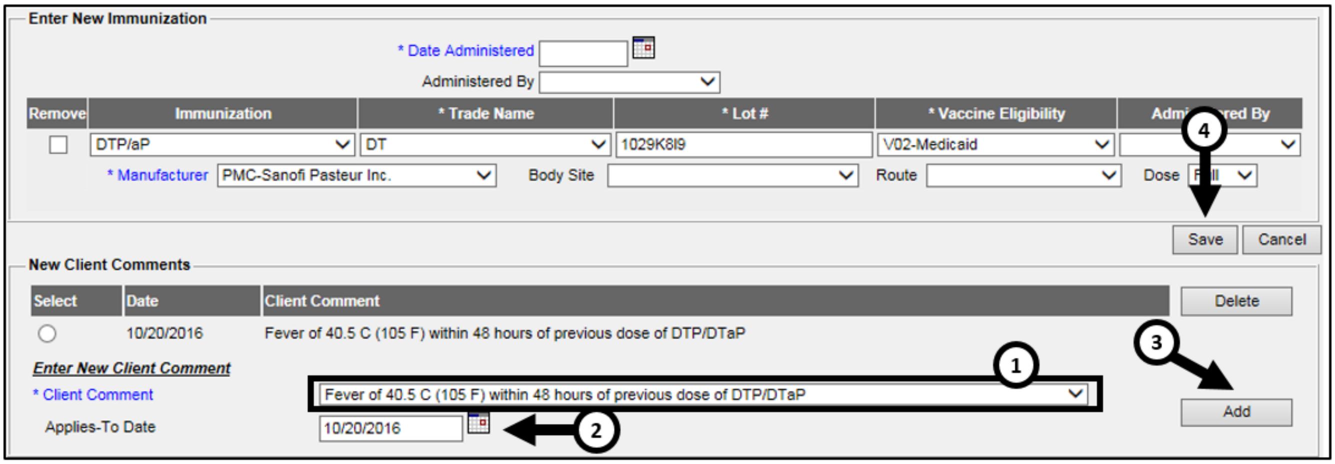


Figure 313 - Enter New Client Comments Steps 1-4

Chapter 20: Schools

The options under the *Schools* category on the menu panel helps to organize and access immunization information for groups of students (or clients) by creating lists.

Manage List

The *Manage List* screen is used to create and manage lists, as well as generate reports. To access this screen, click the Manage List option under the Schools section on the menu panel. The two sections of this screen are *Manage List* and *Report List*.

Create a New School List

Use the *Manage List* section to create a new list. When a list is created, the student count displays as 0 until students (clients) have been added to the list. After students are added to a list, the list name becomes an active hyperlink that is clickable and navigates to the list reports detail screen. See the Add Students to a List section for more details.

To create a new school list, follow the steps below.

See Figure 315: Create New School List Steps 1-3.

1. Click the **Manage List** menu option.
2. Type an entry into the New List Name field.
3. Click the “Save” button.
    - The new list will appear in the *Reports List* section.
    - “The list has been created successfully” message displays at the top of the screen.

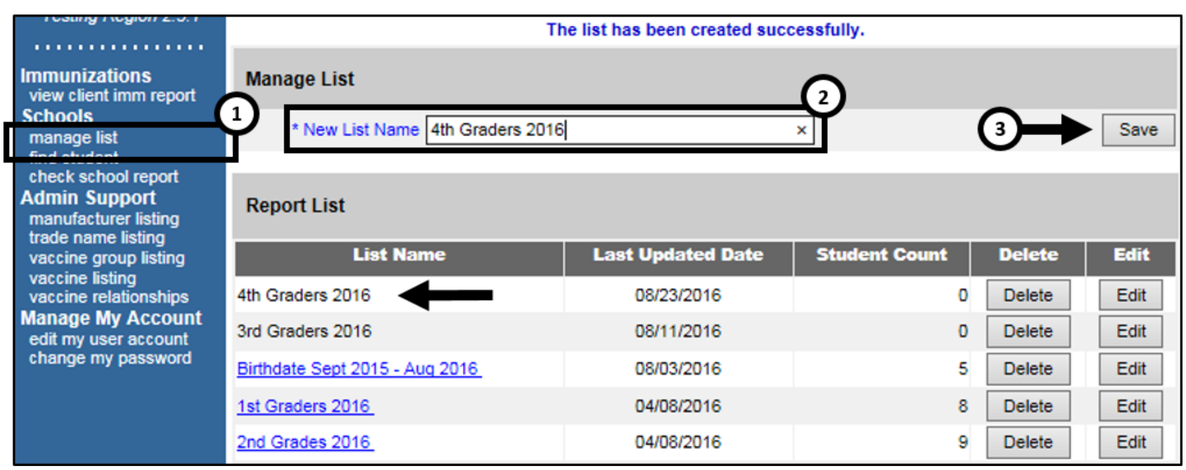


Figure 314 - Create New School List Steps 1-3

Edit a School List Name

The list name can be edited so that a new list does not have to be created. For example, the “4th Graders 2016” list can be renamed to “5th Graders 2017” in the next school year. When the list name is edited, it is updated in all screens.

To edit a list name, follow the steps below.

See Figure 316: Edit School List Name Steps 1-2.

1. Click the “Manage List” menu option.
2. Click the “Edit” button next to the list to be edited.

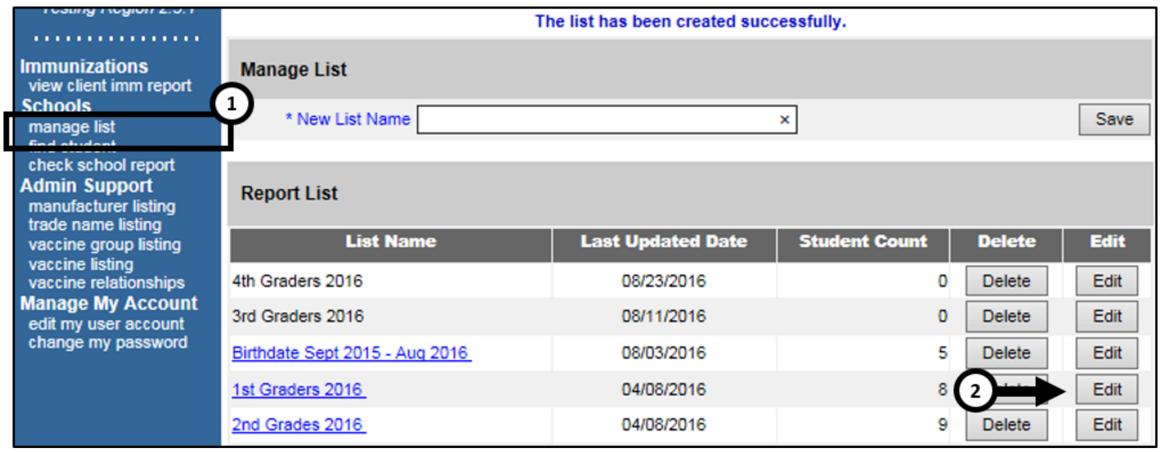


Figure 315 - Edit School List Name Steps 1-2

See Figure 317: Edit School List Name Steps 3-4.

3. Enter the new list name.
4. Click the “Save” button.
   - Users are returned to the Manage List screen where updates can be validated.
   - Click the “Cancel” button to disregard updates and return to the Manage List screen.

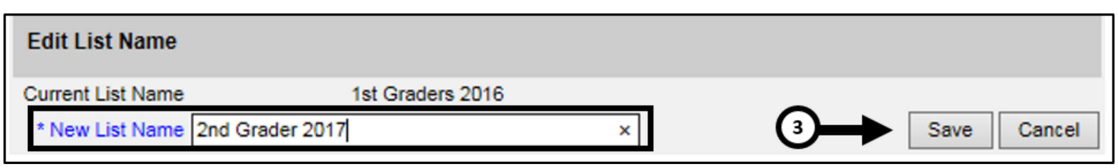


Figure 316 - Edit School List Name Steps 3-4

Delete a School List

To delete a list follow the steps below.

See Figure 318: Delete School List Steps 1-2.

1. Still on the Manage List screen, click the "Delete" button next to the list to be deleted.
2. Click "OK" when the massage dialog box appears.

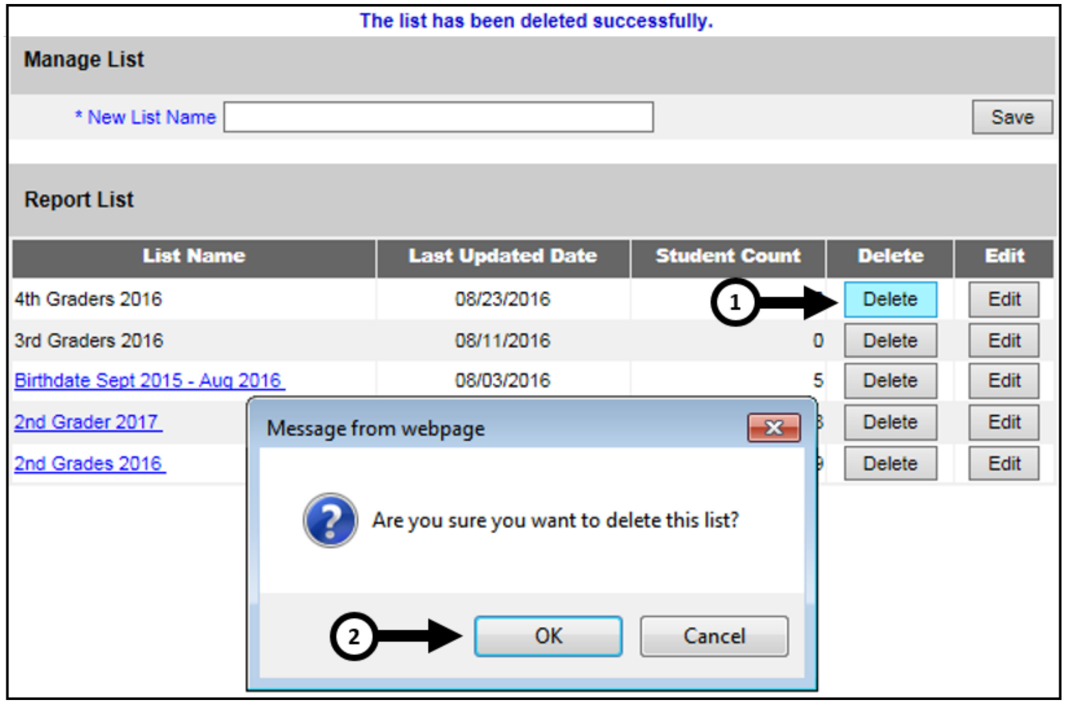


Figure 317 - Delete School List Steps 1-2

Important: Once you delete a list, you cannot retrieve it. Deleting a list will also remove all students from the list and will remove it from the Current Report List section on the *Find Student* screen.

View a School List

To view a school list follow the steps below.

See Figure 319: View School List Steps 1-2.

1. Click the **Manage List** menu option.
2. Click the List Name hyperlink of the list to be viewed.
   - Users are redirected to the Student List.

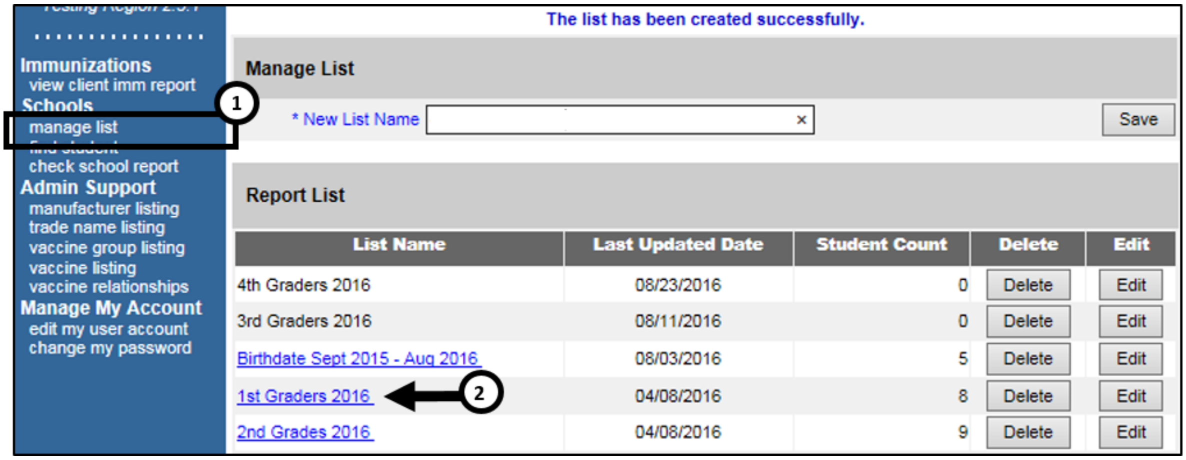


Figure 318 - View School List Steps 1-2

The Student List screen is divided into three main sections: Reports Available for, Select Tracking Schedule, and the Client (Student) List **Error! Reference source not found.**. *See Figure 320: View Student List Example.*

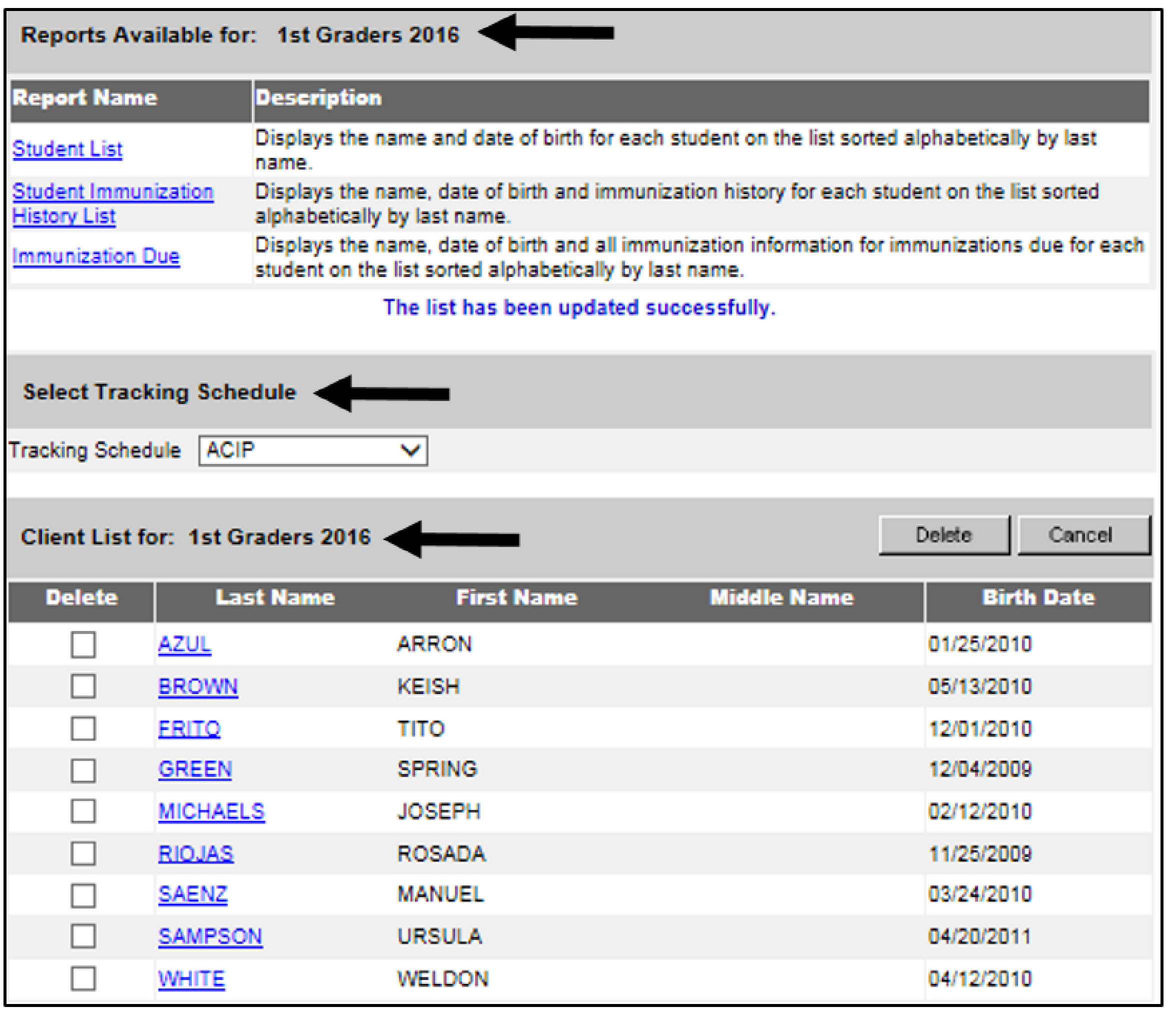


Figure 319 - View School List Example

Reports Available for: List Name

This section displays the three types of reports you can run for the selected list:

- Student List
- Student Immunization History List
- Immunization Due list.

The section includes a brief description of the information that displays for each report. All reports are produced as PDF files and display using Adobe Acrobat Reader.

Select Tracking Schedule

This function allows users to set the Tracking Schedule for each report in order to evaluate the records based on the selected Tracking Schedule.

Client List for: List Name

This section displays the clients assigned to the selected list. In this section, you can click on a last name to navigate to the client's information screen. You can also delete clients from the list by selecting the checkboxes for applicable students and clicking the "Delete" button.

Edit a School List (Remove Student from a School List)

A student, or multiple students can be removed from a school list after selected a Report List Name in the Manage List menu option.

To edit, or removing a student(s) from a school list, follow the steps below.

See Figure 321: Edit School List Steps 1-3.

1. Use the checkbox(s) to select a student(s) to remove from the list.
2. Click the "Delete" button.
    - Click the "Cancel" button to disregard selections and return to the Manage List screen.
3. Click "OK" when the "Are you sure you want to permanently delete selected students from the list" message appears.
    - "The list has been updated successfully" message displays in the middle of the screen.

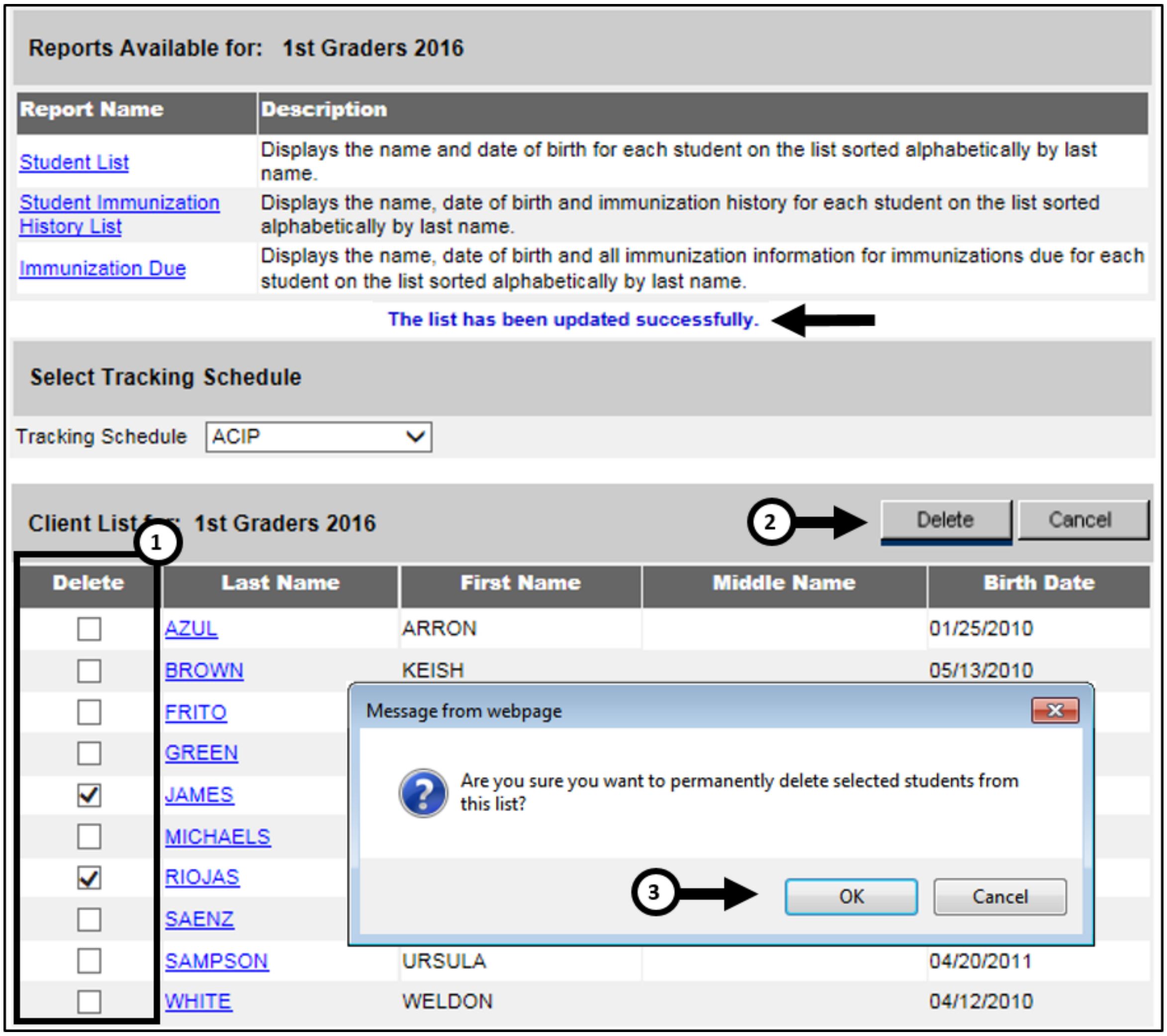


Figure 320 - Edit School List Steps 1-3

School List Reports (Reports Available for:)

This section displays the three types of reports you can run for the selected list: Student List, Student Immunization History List, and Immunization Due list. *See Figure 322: School List Report Options.*

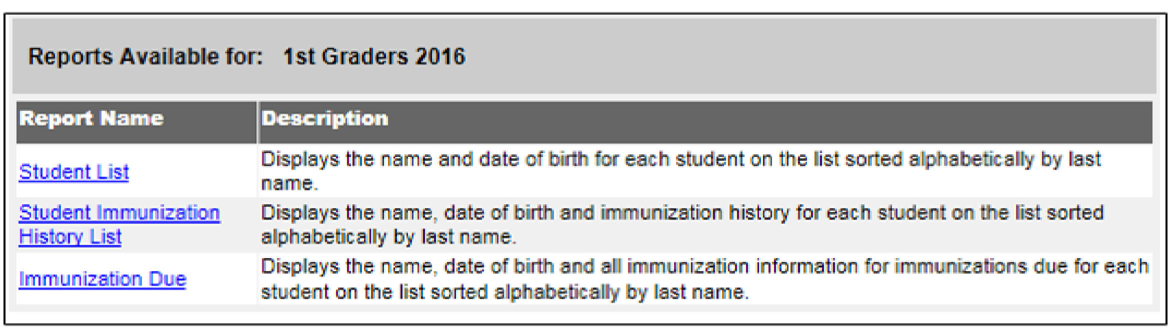


Figure 321 - School List Report Options

Student List Report

This report displays the name and date of birth for each client on the list sorted alphabetically by last name.

To view the Student List report, follow the steps below.

See Figure 323: View Student List Report Steps 1-3.

1. Click the **Manage List** menu option.
2. Select an active list name.
3. When the Report List screen displays, click the **Student List** option.
   - The Student List Report will open in a new browser window. *See Figure 324: Student List Report Example.*

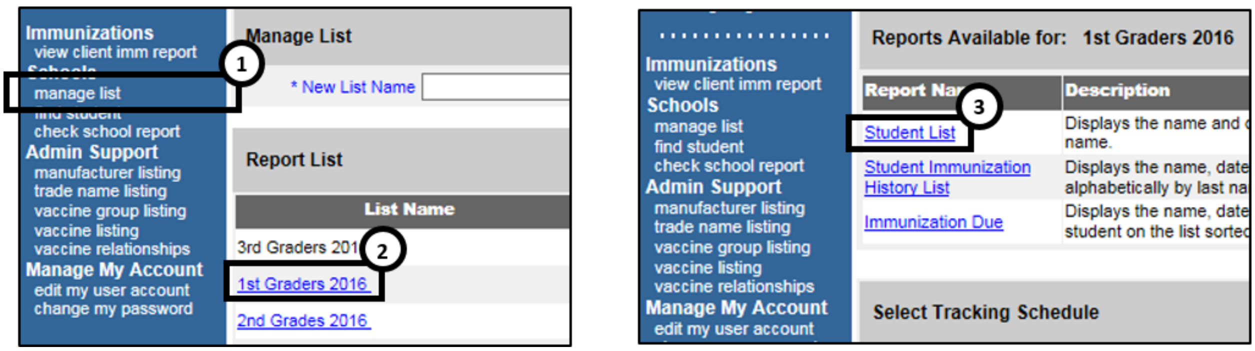


Figure 322 - View Student List Report Steps 1-3

ImmTrac2, the Texas Immunization Registry
Student Listing

*Report run on:*08/23/2016

Last Name	First Name	Middle Name	Birth Date
BOB	TERRY		10/05/2015
DOE	JOHN	ABRAHAM	01/01/2014
HARRISON	GEORGE		10/05/2015
KITTERMAN	AMANDA	M	02/14/2016
SUE	SALLY		02/14/2016
SUE	PEGGY	M	02/14/2016
SUE	TED		02/14/2016
TERRY	BOB		10/05/2015

Figure 324 - Student List Report Example

Student Immunization History List Report

This report displays the name, date of birth, and immunization history for each student, along with a list of their immunizations due. It is sorted alphabetically by last name.

To view the Immunization History Report follow the steps below.

See Figure 325: View Student Immunization History Report Steps 1-4.

1. Click the **Manage List** menu option.

2. Select any active list name.
3. When redirected to the next screen, choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the **Student Immunization History List** option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

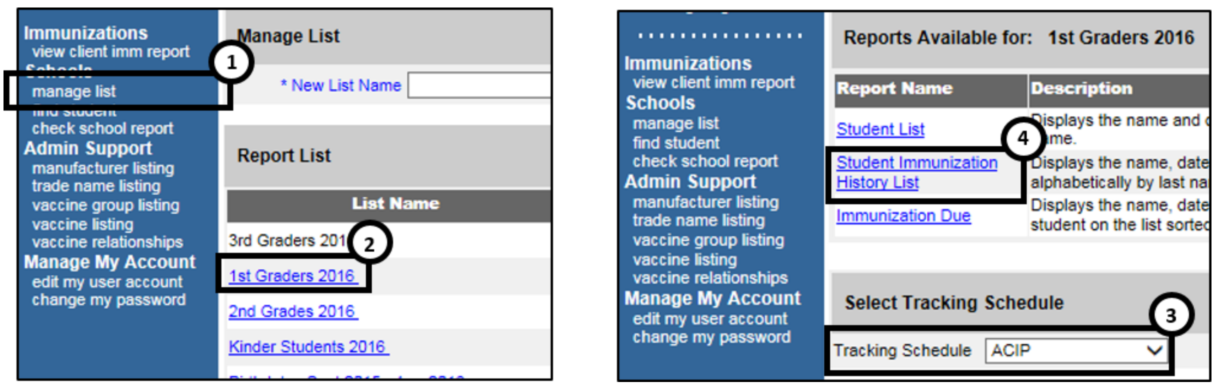


Figure 325 - View Student Immunization History Report Steps 1-4

Figure 326: Student Immunization History Report Steps 5-6.

5. On the *School Report Job Status* screen, click the **Refresh** button periodically to update the job status.
6. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report.
   - The Student Immunization History Report will open in a new browser window. *See Figure 326: Student Immunization History List Example.*

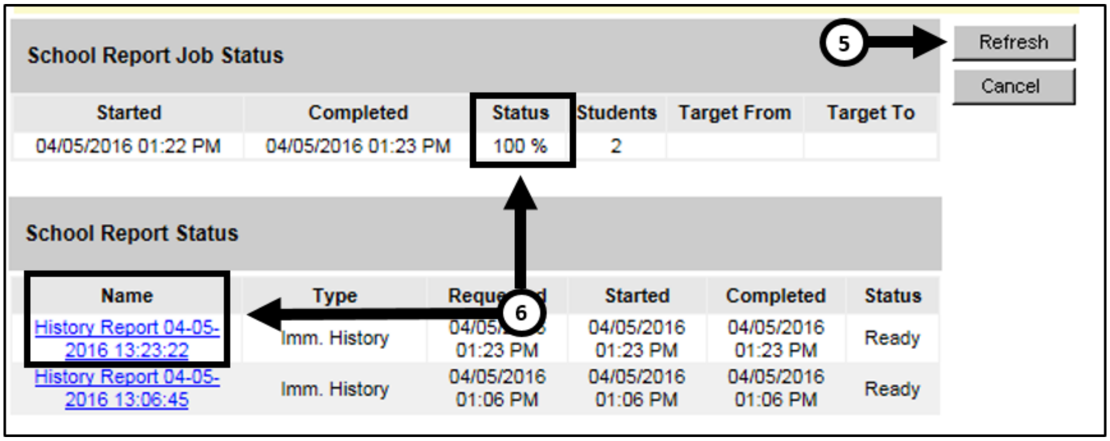
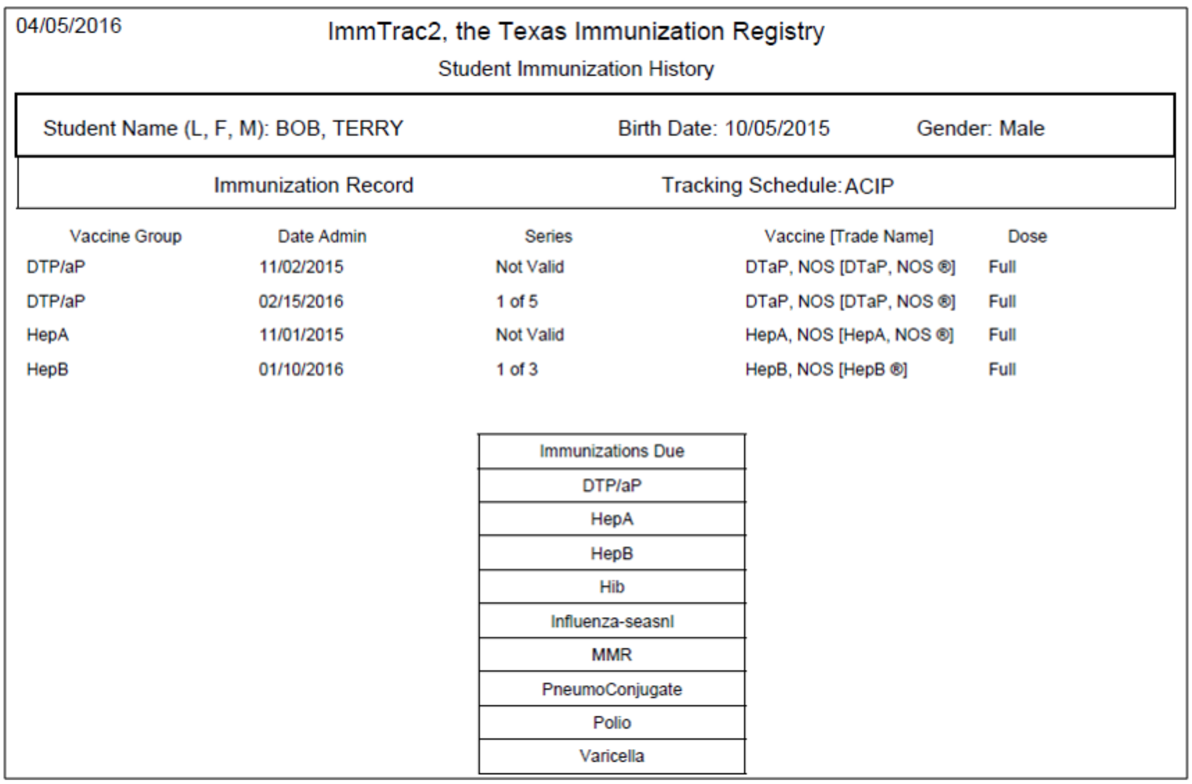


Figure 327 - Student Immunization History Report Steps 5-6


04/05/2016

ImmTrac2, the Texas Immunization Registry

Student Immunization History

Student Name (L, F, M): BOB, TERRY   Birth Date: 10/05/2015   Gender: Male

Immunization Record   Tracking Schedule: ACIP

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
DTP/aP	11/02/2015	Not Valid	DTaP, NOS [DTaP, NOS ®]	Full
DTP/aP	02/15/2016	1 of 5	DTaP, NOS [DTaP, NOS ®]	Full
HepA	11/01/2015	Not Valid	HepA, NOS [HepA, NOS ®]	Full
HepB	01/10/2016	1 of 3	HepB, NOS [HepB ®]	Full

Immunizations Due
DTP/aP
HepA
HepB
Hib
Influenza-seasnl
MMR
PneumoConjugate
Polio
Varicella

Figure 326 - Student Immunization History List Example

Immunization Due Report

This report displays the name, date of birth (DOB), and immunizations due for each student on the list sorted alphabetically by last name.

There are two different ways to configure the report.

Use All Vaccine Groups

This option is used to see the full list of immunizations due or past due. Immunization due dates will be based on the Tracking Schedule selected for this report. Only students on the list who are due or past due for any of the vaccines in the Tracking Schedule will be included in the report.

Use Vaccine Groups Selected

This option is used to focus on a specific vaccine(s) within the selected Tracking Schedule. For example, this report can be used to identify students on the list who may need a specific vaccine. If the student is due or past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report.

To view the Immunization Due report, follow the steps below.

See Figure 327: View Student Immunization Due Report Steps 1-4.

1. Click the **Manage List** menu option.
2. Select an active list name.
3. Choose the appropriate Tracking Schedule from the drop down menu. (The default selection is ACIP.)
4. Click the **Immunization Due** report option.

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

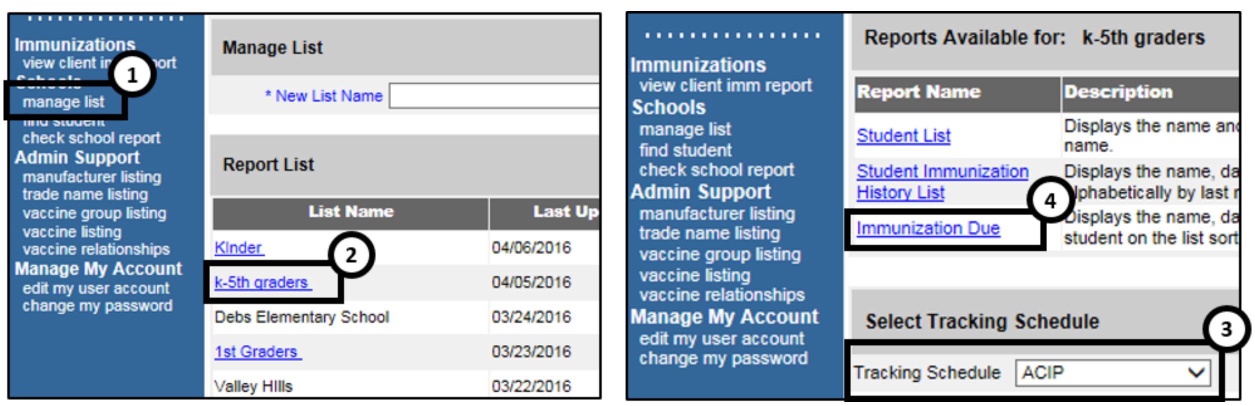


Figure 327 - View Student Immunization Due Report Steps 1-4

See Figure 328: View Student Immunization Due Report Steps 5-7.

5. On the School Immunization Due List Request screen, select a Vaccine Group to report on or select to use all vaccine groups.
    - If you want to report on specific vaccines, select the “Use Vaccine Groups Selected” radio button option.
    - Highlight a vaccine from the list and click “Add”. (If needed, use the “Remove” button to delete vaccines from the report list.)
6. Enter the date criteria.
    - If the “To” date is unspecified for the Target Date Range, the report date range will include the “From” date up to and including today's date.
    - If the “From” date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the “To” date.
    - If both dates are left unspecified for the Target Date Range, then today's date will be entered for both “From” and “To” fields.
7. Click the “Generate” button.

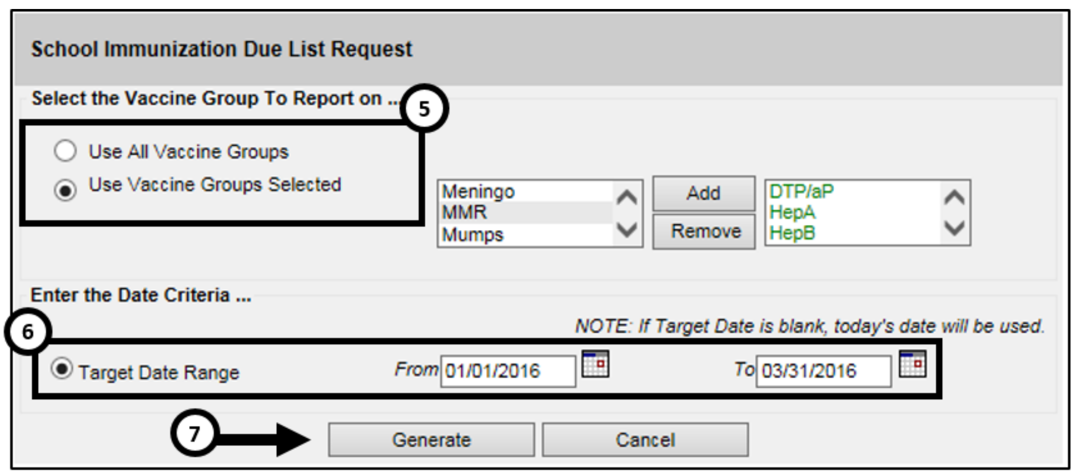


Figure 328 - View Student Immunization Due Report Steps 5-7

See Figure 329: View Student Immunization Due Report Steps 8-9.

8. On the *School Report Job Status* screen, click the “Refresh” button periodically to update the job status.
9. When the job status equals 100%, an active hyperlink displays at the top of the School Report Status screen. Click the hyperlink to view the report.
    - The Student Immunization History Report will open in a new browser window. *See Figure 330: View Student Immunization History Report Example.*

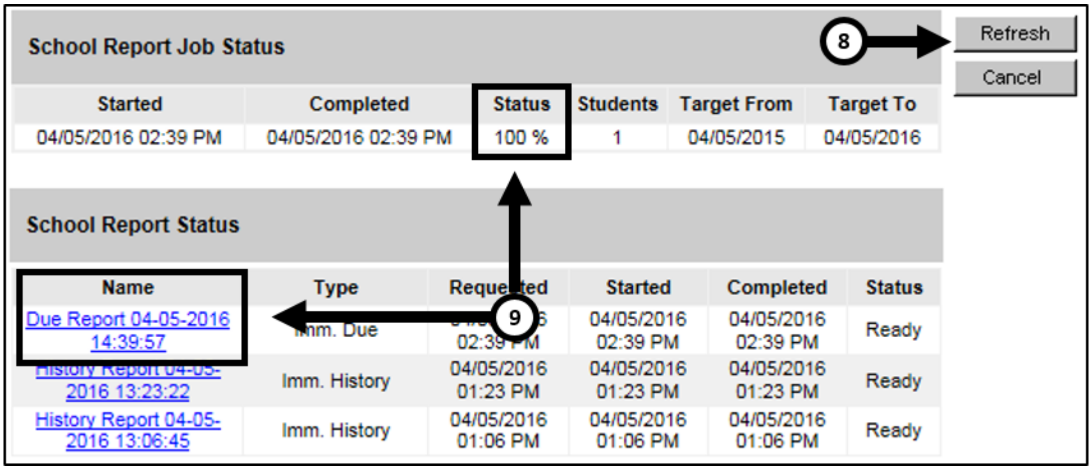
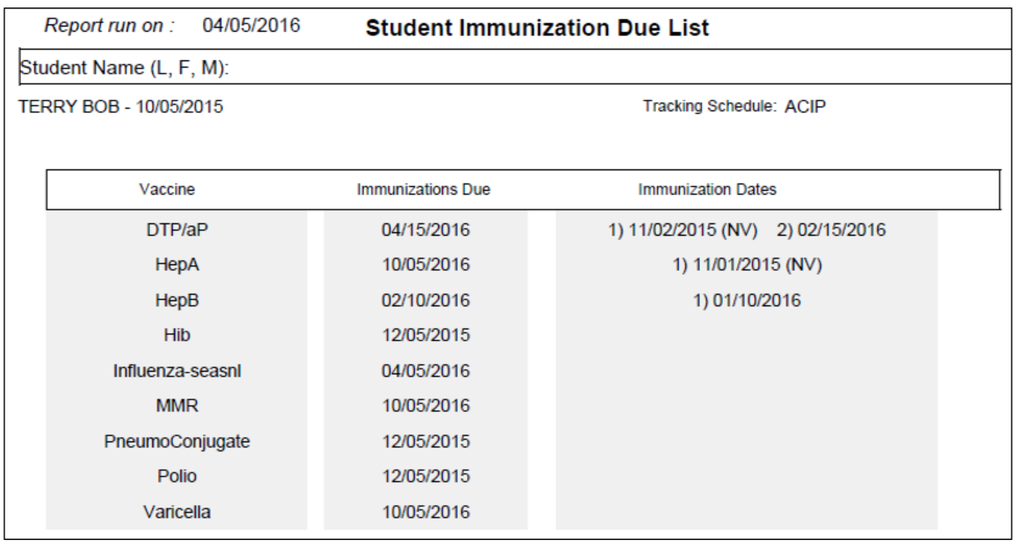


Figure 329 - View Student Immunization Due Report Steps 8-9



Report run on : 04/05/2016 **Student Immunization Due List**

Student Name (L, F, M):

TERRY BOB - 10/05/2015 Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	04/15/2016	1) 11/02/2015 (NV) 2) 02/15/2016
HepA	10/05/2016	1) 11/01/2015 (NV)
HepB	02/10/2016	1) 01/10/2016
Hib	12/05/2015	
Influenza-seasnl	04/05/2016	
MMR	10/05/2016	
PneumoConjugate	12/05/2015	
Polio	12/05/2015	
Varicella	10/05/2016	

Figure 330 - View Student Immunization Due Report Example

Find Student

The *Find Student* menu option is an additional way to view the student immunization history, their recommended vaccines, and to print their official immunization record. However, it is also used to add a student to a list. There are four sections in the Student Immunization History screen: *Figure 331: Student Immunization History Screen.*

- **Student Information**: the student's name, date of birth, gender, and the selected vaccine Tracking Schedule. Select the appropriate Tracking Schedule from the drop down menu to evaluate the immunization record and determine the recommended vaccines. ACIP is the clinical schedule and is the initial default.

Important: *The ACIP schedule should be used when printing a record for the parent to use when obtaining immunizations for their child.*

Note: *If the default Tracking Schedule option is changed, it does not re-establish itself after navigating away and returning later. You must manually change it back to the ACIP option.*

- **Reports**: the lists that are available to add the student to generate reports, and the lists that the student is already assigned to.
- **Immunization Record**: all immunizations the student has received to date ordered alphabetically, then by 'Date Administered.
- **Vaccines Recommended by Selected Tracking Schedule**: the vaccines recommended for the student based on the vaccine Tracking Schedule selected in the Student Information section.

Note: *For more details on immunization records See Section 1 [View Immunization Records](#).*

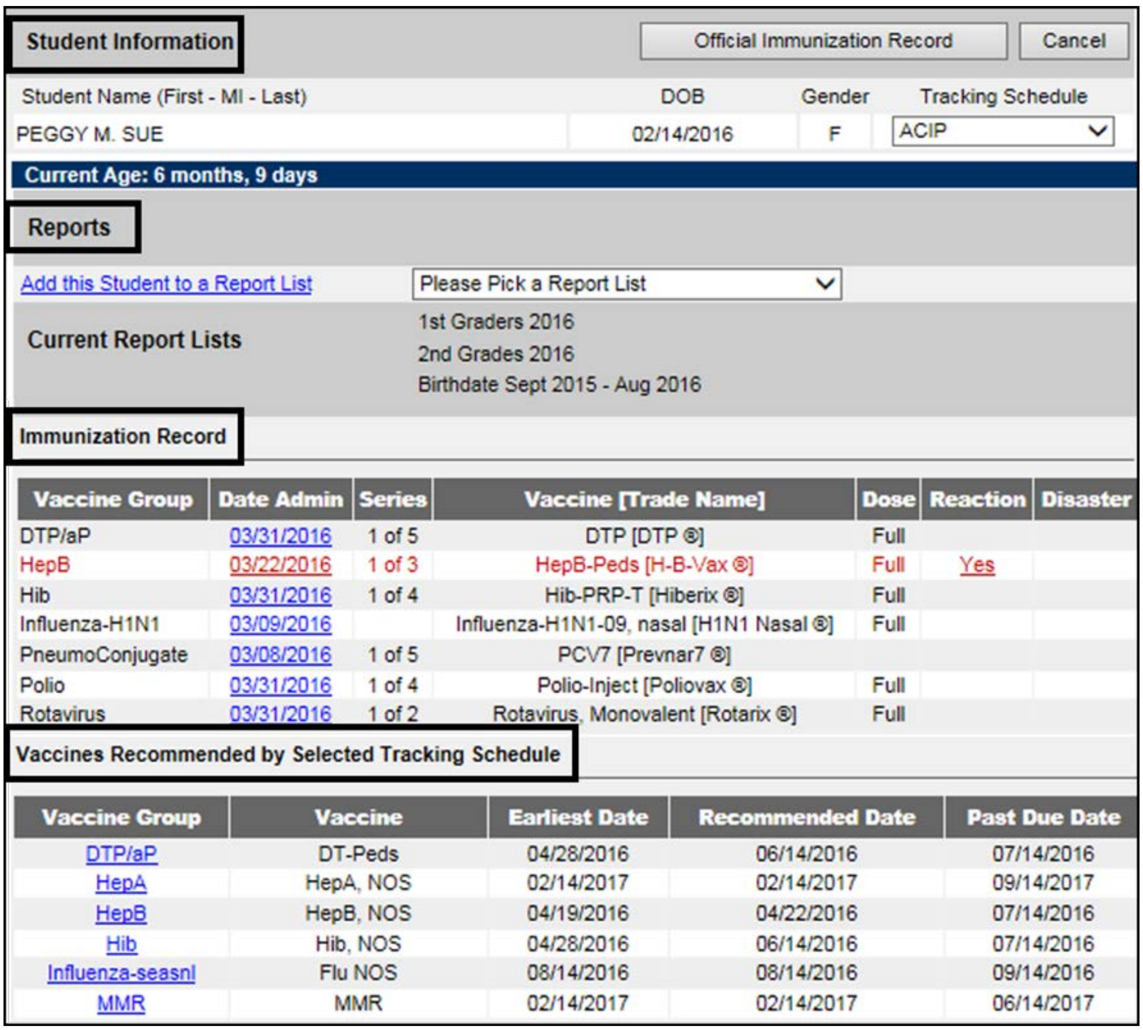


Figure 331 - Student Immunization History Screen

Add Student to a List

To add a student to a list, the list name must have been created in the Manage Lists section of the application. See the Manage List section for details.

To add a student to a list, follow the steps below.

See Figure 332: Add Student to a List Steps 1-3.

1. Click the **Find Student** menu option.
2. Perform a search using. (See the Client Search section for details.)
3. Click the "Find" button.
    a. Depending on the search results, users may need to select the correct client from the result list.
    b. If the search results in finding the exact client, the student information screen displays immediately.

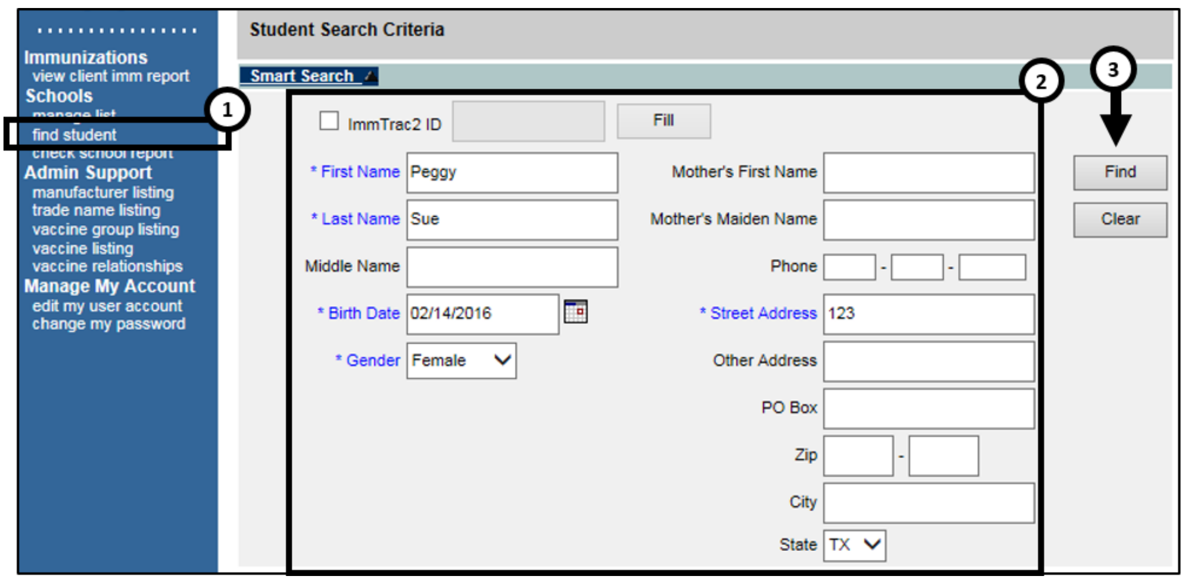


Figure 332 - Add Student to a List Steps 1-3

See Figure 333: Add Student to a List Steps 4-5.

4. When the student information displays, select a list from the "*Please pick a Report List*" drop-down menu.
5. Click **Add this Student to a Report List**.
    a. The newly added list displays in the Current Report Lists section.

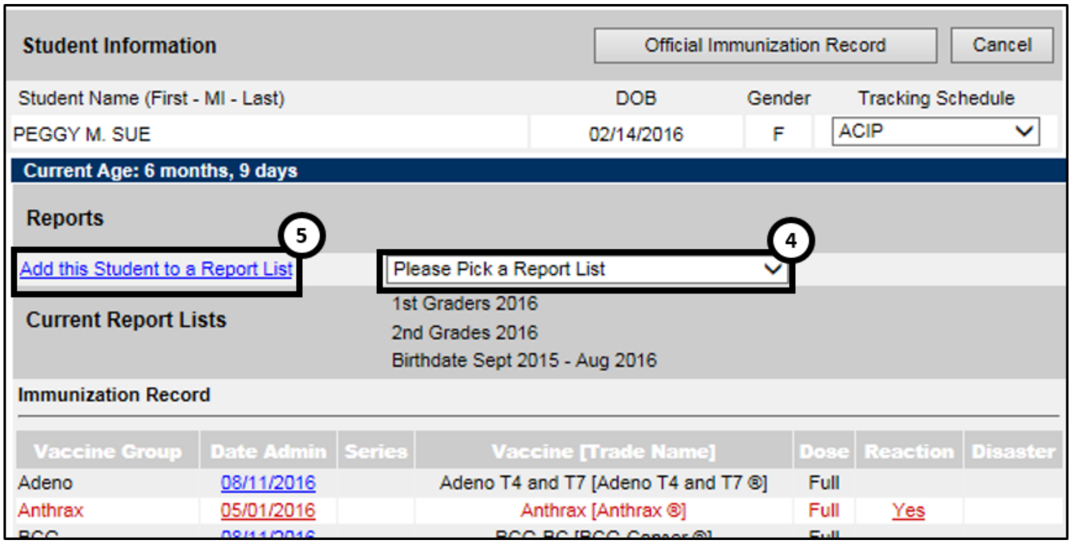


Figure 333 - Add Student to a List Steps 4-5

***Note:** Students can be added to more than one list. The available options in the Pick Report List are the list that the student is not already assigned.*

Check School Report

If you have navigated to a different screen during report generation, or want to view reports that were previously run, use the *Check School Report* menu option to view the report. The Student Immunization History List and the Immunization Due list will be available on the Check School Report screen for 7 days. The screen is separated into two sections: *School Report Job Status* and *School Report Status*. *See Figure 334: Check School Report Status Screen.*

School Report Job Status

This section displays the date and time a report job started and completed, the overall percentage completion, the number of students returned, and the target date range if one was specified. Clicking the “Refresh” button will update the percent completion status. Only one job is listed in this section. Once you run a new report job, your previous job displays below in the School Report Status section.

School Report Status

This section displays reports generated from the *Reports Available* screen. It contains the name of the report, the type of report, the date and time the report was requested, the time it started, and the report status. Reports will be sorted by time generated, with the most recent report at the top.

When the report name appears as a link and the Status displays “*Ready*”, it has completed processing and is ready for viewing. To view the report, click the report name. The selected report displays using the Adobe Acrobat Reader. At any time, click the “Cancel” button to return to the previous screen.

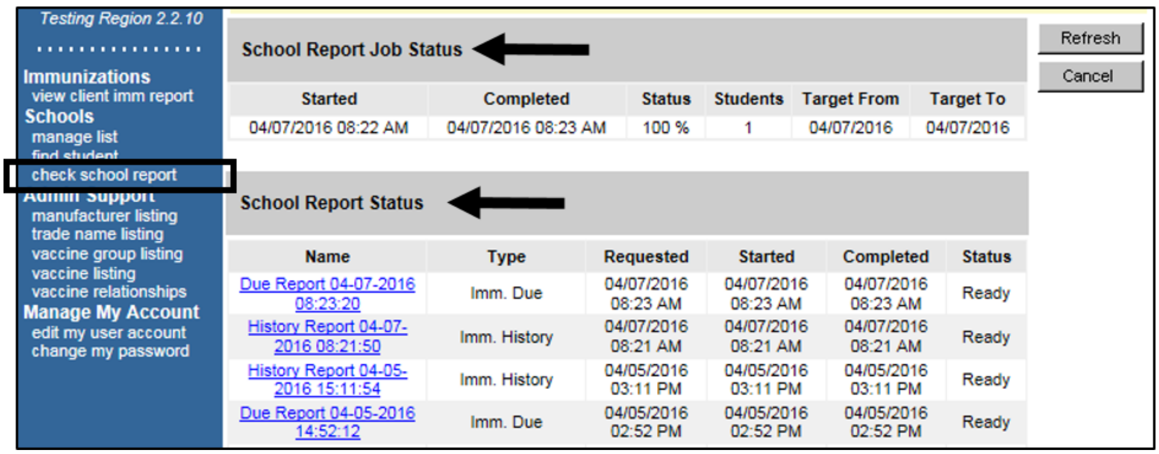


Figure 334 - Check School Report Status Screen

Chapter 21: Reports

The ImmTrac2 application has many reporting capabilities available under the Reports section on the left-side menu panel. Reports can be exported to different file types including Excel, PDF, XML, and plain text formats.

Generate Reports

The Report Available Table lists the reports available under the *Generate Report* menu panel option. From the Generate Report screen users can click on the *Status* link under the Output column for any given report to view previously generated reports. In some cases, the only available option is the last generated version for that particular report.

Table 40 - Reports Available Table

Generate Report	***Description***
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.
Ad Hoc List Report	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.
Check Reminder List	The Check Reminder List allows Provider Organizations to be able to view their clients for statewide reminder / recalls prior to the state reminder recall process being ran.
Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.
Client and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.
CoCASA Extract	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.

Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.
Manage Ad hoc Template	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.
Reminder / Recall Custom Letters	The Reminder / Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.
Reminder / Recall Report	The Reminder / Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.

Ad Hoc Count Report

The *Ad Hoc Count Report* produces a list of selected information based on client or immunizations information in order to count specific data. Users can refine results by selecting up to three "Factors" to include in the report, define filters, and choose the sort order. Client Factors include, but is not limited to, the following examples: Client Type, DOB, Ethnicity, and Gender. Immunization Factors include, but is not limited to, the following examples: Clinic Site, Trade Name, Vaccine, Vaccine Date, and Vaccine Group.

To run the Ad Hoc Count Report follow the steps below.

See Figure 335: Generate Ad Hoc Count Report Steps 1-2.

1. Click the "Generate Report" option from the menu panel.
2. Select the "Ad Hoc Count Report".

Note: *Click the Status link in the right "Output" column at any time to view the Ad Hoc Report State screen. The ad hoc reports are retained for 72 hours for an organization. ImmTrac2 will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.*

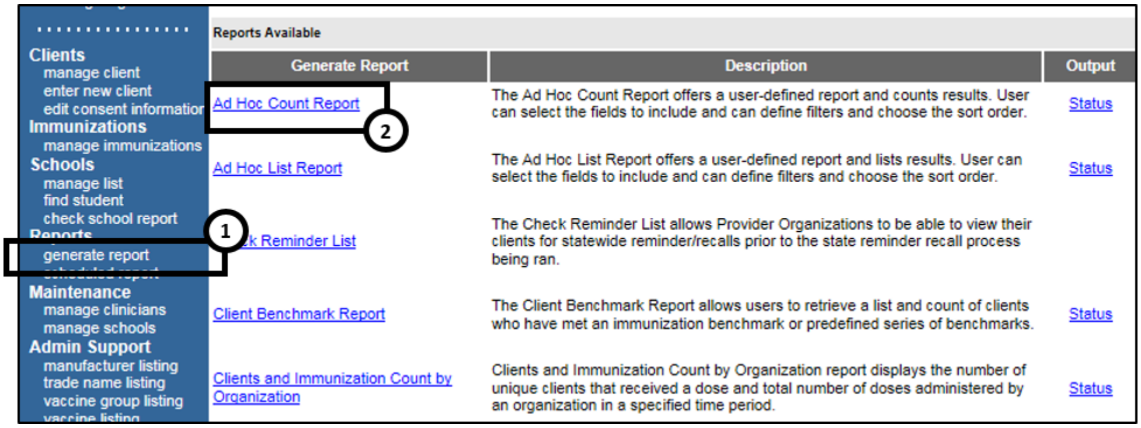


Figure 335 - Generate Ad Hoc Count Report Steps 1-2

See Figure 336: Generate Ad Hoc Count Report Steps 3-5.

3. Once the *Create a Customized Count Report* screen displays choose what to count, Clients or Immunizations.
4. Select up to three factors to use to group the counts on the report by highlighting the item(S) in the left column (for example, Vaccine Group).
    - To highlight multiple items hold the Ctrl button on the keyboard and select the options.
5. Clicking the "Add" button to move the item(s) to the right column so that it can be used in the report.
    - To remove factors, select the one to remove and click the "Remove" button or the "Remove All" button to remove all factors.

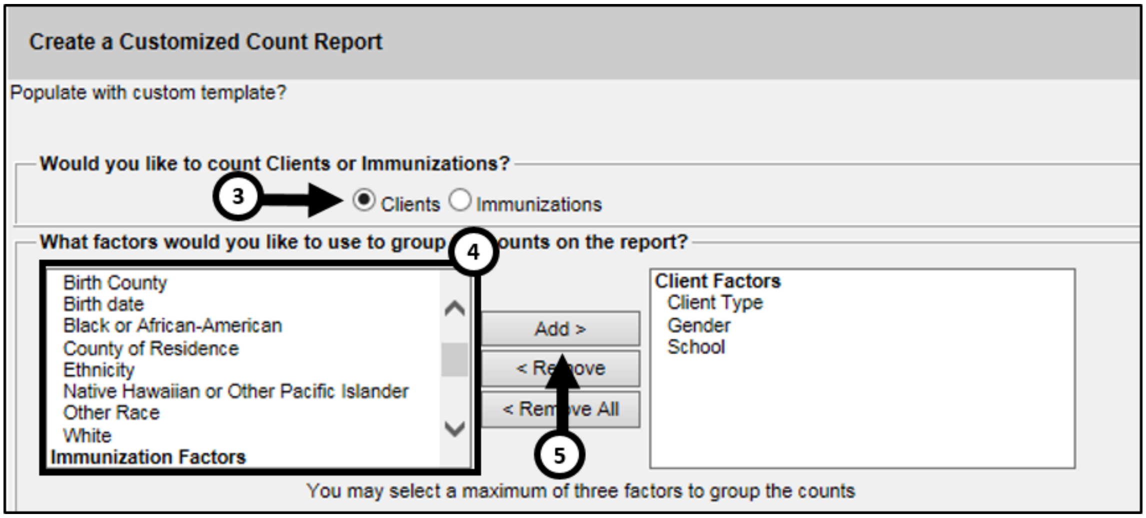


Figure 336 - Generate Ad Hoc Count Report Steps 3-5

See Figure 337: Create a Customized Count Report 6-9.

6. Under the "How would you like to filter?" section, select the appropriate criteria for the report as needed.
    - *See Table 41: Ad Hoc Count Report Filter Data Options for details about the filter options*.
7. Click on "Add / Save Edit" button to add the filter to the "Selected Filters" box.
    - Repeat Steps 6-7 to add additional filters.
8. Use the "Filter" button to add, edit, or configure the filter options.
    - *See Table 41: Ad Hoc Count Report Filter Data Options for details about the filter options buttons.*
9. Click the "Generate" button. The Ad Hoc Report Status screen displays.

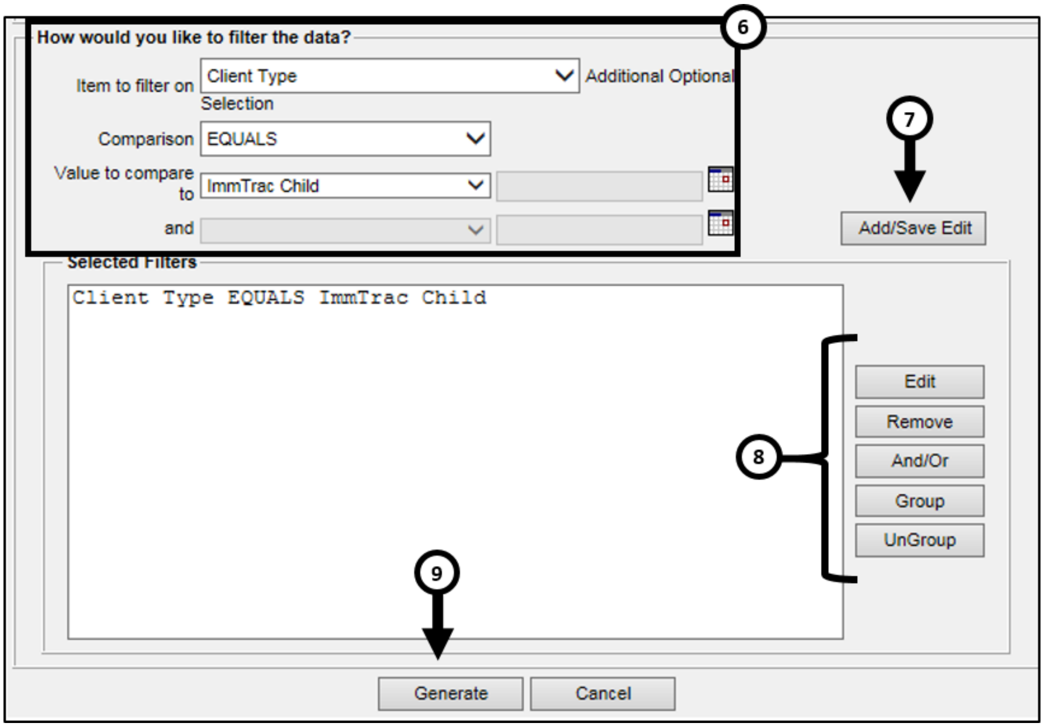


Figure 337 - Create a Customized Count Report 6-9

Table 41 - Ad Hoc Count Report Filter Data Options

Field	***Description***
Item to filter on	Select an item to add as a filter by using the drop down list. The filters are grouped by Client and Immunization factors. For example, Birth Date Range, Client ID, Gender, School, Zip, Trade Name Vaccine...etc.
Comparison	Select a comparison option from the drop down list that best describes the type of comparison to make. Options: Before, Equals, Not Equal to, After, Between, Is and Is Not. ***NOTE****: In some instances, depending on the "Item to Filter on", this field will auto select. For instance, if "State" is selected as a filter the comparison will auto update to "Equals". Some comparison options will trigger a text box in the Value to compare to field.*

Field	***Description***
Value to compare "to"	The "to" fields will be become active depending on the "Comparison" option that was selected. The first "to" field has a drop down list that is populated with the options relevant to the "Comparison" option. For instance, if "State" is selected as a filter the drop down list will contain state options. If "Ethnicity" is selected, the ethnicity options will list. The second field will either be used to enter a date, such as when the "Birth Date" filter is selected, or it will be used to enter free text when an options such as "Zip Code" is selected.
Value to compare "and"	The "and" fields will be become active depending on the "Comparison" option that was selected. In most cases only the second "and" field will become activated to allow for a comparison between two data points. For example, "Birth Date" is "between" XX/XX/XXXX and XX/XX/XXXX.
Selected Filters	This section will list all filters being applied to the report.
Edit (button)	Highlight a statement in the Selected Filters box and click "Edit". The filter data will display in the "How would you like to filter data" section to allow for edits.
Remove (button)	Highlight a statement and click Remove to delete it from the selected filters.
And / Or (button)	Change the AND to an OR statement by highlighting 'AND' and clicking the "And / Or" button. An OR statement can also be changed to an AND statement by clicking the "And / Or" button. ***NOTE****: Example – Zip Code Equals 78724 AND State Equals Texas*
Group (button)	Group filters together by highlighting two filter statements and click the "Group" button. Filters that are grouped will be encompassed in parenthesis.
UnGroup (button)	Highlight a grouped statement and click on the "Ungroup" button to ungroup the statements.

Ad Hoc Report Status

The *Ad Hoc Report Status* screen displays after clicking the "Generate" button on the Ad Hoc Count or Ad Hoc List Report screens. Users can also access the status screen from the Reports Available screen by clicking on the "Status" link following the report description. This screen will only display one list and one count report at any given time.

See Figure 338: Ad Hoc Status Report Steps 1-3.

1. Click Refresh occasionally to check the status of the report.
2. Once the underlined report type appears in blue, click it. The report displays directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.

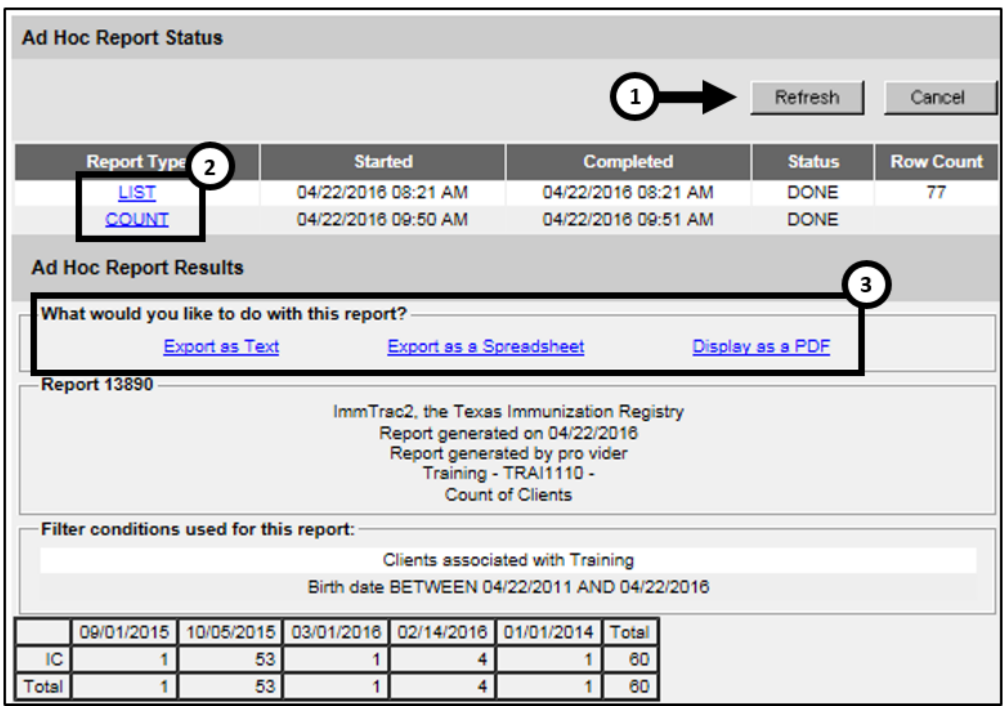


Figure 338 - Ad Hoc Report Status 1-3

Table 42 - Ad Hoc Report Status Screen Data

Field	***Description***
Report Type	Links to the most recent List or Count report.
Started	Date and time the report began generating.
Completed	Date and time the report finished generating.
Status	The status of the report.

Field	Description
Row Count	The row count returned in each report. ***NOTE**: The column will always display a blank for the Count Report.*
Report Number	An auto generate ImmTrac2 report number assigned to the report. ***NOTE**: This is only relevant when technical difficulties are encountered.*
Filter Conditions	The filter options selected to generate the report.

Ad Hoc List Report

The *Ad Hoc List Report* produces a list of clients who match the selected criteria. User can refine results by selecting the items to include in the report, define filters, and choose the sort order. Users can select multiple items such as client information, address, immunization, and person's responsible information. In this report select as few or as many items (fields) as needed.

To run the Ad Hoc List Report follow the steps below.

See Figure 339: Generate Ad Hoc List Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Ad Hoc List Report**.

***Note:** Click the Status link in the left "Output" column at any time to view the Ad Hoc Report State screen. The Ad hoc reports are retained for 72 hours per organization. ImmTrac2 will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.*

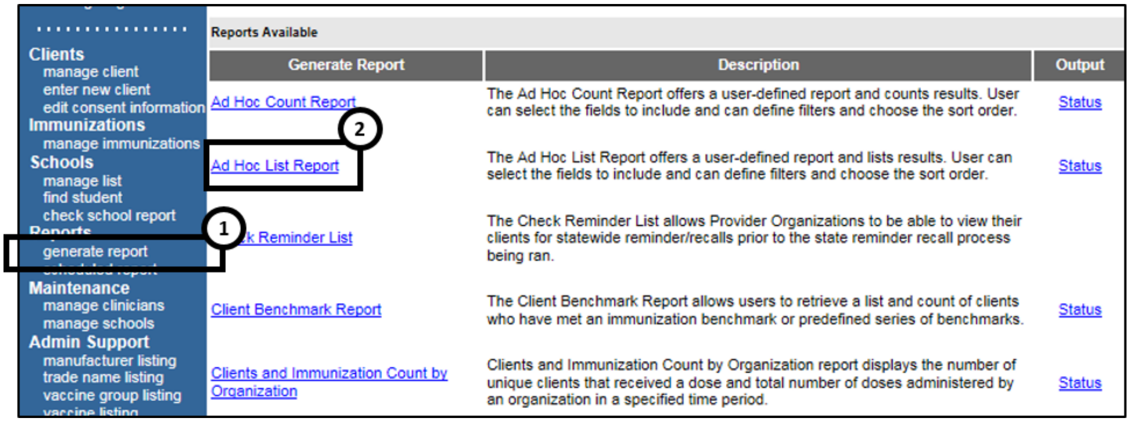


Figure 339 - Generate Ad Hoc List Report Steps 1-2

See Figure 340: Generate Ad Hoc List Report Steps 3-7.

3. Once the *Create a Customized Count Report* screen displays, select the client population to include in the report.
4. Select up to three factors to use to group the counts on the report by highlighting the item(S) in the left column (for example, Vaccine Group).
   - To highlight multiple items hold the Ctrl button on the keyboard and select the options.
5. Clicking the “Add” button to move the item(s) to the right column so that it can be used in the report.
   - To remove factors, select the one to remove and click the “Remove” button or the “Remove All” button to remove all factors.
6. Use the drop down arrow to select a sort option.
   - List options will mirror the items selected to display on the report.
7. Select a sort order as needed.

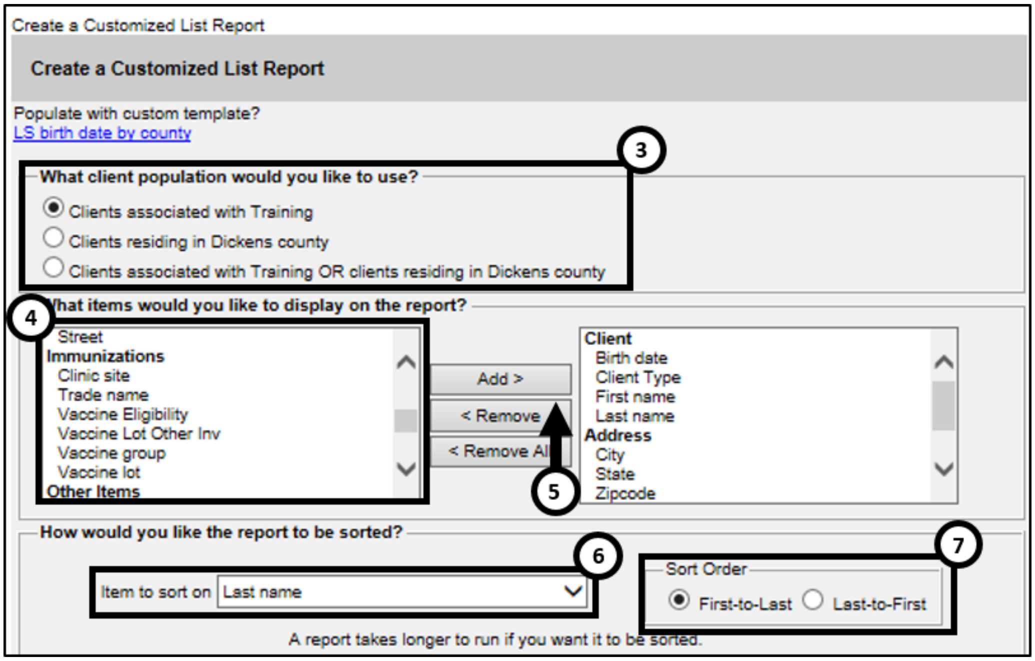


Figure 340 - Generate Ad Hoc List Report Steps 3-7

See Figure 341: Generate Ad Hoc List Report Steps 8-11.

8. Under the “How would you like to filter?” section, select the appropriate criteria for the report as needed.
   - *See Table 43: Ad Hoc List Report Filter Data for details about the filter options*.
9. Click on “Add / Save Edit” to add the filter to the “Selected Filters” box.
   - Repeat Steps 6-7 to add additional filters.
10. Use the “Filter” button to add, edit or configure the filter options.
    - *See Table 43: Ad Hoc List Report Filter Data for details about the filter options.*
11. Click the “Generate” button. The Ad Hoc Report Status screen displays.

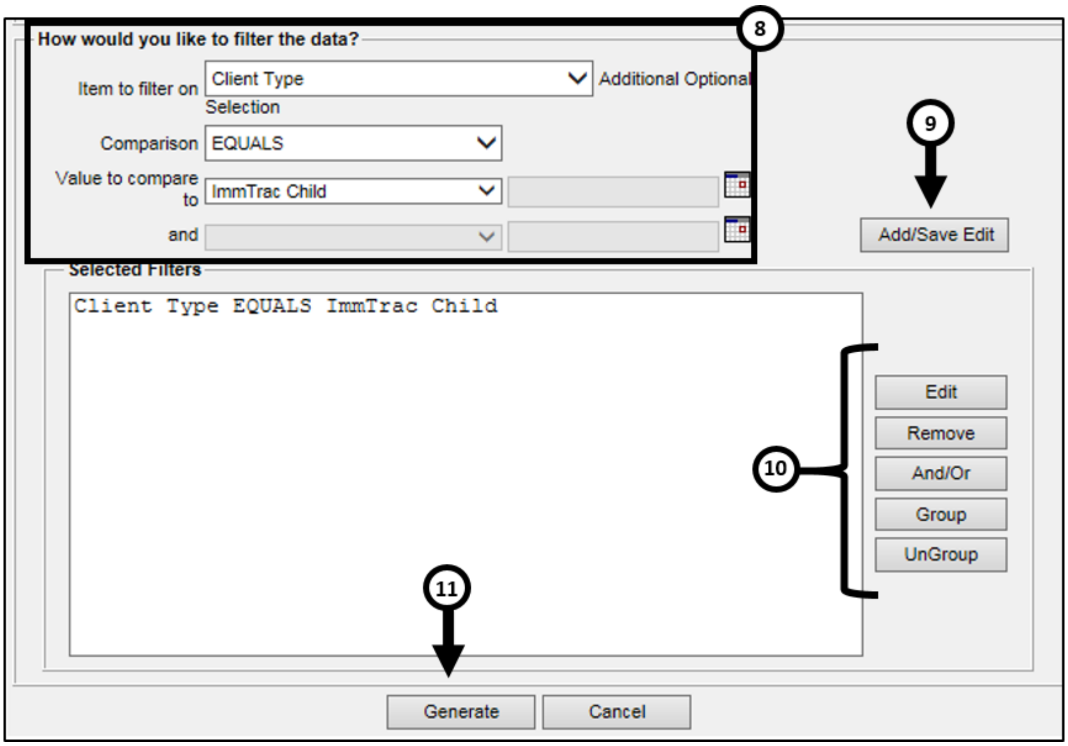


Figure 341 - Generate Ad Hoc List Report Steps 8-11

Note: *Ad Hoc Reports run against all clients associated with the user's organization. To disassociate a client from an organization their status in the organization information section of the client's record must be changed. Newly added clients will not appear on the Ad Hoc Reports until the following day.*

Table 43 - Ad Hoc List Report Filter Data Options

Field	Description
Item to filter on	Select an item to add as a filter by using the drop down list. The filters are grouped by Client and Immunization factors. For example, Birth Date Range, Client ID, Gender, School, Zip, Trade Name Vaccine...etc.
Comparison	Select a comparison option from the drop down list that best describes the type of comparison to make. Options: Before, Equals, Not Equal to, After, Between, Is and Is Not. ***NOTE****: In some instances, depending on the "Item to Filter on", this field will auto select. For instance, if "State" is selected as a filter the comparison will auto update to "Equals". Some comparison options will trigger a text box in the Value to compare to field.*

Field	*Description*
Value to compare “to”	The “to” fields will be become active depending on the “Comparison” option that was selected. The first “to” field has a drop down list that is populated with the options relevant to the “Comparison” option. For instance, if “State” is selected as a filter the drop down list will contain state options. If “Ethnicity” is selected, the ethnicity options will list. The second field will either be used to enter a date, such as when the “Birth Date” filter is selected, or it will be used to enter free text when an options such as “Zip Code” is selected.
Value to compare “and”	The “and” fields will be become active depending on the “Comparison” option that was selected. In most cases only the second “and” field will become activated to allow for a comparison between two data points. For example, “Birth Date” is “between” XX/XX/XXXX and XX/XX/XXXX.
Selected Filters	This section will list all filters being applied to the report.
Edit (button)	Highlight a statement in the Selected Filters box and click “Edit”. The filter data will display in the “How would you like to filter data” section to allow for edits.
Remove (button)	Highlight a statement and click “Remove” to delete it from the selected filters.
And / Or (button)	Change the AND to an OR statement by highlighting ‘AND’ and clicking the “And / Or” button. An OR statement can also be changed to an AND statement by clicking the “And / Or” button. ***NOTE****: Example – Zip Code Equals 78724 AND State Equals Texas*
Group (button)	Group filters together by highlighting two filter statements and click the “Group” button. Filters that are grouped will be encompassed in parenthesis.
UnGroup (button)	Highlight a grouped statement and click on the “Ungroup” button to ungroup the statements.

Check Reminder List

The *Check Reminder List* screen is used to preview the list of clients that are configured from a reminder request notices. This report allows organizations to review the Reminder / Recall candidates before generating reminder recall notifications. A client is configured for reminders and recalls in the "Organization Information" section of the client information screen by selecting "Yes" in the "Allow Reminder and Recall Contact" field. *See Figure 342: Organization Information Tab.*

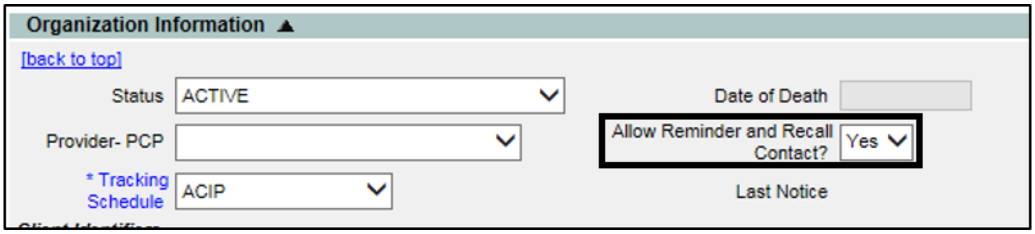


Figure 323 - Organization Information Tab

To view the Check Reminder List follow the steps below.

See Figure 343: Generate Check Reminder List Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Check Reminder List**.

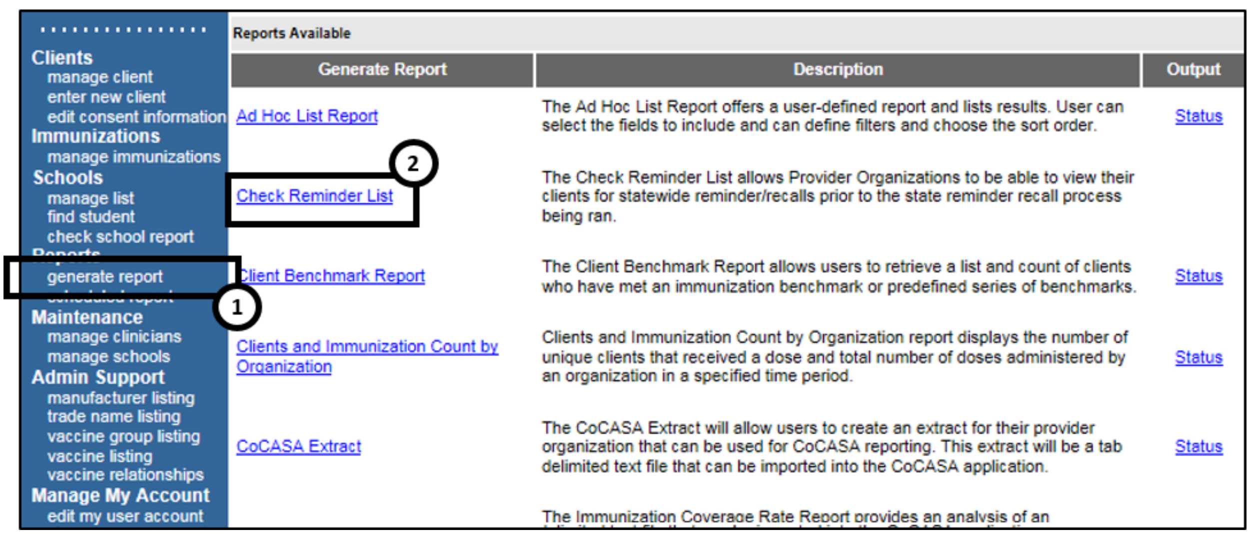
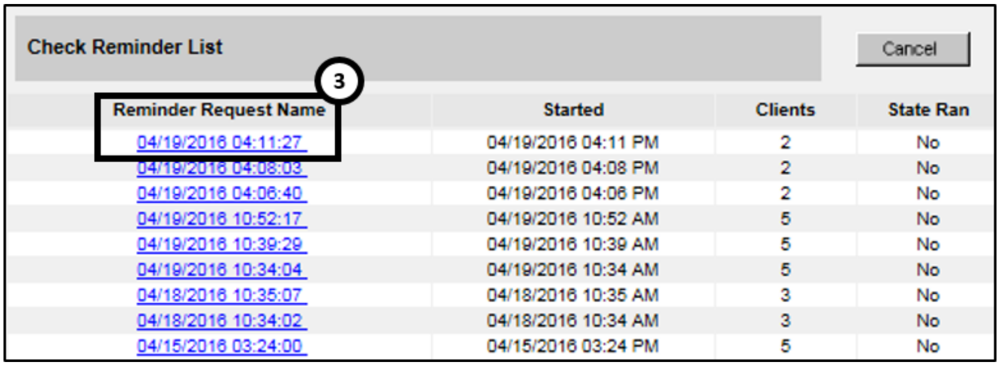


Figure 324 - Generate Check Reminder List Report Steps 1-2

See Figure 344: Generate Check Reminder List Report Step 3.

3. Click on the blue hyperlink reminder request list. *See Table 44: Check Reminder List Data for details on the data columns.*



Check Reminder List

Cancel

Reminder Request Name	Started	Clients	State Ran
04/19/2016 04:11:27	04/19/2016 04:11 PM	2	No
04/19/2016 04:08:03	04/19/2016 04:08 PM	2	No
04/19/2016 04:06:40	04/19/2016 04:06 PM	2	No
04/19/2016 10:52:17	04/19/2016 10:52 AM	5	No
04/19/2016 10:39:29	04/19/2016 10:39 AM	5	No
04/19/2016 10:34:04	04/19/2016 10:34 AM	5	No
04/18/2016 10:35:07	04/18/2016 10:35 AM	3	No
04/18/2016 10:34:02	04/18/2016 10:34 AM	3	No
04/15/2016 03:24:00	04/15/2016 03:24 PM	5	No

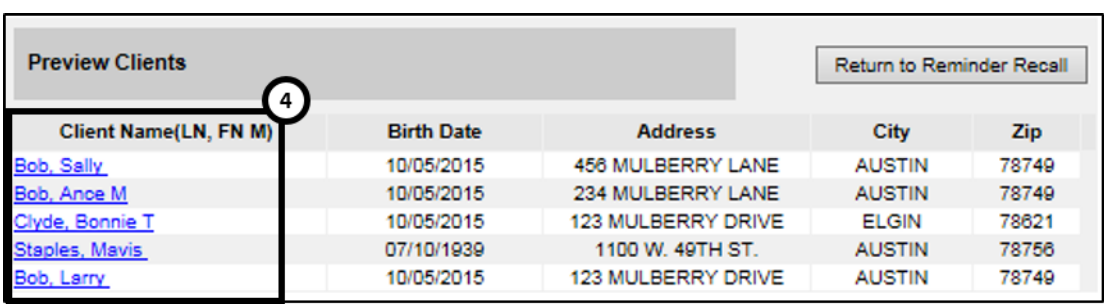
Figure 343 - Generate Check Reminder List Report Step 3

Table 44 - Check Reminder List Data

Field	Description
Reminder Request Name	Displays the date and time the Reminder Report was generated as a hyperlink that is ready to be previewed. Clicking the hyperlink displays the Preview Clients screen, which shows the organization's clients that displays for this report if it is generated.
Started	Displays starting date and time for report generation.
Clients	Displays the final Client count for the report.
State Ran	Displays whether the Reminder Recall was generated by the State.
Cancel	This button takes users back to the Generate Report – Reports Available screen.

See Figure 344: Generate Check Reminder List Report Step 4.

4. The clients who are due for a reminder displays. Click on the hyperlink to go to the client information screen, and (or) view their immunization data.



Preview Clients

Return to Reminder Recall

Client Name(LN, FN M)	Birth Date	Address	City	Zip
Bob, Sally	10/05/2015	456 MULBERRY LANE	AUSTIN	78749
Bob, Ance M	10/05/2015	234 MULBERRY LANE	AUSTIN	78749
Clyde, Bonnie T	10/05/2015	123 MULBERRY DRIVE	ELGIN	78621
Staples, Mavis	07/10/1939	1100 W. 49TH ST.	AUSTIN	78756
Bob, Larry	10/05/2015	123 MULBERRY DRIVE	AUSTIN	78749

Figure 344 - Generate Check Reminder List Report Step 4

Client Benchmark Report

The *Client Benchmark Reports* allows ImmTrac2 users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be exported as a text file, spreadsheet, or PDF file.

To generate the Client Benchmark Report follow the steps below.

See Figure 345: Generate Client Benchmark Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Client Benchmark Report**.

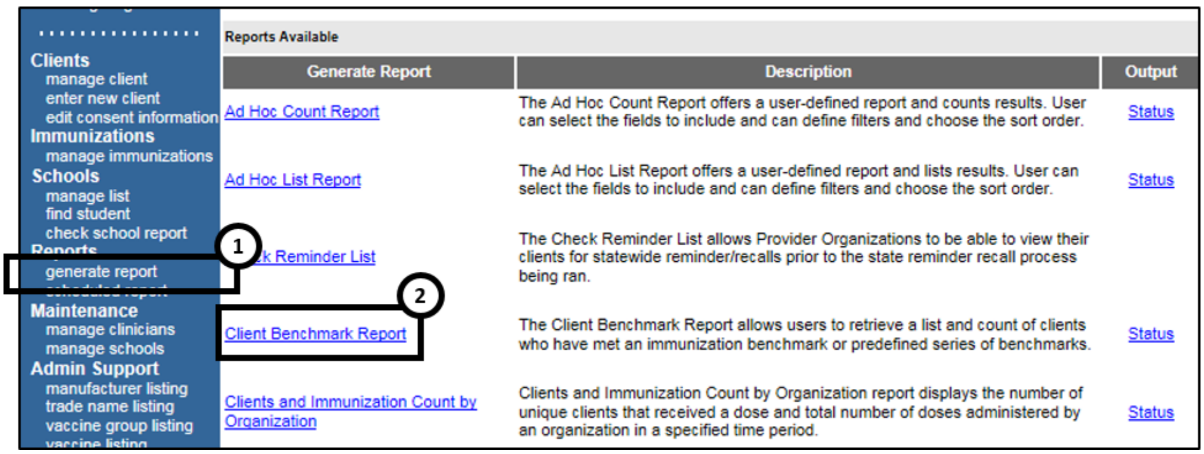


Figure 345 - Generate Client Benchmark Report Steps 1-2

See Figure 346: Generate Client Benchmark Report Steps 3-6.

3. Use the radio buttons to select the Report Grouping.
   - The top section allows users to select which clients will be queried against.
   - The bottom section allows users to select which clients display in the report.
     a. Clients who did NOT meet the benchmark: a list of clients met the criteria and but did not meet the benchmark(s) defined in the table.
     b. Clients who DID meet the benchmark: a list of clients who met the criteria and the benchmark(s) defined in the table.
     c. All clients meeting the criteria defined in the table.

4. Use the radio buttons to select an age or birth date range:
    - Less than or equal to 72 months old: all clients who are 72 months old or younger. Users may only enter up to age six years.
    - Birth date range: a range of birth dates.
    - Age range: in age fields enter numeric date and then use the drop down list next to it to choose days, months, or years.
5. Use the radio buttons to select Options for Benchmarking.
    - Standard Assessment: will return a benchmark report based on clients who have or have not meet the selected benchmark requirements.
    - Assess Clients with Sufficient Refusal History as Covered: will return a benchmark report that also counts clients with a refusal comments and an "Applies-To-Date" entered in the client record on the Comments tab. For a list of the refusal comments see [Appendix B – Client Comment Impacting the Tracking Schedule](#).
6. Enter a date in the MM/DD/YYYY format or use the calendar  icon to select an Evaluation Date.

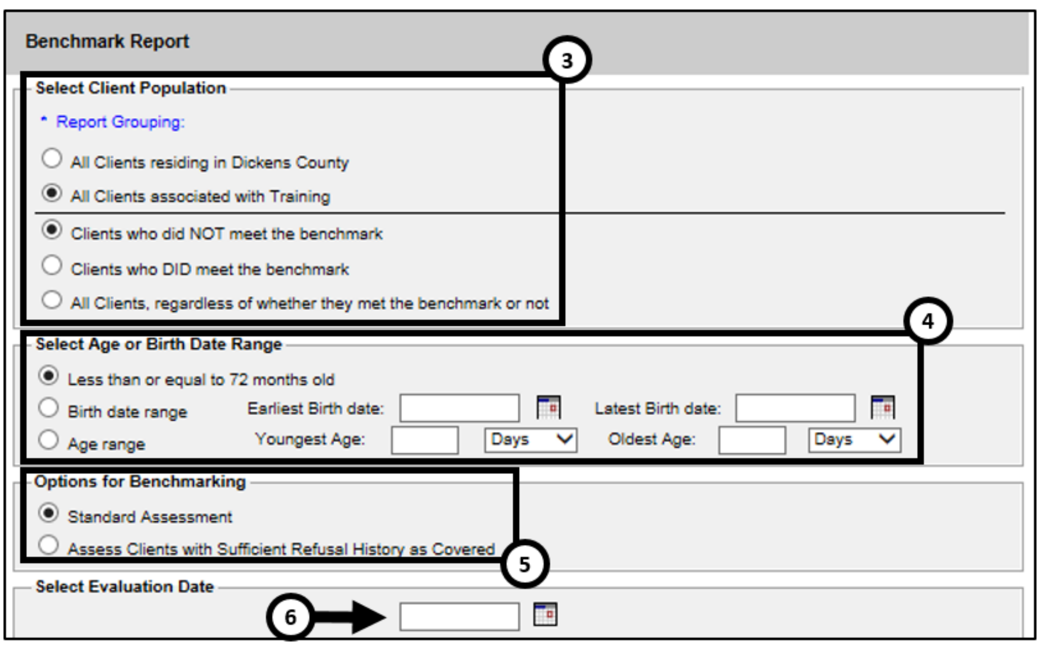
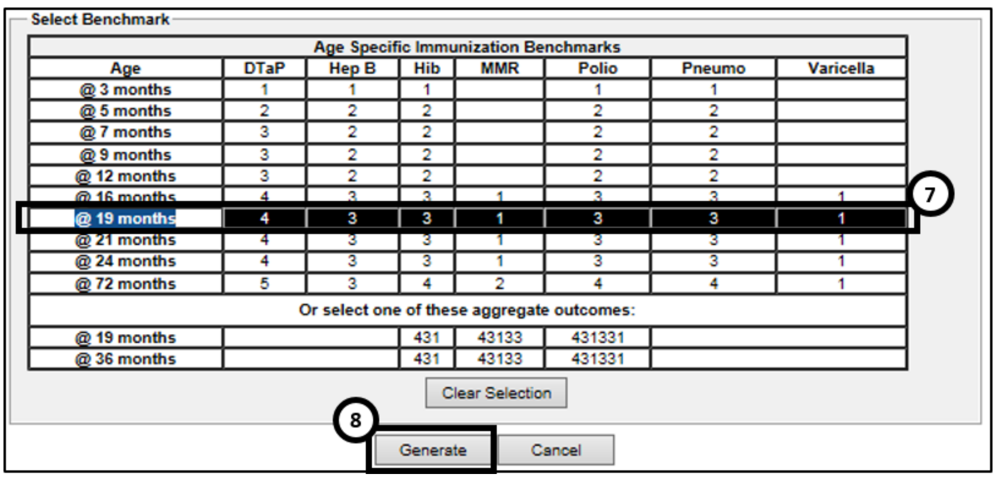


Figure 3256 - Generate Client Benchmark Report Steps 3-6

See Figure 347: Generate Client Benchmark Report Steps 7-8.

7. Select the benchmark(s) to be used on the report:
    - To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
    - To select all benchmarks in a row, click on the first box in the row that indicates @ X months.
    - To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.
8. Click the “Generate” button.

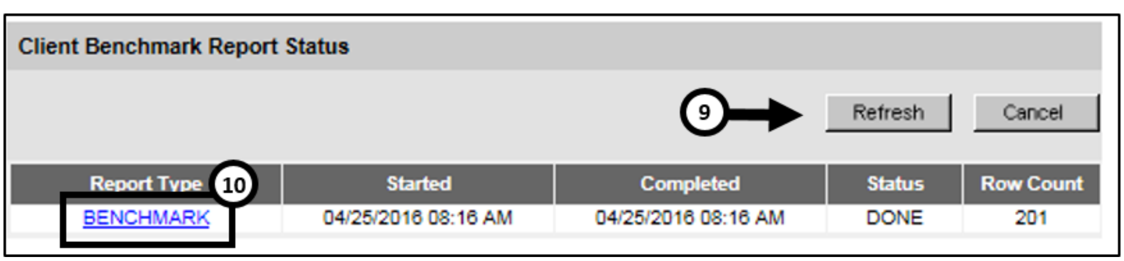

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

Figure 347 - Generate Client Benchmark Report Steps 7-8

See Figure 348: Generate Client Benchmark Report Steps 9-10.

9. The Benchmark Report Status screen displays. Click on the “Refresh” button until the status is “Done”.
10. When the report is ready, click on the blue “Benchmark” hyperlink to display the Benchmark report.



Report Type	Started	Completed	Status	Row Count
BENCHMARK	04/25/2016 08:16 AM	04/25/2016 08:16 AM	DONE	201

Figure 348 - Generate Client Benchmark Report Steps 9-10

The Benchmark Report lists all clients who met the filter criteria specified. The report gives a count and the percentage of clients who met the criteria. It lists clients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each client's demographic information indicates whether the client met the criteria for that vaccine and benchmark age. *See Figure 349: Client Benchmark Report Example.*

Filter conditions used for this report:

Clients Associated with Provider: Training
Clients who did NOT meet the selected benchmark(s)
Just consider immunizations as meeting the benchmark
Age less than or equal to 72 months
Evaluation date: 04/25/2016
Benchmark age @ 16 months
Selected benchmarks: DTaP (4), HepB (3), Hib (3), MMR (1), Polio (3), Pneumo (3), Varicella (1)
Total clients: 201; 0 clients (0%) met all benchmark criteria, 201 clients did not

Report 13900 **Results 1 - 201 of 201**

No	Client ID	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zip	DTaP (4)	HepB (3)	Hib (3)	MMR (1)	Polio (3)	Varicella (1)
1	6967924	AAAA	AAAA	01/01/2015		234 SDAF		TX		N	N	N	N	N	N
2	6968116	ATHENA	ATHENA	07/07/2013		OLIMPO		TX		N	N	N	N	N	N
3	6967471	BERNETTA	BARNES	10/10/2010		25 STONE RD		TX		N	N	N	N	N	N
4	6967400	HELEN	BARTOS	12/13/2010		12 MONROE AVE		TX		N	N	N	N	N	N
5	6968258	ANCE	BOB	10/05/2015		234 MULBERRY LANE	AUSTIN	TX	78749	N	N	N	N	N	N
6	6968252	BILLY	BOB	10/04/2015	(555) 666-6667	123 MULBERRY DRIVE	DALLAS	TX	78749	N	N	N	N	N	N
7	6968906	GRAGRA	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
8	6968616	LANI	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
9	6968596	LARRY	BOB	10/05/2015		123 MULBERRY LANE		TX		N	N	N	N	N	N
10	6969177	LARRY	BOB	10/05/2015		123 MULBERRY DRIVE	AUSTIN	TX	78749	N	N	N	N	N	N

Figure 349 - Client Benchmark Report Example

Note: *The size of the file is not limited when it's exported as text. However, to export it as a spreadsheet or PDF there is a character / line limit. The information message "file not loaded completely" displays to indicate that part of the report was truncated or a red error report banner displays.*

Clients and Immunization Count by Organization

The *Clients and Immunization Count by Organization* report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period. This does not include historical immunizations entered by the organization. *See Figure 353: Client and Imm Count by Organization Example.*

To generate a Clients and Immunization Count by Organization report follow the steps below.

See Figure 350: Generate Client and Imm Count by Organization Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Clients and Immunization Count by Organization**.

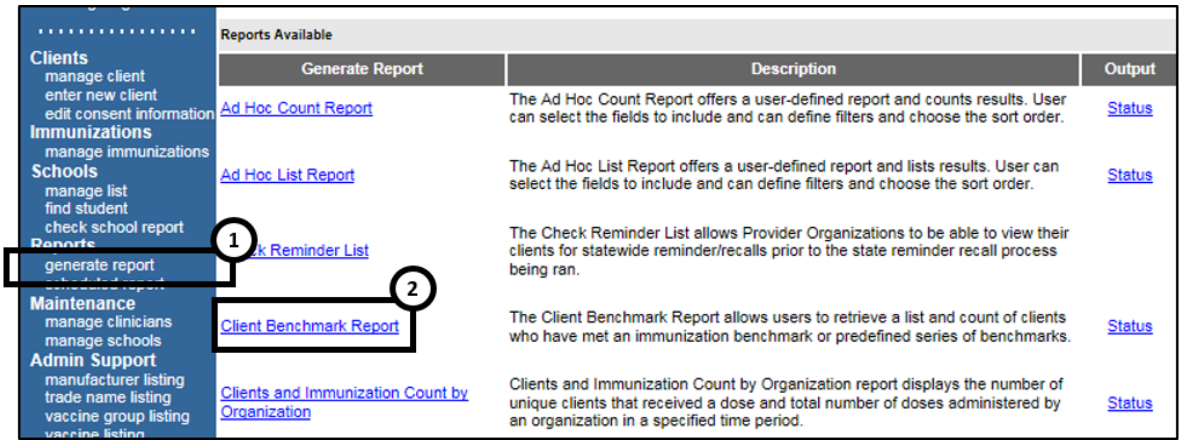


Figure 350 - Generate Client and Imm Count by Organization Steps 1-2

See Figure 351: Generate Client and Imm Count by Organization Steps 3-4.

3. Enter Target Date Range using the MM/DD/YYYY format or use the calendar icon (up to 12 months).
4. Click **Generate Report** to generate a PDF format version of the report that can be viewed from the status link. Select Export to Excel to generate an Excel format version of the report that can be downloaded.

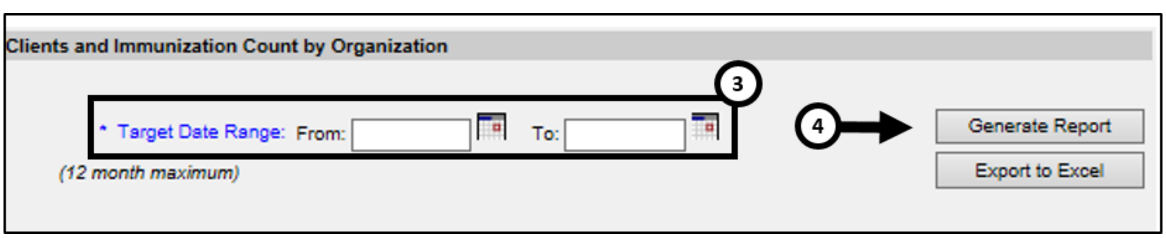


Figure 351 - Generate Client and Imm Count by Organization Steps 3-4

See Figure 352: Generate Client and Imm Count by Organization Steps 5-6.

5. On the Report Status screen click refresh until the status equals 100%.
6. When the report is ready, click on the blue hyperlink to open the report in a PDF file.

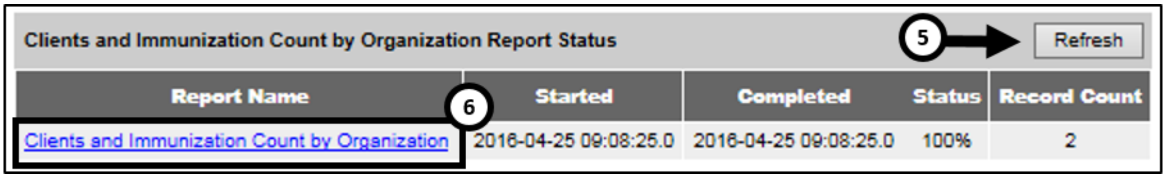


Figure 352 - Generate Client and Imm Count by Organization Steps 5-6

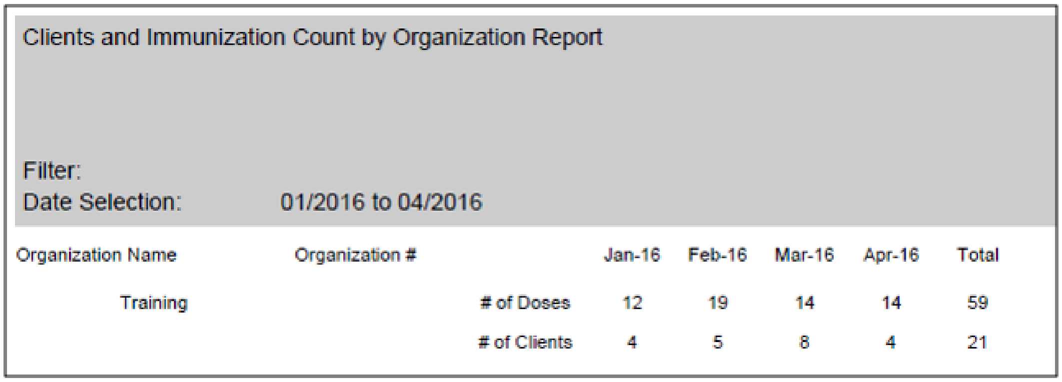


Figure 353 - Client and Imm Count by Organization Example

CoCASA Extract

The **CoCASA Extract Report** will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application. A batch process will create a zipped file that will be stored on our FTP server.

CoCASA stands for Comprehensive Clinic Assessment Software Application, a tool which is published by the Centers for Disease Control.

To generate the CoCASA Extract report follow the steps below.

See Figure 354: Generate CoCASA Extract Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **CoCASA Extract**.

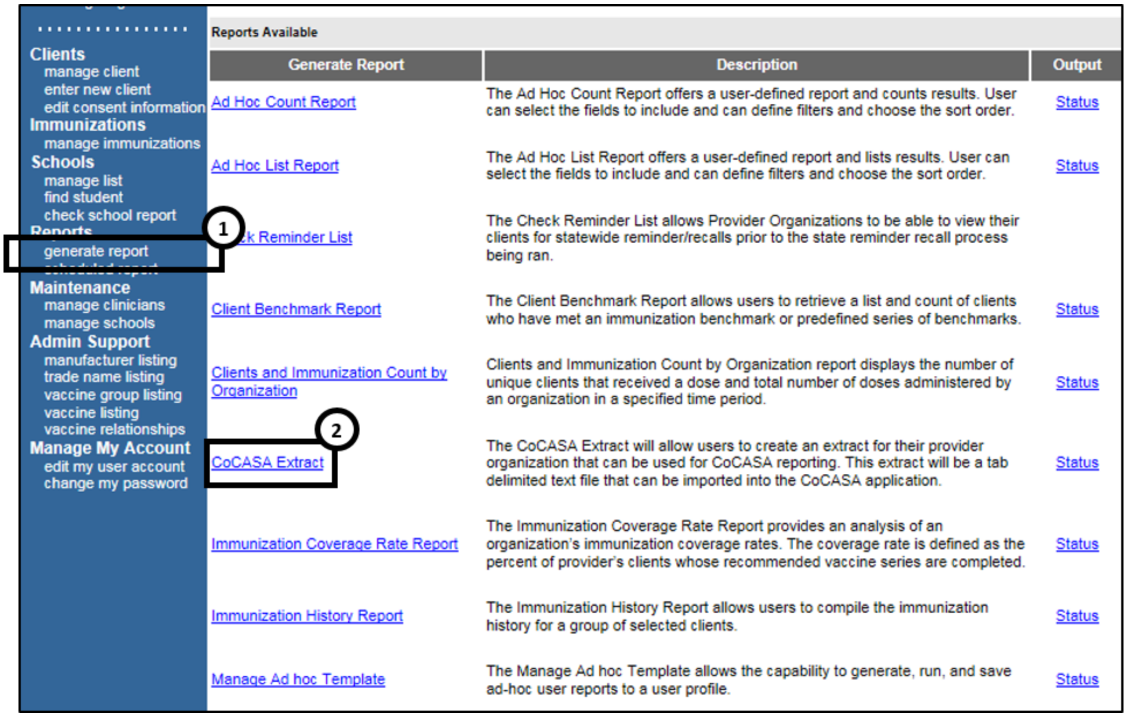


Figure 354 - Generate CoCASA Extract Report 1-2

See Figure 355: Generate CoCASA Extract Report Steps 3-6.

3. Enter an assessment date in the format 'MM/DD/CCYY' in the 'Common Review Date' text box, or click on the calendar icon to select a date. This is used to determine the client's age.
4. Users have the option to leave the default age ranges or elect additional date ranges.
5. Using the radio buttons select a client population.
6. Click the "OK" button.

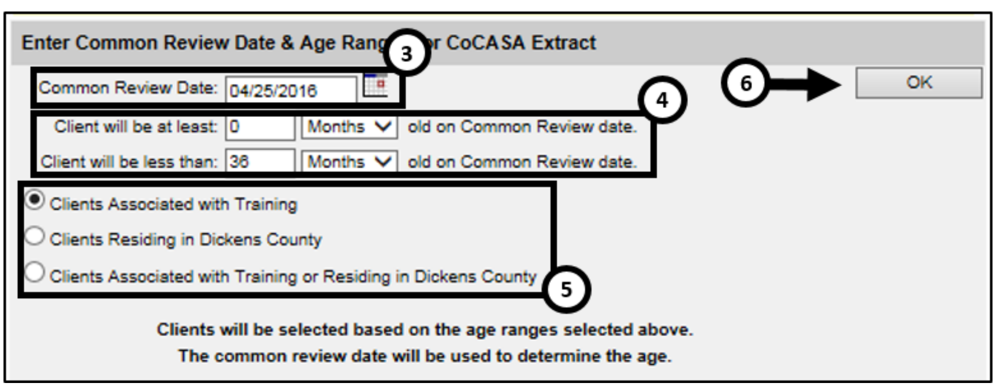


Figure 355 - Generate CoCASA Extract Report 3-6

See Figure 356: Generate CoCASA Extract Report Step 7.

7. On the request submitted screen, click the "Download Status" link.

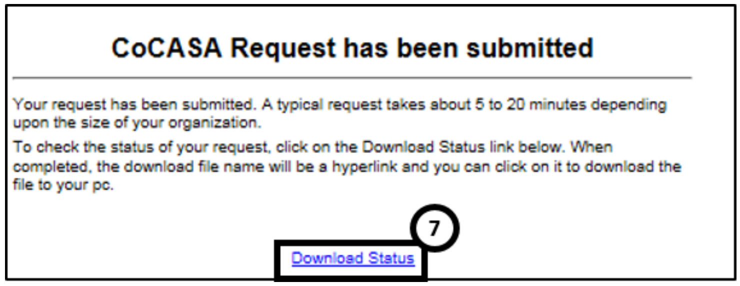


Figure 359 - Generate CoCASA Extract Report Step 7

See Figure 356: Generate CoCASA Extract Report Steps 8-9.

8. On the status screen, click the "Refresh" button until the status is "Complete".
9. Click on the blue hyperlink to open the report. *See Figure 357: Generate CoCASA Extract Report Example.*

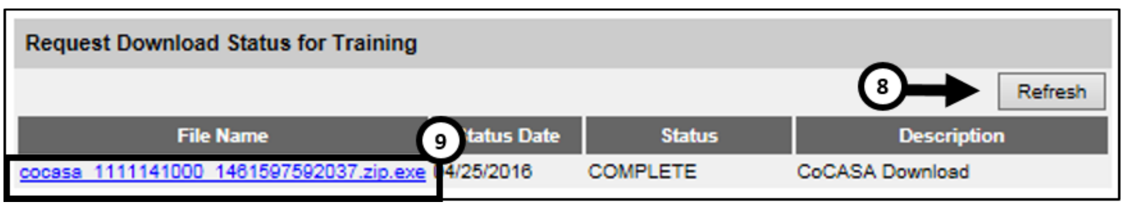
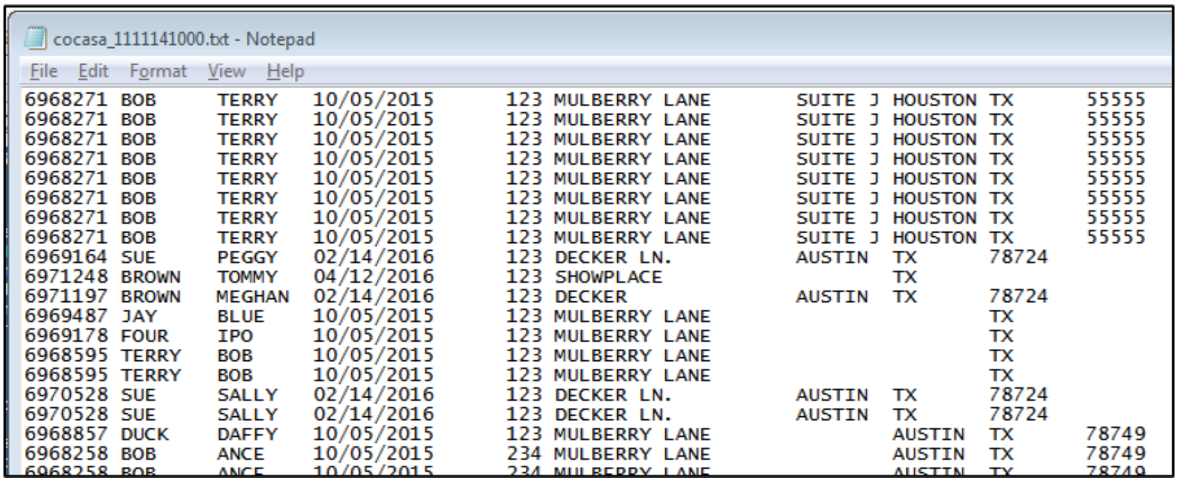


Figure 356 - Generate CoCASA Extract Report Steps 8-9

***Note**: The file will be download as a self-extracting zip file. Click on it to extract the text file used in CoCASA. The text file extracted will include the following fields and will be located in the same directory where the original CoCASA file was downloaded.*

- *Unique Client Identifier*
- *Last Name*
- *First Name*
- *Date of Birth*
- *Address Line 1*
- *Address Line 2*
- *City*
- *State*
- *Zip*
- *Blank Field*
- *Blank Field*
- *Blank Field*
- *Shot Date*

- *Shot Type*
- *Moved or Gone Elsewhere*
- *Provider Organization Identifier*
- *Gender*
- *Ethnicity*
- *Vaccine Eligibility*



```
cocasa_1111141000.txt - Notepad
File  Edit  Format  View  Help
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6968271 BOB     TERRY   10/05/2015      123 MULBERRY LANE       SUITE J HOUSTON TX      55555
6969164 SUE     PEGGY   02/14/2016      123 DECKER LN.          AUSTIN  TX      78724
6971248 BROWN   TOMMY   04/12/2016      123 SHOWPLACE                   TX
6971197 BROWN   MEGHAN  02/14/2016      123 DECKER              AUSTIN  TX      78724
6969487 JAY     BLUE    10/05/2015      123 MULBERRY LANE                       TX
6969178 FOUR    IPO     10/05/2015      123 MULBERRY LANE                       TX
6968595 TERRY   BOB     10/05/2015      123 MULBERRY LANE                       TX
6968595 TERRY   BOB     10/05/2015      123 MULBERRY LANE                       TX
6970528 SUE     SALLY   02/14/2016      123 DECKER LN.          AUSTIN  TX      78724
6970528 SUE     SALLY   02/14/2016      123 DECKER LN.          AUSTIN  TX      78724
6968857 DUCK    DAFFY   10/05/2015      123 MULBERRY LANE               AUSTIN  TX      78749
6968258 BOB     ANCE    10/05/2015      234 MULBERRY LANE               AUSTIN  TX      78749
6968258 BOB     ANCE    10/05/2015      234 MULBERRY LANE               AUSTIN  TX      78749
```

Figure 357 - Generate CoCASA Extract Report Example

Immunization Coverage Rate Reports

The *Immunization Coverage Rate Report* provides an analysis of an organization's immunization coverage rates within four different age categories among the Client population selected. Produces both the Assessment Report and Clients with Missed Opportunities. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.

To generate the Immunization Coverage Rate Report, follow the steps below.

See Figure 358: Generate Immunization Coverage Rate Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Immunization Coverage Rate Report**.

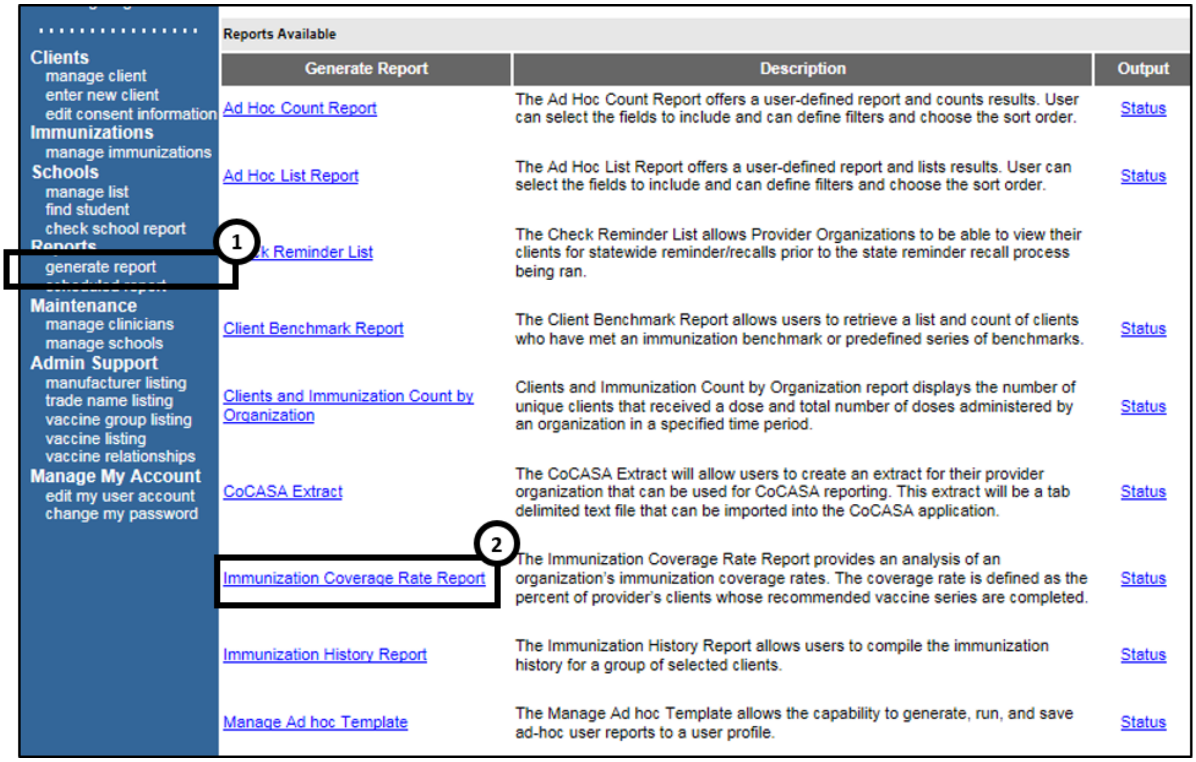


Figure 358 - Generate Immunization Coverage Rate Report Steps 1-2

See Figure 359: Generate Immunization Coverage Rate Report Steps 3-6.

As a provider organization, the Select Client Population section displays the provider organization name and the radio button will by automatically selected.

3. Select the age or DOB rage using the MM/DD/YYYY format for date, or click on the calendar icon to set the dates.
4. Using the radio buttons select an Options for Benchmarking.
    - Selecting the Assess Clients with Sufficient Refusal History counts clients with refusal comments as being up-to-date.
5. Select the report evaluation date by entering the date in a MM/DD/YYYY format or by using the calendar icon to enter the date. The evaluation date is what the Assessment Report uses to determine the cohort for the report. No immunizations given after the evaluation date are included in the evaluation.
6. Click the "Generate" button.
    - Click the "Cancel" button to return to the Generate Report screen.

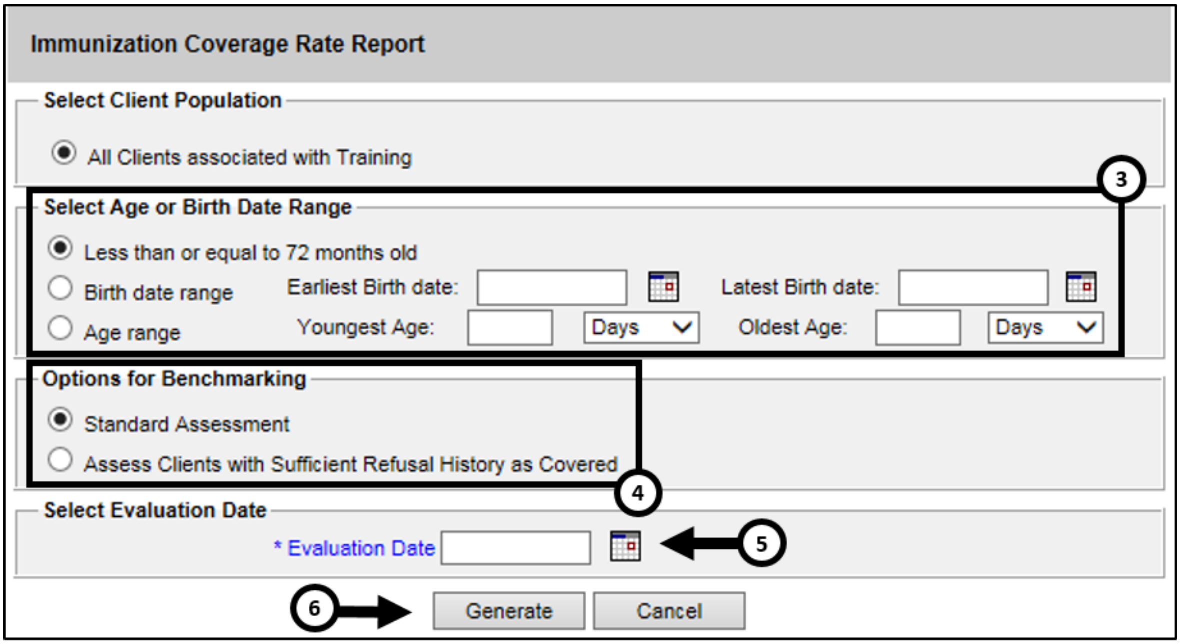


Figure 359 - Generate Immunization Coverage Rate Report Steps 3-6

See Figure 360: Generate Immunization Coverage Rate Report Step 7.

7. On the Immunization Cover Rate Report Status screen, click the "Refresh" button as needed until the output options have a status of "Complete".
    - Output options will have a "Queue" status prior to a "Complete" status.

On the Immunization Coverage Rate Report Status screen some reports will automatically generate and will appear in the *Job Name – Evaluation Date* and *Age Range – Evaluation Date* sections. Click on the hyperlink to view the auto generated reports in a PDF file listing the clients who are within the specified range. This list will give the name, address, and telephone number for all clients meeting the record criteria. To view clients for all age ranges that meet the criteria, click the All Age Ranges link. The number of reports that will automatically generate will vary based on the age range of clients assessed.

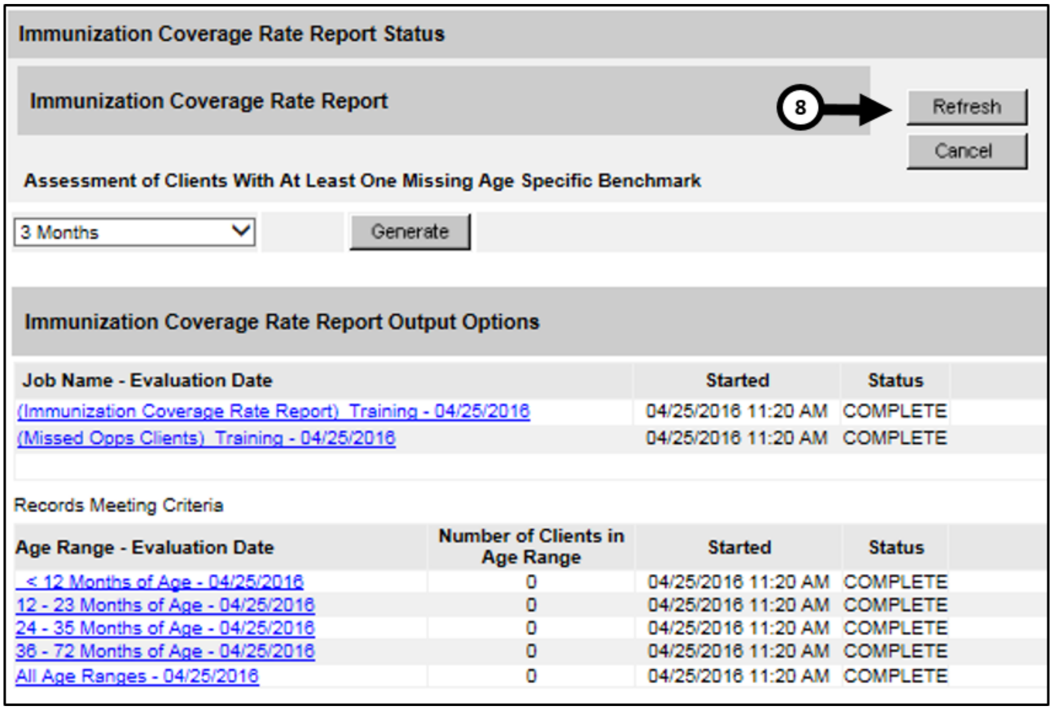


Figure 360 - Generate Immunization Coverage Rate Report Step 7

Users may also run additional reports for clients missing age specific benchmark by selecting an age from the drop down list in the top section of the screen and click on the “Generate” button. This report lists the client’s name, address, telephone number, and the vaccinations that they completed, did not complete, or refused by the benchmark age.

Immunization Coverage Rate Reports Data

The following information outlines the data that displays in the *Immunization Coverage Rate Report*.

Records Analyzed

Age Group	Records Analyzed	Inactive	Records Meeting
36-72 Months of Age	*51*	*0*	*51*
24-35 Months of Age	*38*	*1*	*37*
12-23 Months of Age	*35*	*0*	*35*
< 12 Months of Age	*78*	*0*	
Total	*202*	*1*	*123*

Figure 361 - Records Analyzed Table

Field	Description
Age Group	This column displays the age ranges used for evaluation.
Records Analyzed	This column displays the count of clients within the age group that are included in this report.
Inactive	This column displays the count of clients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Clients, for information on marking clients as inactive.
Records Meeting Criteria	Displays whether the Reminder / Recall was generated by the State.

Figure 362 - Records Analyzed Data Table

Immunization Status

Immunization Status		
Age(months)	Up to Date [1-4] (UTD)	Late [1-4] (UTD)@Assessment
36-72 Months of Age		
72	.0%%	.0%%
24	.0%%	.0%%
12		.0%
7	.0%	
24-35 Months of Age		
24	.0%	.0%
12	.0%	.0%
7	.0%	.0%
12-23 Months of Age		
12	.0%	.0%
7	.0%	.0%
< 12 Months of Age		
7	.0%	.0%

1) UTD by 7 months equals 3 DtaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals 5 DtaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio, 1 Varicella.

Figure 363 - Immunization Status Table

Table 45 - Immunization Status Information

Field	***Description***
Age (Months)	This column displays the age of the client on the assessment date.
Up-to-Date	This column displays the percent of clients (out of the total number of active clients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report screen. For example, a seven-month-old UP-TO-DATE client who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.
Late UP-TO-DATE @ Assessment	This column displays the percent of clients (out of the total number of active clients for that age group) meeting the criteria on the date the report was run, but not on the assessment date.

Age Specific Immunization Benchmarks Requirements

The Age-Specific Immunization Benchmarks table shows how many doses of each vaccine are required for a client at the age listed at the left to be UP-TO-DATE (UTD). These counts are the criteria used in the Assessment of Clients Meeting Age-Specific Benchmarks report. *See Figure 364: Age Specific Immunization Benchmarks Table.*

Age Specific Immunization Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	2	1
@ 19 months	4	3	3	1	3	2	1
@ 21 months	4	3	3	1	3	2	1
@ 24 months	4	3	3	1	3	2	1
@ 72 months	5	3	4	2	4	2	1

Figure 364 - Age Specific Immunization Benchmarks Table

Assessment of Clients Meeting Age Specific Benchmarks

Assessment of Clients Meeting Age Specific Benchmarks									
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
@ 3 months	20	22	8		11	8		195	1.0%
@ 5 months	4	2	0		0	0		189	.0%
@ 7 months	4	1	0		1	0		129	.0%
@ 9 months	4	3	0		1	0		126	.0%
@ 12 months	4	2	0		2	0		123	.0%
@ 16 months	2	2	0	3	1	0	1	109	.0%
@ 19 months	2	1	0	3	0	0	1	105	.0%
@ 21 months	2	1	0	3	0	0	1	99	.0%
@ 24 months	1	0	0	2	0	0	1	88	.0%
@ 72 months	0	0	0	0	0	0	0	28	.0%

Figure 365 - Clients Meeting Age Specific Benchmarks Table

Table 46 - Clients Meeting Age Specific Benchmarks Information

Field	Description
UP-TO-DATE (UTD) Age	This column shows the maximum age the client has attained by the assessment date.
Vaccine Columns	These seven columns display the count of the clients who have met the vaccination criteria by the UP-TO-DATE age.
Total Meeting Age Criteria	Total Meeting Age Criteria: This column gives a count of all the clients who are at least the age listed under UP-TO-DATE Age. However, the 72 Months UP-TO-DATE Age category includes clients from 48 to 72 months of age.
% Coverage	This column displays the percentage of clients meeting all UP-TO-DATE criteria, out of a total of all clients at least the age listed under UP-TO-DATE Age.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations

These tables break down the children who could have been brought up to date into three tables, ≤12 months, 24-36 months, and 60-72 months.

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	2	5.7%
<= 1 Months of Age	1	50.0%
<= 2 Months of Age	1	50.0%
<= 3 Months of Age	0	.0%
<= 4 Months of Age	0	.0%

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
24-36 Months	0	.0%
1 Vaccine Needed	0	
2 Vaccine Needed	0	
3 Vaccine Needed	0	
4 Vaccine Needed	0	

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
60-72 Months	0	.0%
1 Vaccine Needed	0	
2 Vaccine Needed	0	
3 Vaccine Needed	0	
4 Vaccine Needed	0	

Figure 366 - Children Who Could Have Been Brought Up-To-Date Tables

Table 47 - Children Who Could Have Been Brought Up-To-Date

Field	***Description***
Column 1	In the first row of column one, the age range of clients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of clients is displayed.
Column 2	In the first row of column two, a count is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of clients for this age group who need 1, 2, 3 or 4 additional vaccinations to be up-to-date.
Column 3	In the first row of column three, a percent is displayed of all clients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of clients for this age group). Subsequent rows within this column display a percentage of clients for this age group who need 1, 2, 3 or 4 additional vaccinations to be up-to-date.

Children Who Got a Late Start or Have Dropped Off Schedule After a Good Start

Late Start Rates: A client who did not receive one full dose of DTaP by 90 days of age is considered to have a late start. The values in column three of the late start row are the percentages of clients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of clients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart. *See Figure 367: Children Who Got a Late Start Table.*

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age [1]	*98.8%*	36-72 mo. age group
		95.7%	24-35 mo. age group
		91.9%	12-23 mo. age group
Drop Off Rates	60-72 Months	*.0%*	60-72 mo. age group [2]
	48-59 Months	*12.5%*	48-59 mo. age group
	36-47 Months	*8.3%*	36-47 mo. age group
	12-23 mo. age	*4.3%*	24 month status
	24-35 mo. age	*5.4%*	12 month status [3]

Figure 367 - Children Who Got a Late Start Table

1) A client who did not receive dose 1 of DTAP by 90 days is considered to have gotten a “Late Start”.
2) Drop off rate @ 24 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 4 DTaP by 24 Months.
3) Drop off rate @ 12 months of age equals % of clients who had 1 DTaP by 6 months of age minus % of clients who had 3 DTaP by 12 Months.

Note*:* DTaP is the equivalent of a DTaP, a DTP, or a DT.

Parents Who Do Not Have a Birth Dose of HepB ad Have Not Completed the 3 Dose Series

The HepB chart gives the number and percentage of clients who did not receive a birth dose of the HepB vaccination and who did not complete the three-dose series. Clients evaluated are between six and 72 months old and have at least one immunization in ImmTrac2. *See Figure 368: Children Who Do Not Have Birth Dose of HepB Table.*

Clients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number [4]	Per Cent [5]
Clients Missing Birth Dose of Hep B	*42*	*79.2%*

Figure 368 - Children Who Do Not Have Birth Dose of HepB Table

Missed Opportunity Assessment

The missed opportunities report lists all an organization's clients who have missed opportunities to be vaccinated. This report lists the client's first and last names, birth date, and date of each missed opportunity by vaccine group. *See Figure 369: Children Who Do Not Have Birth Dose of HepB Table.*

Missed Opportunity Assessment					
Age Group on Evaluation Date	Total Clients in Age Group	Clients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
< 12 months 7 month benchmark	35	0	0.0%	4	11.4%
12-23 months 12 month benchmark	37	0	0.0%	9	24.3%
24-35 months 24 month benchmark	23	0	0.0%	9	39.1%
36-72 months 36 month benchmark	80	0	0.0%	20	25.0%

Figure 369 - Children Who Do Not Have Birth Dose of HepB Table

Table 48 - Children Who Do Not Have Birth Dose of HepB Table Data

Field	***Description***
Age Group on Evaluation Date	This column lists the age group of the selected clients and the immunization benchmark used for evaluation.
Total Clients in Age Group	This column gives the total number of clients within the age group listed in the first column.
Clients Not Up to Date	This column gives the count and percentage of clients who are not up to date for the benchmark listed in column one.

Field	Description
Missed Op on Last Visit	This column gives the count and percentage of clients who are ***not*** up to date ***and*** who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

Note: ImmTrac2 only identifies clients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in ImmTrac2 does not include any clients that were treated at the user's organization for any other reason.

Immunization History Report

The *Immunization History Report* allows users to retrieve client immunization histories for a group of selected clients within their organization. This is the same immunization report available for each client, but it is generated for multiple clients in one report.

To generate the Immunization History Report, follow the steps below.

See Figure 370: Generate Immunization History Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Immunization History Report**.

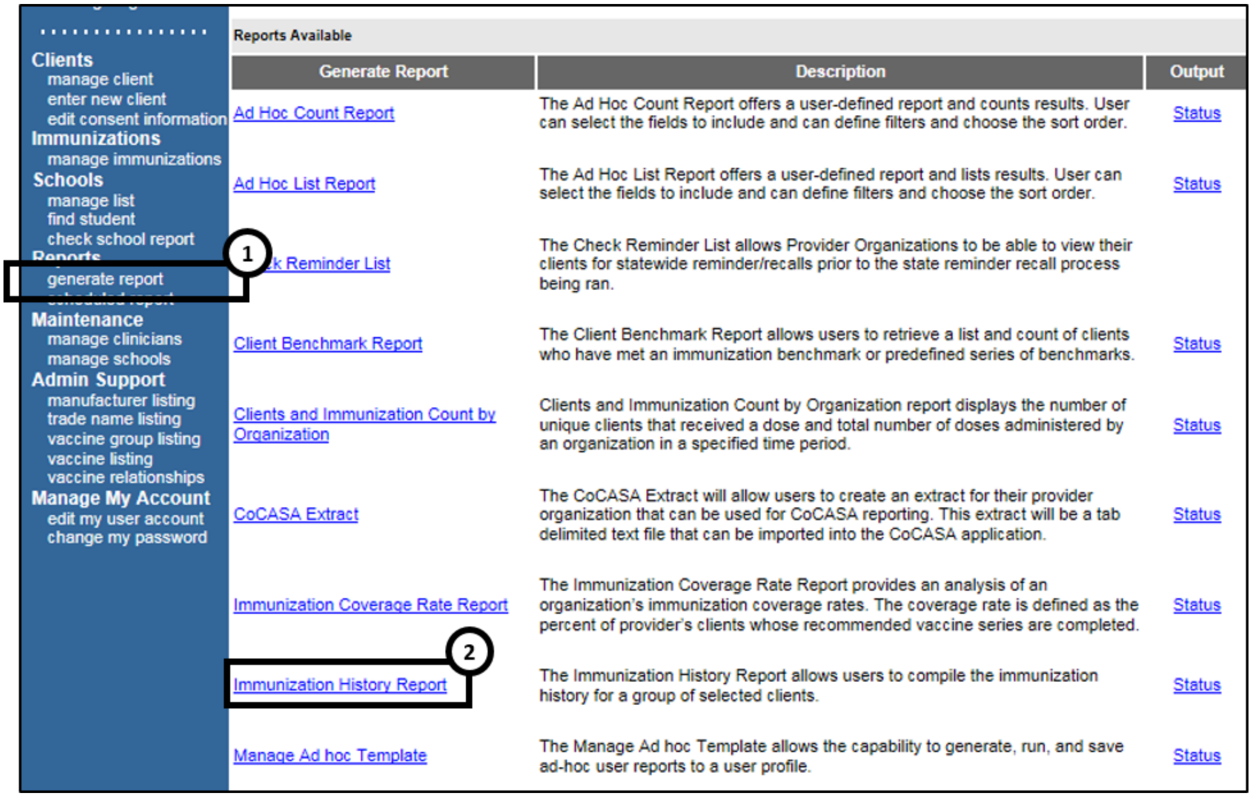


Figure 370 - Generate Immunization History Report Steps 1-2

See Figure 371: Generate Immunization History Report Steps 3-5.

3. Select the appropriate criteria: any combination of the criteria can be selected.
    - All patients within date of birth range: runs a report for clients in a specific birth date range by entering a “from” and “to” birth date in the MM/DD/YYYY format or use the calendar  icon. This is the default when the Immunization History Reports screen opens.
    - All patients with immunization(s) administered by selected site: as a provider user, this field will auto populate with the user organization name and cannot be changed. Selecting this option alone will include all clients with immunization(s) administered by the user's organization.
    - All patients who received immunization(s) within these dates: includes in the report the clients who have an immunization in a specific date range. Enter a “from” and “to” date in MM/DD/YYYY format or use the calendar  icon.

4. Choose a sort order.
   - The options are by “Last Name, then Age” or by “Age, then Last Name”.
5. After criteria has been selected, click the “Generate” button.
   - Click the “Reset” button to restore default selections.
   - Click the “Cancel” button to return to the Generate Report screen.

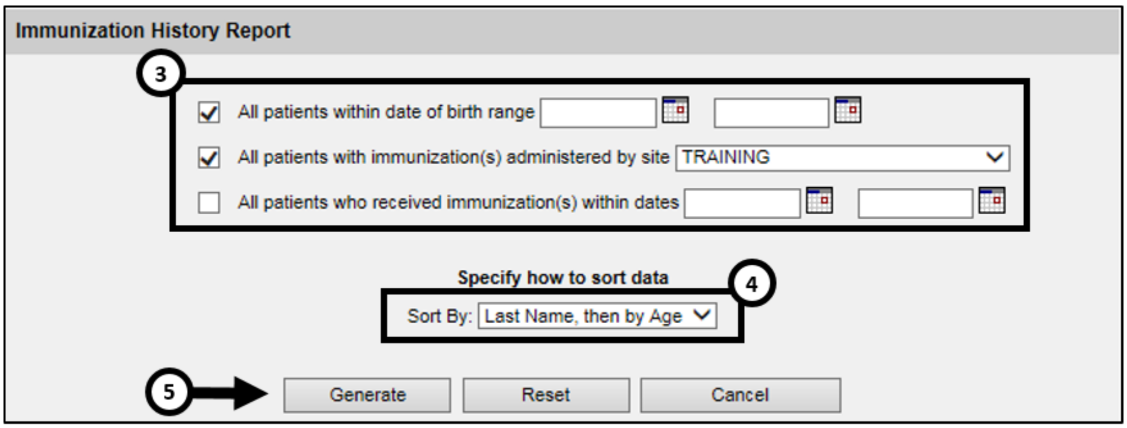


Figure 371 - Generate Immunization History Report Steps 3-5

See Figure 372: Generate Immunization History Report Steps 6-7.

6. When redirected to the History Report Request Status screen, click the “Refresh” button until the status is 100%.
7. When the report is ready, click on the blue hyperlink to open the Immunization History Report.
   - The report will open in a new browser tab in a PDF file. *See Figure 373: Generate Immunization History Report Example.*
   - The report will include the immunization history for all clients who meet the selected criteria.
   - The Immunization History Report(s) will be available on the History Report Request Status screen for up to 7 days.

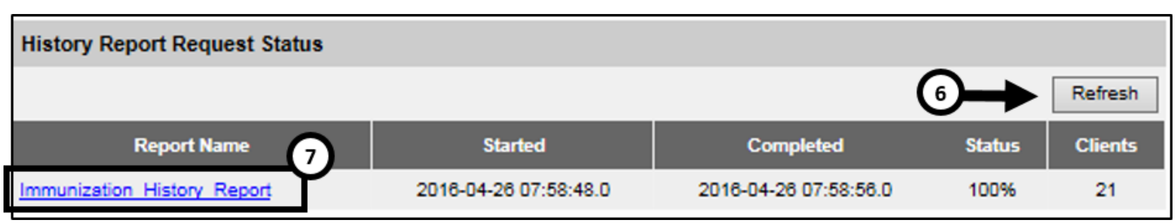


Figure 372 - Generate Immunization History Report Steps 6-7

26 April 2016

ImmTrac2, the Texas Immunization Registry

Training

Immunization History Report

Client ID: Tracking Schedule: ACIP

Client Name: **MARY BOB**

Birth Date: 10/05/2015 Gender: **Female**

Age: **6 months, 21 days**

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
Anthrax	03/30/2016		Anthrax [Anthrax]	Full					Training	
DTP/aP	01/10/2016	1 of 5	DTaP,5 pertussis antigens [DAPTACEL]	Full			PO		Training	
HepA	01/05/2016	Not Valid	HepA-Ped 2 Dose [Havrix-Peds 2 Dose]	Full			ID		Training	
HepB	01/05/2016	Not Valid	HepB-Adult [Engerix-B Adult]	Full			PO		Training	
	01/05/2016	1 of 3	HepB-Hib [Comvax]	Full			PO		Training	
Hib	01/05/2016	1 of 3	HepB-Hib [Comvax]	Full			PO		Training	
Ig	01/05/2016		RIg [BayRab]	Full					Training	
	03/30/2016		RIg [BayRab]	Full					Training	
Influenza-seasnl	04/11/2016	1 of 2	Flu trivalent injectable [AFLURIA]	Full					IR Physicians	
TBTest	01/05/2016		TBTest-PPD-ID [Aplisol]	Full					Training	
	04/11/2016		TBTest-PPD-ID [Aplisol]	Full					IR Physicians	

Reaction Descriptions:
No Records Found.

Client Comments: **Start Date:** **End Date:**
No Records Found.

Primary Physician:

Address:

-

Physician's Signature

MARY BOB **10/05/2015**

Figure 32673 - Generate Immunization History Report Example

Manage Ad Hoc Templates

The *Manage Ad Hoc Template* menu option allows users to create, edit, and delete pre-defined ad hoc report templates. Templates can be used to run popular ad hoc reports without re-entering filters each time. Creating a template is unique to each user profile, and is not shared within an organization.

These templates displays on the Ad Hoc Report screens under the "Populate with customer template?" section for selection when generate an AD Hoc report. *See Figure 374: Select a Customer Template Example.*

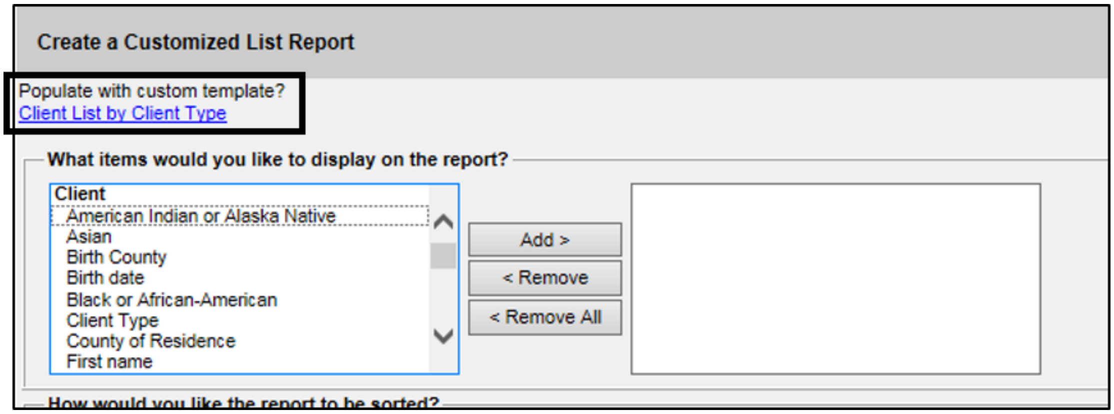


Figure 374 - Select a Customer Template Example

Create a New Ad Hoc Template

To create a new Ad Hoc Template, follow the steps below.

See Figure 375: Create Ad Hoc Template Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

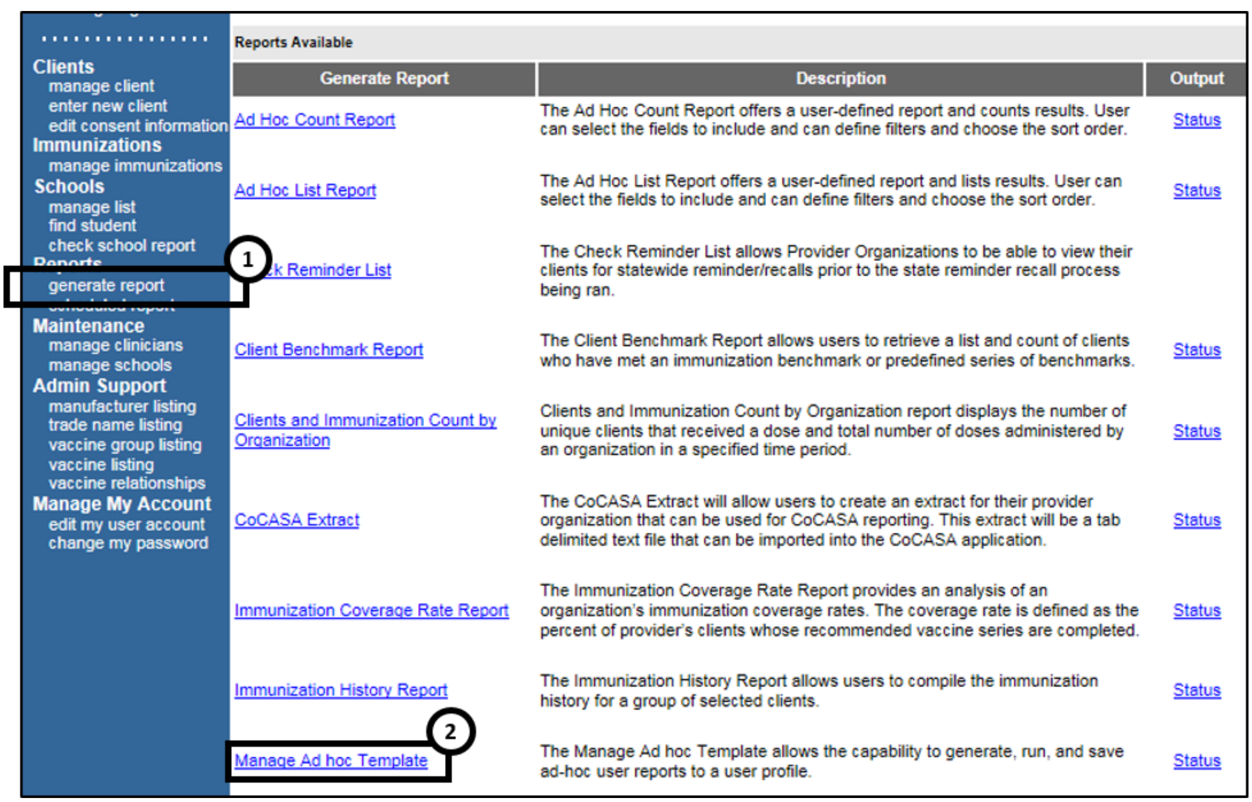


Figure 375 - Create Ad Hoc Template Steps 1-2

See Figure 376: Create Ad Hoc Template Steps 3-4.

3. Use the drop down arrow to "Pick a report to begin". Choose to create either an Ad Hoc Count Template or an Ad Hoc List Template.
4. Depending on the selection, click the "New Ad Hoc Count" button or the "New Ad Hoc List" button to select the criteria for the template.
   - All existing templates displays as a link below the "Manage Ad Hoc Templates" section.

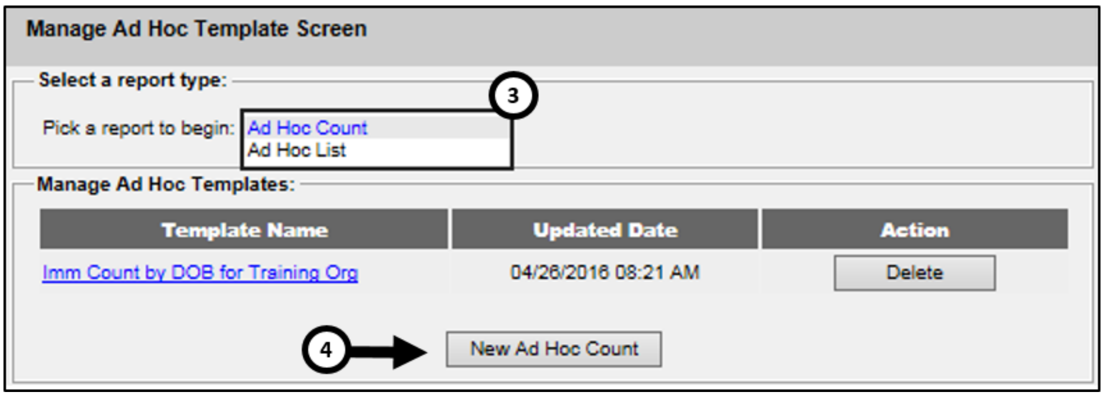


Figure 376 - Create Ad Hoc Template Steps 3-4

See Figure 377: Create Ad Hoc Template Steps 5-7.

5. On the Create Customize Report screen, select the template criteria. For details on the Ad Hoc Count or List report data fields, see the Ad Hoc Count Report section and (or) the Ad Hoc List Report section.
6. Enter the template name in the "Name your template" box.
7. Click the "Save" button.
   - Click the "Cancel" button to return to the Generate Report screen.

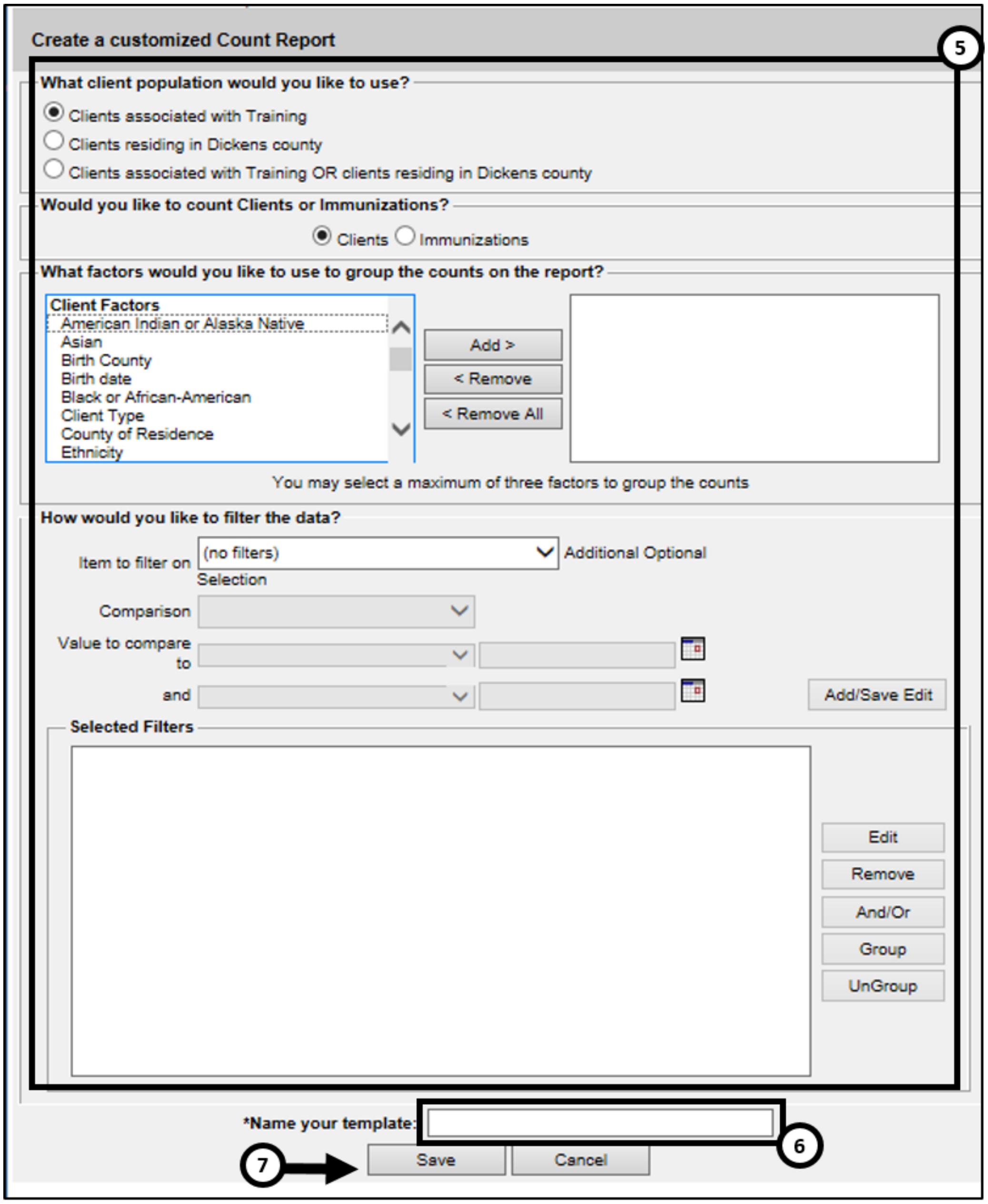


Figure 377 - Create Ad Hoc Template Steps 5-7

Edit an Ad Hoc Template

To edit an Ad Hoc Template, follow the steps below.

See Figure 378: Edit Ad Hoc Template Steps 1-4.

1. After opening the Manage Ad Hoc Template Screen, use the drop down arrow to “Pick a report to begin”. Select the Ad Hoc Count Template or an Ad Hoc List Template depending on which template needs to be edited.

2. When the list of templates display, click on the hyperlink of the template to edit.
3. Make edits to the template criteria based on information listed in the Manage Ad Hoc Template section. For details on how to use the Ad Hoc Count or List report, See the Ad Hoc Count Report section and (or) the Ad Hoc List Report section.
4. Click the “Save” button.
    - Click the “Cancel” button to return to the Generate Report screen.

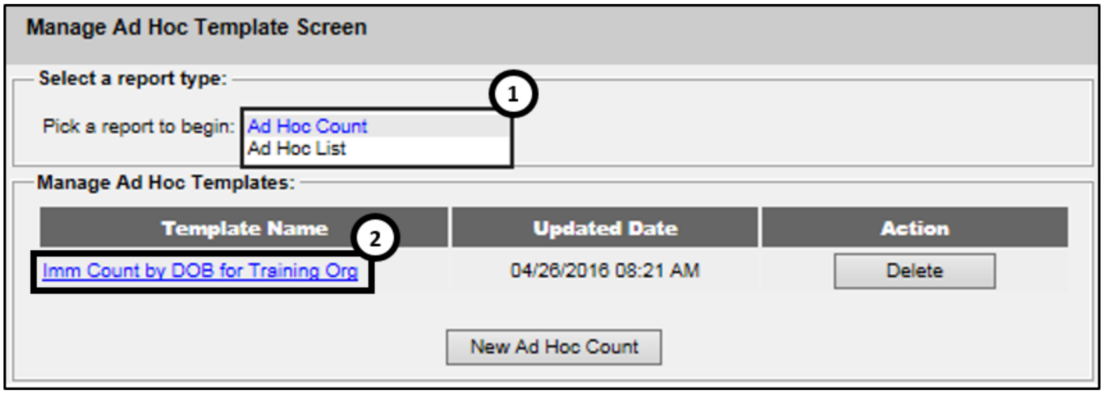


Figure 378 - Edit Ad Hoc Template Steps 1-4

Delete an Ad Hoc Template

To delete an Ad Hoc Template, follow the steps below.

See Figure 379: Delete Ad Hoc Template Steps 1-3.

1. On the Manage Ad Hoc Template Screen, use the drop down arrow to “Pick a report to begin”. Select the Ad Hoc Count Template or an Ad Hoc List Template depending on which template needs editing.
2. When the list of templates display, click the “Delete” button in the Action column corresponding to the template to be deleted.
3. Click “OK” when asked “Are you sure you want to delete?”
    - Users are returned to the Manage Ad Hoc Template Screen and the template will be deleted.

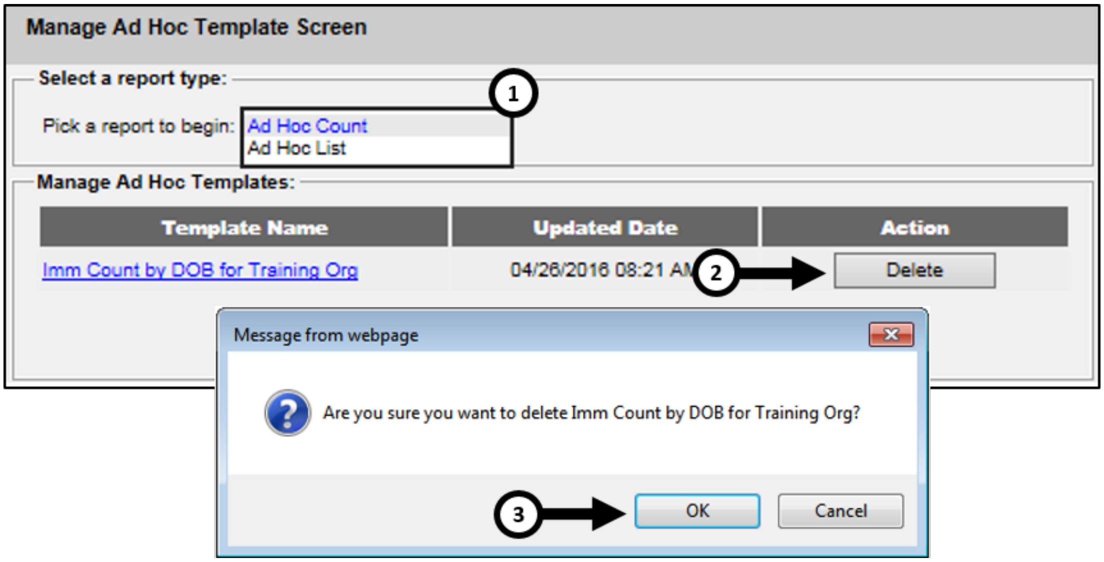


Figure 379 - Delete Ad Hoc Template Steps 1-3

Reminder / Recall Custom Letters

In addition to the standard letter, ImmTrac2 allows users to create and store up to three custom letters to be used for reminders and recalls. Once a custom letter is created it is available for selection on the Reminder Request Output Option screen for the Reminder Report. *See Figure 380: Generate Reminder / Recall Custom Letters.*

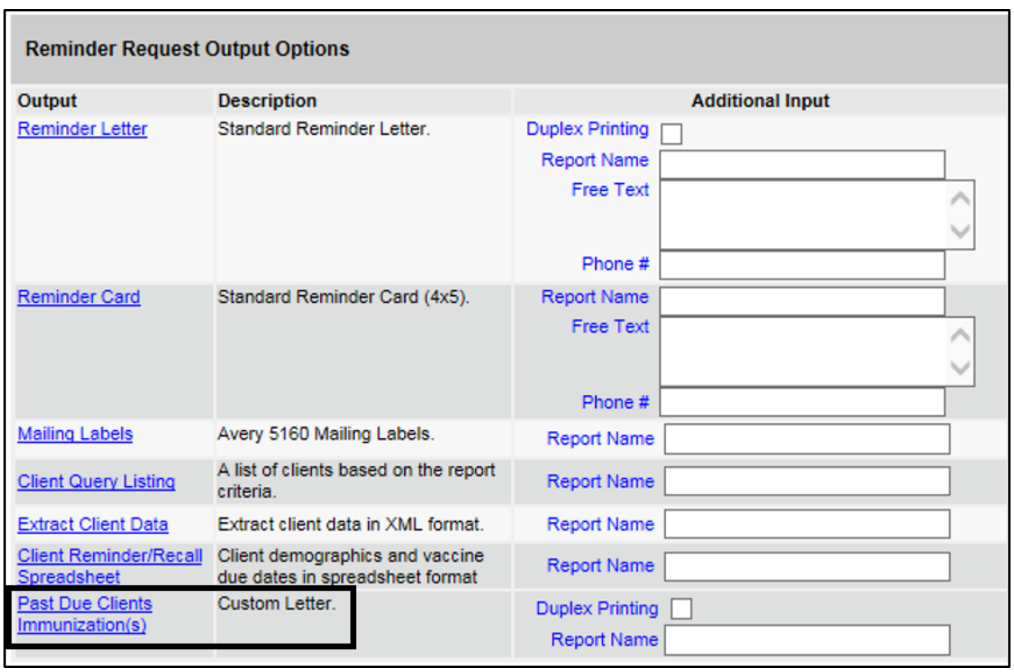


Figure 380 - Generate Reminder/Recall Custom Letters

Create a New Reminder / Recall Custom Letter

To create Reminder / Recall Custom Letters, follow the steps below.

See Figure 381: Generate Reminder/Recall Custom Letters Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

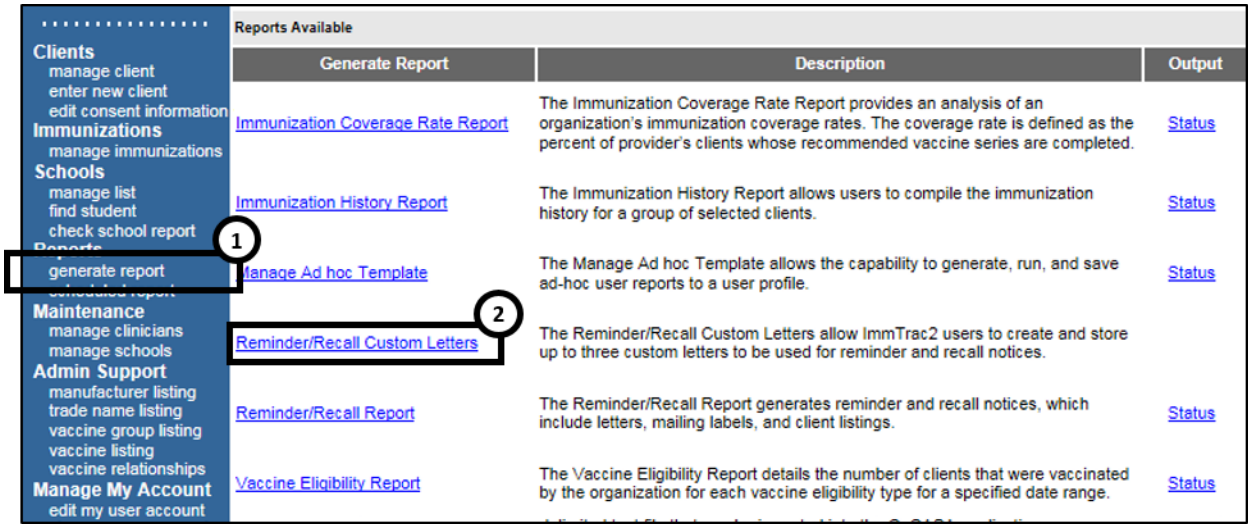


Figure 381: Generate Reminder / Recall Custom Letters Steps 1-2

See Figure 382: Reminder / Recall Custom Letters Step 3.

3. On the Reminder / Recall Custom Letter screen, click the New Custom Letter link to begin creating the custom letter.

Figure 382 - Generate Reminder / Recall Custom Letters Step 3

See Figure 383: Reminder / Recall Custom Letters Steps 4-5.

4. Use the *Reminder/Recall Custom Letters Data* table to help complete the customized template.
5. Enter the Custom Letter Name, and then Click the "Save" button.
   - The screen will refresh, but no message displays.
   - Click the "Cancel" button to return to the previous Reminder / Recall Custom Letters screen as seen in step 3, where the newly create letter displays as a hyperlink.

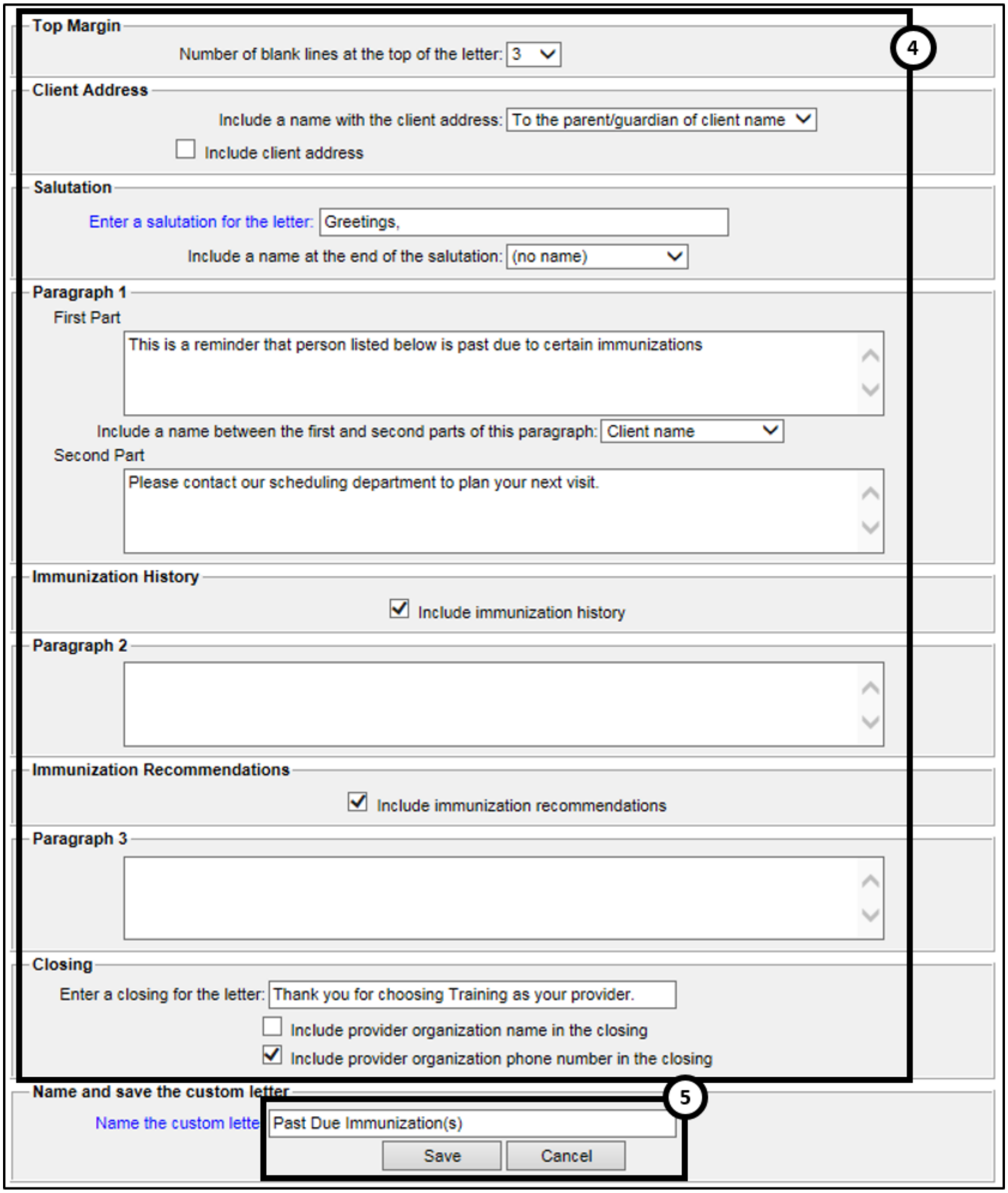


Figure 383 – Reminder / Recall Custom Letters Data Steps 4-5

Table 49 – Reminder / Recall Custom Letters Data Fields

Field	Description
Top Margin	From the drop down list provided, choose the number of blank lines at the top of the letter. **These blank spaces will leave room for your office letterhead.** This field will default to 3.
Client Address	Check the box to include the client's address at the top of the letter.
Salutation (1 of 2)	Enter a greeting in the text box to begin the letter. For example: "Dear" or "Greetings".
Salutation (2 of 2)	Use the drop down arrow to determine if you want to **Include a name at the end of the salutation**. • If "Name" is selected, the name of the client will show up after the salutation. • If "Responsible Person" is chosen, the letter will read <salutation> Parent / Guardian of <client name>. For example: "Dean Parent / Guardian of Peggy Sue".
Paragraph 1 (1 of 2)	First Part: Enter desired text. Enter up to 4,000 characters of text in this field.
Paragraph 1 (2 of 2)	Include a name between the first and second part of this paragraph: Choose the name to appear within the paragraph from the drop down list. Select either parent / guardian, client name, or no name.
Paragraph 1 (3 of 2)	Second Part: If it was chosen to enter a name, add the remaining text for the first paragraph in this field.
Immunization History	Check the box to include the client's immunization history in the letter.
Paragraph 2	Enter desired text. Enter up to 4,000 characters of text in this field.
Immunizations Recommended	Check this box to include the immunization forecast for the client in the letter.
Paragraph 3	Enter desired text. Enter up to 4,000 characters of text in this field.
Closing (1 or 2)	Enter a closing word or statement for the letter in this field.
Closing (2 or 2)	If the provider's organization name and / or telephone number are included after the closing, make a selection using the appropriate check boxes.

Edit a Reminder / Recall Custom Letter

To edit an existing Reminder / Recall Custom Letter, follow the steps below.

See Figure 385: Edit Reminder / Recall Custom Letters Step 1.

1. Once users have navigated to the Reminder/Recall Custom Letter screen, click the custom letter link**.**

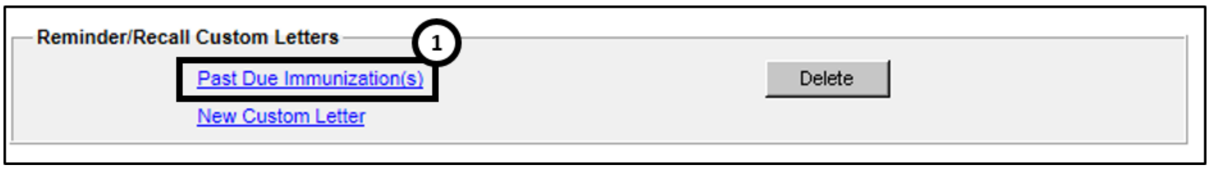


Figure 385 - Edit Reminder / Recall Custom Letters Step 1

2. Update the custom letter data or letter name as needed, and then click the “Save” button. See the Reminder / Recall Custom Letters Data Fields for details on the each date field.
   - The screen will refresh, but no message displays.
   - Click the “Cancel” button to return to the previous Reminder / Recall Custom Letters screen as seen in step 3. If the letter name was updated, the new name displays.

Delete a Reminder / Recall Custom Letter

To delete an existing Reminder / Recall Custom Letter, follow the steps below.

See Figure 386: Delete Reminder / Recall Custom Letters Step 1.

1. Once users have navigated to the Reminder / Recall Custom Letter screen, click the “Delete” button next to the letter to be deleted**.**

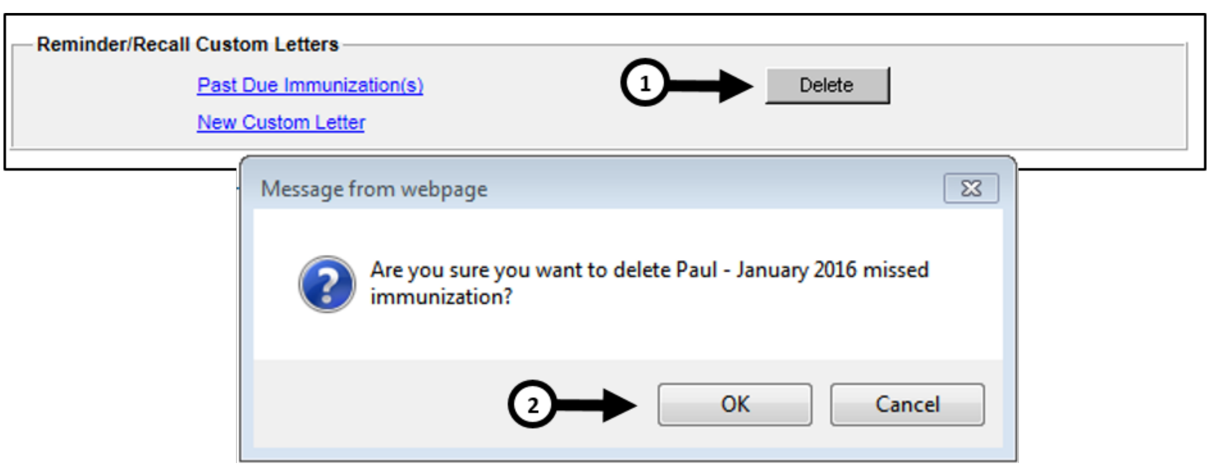


Figure 386 - Edit Reminder / Recall Custom Letters Step 1

Reminder / Recall Reports

The Reminder / Recall Report generates client notices, which include letters, cards, mailing labels, and client listings.

Reminder and recall notices can be generated for each client if the following conditions are met:

- The client status is “Active” in the Client Information Section for your organization.
- The “Allow Reminder and Recall Contact?” indicator in the Client Information Section is “Yes”.
- The client has complete address information listed in the Address Information Section.

To generate the Reminder / Recall Report, follow the steps below.

See Figure 387: Generate Reminder / Recall Reports Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Manage Ad Hoc Template**.

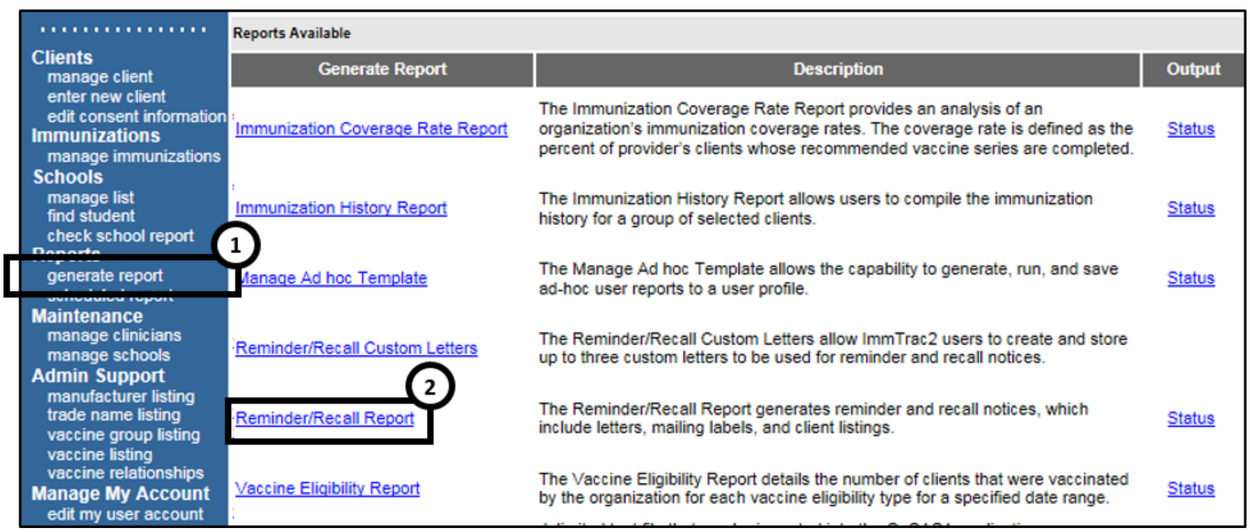


Figure 387 - Generate Reminder / Recall Reports Steps 1-2

See Figure 388: Generate Reminder / Recall Reports Steps 3-7.

3. The Create New List Section gives users the option of selecting saved reminder / recall request criteria or creating a new reminder recall request.
   - **Enter new Reminder / Recall Request Criteria:** Selecting the radio button and supplying a list name will generate a new reminder / recall request report that can be generated as

a report or saved as a template and later generated as a report.

- **Use a previous Reminder / Recall Request Criteria:** Selecting the "Use a previous Reminder / Recall Request Criteria" radio button and selecting a list name displays that template's criteria. Once the criteria displays, users can edit the criteria from the previous list before generating the report.

4. **Select a Client Population:** this enables reporting of a specific population.
5. **Indicate the Tracking Schedule**: choose which set of recommended immunizations and corresponding dates will be compared to each client's immunization history.
6. **Select the Vaccine Group to Report on**: choose which vaccines will be included in the report by selecting a vaccine and clicking the “Add” button. Also select which vaccines to include, vaccines that are *Due Now, Past Due,* or *Both*.
7. **Selecting Subpotent Recall**: This filters will show the clients with Sub-potent vaccinations recorded.

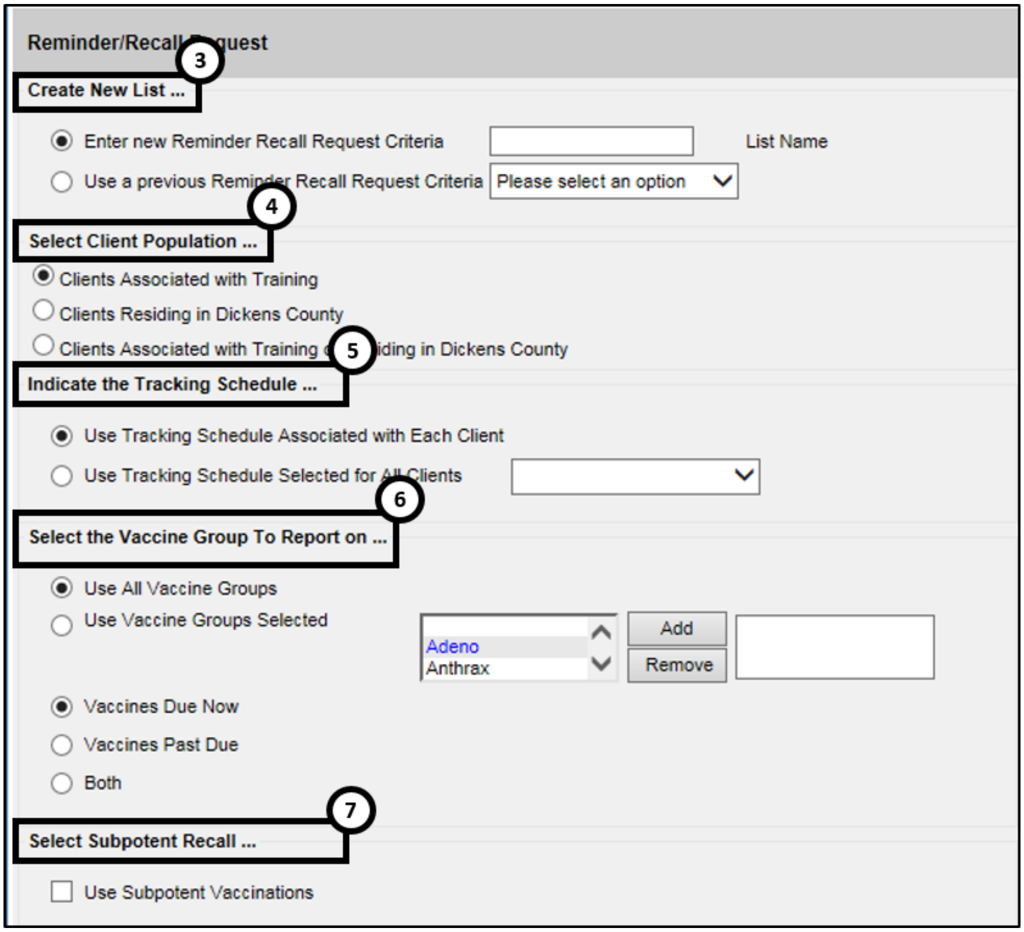


Figure 388 - Generate Reminder / Recall Reports Steps 3-7

See Figure 389: Generate Reminder / Recall Reports Steps 8-13.

8. **Selecting a School or Primary Care Provider**: This filters clients who have been assigned to the selected school or physician.
9. **Enter Additional Demographic Information**: Entering and / or selecting these options allows filtering of clients whose records match specific demographic information.
10. **Enter the Date criteria**: Select a Date Ranges to filter clients.
    - Target Date – Entering a target date range will return clients who are due now, are past due, or will be due for the selected vaccine within the specified date range.
    - Birth Date - Entering a birth date range will return clients who have a birth date that falls between the dates entered.
    - Age Range - Entering an age range will return clients who age falls between the dates entered.

11. **Select Vaccine Groups to Display**: Selecting Vaccine Groups to display will filter for the vaccine groups that displays on the report as being recommended. By default, all vaccine groups that are due now or past due displays on the report.
12. **Specify How to Sort the Report Data**: Allows a choice of sorting options. The default is last name in ascending order, then first name in ascending order.
13. Click the "Save & Generate" button to save the request criteria and to generate the report.
    - If previous Reminder / Recall Request Criteria was selected, this will save any changes made to template.
    - Click the "Generate" button to generate the report and not save as a template or save changes to the criteria list.
    - Click the "Cancel" button to return to the Generate Reports screen.

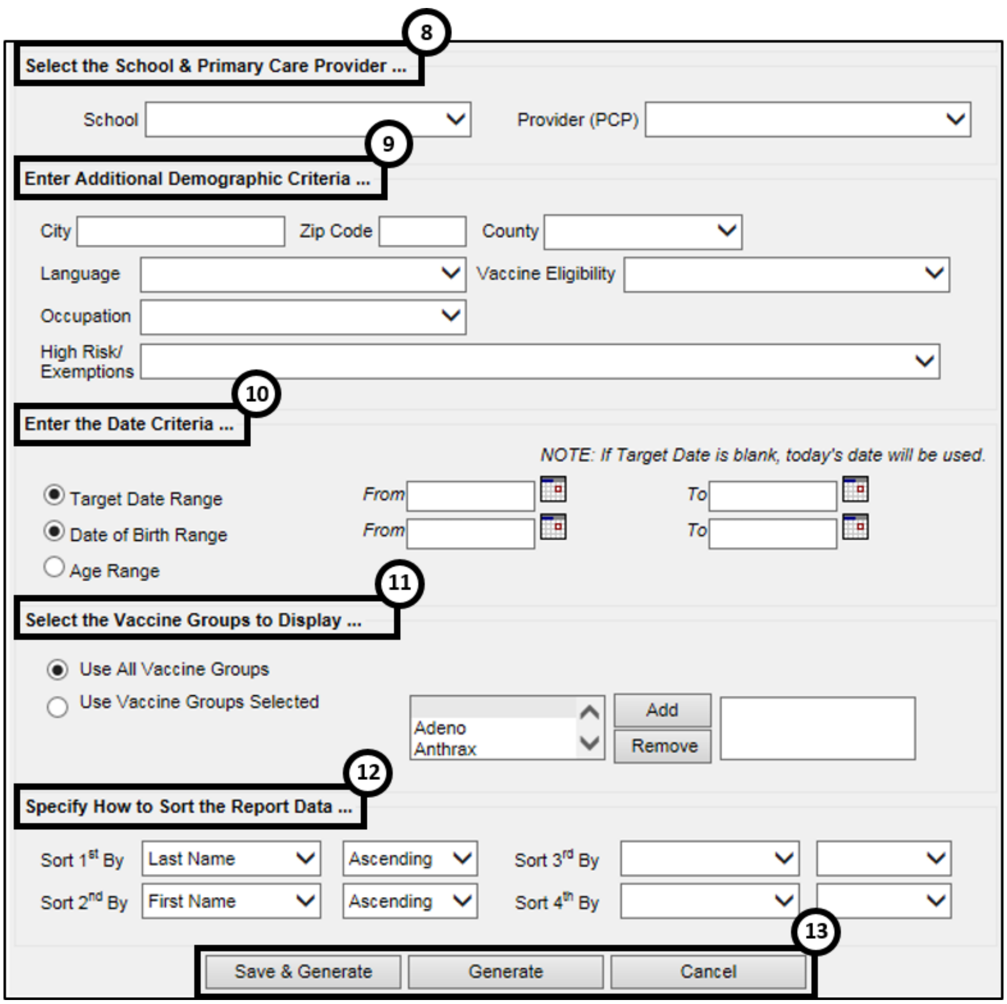


Figure 389 - Generate Reminder / Recall Reports Steps 8-13

Reminder Request Status Screen

Once the reports are generates, the **Reminder Request Status** screen displays. This screen will only retain one report at a time, and as new reports are generate the previous report will no long be accessible. The status indicates the percentage of completion for the report. Periodically click on **Refresh** to update the completion percentage information. The time it will take for the report to generate will depend upon the number of clients associated with the provider organization.

This screen will also display all the reminder output options that were generate for the specific report.

See Figure 390: Generate Reminder / Recall Reports – Status Screen Steps 1-2.

1. When redirected to the Reminder Request Status screen, click the "Refresh" button until the status is 100%.
2. When the report is ready, click on the blue hyperlink to go to the Reminder Request Process Summary screen.

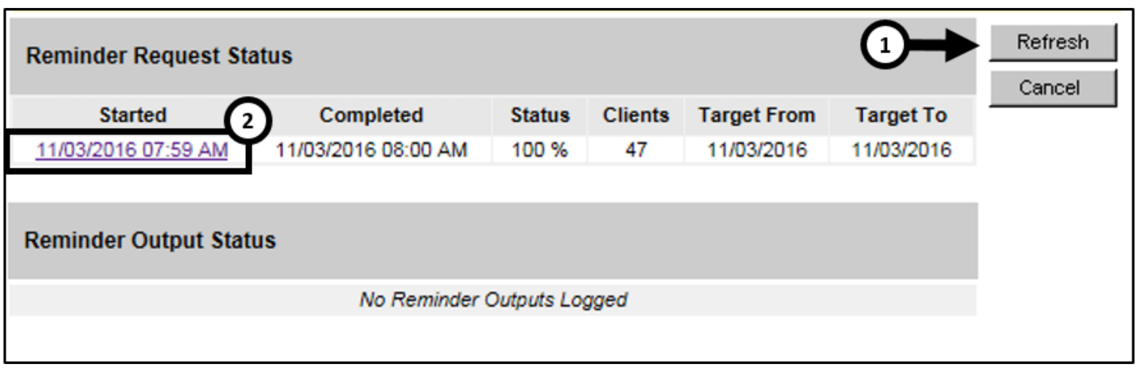


Figure 390 - Generate Reminder / Recall Reports – Status Screen Steps 1-2

***Note**: The report will run in the background similar to other reports, allowing user to exit ImmTrac2 or work on other ImmTrac2 tasks until it completes. To go to "generate report" on the menu panel and click the Status link next to the Reminder / Recall Report link.*

Reminder Request Process Summary Screen

The Summary screen is broken up into three sections: Reminder Request Criteria, Reminder Request Output Options, and Last Notice Date Options. From the Summary screen, users may create various reminder output options.

Reminder Request Criteria: This section lists the number of clients involved in the search and the criteria used to define the search. The *Total Number of Clients Eligible for Reminder* is dependent upon the search criteria and is narrowed down by each criteria step. *See Figure 391: Reminder Request Criteria.*

Reminder Request Process Summary

Reminder Request Criteria

Step	Criteria Evaluated at this Step	Clients
1	Clients **associated** with *Training*.	171
2	Clients **immunized** by *Training*.	160
3	Clients that are **active** within *Training* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **School** is not specified; • **Provider** is not specified.	135
4	Clients that have a **Valid Address**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified.	47
5	Clients that meet the following criteria regarding vaccination status: • Clients that are **Past Due** for one or more vaccinations **as of 11/03/2016**; • Use all **vaccine groups**; • Use **ACIP** for all clients.	47
	Total Number of Clients Eligible for Reminder	**47**

Figure 391 - Reminder Request Criteria

Reminder Request Output Options: This section lists the various reminder output option available, including both standard outputs and custom outputs. *See Table 50: Reminder Request Output Data Fields* and *Figure 392: Reminder Request Output Options.*

Table 50 - Reminder Request Output Data Fields

Column	***Description***
Output	This column displays the types of reports that can be produced. These reports are described in detail in the table below. Clicking the Hyperlink in the Output column will generate the report that was selected.
Description	This column provides a brief description of the output option.

Column	Description
Additional Input	This column displays options for including additional information on the output report and defining a report. • **Report Name:** Enter the Name to describe the output report. • **Free text:** Enter in text that will appear on the report. • **Phone#:** Enter in the phone number that will appear on the output report.

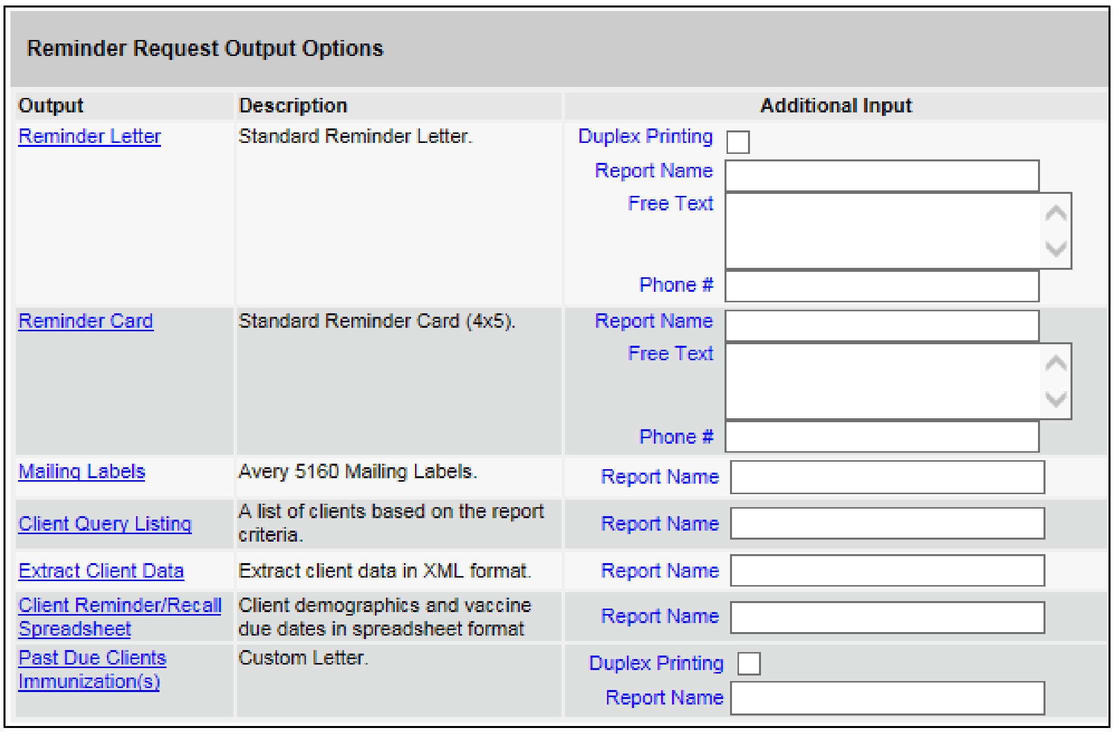


Figure 392 - Reminder Request Output Options

Reminder Letter

The letter output option allows users to generate a standard form letter to the parent / guardian for each client returned on the query. The letter allows room at the top for the organization's letterhead. The body of the letter includes the client's immunization history, recommended immunizations and due dates. There are up to two lines for free text and / or a telephone number.

To generate Reminder Letter, follow the steps below.

See Figure 393: Generate Reminder Letter Steps 1-2.

1. Under the *Additional Input* column, there are options to enter the following:
    - **Duplex printing** – printing on both side.
    - **Report Name** - if a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
    - **Free Text** - include a maximum of 400 characters in this field. This information will be displayed as the closing for each letter.
    - **Phone** - the telephone number is presented in the closing for each of the letter.
2. Click the "Reminder Letter" hyperlink.

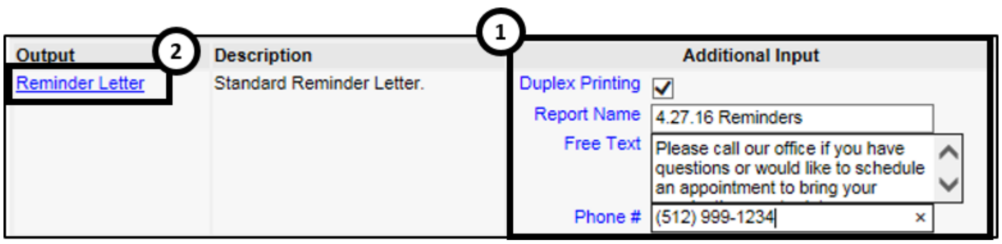
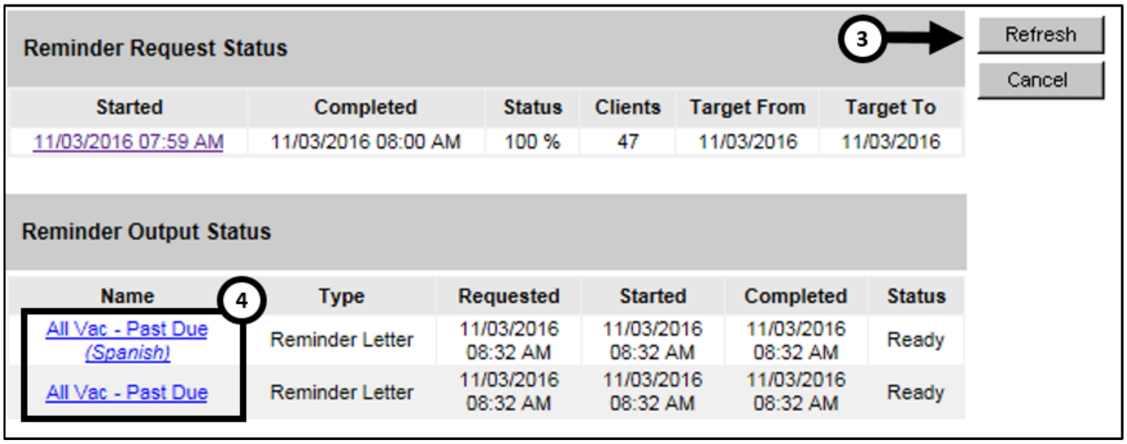


Figure 327 - Generate Reminder Letter Steps 1-2

See Figure 394: Generate Reminder Letter Steps 3-4.

3. Users are redirected back to the Reminder Request & Output Status screen. If needed click the "Refresh" button until the status is "Ready".
4. The Reminder Letter will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish.
    - Clients who have selected Spanish as their "Language Spoken" option in the Client Information tab of the client's record, will appear on the Spanish output option.
    - Click on the "Reminder Letter" hyperlink to view or print the letters in a PDF file. Reminder Letter Example - *See Figure 395: Generate Reminder Letter Example.*



Reminder Request Status

3 Refresh

Cancel

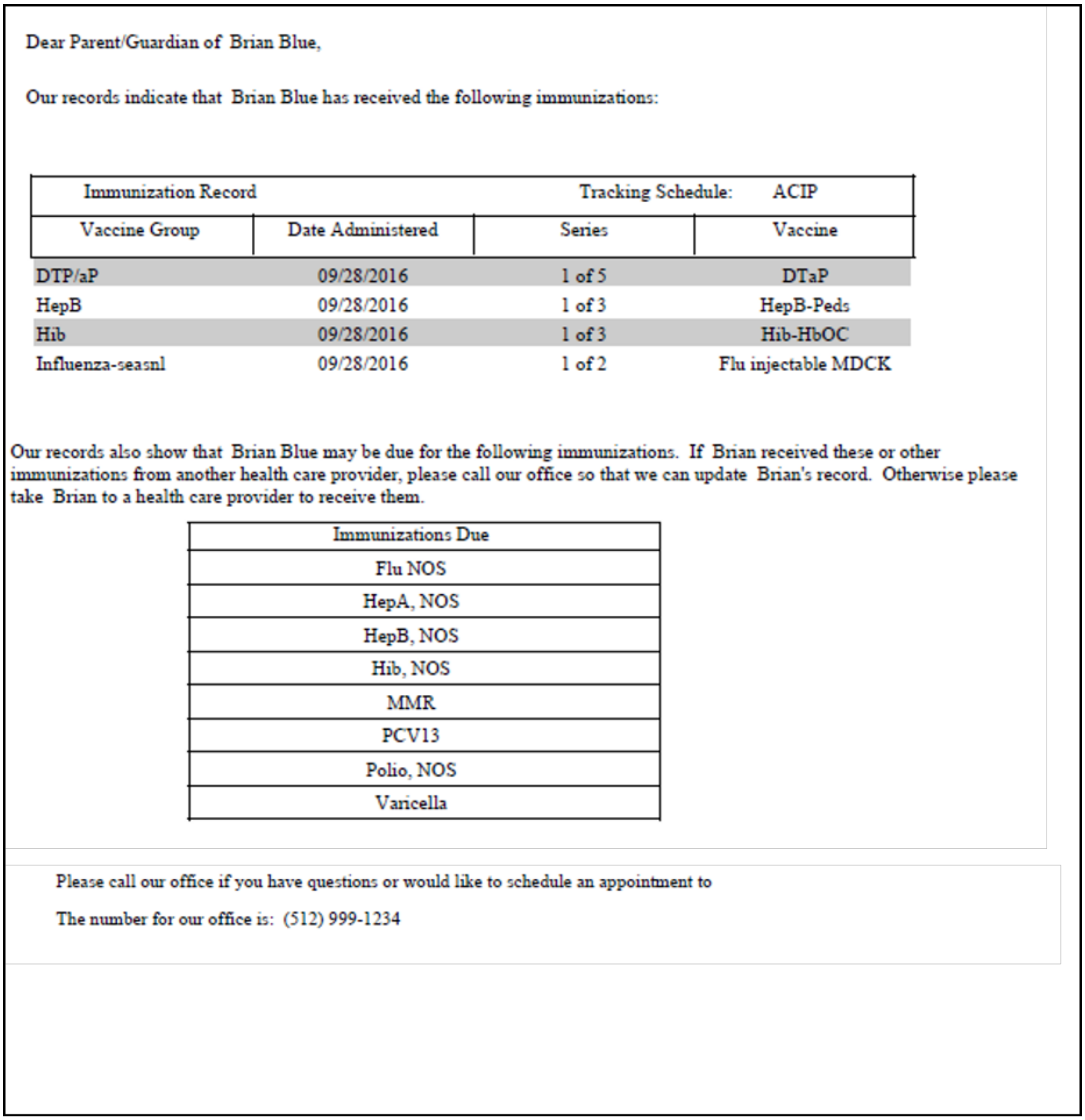
Started	Completed	Status	Clients	Target From	Target To
11/03/2016 07:59 AM	11/03/2016 08:00 AM	100 %	47	11/03/2016	11/03/2016

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
All Vac - Past Due (Spanish)	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready
All Vac - Past Due	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready

4

Figure 394 - Generate Reminder Letter Steps 3-4



Dear Parent/Guardian of Brian Blue,

Our records indicate that Brian Blue has received the following immunizations:

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	09/28/2016	1 of 5	DTaP
HepB	09/28/2016	1 of 3	HepB-Peds
Hib	09/28/2016	1 of 3	Hib-HbOC
Influenza-seasnl	09/28/2016	1 of 2	Flu injectable MDCK

Our records also show that Brian Blue may be due for the following immunizations. If Brian received these or other immunizations from another health care provider, please call our office so that we can update Brian's record. Otherwise please take Brian to a health care provider to receive them.

Immunizations Due
Flu NOS
HepA, NOS
HepB, NOS
Hib, NOS
MMR
PCV13
Polio, NOS
Varicella

Please call our office if you have questions or would like to schedule an appointment to

The number for our office is: (512) 999-1234

Figure 395 - Generate Reminder Letter Example

Reminder Card

The Reminder Card output option allows users to generate a standard reminder card for the parent / guardian for each client returned on the query. The card allows room at the top for a greeting. The body of the card includes the client's recommended immunizations and due dates. There are up to two lines for free text and / or a telephone number.

To generate Reminder Cards, follow the steps below.

See Figure 396: Generate Reminder Card Steps 1-2.

1. Under the *Additional Input* column, users have the option of entering:
   a. **Report Name** - if a Report Name is not indicated, the report will simply be named "Reminder Card" on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
   b. **Free Text** - include a maximum of 400 characters in this field. This information will be displayed as the closing for each card.
   c. **Phone** - the telephone number is presented in the closing for each of the card.
2. Click the "Reminder Letter" hyperlink.

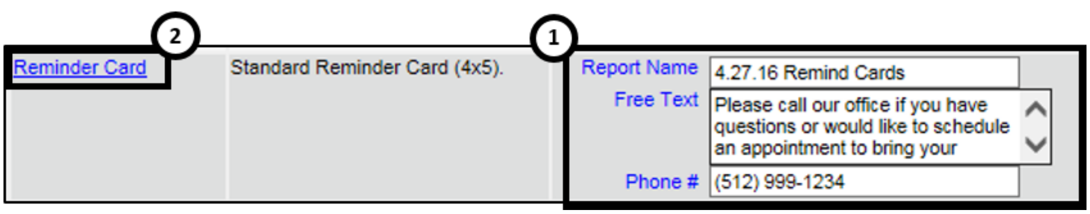


Figure 396 - Generate Reminder Card Steps 1-2

See Figure 397: Generate Reminder Card Steps 3-4.

3. Users are redirected back to the Reminder Request & Output Status screen, and if needed click the "Refresh" button until the status is "Ready".
4. The Reminder Card will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish. Click on the "Reminder Card" hyperlink to view or print the letters in a PDF file. *See Figure 398: Generate Reminder Card Example.*

Reminder Request Status

3 Refresh

Cancel

Started	Completed	Status	Clients	Target From	Target To
11/03/2016 07:59 AM	11/03/2016 08:00 AM	100 %	47	11/03/2016	11/03/2016

Reminder Output Status

Name 4	Type	Requested	Started	Completed	Status
All Vac - Past Due	Reminder Card	11/03/2016 01:39 PM	11/03/2016 01:39 PM	11/03/2016 01:39 PM	Ready
All Vac - Past Due (Spanish)	Reminder Card	11/03/2016 01:39 PM	11/03/2016 01:39 PM	11/03/2016 01:39 PM	Ready
All Vac - Past Due (Spanish)	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready
All Vac - Past Due	Reminder Letter	11/03/2016 08:32 AM	11/03/2016 08:32 AM	11/03/2016 08:32 AM	Ready

Figure 397 - Generate Reminder Card Steps 3-4

Dear Parent of Brian Blue

Our records show that Brian Blue may be due for the following immunizations. If Brian received these or other immunizations from another health care provider, please call our office so that we can update Brian's record. Otherwise please schedule an appointment for Brian to receive them.

Vaccine Group	Date Needed
PneumoConjugate	12/05/2015
Polio	12/05/2015
HepA	10/05/2016
MMR	10/05/2016
Varicella	10/05/2016
Hib	10/26/2016
Influenza-seasnl	10/26/2016
HepB	10/28/2016

The number for our office is: (512) 999-1234

Please call our office if you have questions or would like to schedule an appointment.

Figure 398 - Generate Reminder Card Example

Mailing Labels

The labels output option produces 30 labels per screen on Avery Mailing Labels #5160. *See Figure 399: Generate Reminder Mailing Labels Example.*

To the Parent/Guardian of:	To the Parent/Guardian of:	To the Parent/Guardian of:
ANCE MARLIN BOB	LANI BOB	LARRY BOB
234 MULBERRY LANE	123 MULBERRY LANE	123 MULBERRY DRIVE
AUSTIN TX 78749	AUSTIN TX 78723	AUSTIN TX 78749

Figure 399 - Generate Reminder Mailing Labels Example

Client Query Listing

The Client Query Listing displays contact information for those clients identified as being due / overdue in the Reminder / Recall output in a report format. This report lists every client that was returned in the report query process. *See Figure 400: Client Query Listing Example.*

Report run on : 04/27/2016 **Client Query Listing** Page 1 of 1

Client Name (FML)	Phone Number	Address	City/State/ZIP
ANCE MARLIN BOB - 10/05/2015		234 MULBERRY LANE	AUSTIN, TX 78749

Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	02/02/2016	1) 01/05/2016 (NV)
HepA	10/05/2016	
HepB	03/23/2016	1) 02/23/2016
Hib	04/03/2016	1) 02/03/2016
Influenza-seasnl	04/05/2016	1) 02/23/2016 (NV)
MMR	10/05/2016	1) 02/23/2016 (NV)
PneumoConjugate	04/23/2016	1) 02/03/2016 2) 02/23/2016 (NV)
Polio	04/03/2016	1) 02/03/2016
Rotavirus	03/23/2016	1) 02/03/2016 2) 02/24/2016 (NV)
Varicella	10/05/2016	

Figure 328 - Client Query Listing Example

Extract Client Data

The Client Extract Data displays in an XML format, and contains every client and their demographic information that was returned in the report query process.

Client Reminder / Recall Spreadsheet

The Client Extract Data displays client demographic information, immunization history, and recommendations for those clients identified as being due / overdue in the Reminder / Recall output in an Excel spreadsheet. This report lists every client that was returned in the report query process. *See Figure 401: Reminder / Recall Spreadsheet Example.*

Client Reminder/Recall Spreadsheet
Filters:
Type Clients that are **Due Now or Past Due** for one or more vaccinations **as of 04/27/2016**
To and From 04/27/2016 to 04/27/2016
Birthdate range is not specified
TXIIS 1111141000
Organization Name: Training
TVFC PIN: null

Client First Name	Client Last Name	Client Date of Birth	Parent/Guardian First Name	Parent/Guardian Last Name	Client Address 1	Client Address 2	Client City
ANCE	BOB	2015-10-05			234 MULBERRY		AUSTIN
LANI	BOB	2015-10-05			123 MULBERRY		AUSTIN
LARRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
MARY	BOB	2015-10-05			123 MULBERRY		AUSTIN
SALLY	BOB	2015-10-05			456 MULBERRY		AUSTIN
TERRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
TYLER	BOB	2015-10-05			123 MULBERRY		AUSTIN
BONNIE	CLYDE	2015-10-05	BOBBIE	MAGEE	123 MULBERRY		ELGIN
MAVIS	STAPLES	1939-07-10	OCEOLA	STAPLES	1100 W. 49TH ST		AUSTIN
AMANDA	SUE	2016-02-14			123 DECKER LN.		AUSTIN
MAX	SUE	2016-02-14			123 SHOWPLACE		AUSTIN
MYRTLE	TURTLE	2015-10-05			123 MULBERRY	34456	SIMCITY

Figure 401 – Reminder / Recall Spreadsheet Example

To generate the Mailing Labels, Client Query Listing, Extract Client Data, and Client Reminder / Recall Spreadsheet, follow the steps below.

***Note**: The reminder output options are generated one at a time.*

See Figure 402: Generate Reminder Output Options Steps 1-2.

1. Under the Additional Enter column or the Letter section of the table enter a **Report Name** - if a Report Name is not indicated, the report will simply be named “Reminder Card” on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in each file name field.
2. Click the “Reminder Letter” hyperlink.

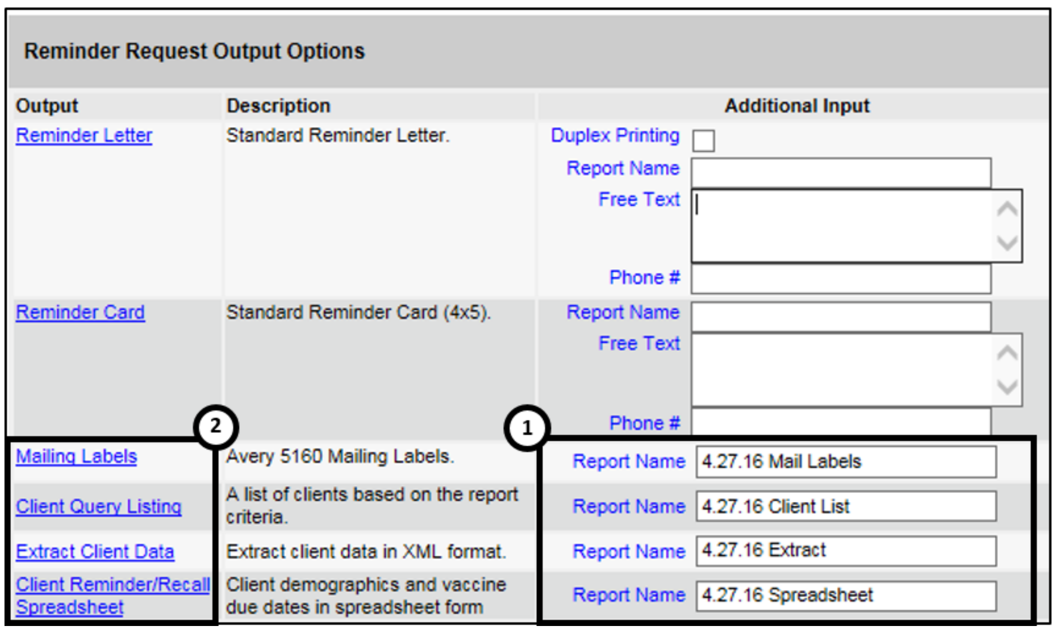


Figure 402 - Generate Reminder Output Options Steps 1-2

See Figure 403: Generate Reminder Output Options Steps 3-4.

3. User are redirected back to the Reminder Request & Output Status screen. Click the “Refresh” button until the status is “Ready”.
4. Each reminder output will be listed in the Output Status section as an active hyperlink - click on the applicable option to open the output file.

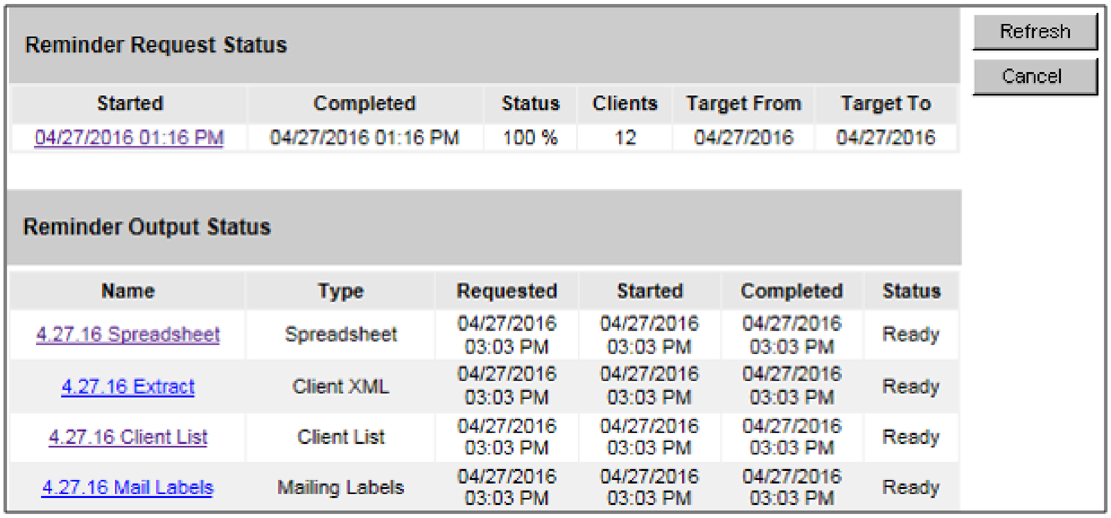


Figure 403 - Generate Reminder Output Options Step 3-4

Last Notice Date Options

The Reminder Request Process Summary screen allows users to reset the last notice date, which will affect future reminder / recall notices generated using this information. *See Figure 404: Reminder / Recall Last Notice Date Options.*

Preview Clients: view a list of clients included in the Reminder / Recall Report. This information includes a hyperlink to each client's demographic record. This is the same screen that display if the Check Reminder List is selected from the *Generate Report* menu option.

Increment Eligible: used to reset the last notice date for all clients eligible for this reminder. The last notice date is viewable on the client's demographic record under the organization information section.

Increment Immunized: used to increment the last notice date for all clients immunized by your organization.

Cancel: to return to the Reminder Request Status screen.

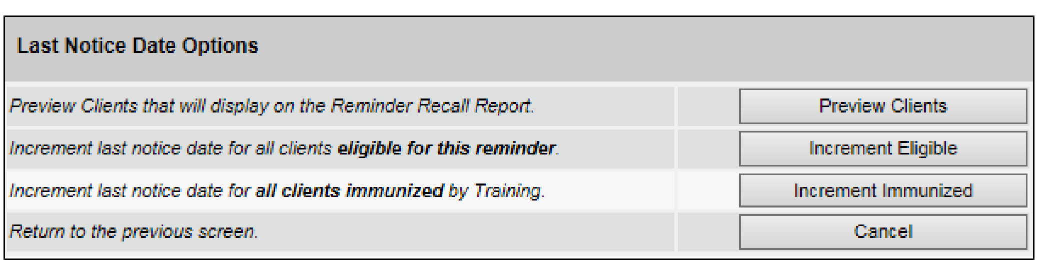


Figure 404 – Reminder / Recall Last Notice Date Options

Vaccine Eligibility Report

The Vaccine Eligibility Report details the number of clients that were vaccinated by an organization for each vaccine eligibility type or age group for a specified date range.

To generate the Vaccine Eligibility Report, follow the steps below.

See Figure 405: Generate Vaccine Eligibility Report Steps 1-2.

1. Click the **Generate Report** option from the menu panel.
2. Select the **Vaccine Eligibility Report**.

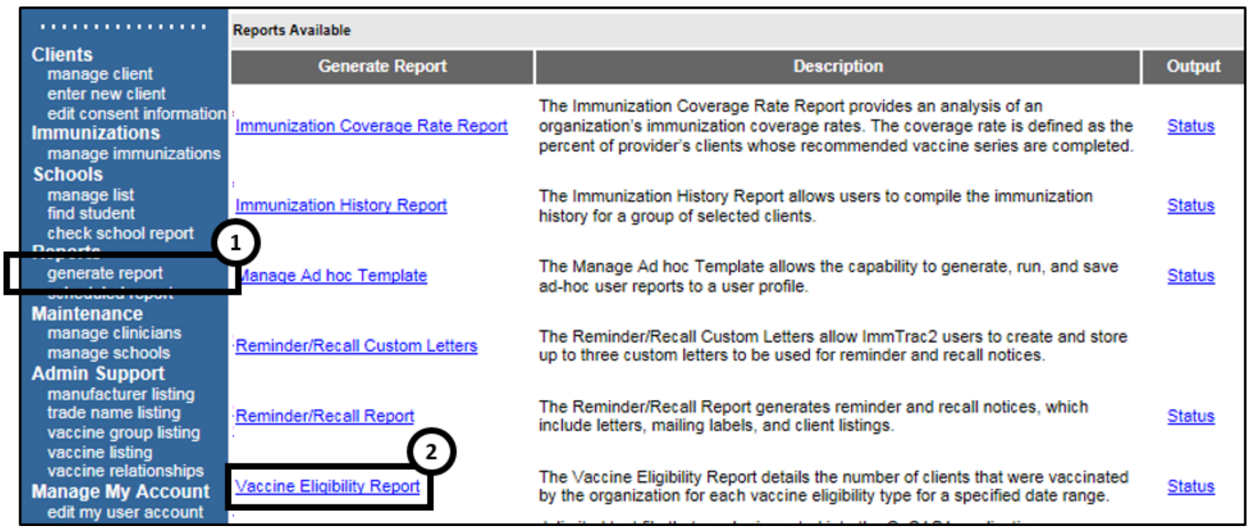


Figure 405 - Generate Vaccine Eligibility Report Steps 1-2

See Figure 406: Generate Vaccine Eligibility Report Steps 3-6.

3. Select an organization from the drop-down list.
4. Enter **From** and **To** dates under the Report Date Range using the MM/DD/YYYY format or use the calendar icon to select date.
5. Using the radio buttons select a Report Type:
   - The **Age Group** report displays a summary of clients by vaccine eligibility and four specific age ranges: <1 year of age, 1-6 years of age, 7-18 years of age, and 19 years and older.
   - The **Vaccine Group** report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the “Generate Report” button. The reports will be set to run. Click “Refresh” to see the current completion percentage.

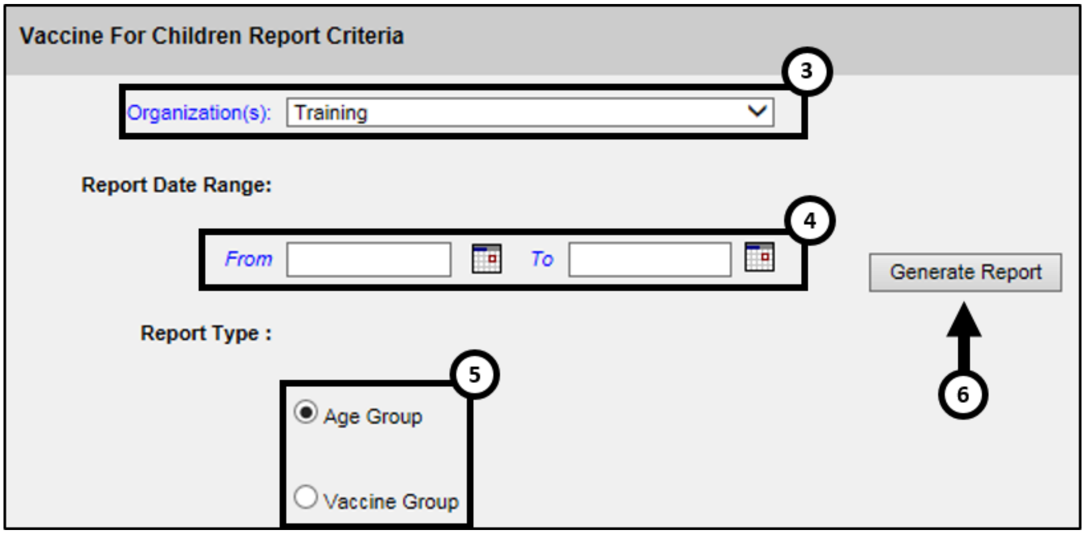


Figure 406 - Generate Vaccine Eligibility Report Steps 3-6

See Figure 407: Generate Vaccine Eligibility Report Steps 7-8.

7. Once users are redirected to the VFC (Vaccines for Children) Report Status screen, click the "Refresh" button until the status is 100%.
8. When the report is ready, click on the blue hyperlink to open the Vaccine Eligibility Report. *See Figure 408: Generate VFC Detail by Age Report Example* and *Figure 409: Generate VFC Detail by Vaccine Report Example.*

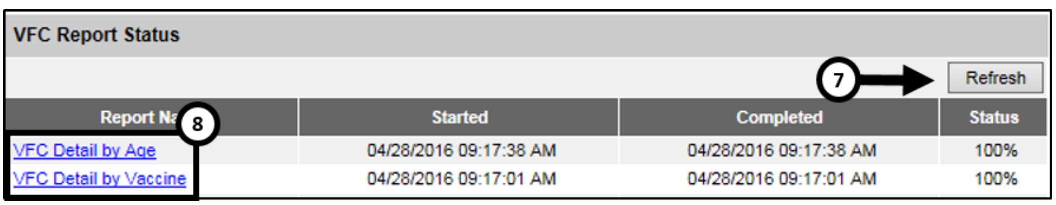


Figure 407 - Generate Vaccine Eligibility Report Steps 7-8

Texas Vaccines For Children
For Dates Between 01/01/2016 and 04/27/2016

Report run on: 04/27/2016 4:10 Page 1

Training

Key: Vaccine Eligibility Code

V01-Private Pay/Insurance	V05-Underinsured, FQHC/RHC/Deputized
V02-Medicaid	TXA01-CHIP
V03-No Insurance	TXA02-Underinsured, Not FQHC/RHC/Deputized
V04-American Indian/Alaskan Native	

(Age)	V01	V02	V03	V04	V05	TXA01	TXA02	Total
<1	3	14	10	10	3	3	0	43
Total	3	14	10	10	3	3	0	43

Figure 408 - Generate VFC Detail by Age Report Example

Texas Vaccines for Children
For Dates Between 01/01/2016 and 04/28/2016

Report run on: 04/28/2016 9:17

Organization: Training

Key: Vaccine Eligibility Code

V01-Private Pay/Insurance	V05-Underinsured, FQHC/RHC/Deputized
V02-Medicaid	TXA01-CHIP
V03-No Insurance	TXA02-Underinsured, Not FQHC/RHC/Deputized
V04-American Indian/Alaskan	

Vaccine	V01	V02	V03	V04	V05	TXA01	TXA02	Total
TBTest	0	0	5	0	0	0	0	5
DTP/aP-HepB-	0	1	0	0	0	0	0	1
Polio	0	4	4	0	0	0	0	8
Td/Tdap	0	0	4	0	0	0	0	4
Yellow Fever	0	0	1	0	0	0	0	1
Measles	0	1	0	0	0	0	0	1
Influenza-	0	1	0	0	0	0	0	1
DTP/aP	1	5	1	3	0	1	0	11
HPV	0	1	0	0	0	1	0	2
Influenza-	1	0	1	0	1	0	0	3
Meningo	0	0	0	0	1	0	0	1
Hib	0	0	2	1	0	2	0	5
PneumoConjug	1	3	2	1	0	1	0	8
HepB	1	4	3	1	0	2	0	11

Figure 409 - Generate VFC Detail by Vaccine Report Example

Scheduled Reports

The Scheduled Reports menu panel option provides three types of reports for Modified Access Sub-State users. These reports are pre-configured and scheduled to run in defined time intervals. The number of reports available and the title of each report will vary according to the number of organizations and regions the Modified Access Sub-State user is associated with. The report topics are as follows:

18 Year Old Target Client Report

Public Outreach Provider Listing

IPO Client Listing

Each report generates two separate sets of reports based on Responsible Entity (RE) hierarchy. The RE for each organization that the client is active in is used to determine whether the client is included in the Regional report or the Local Health Department report. All reports are generated in Excel.

Region Report

- Each Health Service Region (HSR) has one spreadsheet with multiple tabs.
- One tab is included for each LHD that reports to the HSR.
- One tab is included for 'unassigned.' This tab contains clients who are active in organizations that report directly to the HSR.
- Each HSR also has individual reports for the LHDs they oversee. These reports include the name of the county in the report name.

LHD Report

- Each Local Health Department (LHD) has its own spreadsheet.
- Only one tab exists in the spreadsheet.

18 Year Old Target Client Report

The *18 Year Old Target Client Report* generates a list of 17 year olds who will turn 18 in the two to three months following the release of the report. This report runs on the 1st day of each even-numbered month (February, April, June, August, October, and December) and lists clients in ascending order by ImmTrac2 Client ID. *See Figure 410: 18 Year Old Target Client Report Example.*

Why is this Report Important?

The Texas immunization information system is an “opt in” registry. In order to have their immunization records maintained in ImmTrac2, adults must provide consent to participate. Parents or legal guardians must consent to have their children participate in the registry as well.

To comply with Texas law, the ImmTrac2 system changes the status of a child’s record on his or her 18th birthday, from “ImmTrac Child (IC)” to “Pending Adult (PA)”. Client records labeled Pending Adult are not accessible for display in search results or in reports. By state law, the records are stored in the database, pending consent, until the individual’s 26th birthday at which time the records are permanently deleted. The report is designed to provide targeted outreach to the 17-year-old population about the need to provide adult consent in order to maintain client immunization history in the database for a lifetime.

This report will only display the following clients:

- Client Type = IC
- Client = Active
- Clients whose 18th birthday falls 2 months to 4 months after the date the report was run. For example, a report released Feb. 1 will include clients who turn 18 between April 1 and May 31.

To view the *18 Year Old Target Client Report* follow the steps below.

See Figure 411: 18 Year Old Target Client Report Steps 1-2.

1. Click the **Scheduled Report** option from the menu panel.
2. Select the **18 Year Old Target Client Report**.
    - Reports are listed in alphabetical order, and the Ctrl + F keys may be used to search in the browser window to help locate a file quicker. For example, users can perform a search by “Corpus” or “Houston”.

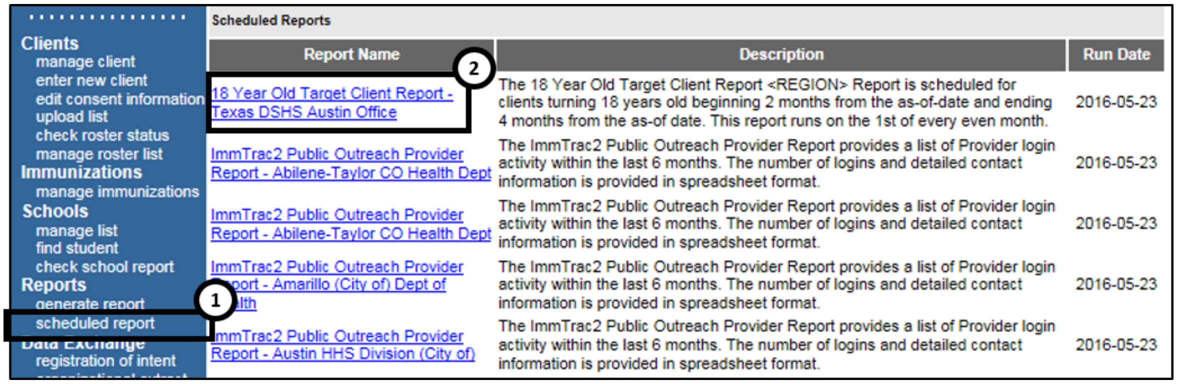


Figure 411 - 18 Year Old Target Client Report Steps 1-2

See Figure 412: 18 Year Old Target Client Report Step 3.

3. When the Internet Explorer dialog box appears, click on “open” to open and view the report results in a spreadsheet format. *See Figure 413: 18 Year Old Target Client Report Example.*

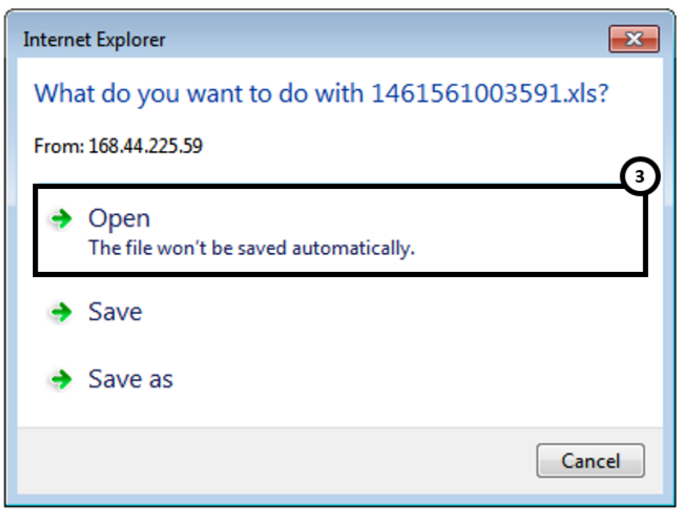
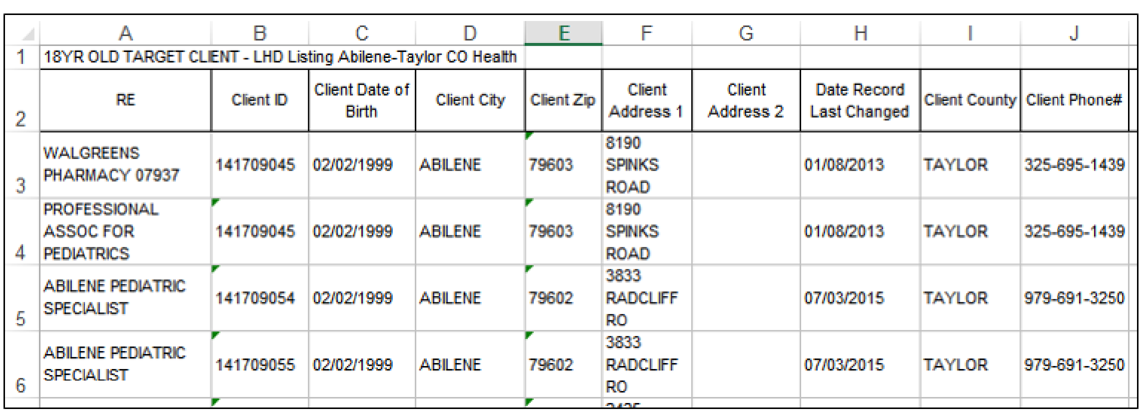


Figure 412 - 18 Year Old Target Client Report Step 3



	A	B	C	D	E	F	G	H	I	J
1	18YR OLD TARGET CLIENT - LHD Listing Abilene-Taylor CO Health									
2	RE	Client ID	Client Date of Birth	Client City	Client Zip	Client Address 1	Client Address 2	Date Record Last Changed	Client County	Client Phone#
3	WALGREENS PHARMACY 07937	141709045	02/02/1999	ABILENE	79603	8190 SPINKS ROAD		01/08/2013	TAYLOR	325-695-1439
4	PROFESSIONAL ASSOC FOR PEDIATRICS	141709045	02/02/1999	ABILENE	79603	8190 SPINKS ROAD		01/08/2013	TAYLOR	325-695-1439
5	ABILENE PEDIATRIC SPECIALIST	141709054	02/02/1999	ABILENE	79602	3833 RADCLIFF RO		07/03/2015	TAYLOR	979-691-3250
6	ABILENE PEDIATRIC SPECIALIST	141709055	02/02/1999	ABILENE	79602	3833 RADCLIFF RO		07/03/2015	TAYLOR	979-691-3250

Figure 410 - 18 Year Old Target Client Report Example

	J	K	L	M	N	O	P	Q	R	S	T
			REPORT DATE:	11/29/2016							
ty	Client Phone#	Client Email	Client Last Name	Client First Name	Client Middle Name	Client's Mother's Last Name	Client's Mother's First Name	Client's Mother's Middle Name	Client's Father's Last Name	Client's Father's First Name	Client's Father's Middle Name
	325-695-1439		CADE	MATTHEW		KRIEGER	DEANA		CADE	JAMES	GLENN
	325-695-1439		CADE	MATTHEW		KRIEGER	DEANA		CADE	JAMES	GLENN
	979-691-3250		MARCELAIN	JACK		GILILLAND	TAMMY		MARCELAIN	ROBERT	DAVID
	979-691-3250		MARCELAIN	SOPHIE		GILILLAND	TAMMY		MARCELAIN	ROBERT	DAVID

Figure 410 - 18 Year Old Target Client Report Example Continue

Public Outreach Provider Report

The **Public Outreach Provider Report** provides a list of provider login activity within the most recent six months of the date the report was generated for those providers who have logged in at least once within the last 2 years. The spreadsheet includes number of logins and detailed contact information. This report runs on the 1st of every odd month (January, March, May, July, September, and November) and is generated in an Excel file.

Why is this Report Important?

Immunization tracking systems like ImmTrac2 work best when the medical providers who give immunizations in Texas are actively using the system and reporting administered vaccines into the system. This report is designed to provide information on which ImmTrac2 providers are not "active" users, defined as having logged into ImmTrac2 within the last 6 months. The information can then be used by program coordinators and public outreach staff at the state and local level to provide support to increase participation with the system.

This report excludes the following types of provider sites:

- Childcare (Daycare)
- Schools
- State Agency – Department of State Health Services Austin
- State Agency – Juvenile Justice Department
- Providers who have **not** logged in at least once within the last 2 years

To view the Public Outreach Provider Report, follow the steps below.

See *Figure 413: Public Outreach Provider Report Steps 1-2.*

1. Click the **Scheduled Report** option from the menu panel.

2. Locate and select the appropriate **ImmTrac2 Public Outreach Provider Report** depending on user's needs.
    - Reports are listed in alphabetical order, and the Ctrl + F keys may be used to search in the browser window to help locate a file quicker. For example, users can perform a search by "Corpus" or "Houston".

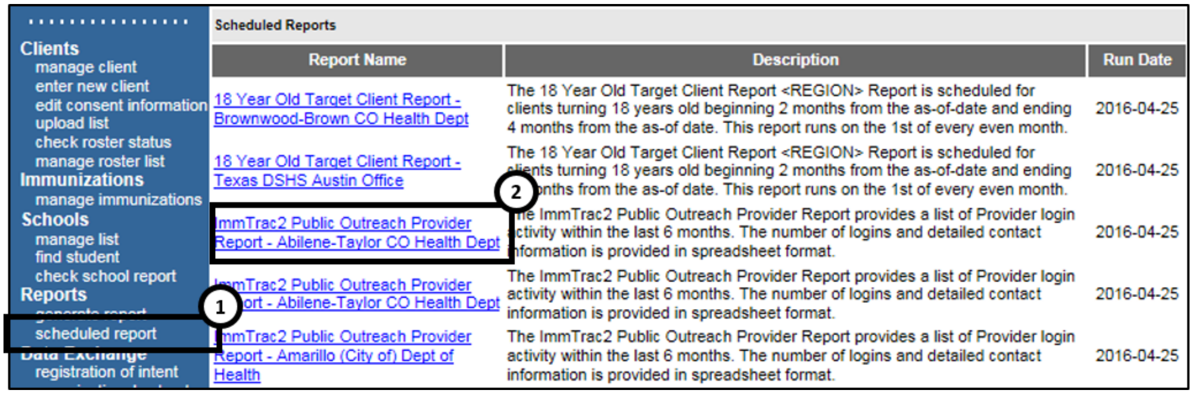


Figure 413 - Public Outreach Provider Report Steps 1-2

See Figure 414: Public Outreach Provider Report Step 3.

3. When the Internet Explorer dialog box appears, click on "open" to open and view the report in a spreadsheet format. *See Figure 415: Public Outreach Provider Report Example.*

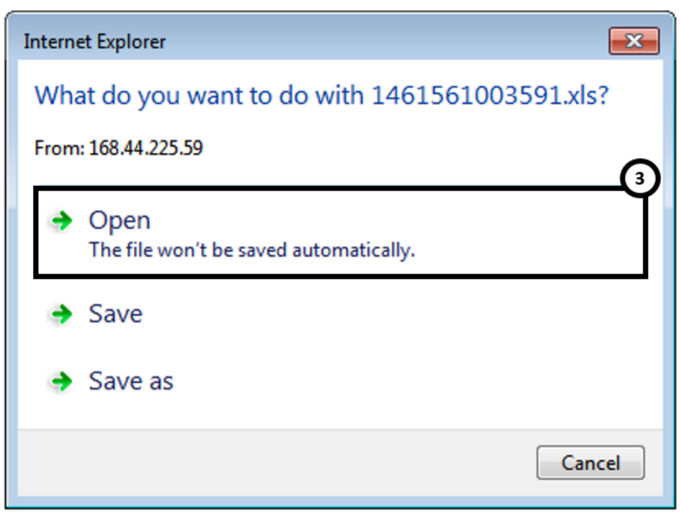


Figure 414 - Public Outreach Provider Report Step 3

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Public Outreach Provider Listings - LHD Listing Abilene-Taylor CO Health Dept											REPORT DATE:	11/29/2016
2	Provider #	Provider Name	Provider Address	Provider City	Provider Zip	Provider County	Provider Phone	Provider Fax	Organization Contact Name	Organization Type	Number of Logins	Registration Date	Site Agreement Date
3	1230400151	HENDRICK MEDICAL CLINIC - CISCO	1619 HIGHWAY 206	CISCO	76437	Taylor	254-442-1908		ROBERT STEED	Private Practice	0	08/07/2014	08/07/2014
4													

Figure 415 - Public Outreach Provider Report Example

IPO Client Listing

The *IPO Client Listing* report provides a list of child clients between 19 months and 36 months of age who have not completed their 4:3:1:3:3:1:4 vaccine series. This report runs quarterly on the first day of the scheduled month (March, June, September and December) and is generated as an Excel file. The information is sorted by ImmTrac2 ID in ascending order. *See Figure 416: IPO Client Listing Report Example.*

Why is this Report Important?

This report is designed to provide a listing of children in ImmTrac2 that are not in compliance with the 4:3:1:3:3:1:4 vaccine series. The information can then be used by program coordinators and public outreach staff at the state and local level to be able to reach out to children's families to complete the vaccines needed to meet the series requirement for immunizations.

This report includes the following clients:

- Only clients between the ages of 19 and 36 months old
- Client Type = IC
- Client = Active
- Clients who have an incomplete vaccine series and are missing one or more of the following:
  - 4 doses of DTaP (diphtheria-tetanus-pertussis)
  - 3 doses of Polio
  - 1 dose of MMR (measles-mumps-rubella)
  - 3 doses of Hib (*haemophilus influenzae* type b)
  - 3 doses of HepB (hepatitis B)
  - 1 dose of Varicella
  - 4 doses of PCV (pneumococcal conjugate vaccine)

To view the *IPO Client Listing*, follow the steps below.

See Figure 417: IPO Client Listing Report Steps 1-2.

1. Click the **Scheduled Report** option from the menu panel.

2. Locate and select an **IPO Client Listing** report.

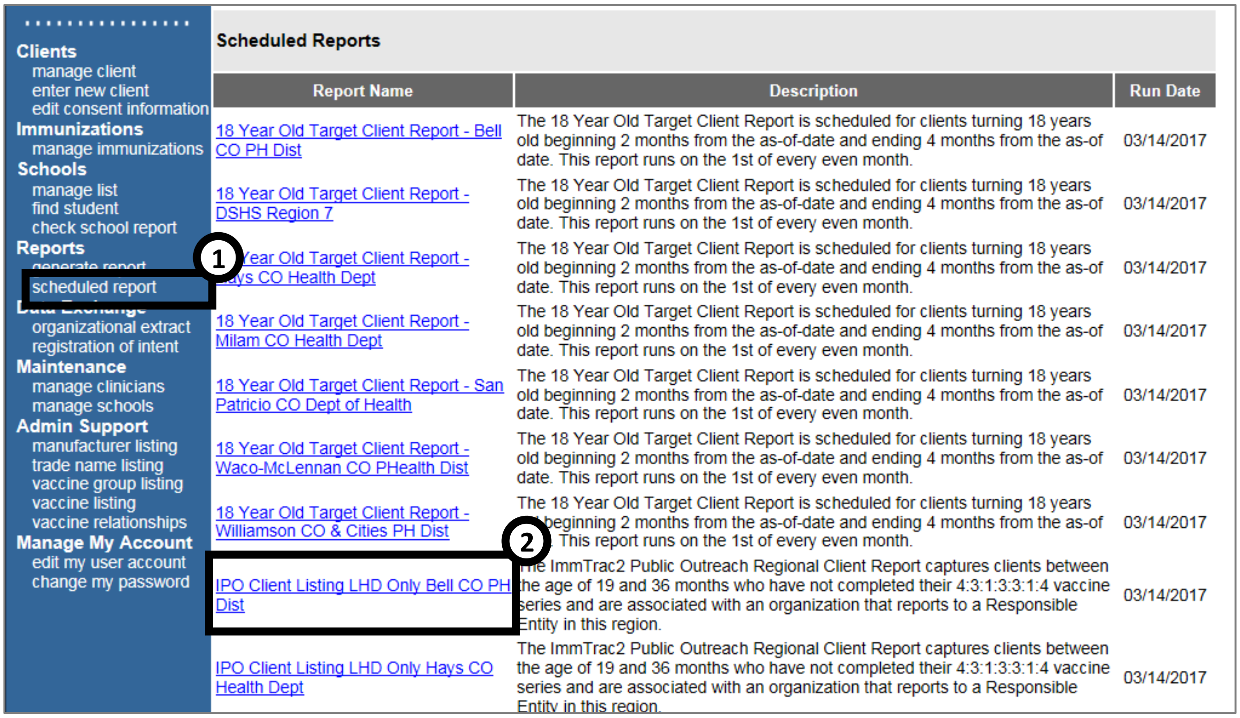


Figure 417 - IPO Client Listing Report Steps 1-2

3. When the Internet Explorer dialog box appears, click on “open” to open and view the report results in a spreadsheet format. *See Figure 418: IPO Client Listing Report Step 3.*

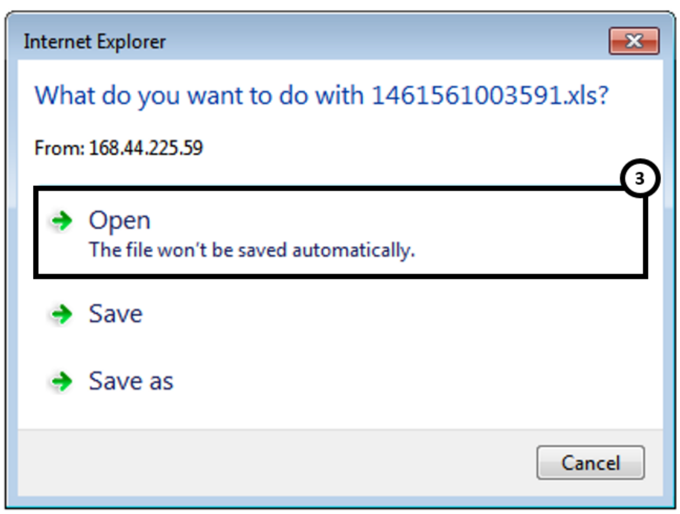


Figure 418 - IPO Client Listing Report Step 3

1	IPO Client Listing - LHD Plainview-Hale CO Health Dist											Report Date: 12/12/2016
2	RE	Client ID	Client Date of Birth	Client City	Client County	Client Zip	Client Phone	Most Recent Provider TXIIS ID	Most Recent Provider Name	Provider County	Provider City	Provider Zip
3	Plainview-Hale CO Health Dist	6967977	10/20/2014	MCFARLAND				1111080000	3rd Best Clinic	TRAVIS	AUSTIN	78756
4	Plainview-Hale CO Health Dist	6968177	02/02/2014	AMARILLO	POTTER	79101		1111080000	3rd Best Clinic	TRAVIS	AUSTIN	78756
5	Plainview-Hale CO Health Dist	6968224	02/02/2014					1111080000	3rd Best Clinic	TRAVIS	AUSTIN	78756
	Plainview-											

Figure 416 - IPO Client Listing Report Example

Chapter 22: Maintenance

The Maintenance section of the Menu Panel allows ImmTrac2 users to add and update information on clinicians and schools. Modified Access Sub-State users have limited access to managing clinicians, but may contact ImmTrac2 Customer Support for additional help in modifying additional information. Adding and maintaining this information is optional; however, these components will allow organizations to utilize more functionality when generating reports.

Use of the Soft Access capability will be required to manage Clinicians or Schools for a specific organization by a Modified Access Sub-State user. Use the Switch Organization screen in the Manage Access Portal view to soft access to another organization with a Modified Access Sub-state role.

Manage Clinicians

Clinicians are the individuals administering immunizations at ImmTrac2 provider locations such as doctors' offices, clinics and hospitals. Clinicians can be physicians, physician assistants, and nurses, and they can be associated with one or more clinic sites and organizations. Full Access Providers and Provider Supervisors can view clinicians associated to their organization(s).

Clinicians display as selection options in the Add Immunization process to identify who administered the vaccine. Certain clinicians (designated by license type) display as selection options for the Primary Care Provider (PCP) on the *Organization Information* tab in the client's record.

Within "Clinicians" records, there is a distinction between terms: Clinician and Prescribing Authority.

> **Clinician**: A clinician assigned the Clinician role is an individual within a provider organization who is legally authorized to physically **administer a vaccine** to a client. In the event a clinician has a Clinician role, his or her name will be available for selection in the 'Administered By' drop down menu on the Pre-select Immunizations screen when entering new immunizations.
>
> **Prescribing Authority:** A clinician assigned the Prescribing Authority role is an individual within a provider organization who is licensed by the state of Texas to authorize the **prescribing** of immunizations to a client. In the event a clinician is given a Prescribing Authority role, his or her name will be made available for selection in the 'Prescribing Authority' field when editing an immunizations record.

Prescribing Authority / Clinician- When the Prescribing Authority / Clinician option is selected for a clinician, this person will have the Clinician ***and*** Prescribing Authority roles assigned to them. In addition, his / her name will be made available for selection in both the 'Administered By' and Prescribing Authority' pick lists.

View Clinician / Edit Clinician

A Modified Access Sub-State user can update limited clinician information. If any other data needs to be modified, call ImmTrac2 Customer Support for assistance.

To view and edit clinician information follow the steps below.

See Figure 419: View & Edit Clinician Steps 1-2.

1. Click the **Manage Clinician** option from the menu panel and a list of active clinicians display.
2. Click a clinician's name to view the clinician information in the Edit Clinician screen. *See Figure 419: View / Edit Clinician Info Steps 1-2.*
   - If the list of clinician is too long to locate a name, use the "Find Clinician" button to perform a Clinician Search.
   - The "Clinician List" button displays a list of all clinicians and their role, but the clinician name is NOT an active hyperlink.

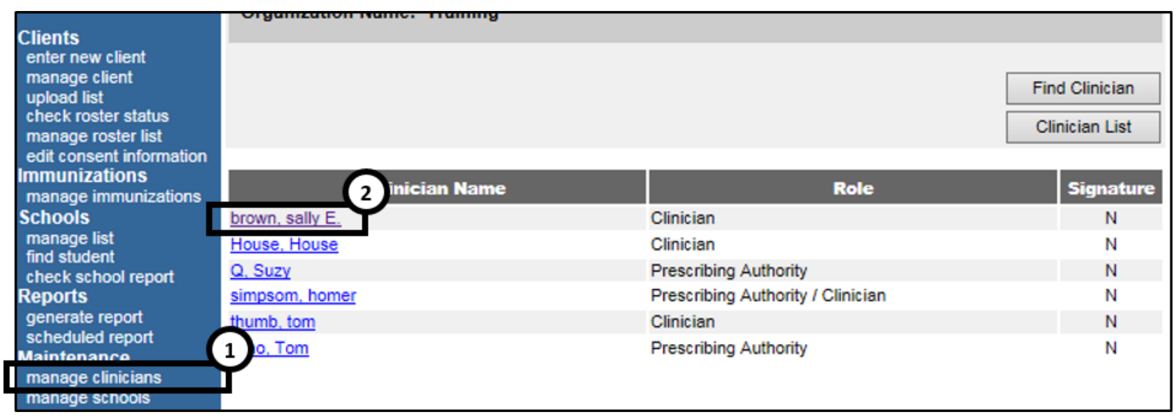


Figure 419 - View & Edit Clinician Steps 1-2

***Note**: The **Signature** column displays "N" dignifying the clinician's signature is not on file. Capturing signatures for the clinicians has not been implemented for ImmTrac2.*

See Figure 420: Edit Clinician Steps 3-4.

3. Edit the clinician information as needed. Editable information is designated by an active white field.
4. Click the "Save" button. A "Record Update" message displays at the top.

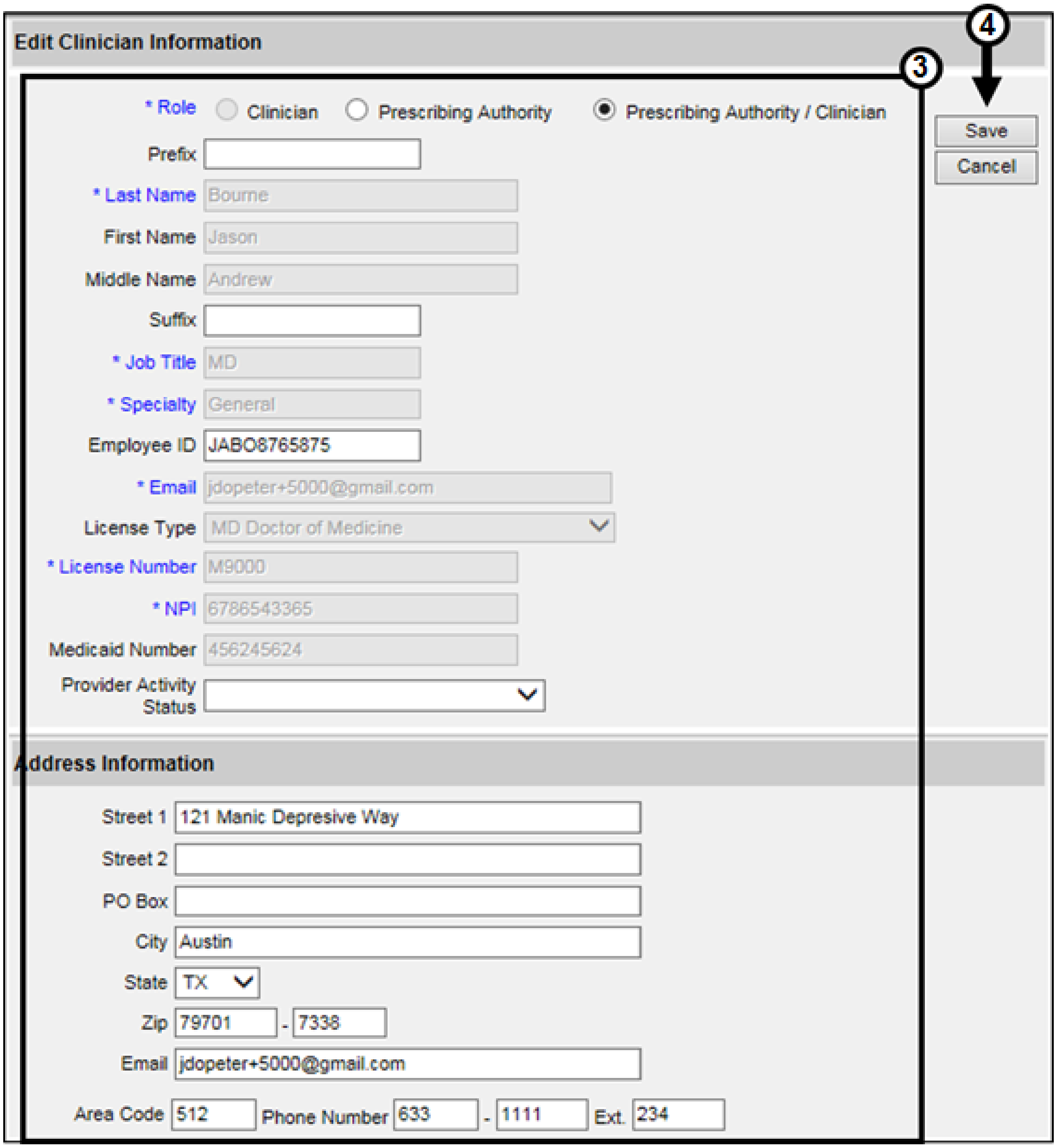


Figure 420 - Edit Clinician Steps 3-4

Clinician Search

The Clinician Search screen allows user to enter specific search criteria to find a clinician, and is helpful when organizations have a long clinician list. This screen will also list all active and inactive clinicians.

To search for a clinician, follow the steps below.

See Figure 421: Clinician Search Step 1.

1. After clicking the Manage Clinician option from the menu panel, click the “Find Clinician” button.

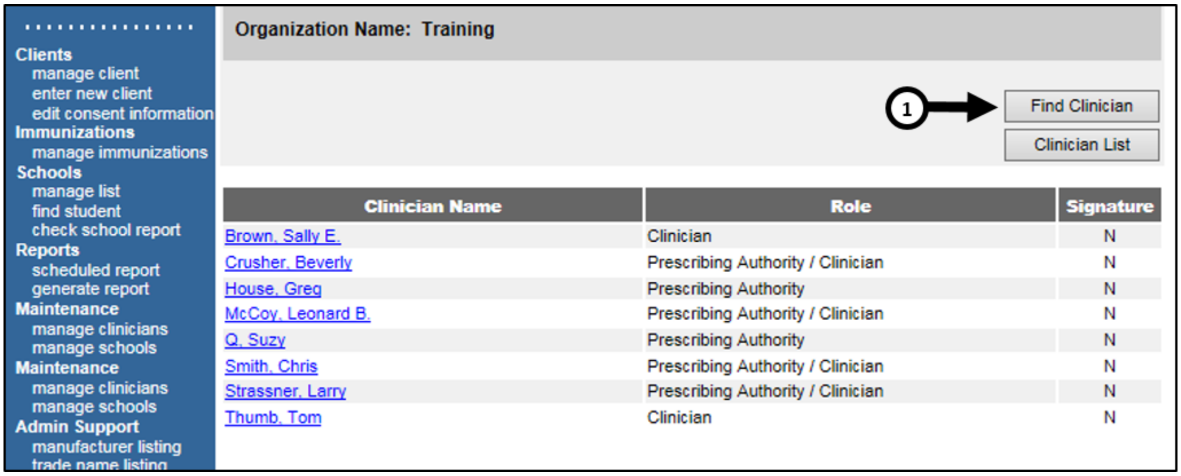


Figure 421 - Clinician Search Step 1

See Figure 422: Clinician Search Steps 2-3.

2. On the Clinician Search screen, enter the first and last name search criteria to limit search results.
    - It is only required to enter at least one letter of the first or last name to perform a search.
3. Click the “Find” button to view search results.
    - Clicking the “Find” button without entering search criteria will list all active and inactive clinicians for the organization.

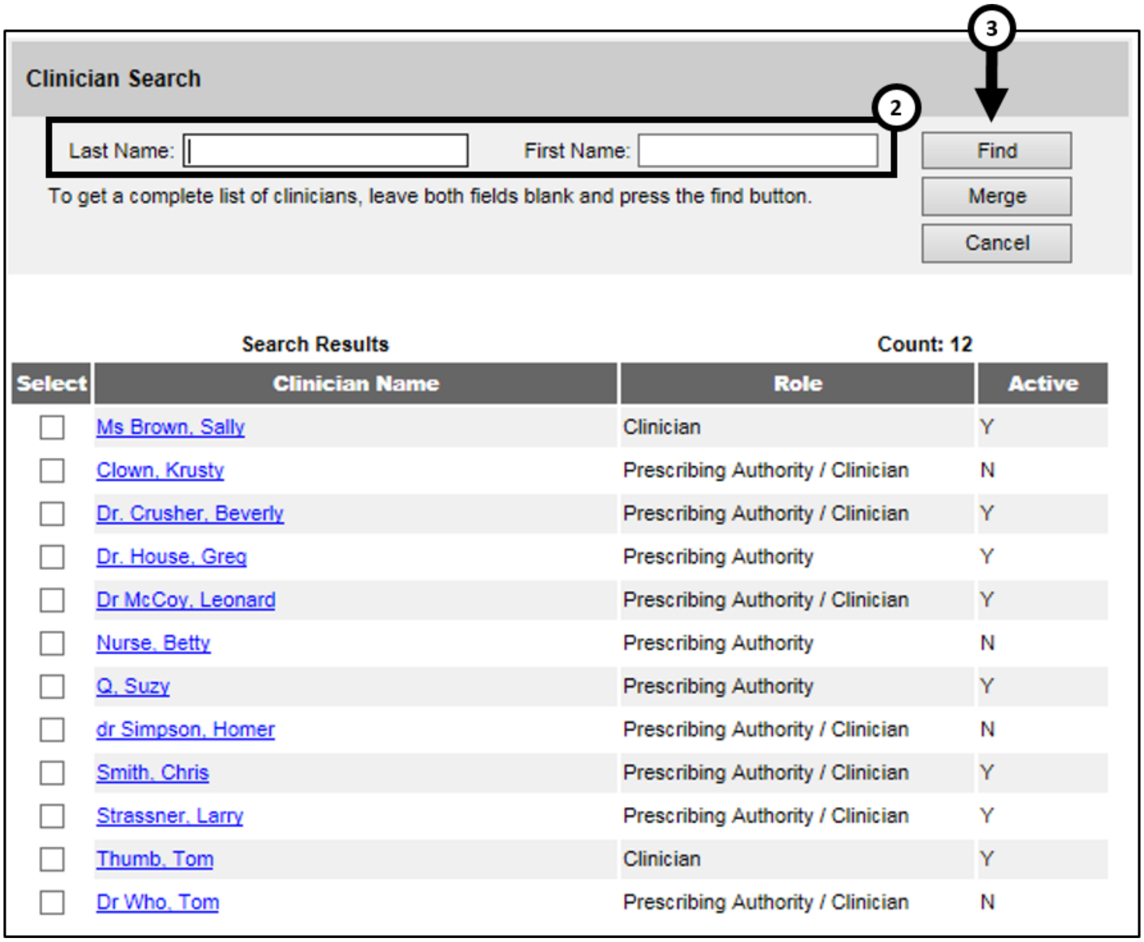


Figure 422 - Clinician Search Steps 2-3

Merge Clinicians

The Merge Clinician function is available only after searching for clinicians on the Manage Clinician screen. Users can merge two or more clinicians into one record. Always review the clinician information very closely to ensure the records are truly duplicates before completing a merge. After merging clinicians, all references to the other clinician will be redirected to the kept clinician.

To Merge Clinicians, follow the steps below.

See Figure 423: Merge Clinicians Steps 1-2.

1. On the Clinician Search screen, enter the first and last name search criteria to limit search results.
    - It is only required to enter at least one letter of the first or last name to perform a search.

2. Click the “Find” button to view search results.
    - Clicking the “Find” button without entering search criteria will list all active and inactive clinicians for the organization.

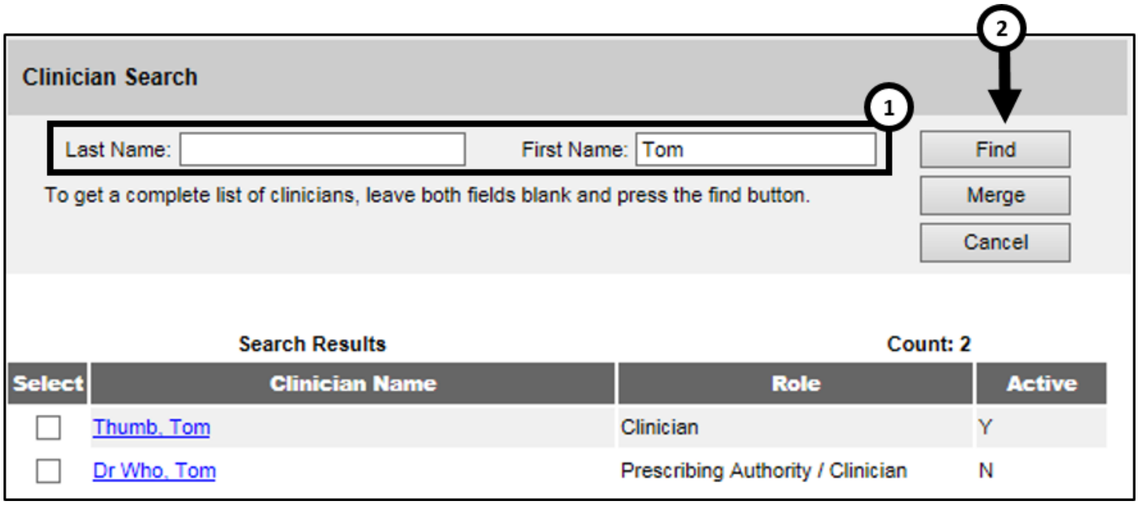


Figure 423 - Merge Clinicians Steps 1-2

See Figure 424: Merge Clinicians Steps 3-4.

3. Select the clinicians you intend to merge by clicking the associated check boxes.
4. Click the “Merge” button.

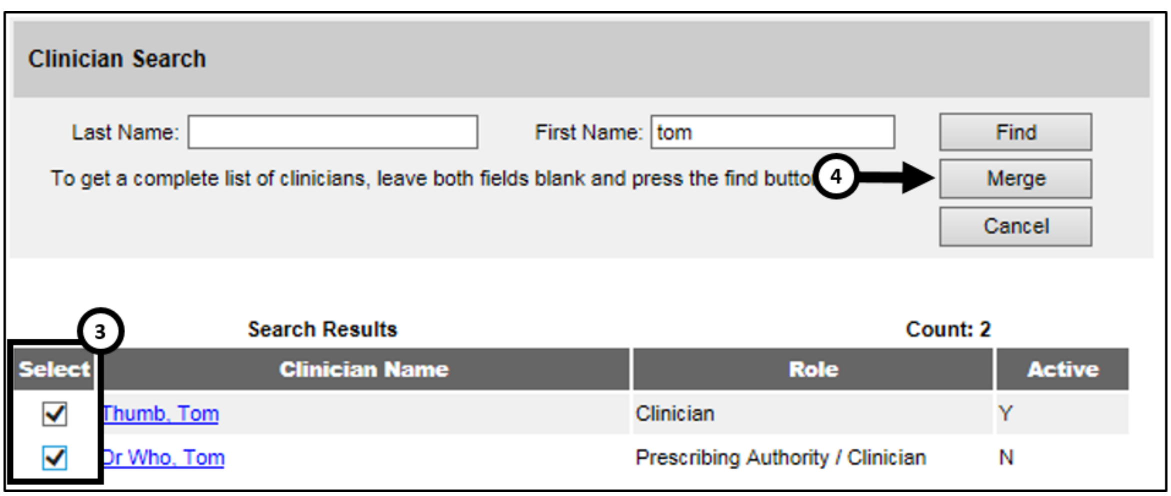


Figure 424 - Merge Clinicians Steps 3-4

See Figure 425: Merge Clinicians Steps 5-6.

5. The Clinician Merge screen displays. Select the clinician to keep.
6. Click the “Keep Selected” button. If needed, verify that the Clinician who was not selected is no longer on the Clinician list.

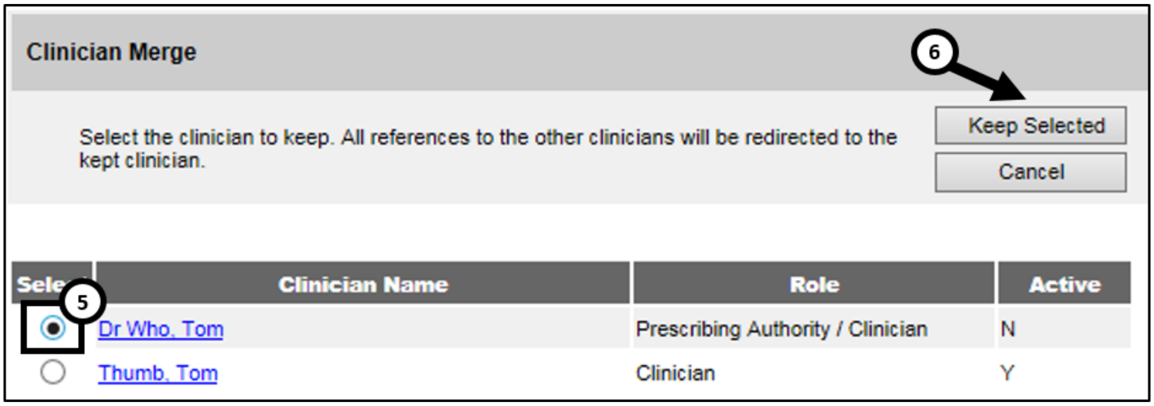


Figure 425 - Merge Clinicians Steps 5-6

Manage Schools

If an organization would like to include the client's school information in their record, this is done by selecting a school from the drop down arrow on the Client Information tab. *See Figure 426: Client Information – Assign a School.*

Schools added from the Manage School menu option will be available for selection in a drop down list in the Client Information section screen.

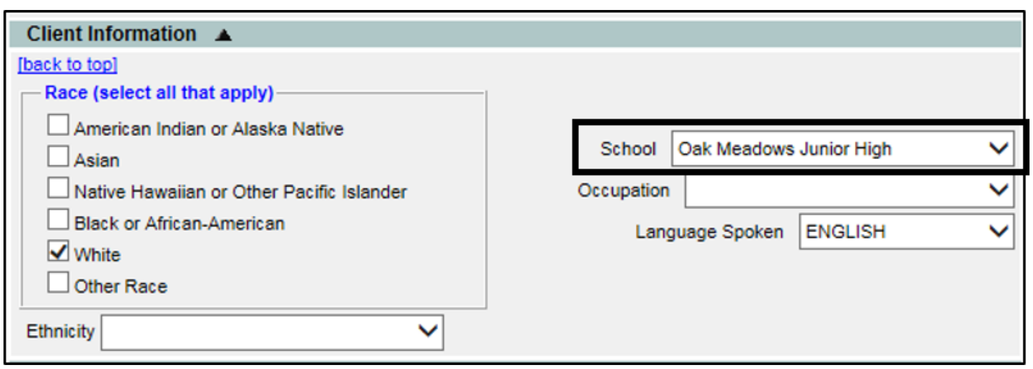


Figure 426 - Client Information – Assign a School

Add a New School

When attempting to update the client's record with their school information, and there is no option for that particular school, a Modified Access Sub-State user will need to add the school.

To add a new school, follow the steps below.

See Figure 427: Add New School Steps 1-2.

1. Click the "Manage School" option from the menu panel.
2. Click the "Add School" button.

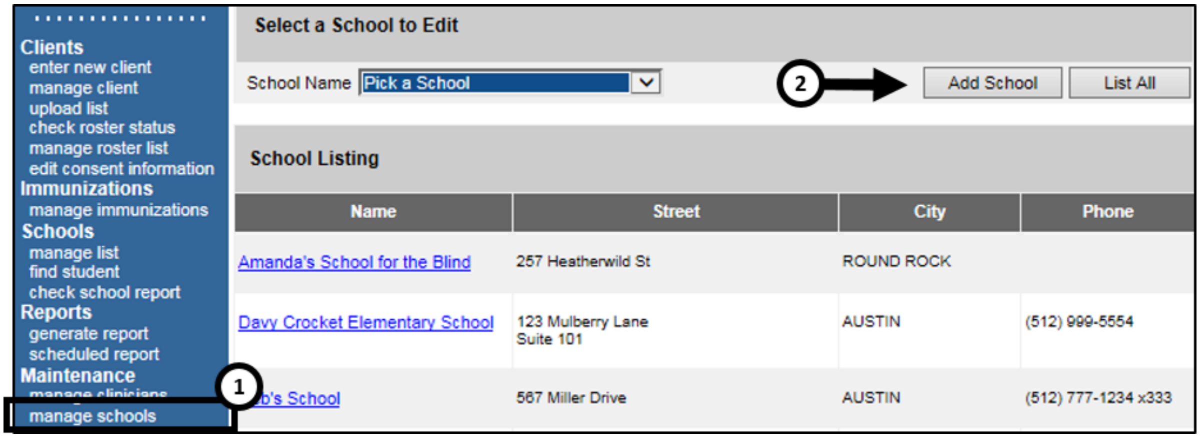


Figure 427 - Add New School Steps 1-2

See Figure 428: Add New School Steps 3-4.

3. On the next screen, enter the school information in the Add School section. Enter at least the school name.
4. Click the "Save" button. A "School Added" message displays to confirm the update.

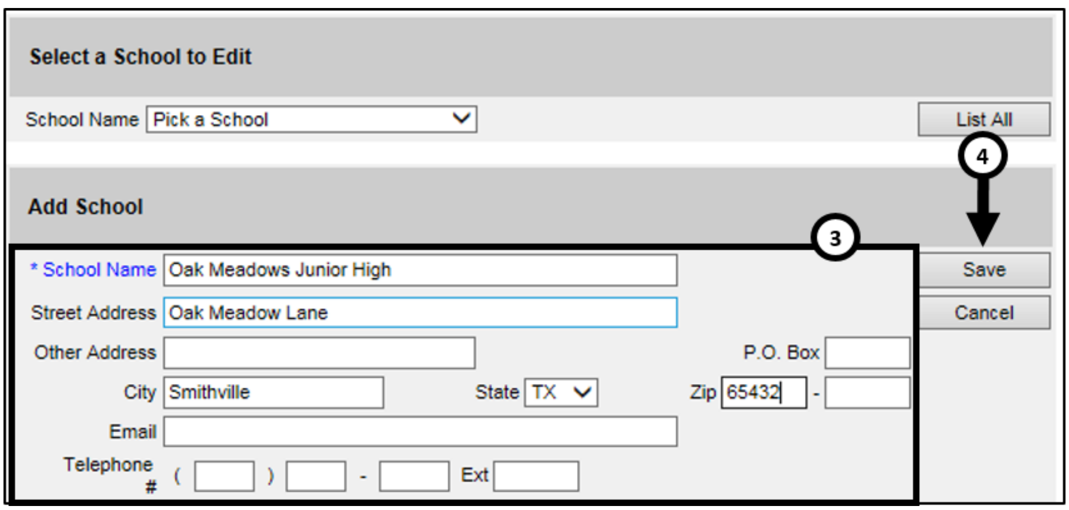


Figure 428 - Add New School Steps 3-4

After the school has been successfully added, click the "List All" button to return to the previous screen. Users can locate the newly added school in the School Listings. Schools are listed in alphabetical order.

Edit a School

To edit school information, follow the steps below.

See Figure 429: Edit School Step 1.

1. Click on a school name from the School Listing section.

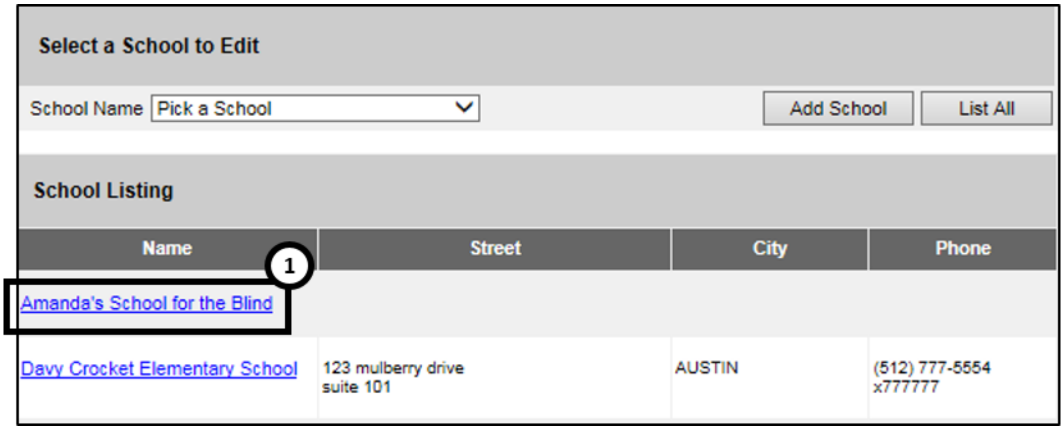


Figure 429 - Edit School Step 1

See Figure 430: Edit School Steps 2-3.

2. Edit the school's information as needed.
3. Click the "Save" button. A "School Updated" message displays to confirm the updates.

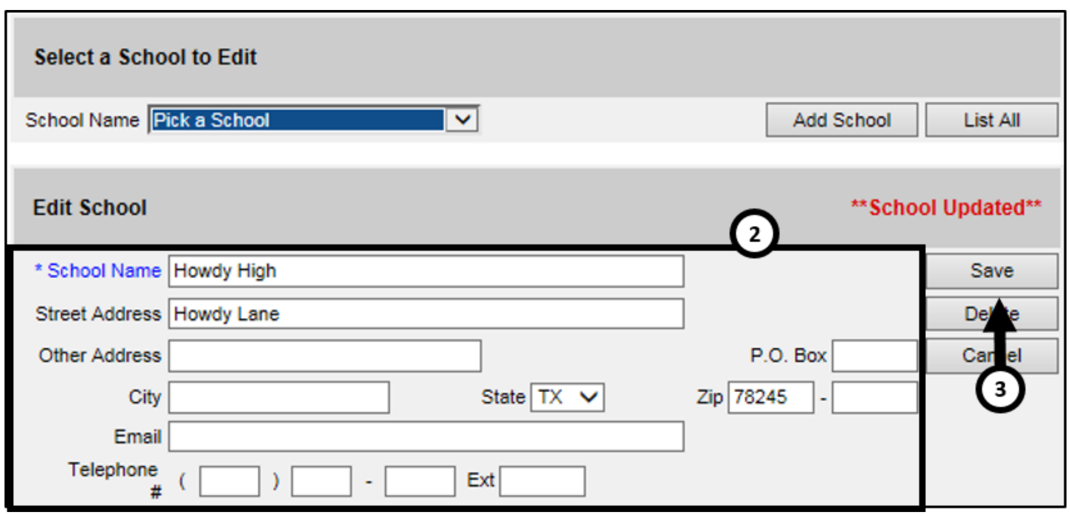


Figure 430 - Edit School Steps 2-3

Delete a School

To delete a school, follow the steps below.

See Figure 431: Delete School Step 1.

1. Click on a school name from the School Listing section

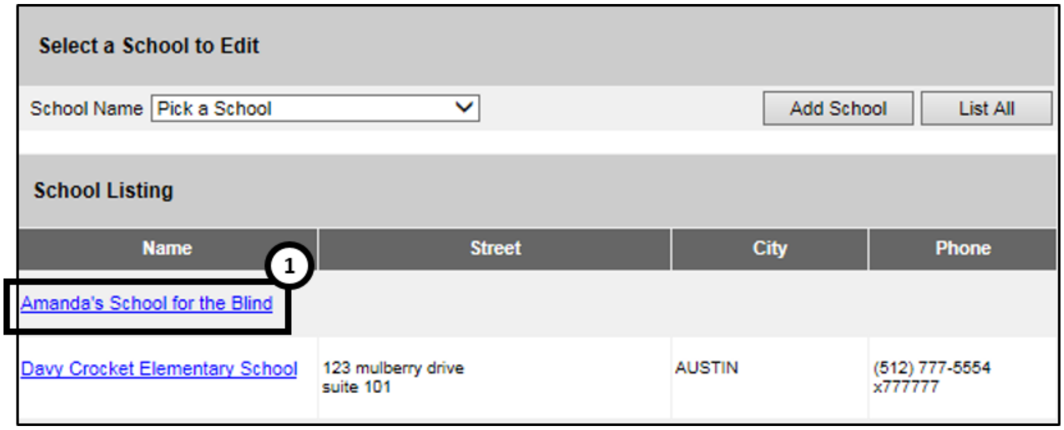


Figure 431 - Delete School Step 1

See Figure 432: Delete School Steps 2-3.

2. Click the "Delete" button on the same screen.
3. When the message dialog box appears, click "Yes" to delete.

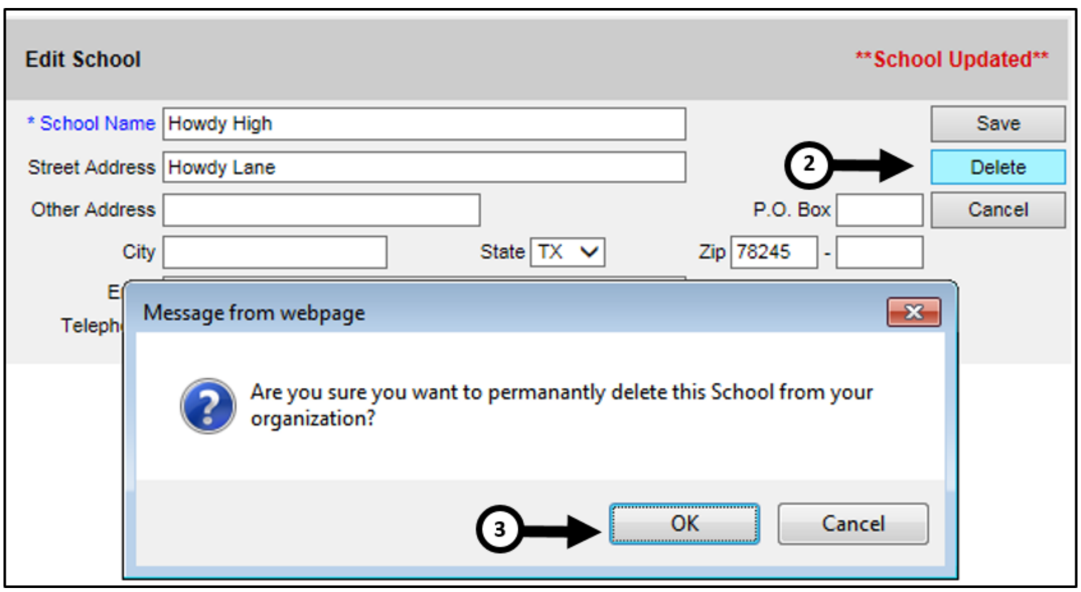


Figure 432 - Delete School Steps 2-3

Chapter 23: Managing Access

Modified Access Sub-State users have the ability to add users, assign and edit user roles, assign and edit organizational access, and reset user passwords. A Provider Supervisor should be the first level of contact for a user who needs access to ImmTrac2 or who needs a password reset. However, Modified Access Sub-State users also have access to this feature and should assist when needed. Modified Access Sub-State users can access all users and organizations under their Responsible Entity jurisdiction.

The Manage Access menu panel options display in the portal view of ImmTrac2. To get to the portal view from the application screen, click the “Manage Access / Account” tab on the top menu bar. *See Figure 433: Portal View – Manage Access.*

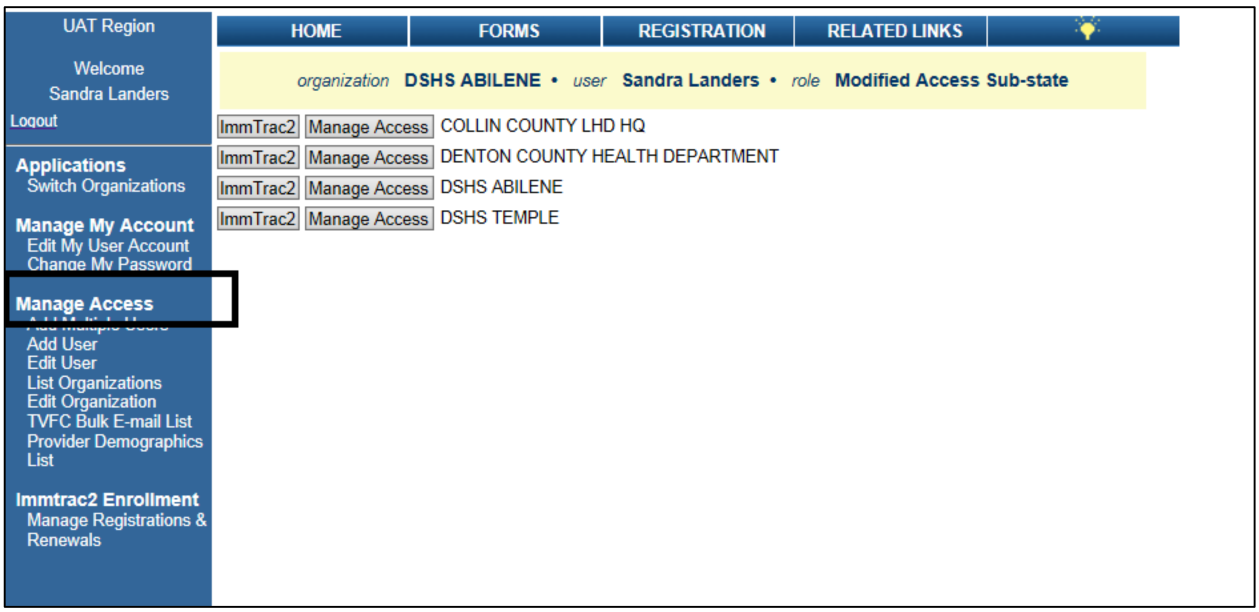


Figure 433 - Portal View – Manage Access

Add Multiple User

The Add Multiple User screen provides users with the ability to create multiple user accounts and associate multiple new and existing users to an Organization once the ImmTrac2 Program Status has been set to “Approved”. This is the quickest way to create user accounts after a Registration or Renewal is approved.

User account changes that are not associated with the Registration and / or Renewal process, should be managed on the Add User and Edit User screens.

To add multiple users to an organization after an approved registration or renewal, follow the steps below.

See Figure 434: Add Multiple Users Steps 1-5.

1. Click the **Add Multiple Users** option from the menu panel.
2. Select an Organization using the drop down arrow. (The screen will auto populate the information below based on the selection.)
3. In the **Select** column, check the user(s) to be updated.
    - The *New Users on Registration or Renewal* section contains users who do not currenlty have an ImmTrac2account.
    - The *Existing Users on Registration or Renewal* section contains “Newly added users” who already have access to ImmTrac2 but will now have access to this organization. *(Not shown in this example.)*
4. In the **Role** column select the role to assign to the user.
5. Click the “Add” button.

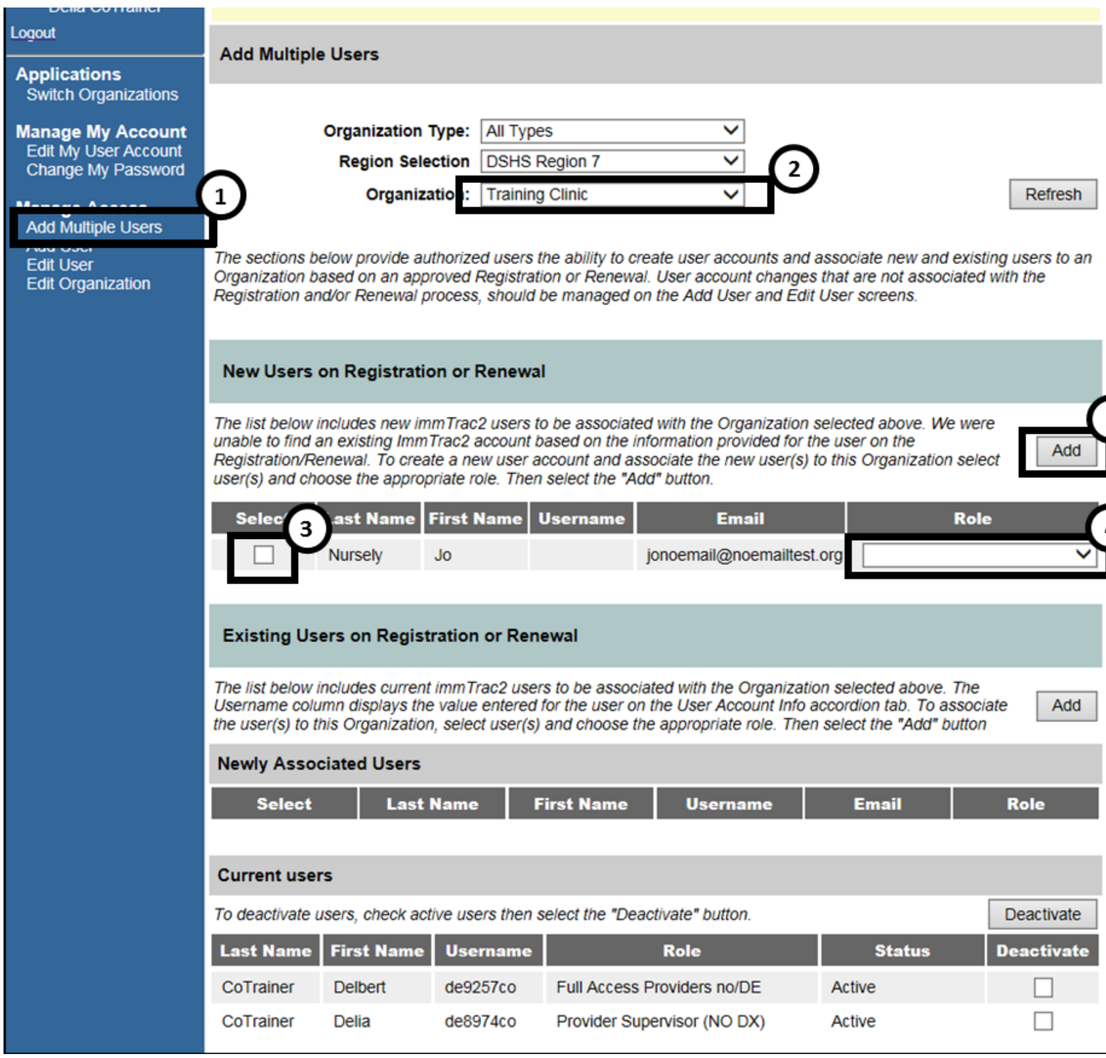
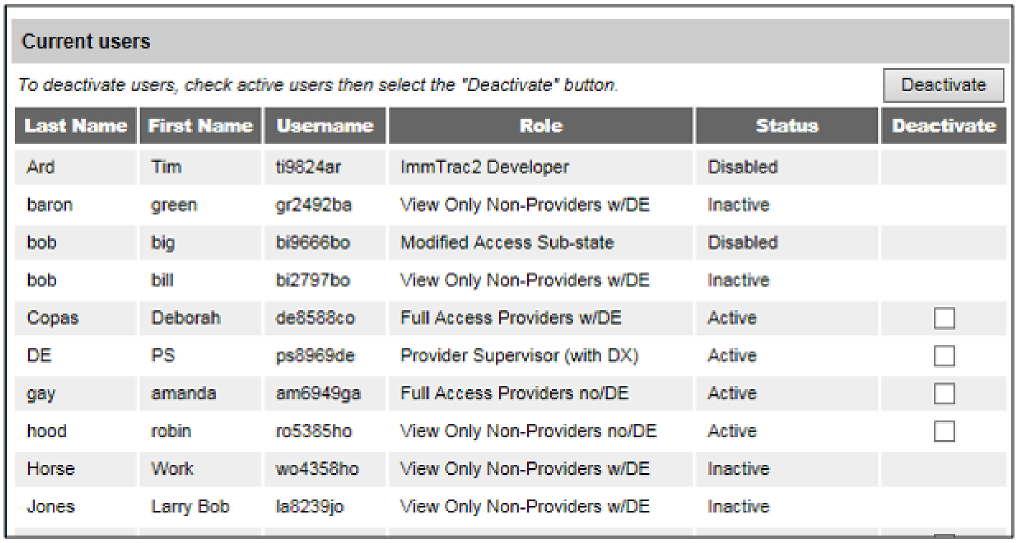


Figure 434 - Add Multiple Users Steps 1-5

At the bottom of the *Add Multiple User* screen it displays a list of **Current Users**. From this screen a user can quickly see all users associated to the organization. A user's status can be changed to Inactive by selecting the associated check box and then clicking the "Deactivate" button. *See Figure 435: Add Multiple Users – Current Users.*


Current users

To deactivate users, check active users then select the "Deactivate" button. Deactivate

Last Name	First Name	Username	Role	Status	Deactivate
Ard	Tim	ti9824ar	ImmTrac2 Developer	Disabled	
baron	green	gr2492ba	View Only Non-Providers w/DE	Inactive	
bob	big	bi9666bo	Modified Access Sub-state	Disabled	
bob	bill	bi2797bo	View Only Non-Providers w/DE	Inactive	
Copas	Deborah	de8588co	Full Access Providers w/DE	Active	☐
DE	PS	ps8969de	Provider Supervisor (with DX)	Active	☐
gay	amanda	am6949ga	Full Access Providers no/DE	Active	☐
hood	robin	ro5385ho	View Only Non-Providers no/DE	Active	☐
Horse	Work	wo4358ho	View Only Non-Providers w/DE	Inactive	
Jones	Larry Bob	la8239jo	View Only Non-Providers w/DE	Inactive	

Figure 435 - Add Multiple Users – Current Users

Add User

A Modified Access Sub-State user can add users to their organization and assign the user any lower-level access user role. If a Provider Supervisor has access to multiple organizations, they must first navigate to the Manage Access Portal view for the organization in which the user needs to be added.

To add a user to an organization, follow the steps below.

See Figure 436: Add User Steps 1-3.

1. Click the "Add User" option from the menu panel.
2. Enter all required user information marked with an asterisks.
    - The email address must be unique.
    - If the email address is not unique, a pop-up box will appear with the following error validation message: "An existing user was found with this email address. Press OK to associate that user to your organization, or Cancel to enter a different email address to create a new user." *See Figure 437: Add User – Email Address Validation Error.*
3. Click the "Save" button.

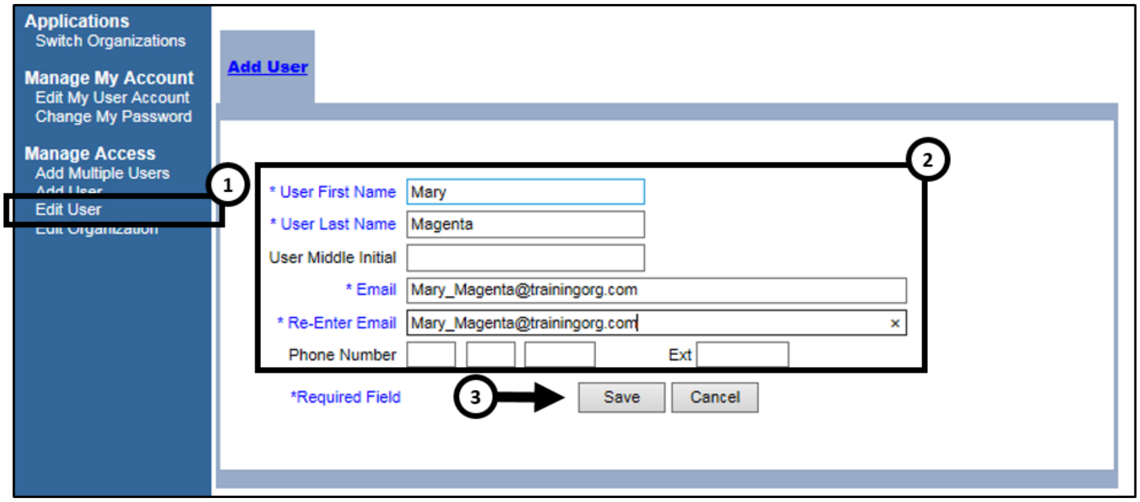


Figure 436 - Add User Steps 1-3

If an existing user was found with the email address entered, click the "OK" button to navigate to the user account with that email address. Updates can be made to the user's account giving them access to the needed organization.

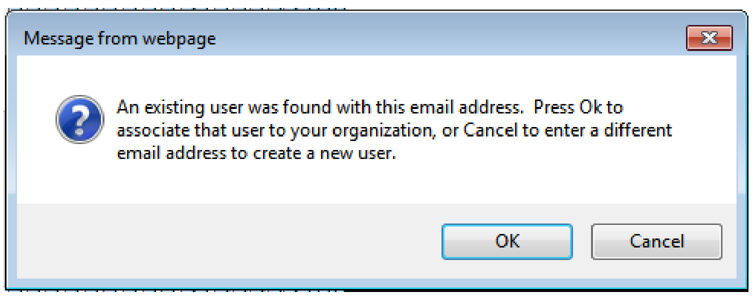


Figure 437 - Add User – Email Address Validation Error

If the email address is unique the screen will refresh displaying the additional data information below and the following message: "The new user has been added to ImmTrac2. **They will not have access** until you modify their access privileges. To continue and complete their access privileges click the Modify Access tab." Users will not receive a welcome email and temporary password until they have been given access privileges to a specific organization. *See Figure 438: User Added*.

Table 51 - Add User Data Fields

Column	Description
User ID	Systematically generated ID.
Username	Systematically generated username needed for ImmTrac2 log in purposes.
Current Status	The current status of the users ImmTrac2 account. • **Active** – account is active. • **Disabled** – account is disable and users cannot access their account. • **Admin** – a user's account has been looked by a Full Access State user for security reason and should not be unlocked unless authorized. • **Inactive** – user's account has been inactive for 90 days (view only and Full Access Provider users) and 60 days (Provider Supervisor, Modified Access Sub-State, and Full Access State users) without logging in. These accounts will have the "Disabled" radio button selected. • **Password** – a user attempted to login multiple times with a wrong password. These accounts will have the "Disabled" radio button selected. • **Unused** – a new user that has not logged into the system to activate their account in 90 days (view only and Full Access Provider users) and 60 days (Provider Supervisor, Modified Access Sub-State, and Full Access State users). • **No Org** – a user's account is not associated to an organization.
Status	Different status options that cab be selected for the user. A Full Access State user has the ability to change the status to "Active", "Disabled", or "Admin". The "State" option will be greyed out and available to Developers only.
Send Password Reset Email	Can be used at any time to send a password reset email to the user's email address on file. If an account is in a Disabled status and the current status displays "Password", "Inactive", or "Unused", the Send Password Reset Email will reset the account as active. For more details see the Password Reset section.

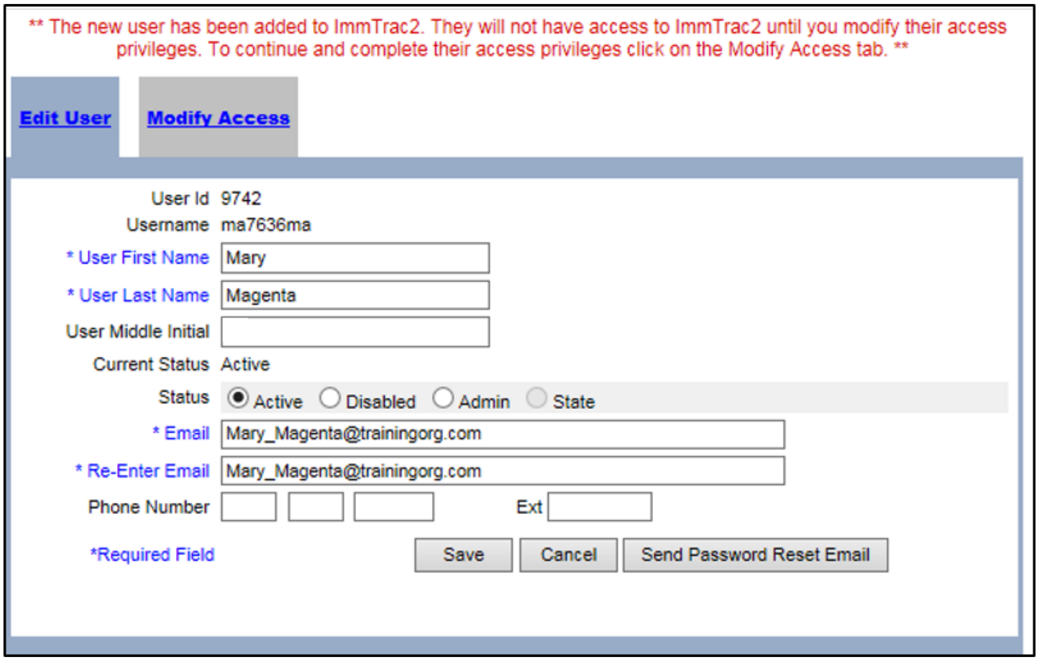


Figure 438 - User Added

See Figure 439: Add User Steps 4-7.

4. Click the “Modify Access” tab at the top of the add user section.
5. Select the user’s organization and role.
    - A Provider Supervisor will only have the following user role options to select from: View Only Non-Provider and Full Access Provider.
6. Click the “Add” button. An “Update in progress, press Save to keep” message with display in the center of the screen.
7. Click the “Save” button. A “User Updated” message displays at the top of the page.

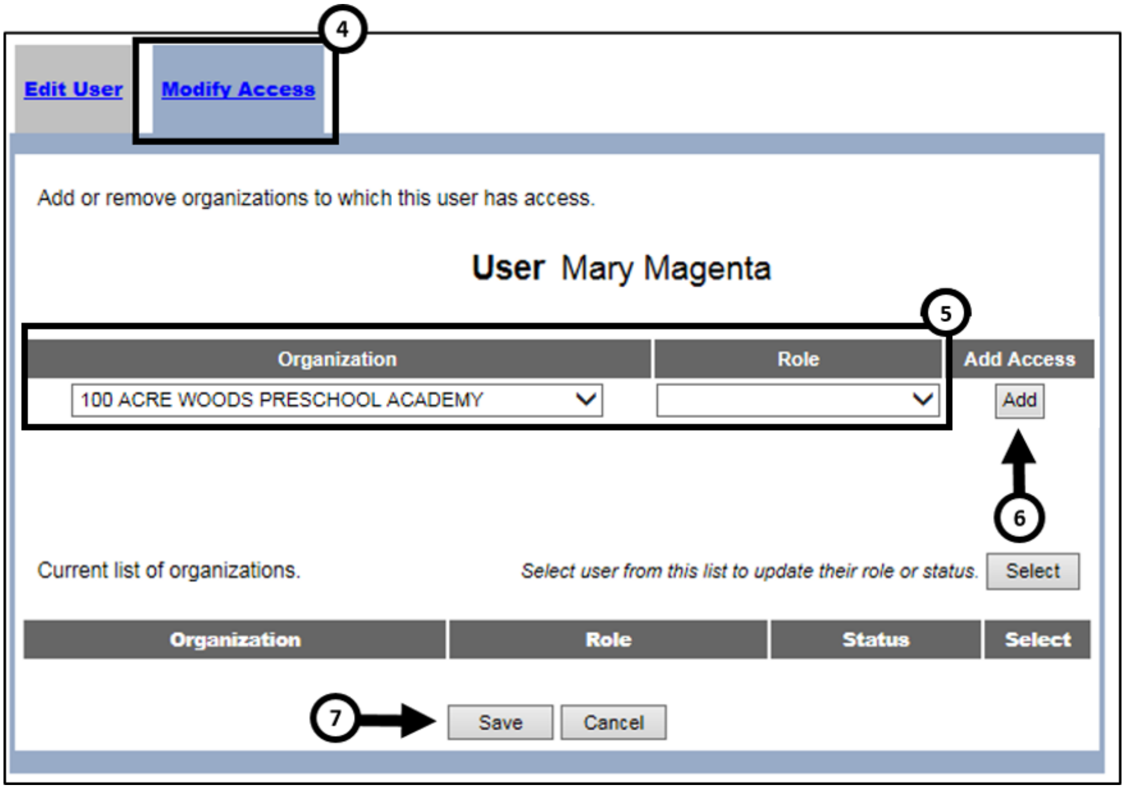


Figure 439 - Add User Steps 4-7

The bottom portion of the screen will be updated with the current list of organizations and application. Follow the same steps above if the user needs access to more than one organization, or to give existing users access to additional organizations. *See Figure 440: Add User – Access Granted.*

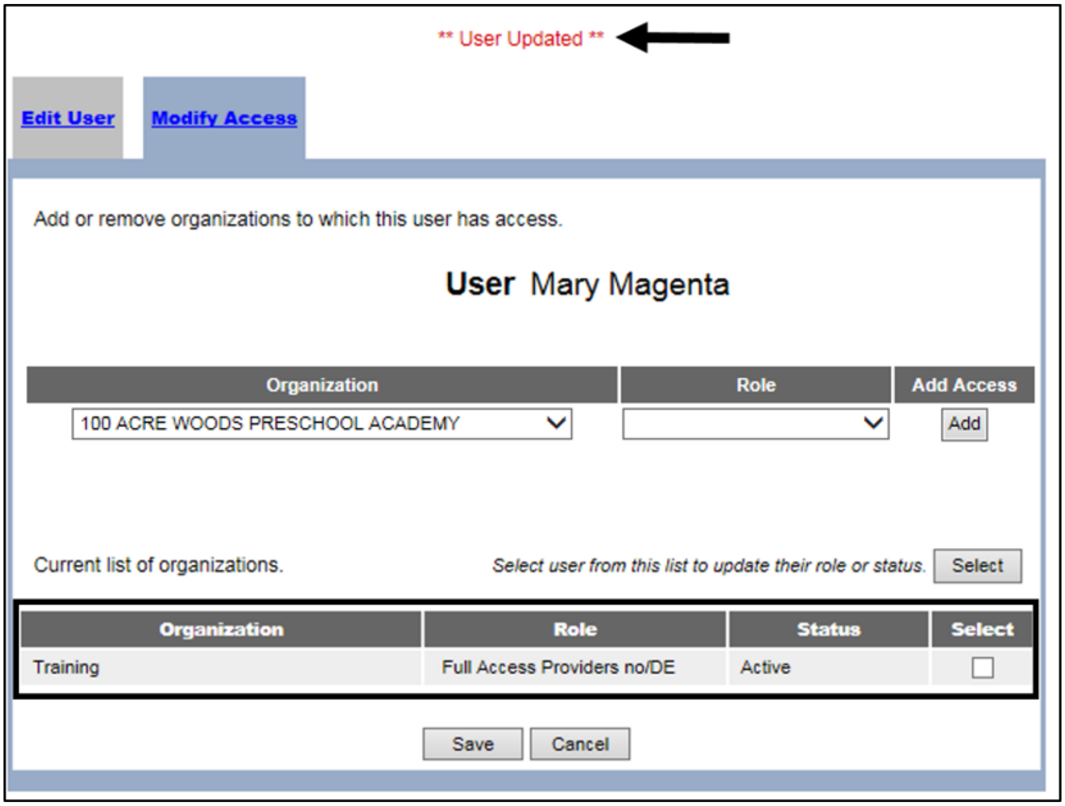


Figure 440 - Add User – Access Granted

New users will receive a “Welcome to ImmTrac2!” email with their login credentials, their Username and Org Code, and a link to the ImmTrac2 application. The organization’s POC will also be copied on the email.

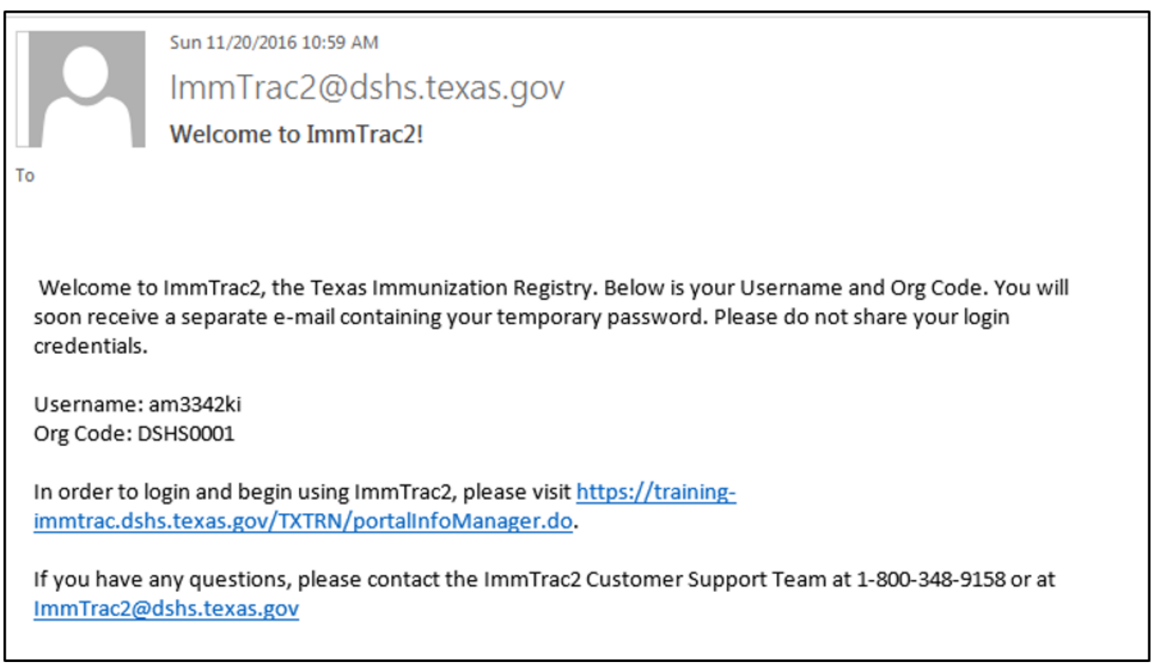
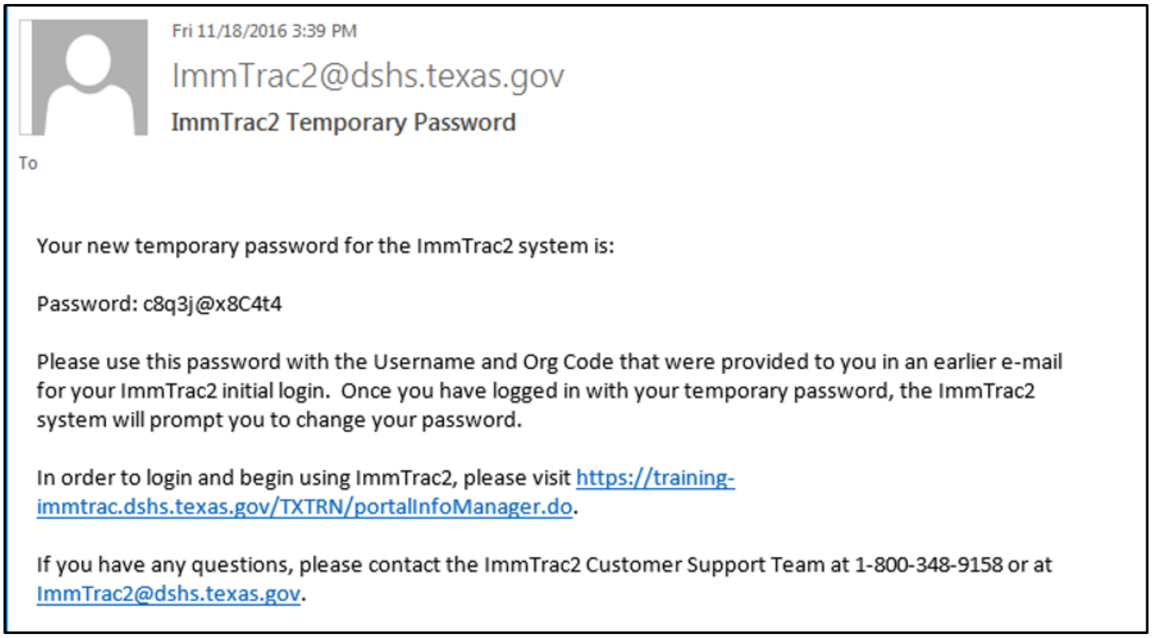


Figure 329 - Welcome to ImmTrac2 Email

New users will also receive an ImmTrac2 Temporary Password email. Once users have logged in with the temporary password, the system will prompt the user to change the password. For more details on changing a password, reference the Section 1 - Change Password section.


Fri 11/18/2016 3:39 PM

ImmTrac2@dshs.texas.gov

ImmTrac2 Temporary Password

To

Your new temporary password for the ImmTrac2 system is:

Password: c8q3j@x8C4t4

Please use this password with the Username and Org Code that were provided to you in an earlier e-mail for your ImmTrac2 initial login. Once you have logged in with your temporary password, the ImmTrac2 system will prompt you to change your password.

In order to login and begin using ImmTrac2, please visit https://training-immtrac.dshs.texas.gov/TXTRN/portalInfoManager.do.

If you have any questions, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov.

Figure 442 - ImmTrac2 Temporary Password Email

Edit User

This process is for existing users that require changes to their account information or access to additional organizations. Modified Access Sub-State users can add or delete access to an organization, change the user's role, update the user's status, or assist with a password reset for organizations to which they are assigned.

The Modified Access Sub-State user must first access the organization of the user they wish to edit using the *Switch Organization* menu panel option.

To edit user's account information and access, follow the steps below.

See Figure 443: Edit User Steps 1-4.

1. Click the **Edit User** option from the menu panel.
2. Select the search criteria as needed.
    - **Organization Account Status** – Both the Active and the Disabled boxes will be checked as a default but users can uncheck them to show just one or the other to narrow the search.

- **Username** – Enter the user unique login name to find an exact match.
- **First / Last Name** – Enter the users name to limit the search result / find an exact match.

3. Click the “Find” button to run the search.
    - Clicking the “Find” button without entering search criteria will list all the users assigned to that organization.
4. When search results display, click the username hyperlink to open the Edit User screen.

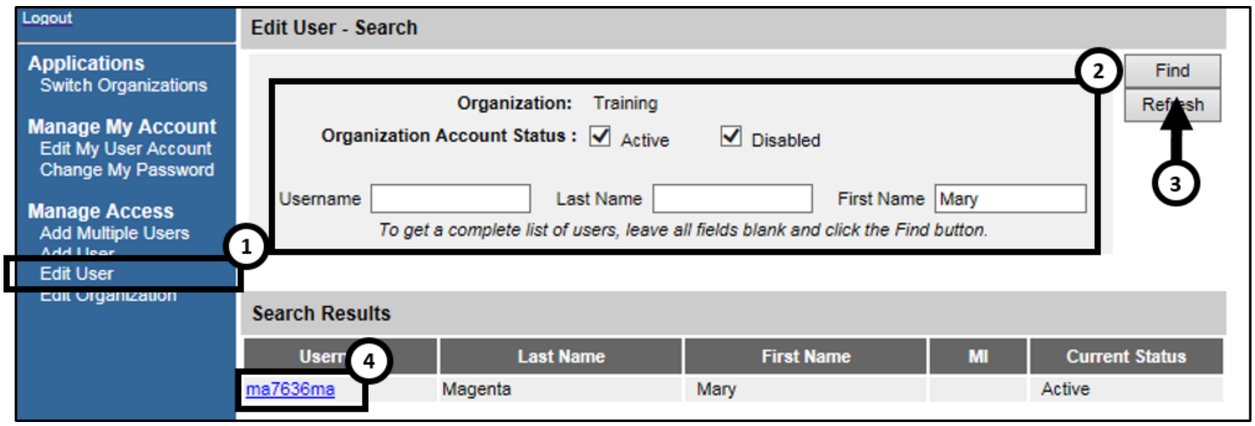


Figure 443 - Edit User Steps 1-4

See Figure 444: Edit User Steps 5-6.

5. On the **Edit User** tab, make any necessary changes to the users account info.
    - If only the user’s access needs to make edits to the, skip to step 7.
    - The username cannot be edited.
    - **Status**: As a Provider Supervisor can update a user from ‘Disabled’ to ‘Active’ only. If a user is locked out of their account their status will be disabled. The status will automatically change to Active during the Forgot Password process and should not require manual intervention. See the Section 1 - Password Reset section for additional information on resetting the user’s password.
6. Click the “Save” button. The “User Updated” message will appear at the top of the screen.

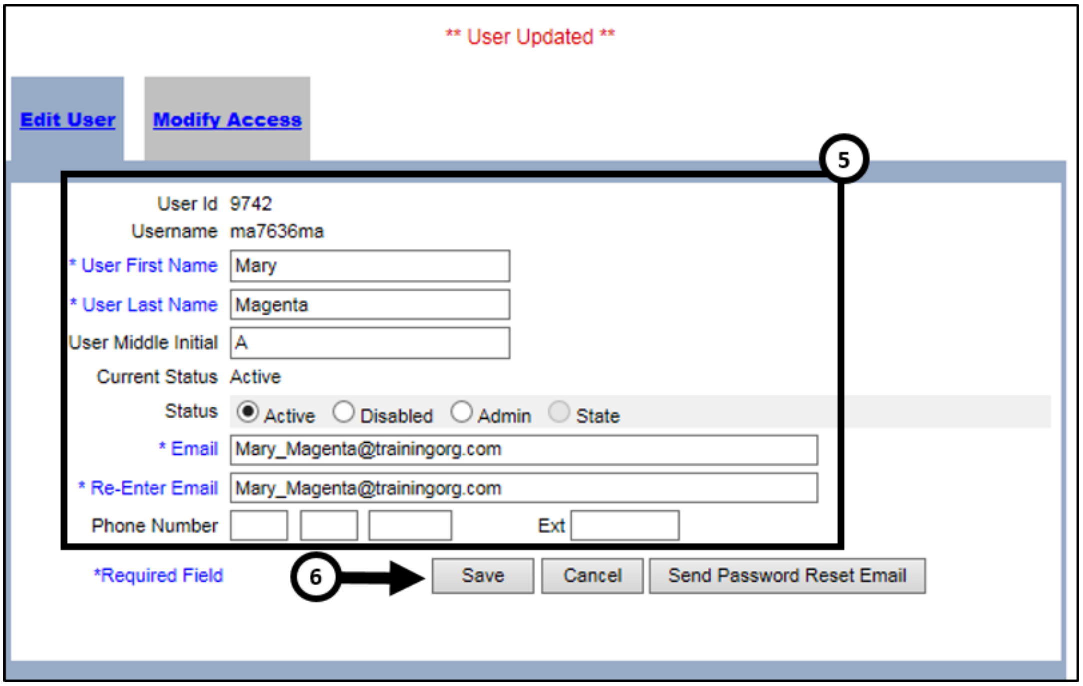


Figure 444 - Edit User Steps 5-6

Modify Access

The *Edit User* menu option is also used to modify a user's access to different organizations. The *Modify Access* screen can be used to give additional organizational access, edit a user's role, disassociated a user with an organization, or to disable a user associated with a specific organization. To give existing users access to additional organizations follow steps 4-7 under the Adding User section.

To modify a user's organizational access, follow the steps below.

See Figure 445: Modify Access Steps 1-3.

1. In the Edit User screen, click the "Modify Access" tab.
2. Select the Organization / Role to modify using the check box.
3. Click the "Select" button.

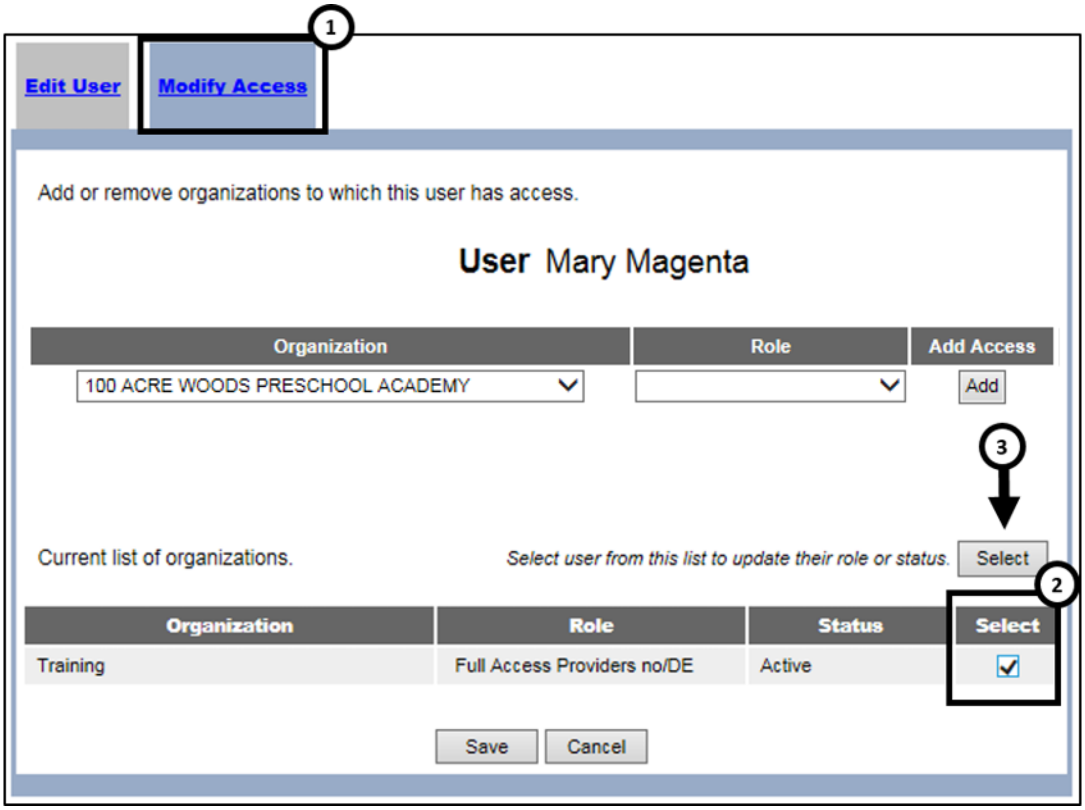


Figure 445 - Modify Access Steps 1-3

See Figure 446: Modify Access Steps 4-6.

4. Update the user Role and (or) Status as applicable. The following status options are available:
    - **Activate**: the user has access to perform task within ImmTrac2 for that specific organization.
    - **Disable**: the user no longer has access to perform task within ImmTrac2 for that specific organization. The user is still associated to the org, but cannot perform tasks.
    - **Disassociate**: this option removes a user's access to that specific organization.
5. Click the "Update" button.
6. The "Update in progress" message displays in the center of the screen, click the "Save" button to keep.

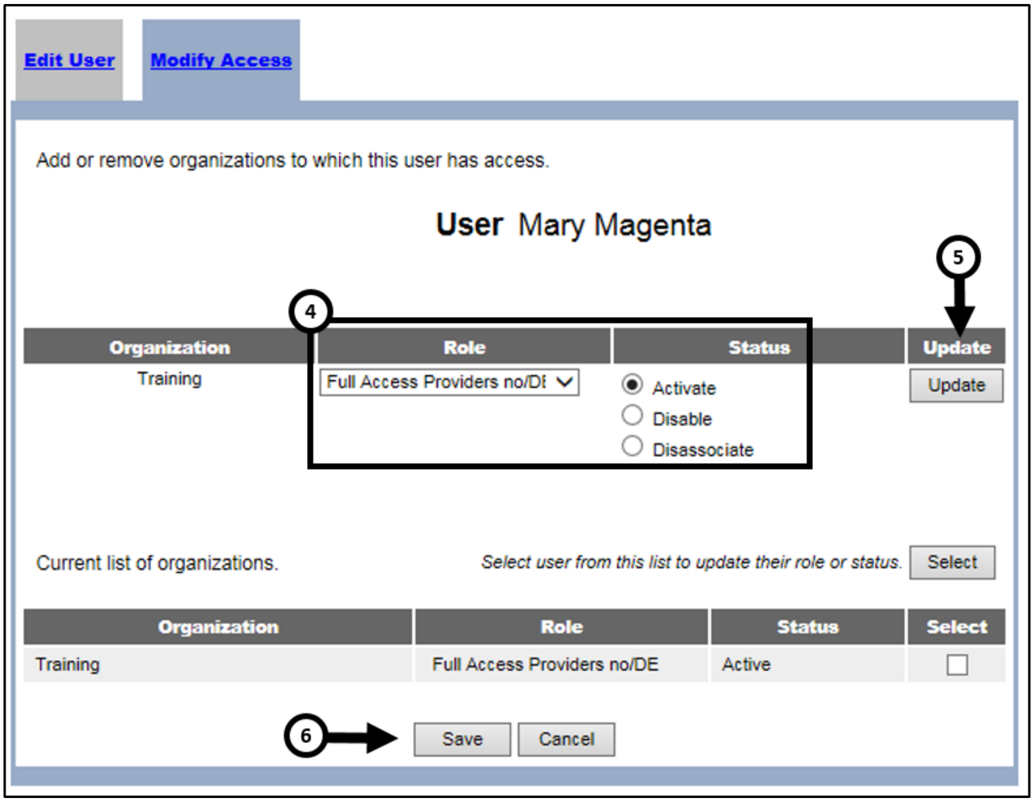


Figure 446 - Modify Access Steps 4-6

***Note**: To give existing users access to additional organizations follow steps 4-7 under the [Adding User](#) section.*

Send Password Reset Email

In some instances a user may require a password reset if they have forgotten their password or are locked out after too many log in attempts. The user can use the Forgot Password option on the log in screen at any time. If additional help is needed, the user should attempt to contact their organization's Provider Supervisor first but at any time a Modified Access Sub-State user can assist using the Send Password Reset Email option.

Clicking the "Send Password Reset Email" button will send an email to the user's email address listed in the user's account. Clicking this button will automatically change a "Disabled" account to an "Active" account. This is true for all accounts that have a Current Status of "Password", "Inactive", or "Unused". *See Figure 447: Password Reset – Inactive Status.*

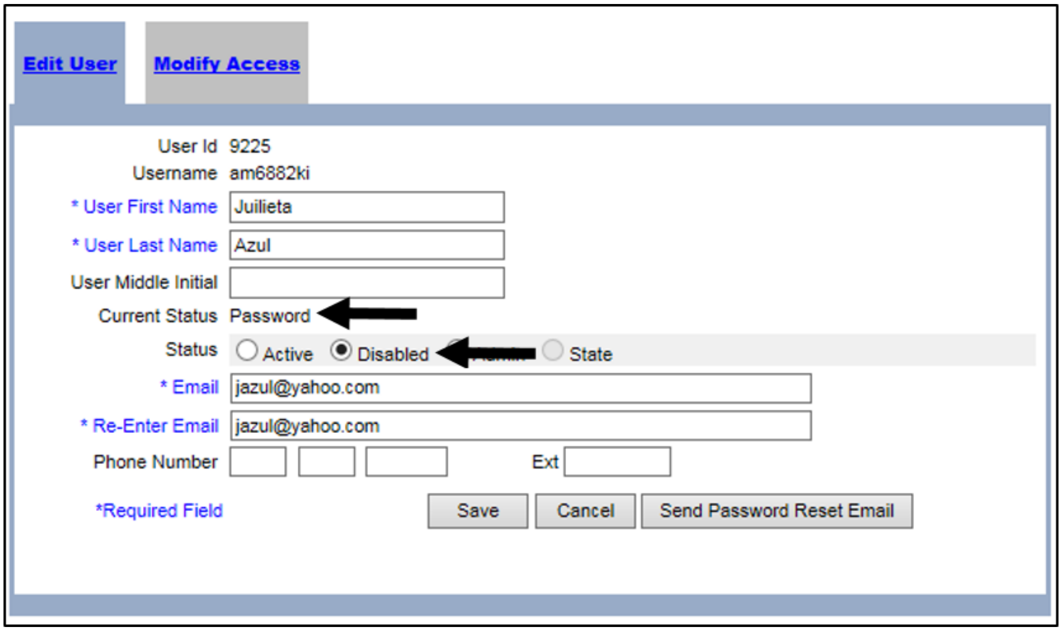


Figure 447 - Edit User – Inactive Status Example

To reset a user password, follow the steps below.

See Figure 458: Send Password Reset Email Step 1.

1. While in the Edit User screen, click the “Send Password Reset Email” button.
    - Depending on initial status, the user will receive an email from ImmTrac2 with a temporary password or a link to reset their password within seconds of clicking the button.
    - For instructions on how to log in using a password reset link, see the Forgot Password section steps 4-6. For instructions using the temporary password continue to next step.
    - Click the “Cancel” button to return to the Edit User – Search screen. The user’s status will display “Active”.

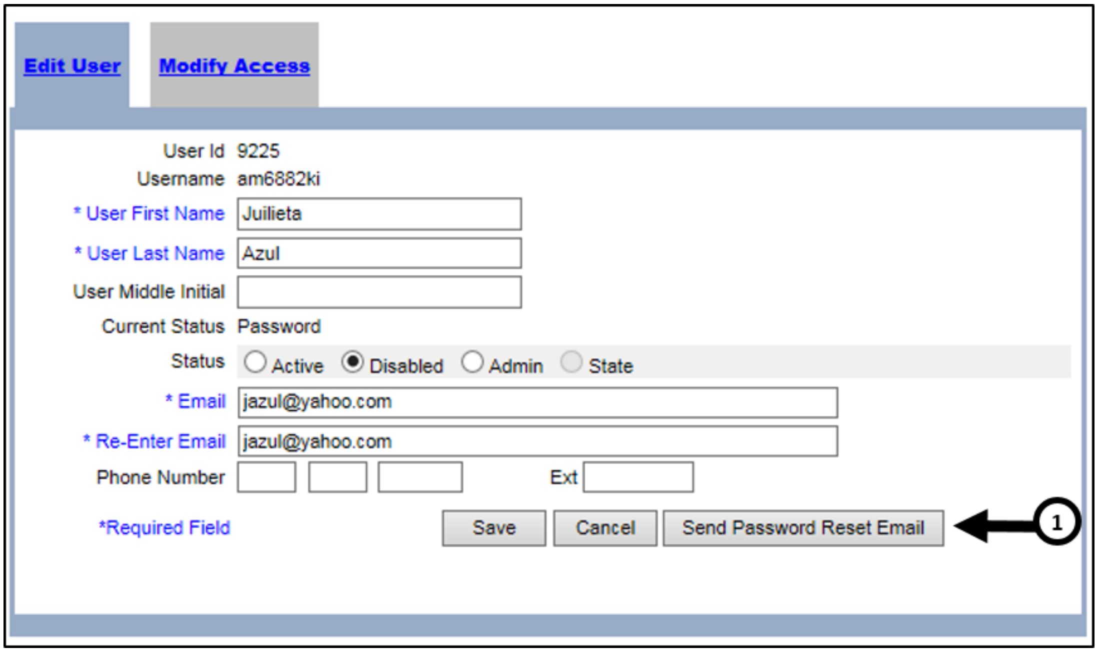


Figure 458 - Send Password Reset Email Step 1

See Figure 459: Send Password Reset Email Step 2.

2. Once the password reset email is received, copy the temporary password and log into ImmTrac2.

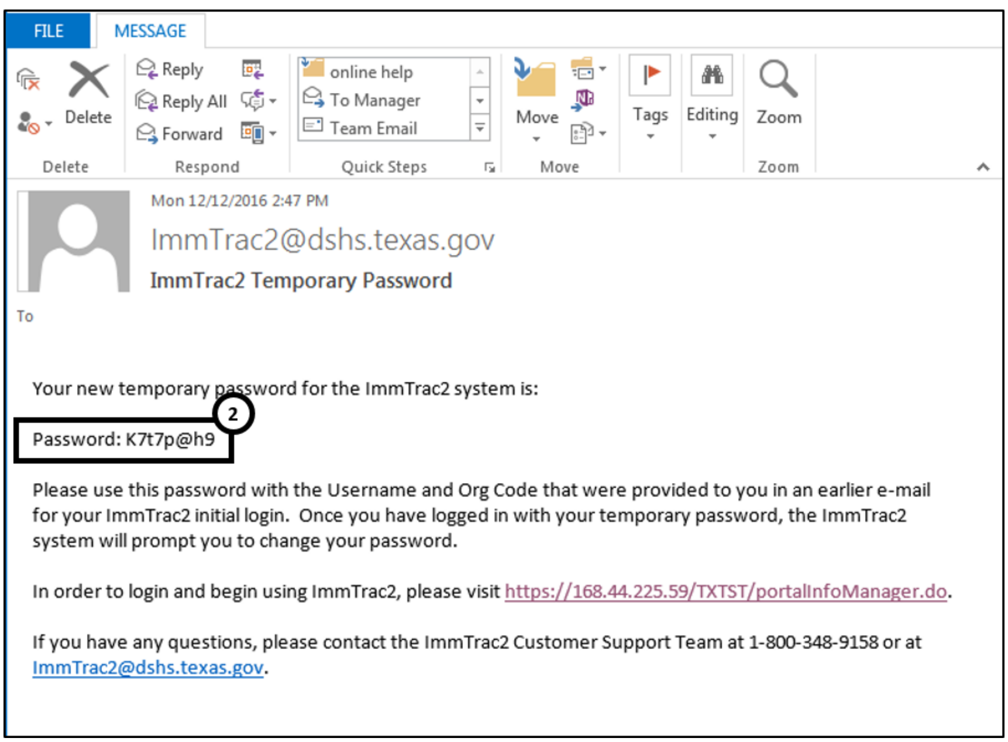


Figure 459 - Send Password Reset Email Step 2

See Figure 460: Send Password Reset Email Step 3.

3. Upon successful login using the temporary password users will receive a validation error stating your password has expired, click ok.

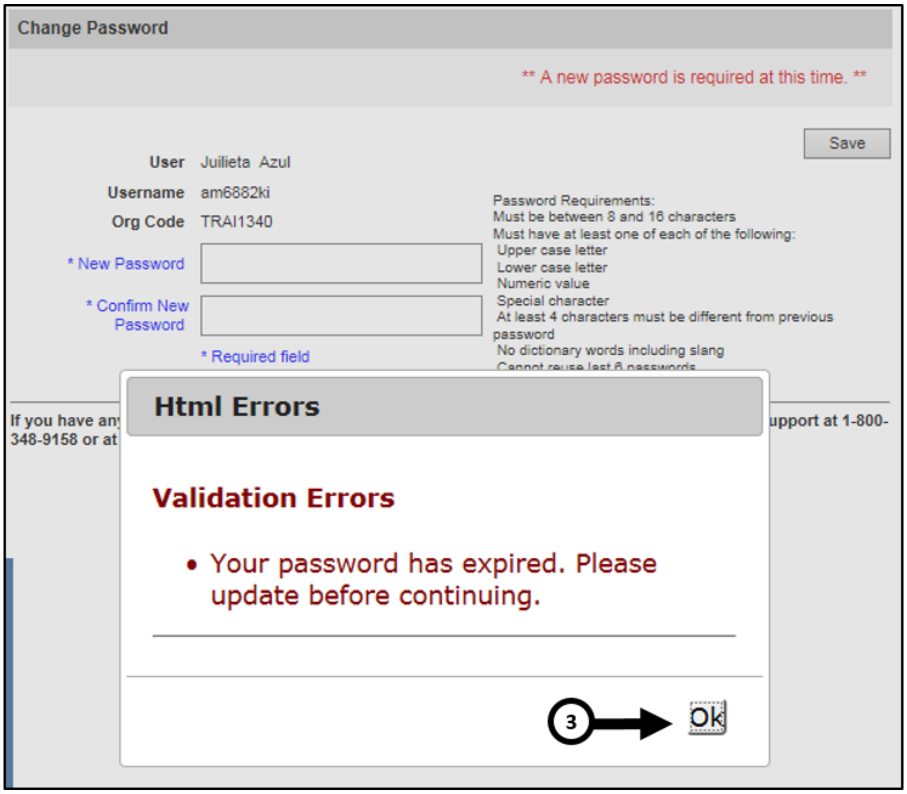


Figure 460 - Send Password Reset Email Step 3

See Figure 461: Send Password Reset Email Steps 4-5.

4. User are directly immediately to the Change Password screen. Enter a new password using the Password Requirements.
5. Click the “Save” button.

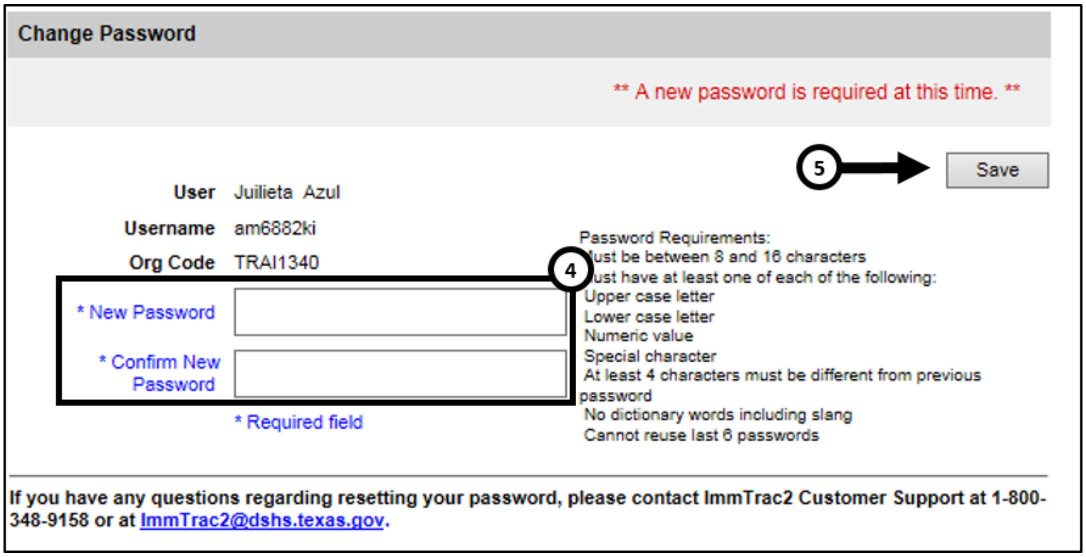


Figure 461 - Send Password Reset Email Steps 4-5

***Note**: Notice the Password Requirements are listed on the Change Password screen when creating a new password.*

List Organizations

The *List Organizations* screen provides a search tool to generate a list of organizations. Modified Access Sub-State users are able to list all organizations to which they are associated. The search results display the five components of the organization listed below.

Table 52 - Manage Access Data Columns

Field Name	Description
Name	The full name of the organization.
Org Code	The organization's code.
VFC Pin	The organization's VFC PIN, if applicable.
City	The city where the organization is located.
County	The county where the organization is located.
Open	Indicator tells whether the organization is open ('Y') or closed ('N').

To view a list of all the organizations to which the user is associated, follow the steps below.

See Figure 462: List Organizations Steps 1-3.

1. On the Portal page click the **List Organizations** option from the menu panel.
2. Using the drop-down menus, select options to filter the results.
    - **Organization Type**: type of organization (Child-Care, Hospital, Mobil Clinic, Pharmacy, etc.)
    - **Search Field**: the type of information to search by (Name, Org Code, Address, City, etc.)
    - **Search String**: the value that corresponds to the search field (i.e., ABC Clinic – if searching by Name)
3. Click the “Search” button.

***Note**: Using the filter options is optional. To display all the organizations to which the user has access, do not select any search options and click the “*Search” button*.*

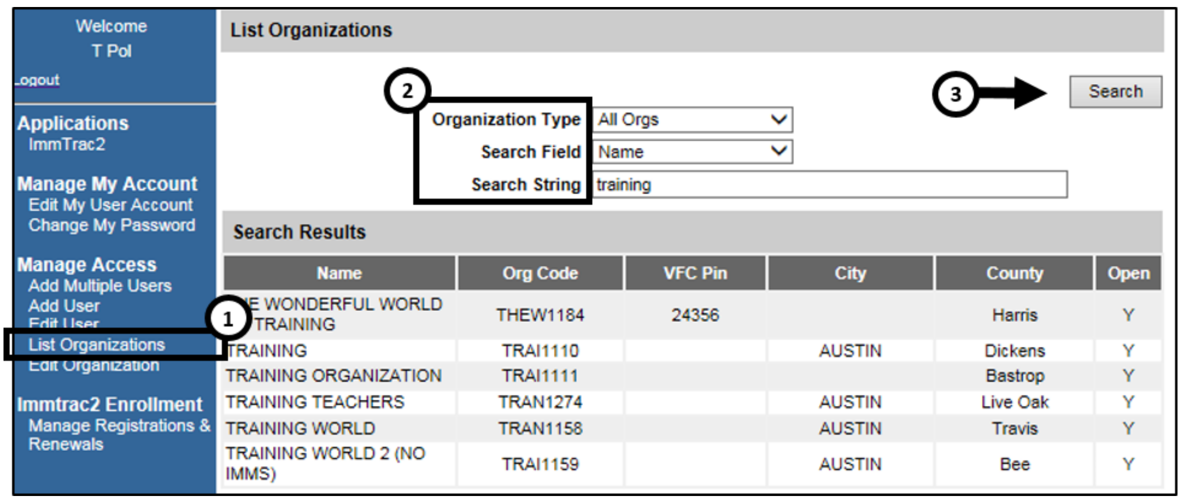


Figure 462 - List Organizations Steps 1-3

Edit Organizations

A Modified Access Sub-State user has limited access to edit organizational information. If additional edits need to be made call ImmTrac2 Customer Support and in many cases an ImmTrac2 Renewal may be required.

To edit organization information, follow the steps below.

See Figure 463: Edit Organization Steps 1-4.

1. Click the **Edit Organization** option from the menu panel.

2. Select the search criteria as needed, or skip this step altogether if access is limited to only one (or a few) organization(s).
    - Search Field: This is the type of information to search by.
    - Search String: This is the information to search for.
3. Click the “Search” button.
4. Click on the hyperlink of the organization to edit.

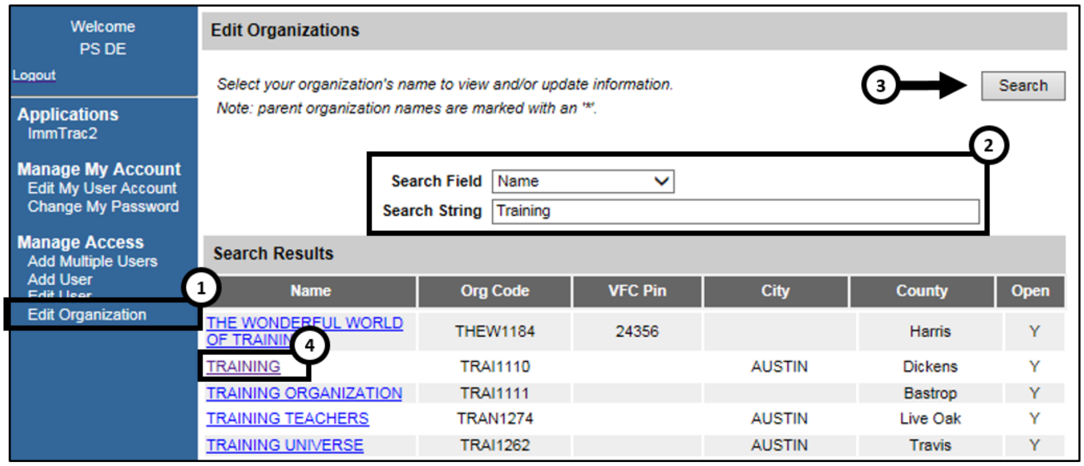


Figure 463 - Edit Organization Steps 1-4

See Figure 464: Edit Organization Steps 5-6.

5. Edit the **Organization Medicaid ID** only if the organization TVFC = NO. If the TVFC = YES, this field is not editable.
6. Select or unselect the **Vaccines Offered** by the organizations using the radio buttons or check boxes.

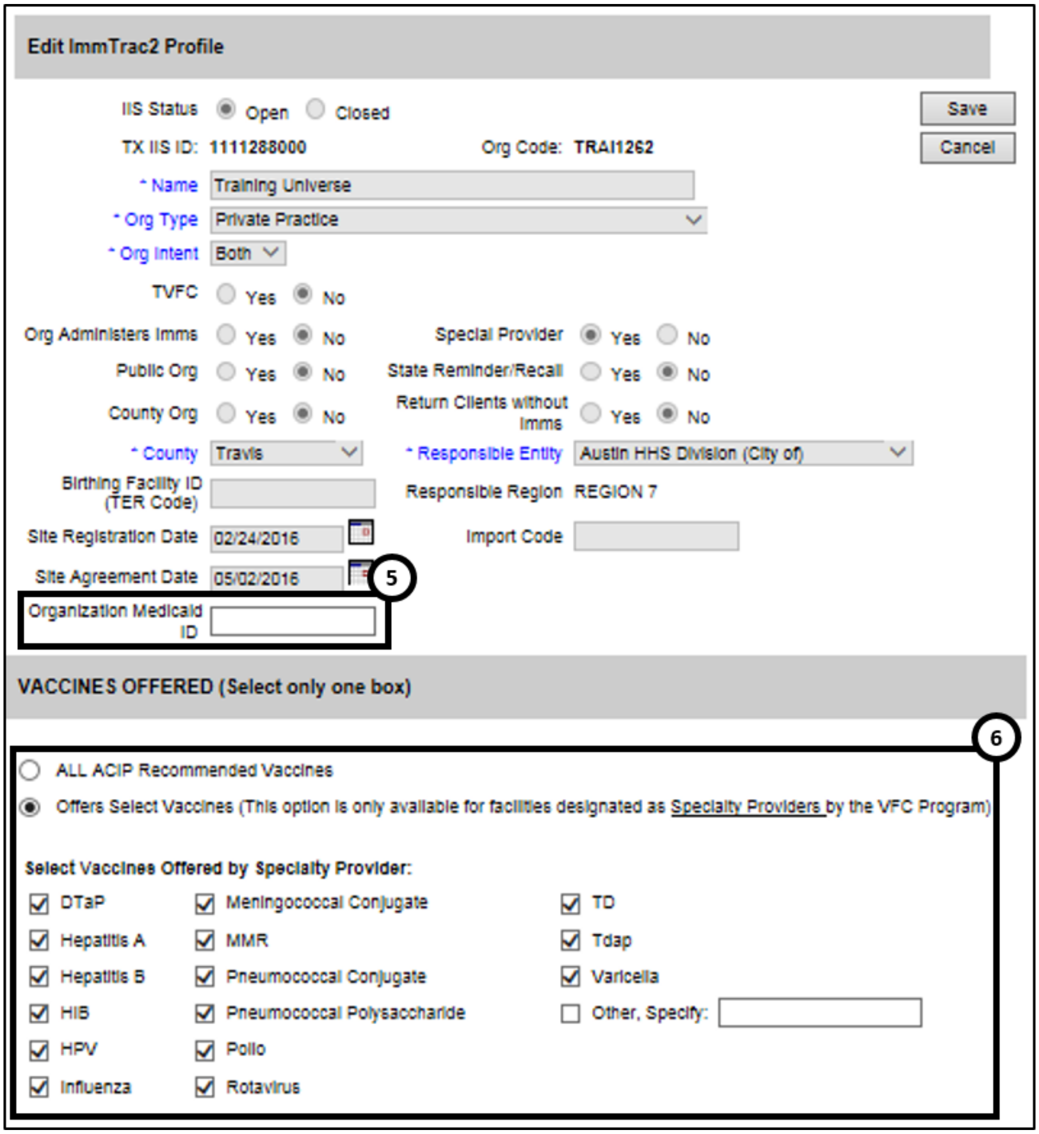


Figure 464 - Edit Organization Steps 5-6

See Figure 465: Edit Organization Step 7.

7. Edit the **Organization Contact Information** as needed.
    - The Contact Information will always be editable.
    - The Address Information will only be editable if the organization TVFC = NO.

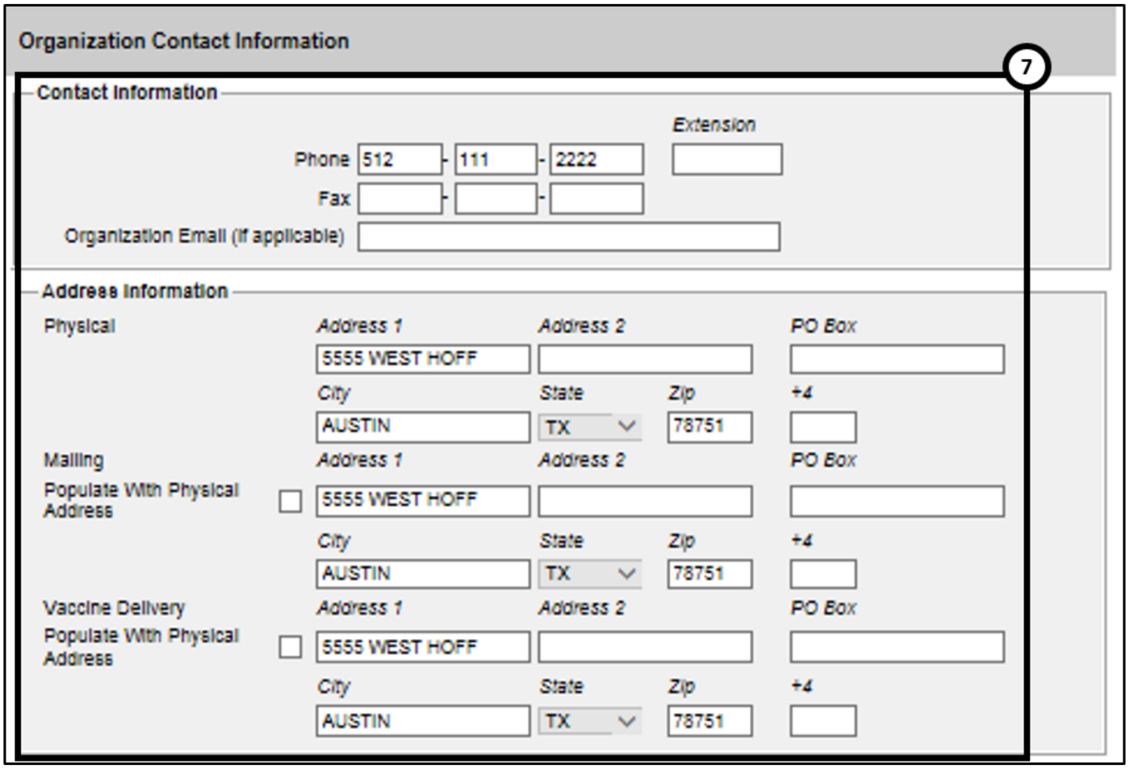


Figure 465 - Edit Organization Step 7

See Figure 466: Edit Organization Step 8.

8. Updates the **Organization's Client Demographic Information,** the age range in which the organization services, by using the check boxes and radio buttons.

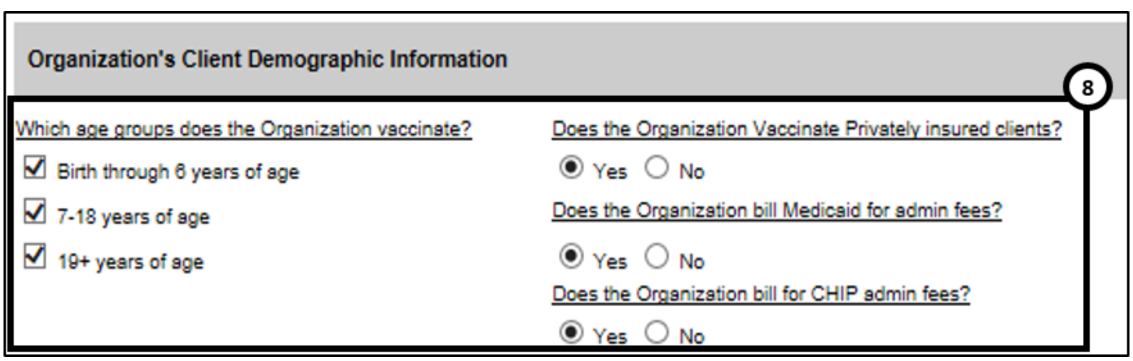


Figure 466 - Edit Organization Step 8

See Figure 467: Edit Organization Step 9.

9. **Edit Individual Contact** as needed by clicking the edit icon for the contact that needs updating. For more details reference the next section Edit Organization Contacts.

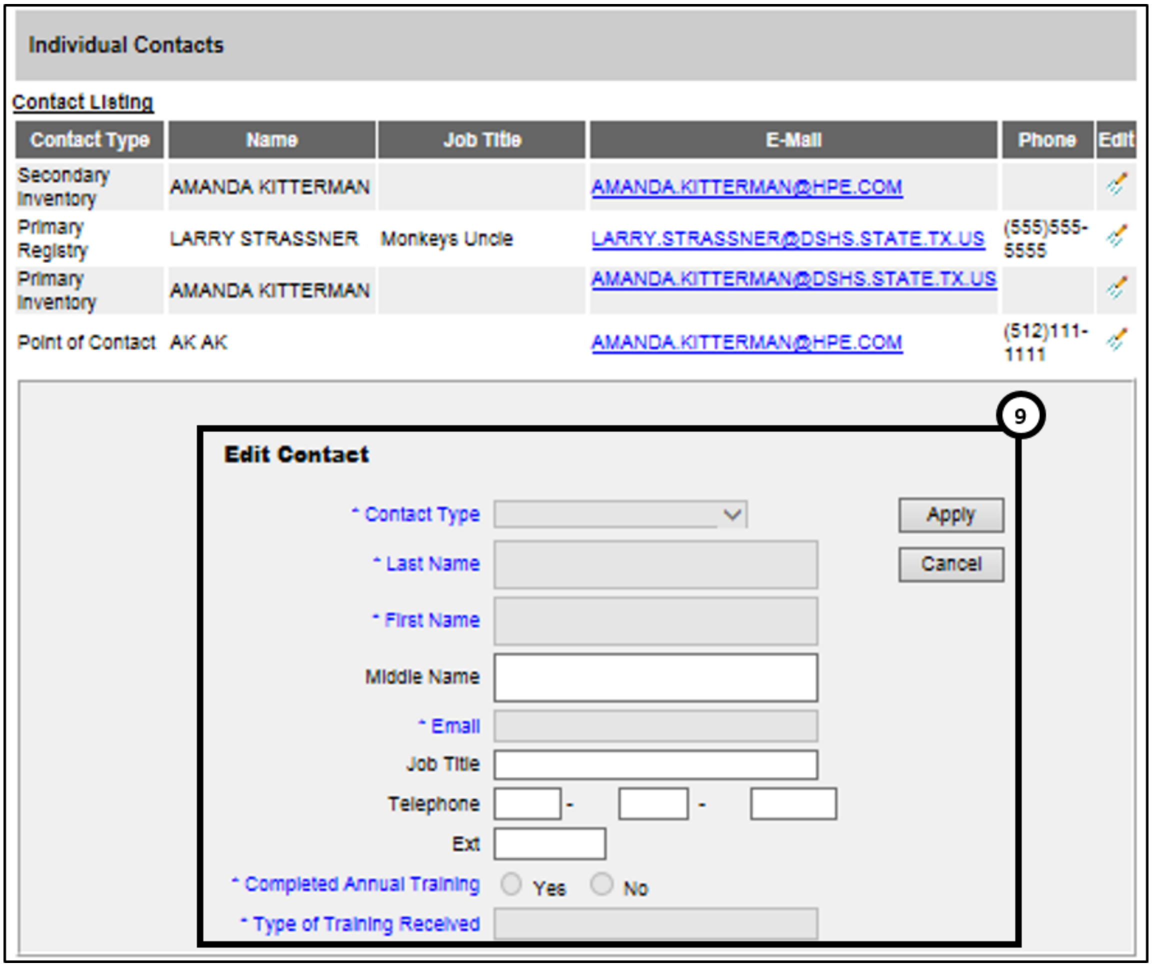


Figure 467 - Edit Organization Step 9

See Figure 468: Edit Organization Step 10.

10. Add **Comments** as needed and click the “Apply” button. Comments will only be seen by the used who added them and cannot be modified or deleted. Scroll to the top of the page and click the “Save” button.

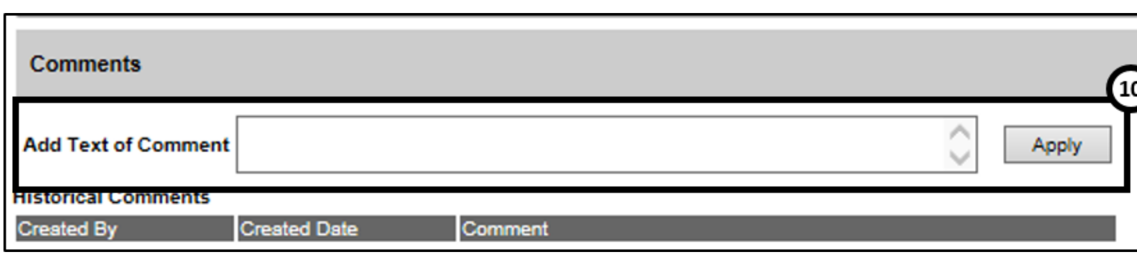


Figure 468 - Edit Organization Step 10

Edit Organization Contacts

To edit organization contacts, follow the steps below.

See Figure 469: Edit Organization Contacts Steps 1-3.

1. Click the **Edit**  icon for the contact that needs updating.
2. The Edit Contact section will populate with the contact's information. Make changed as needed.
   - Users can only update the Middle Name, Job Title, Telephone / Ext. information.
3. Click the "Apply" button.
4. Click the "Save" button at the top of the screen (not shown in figure below).

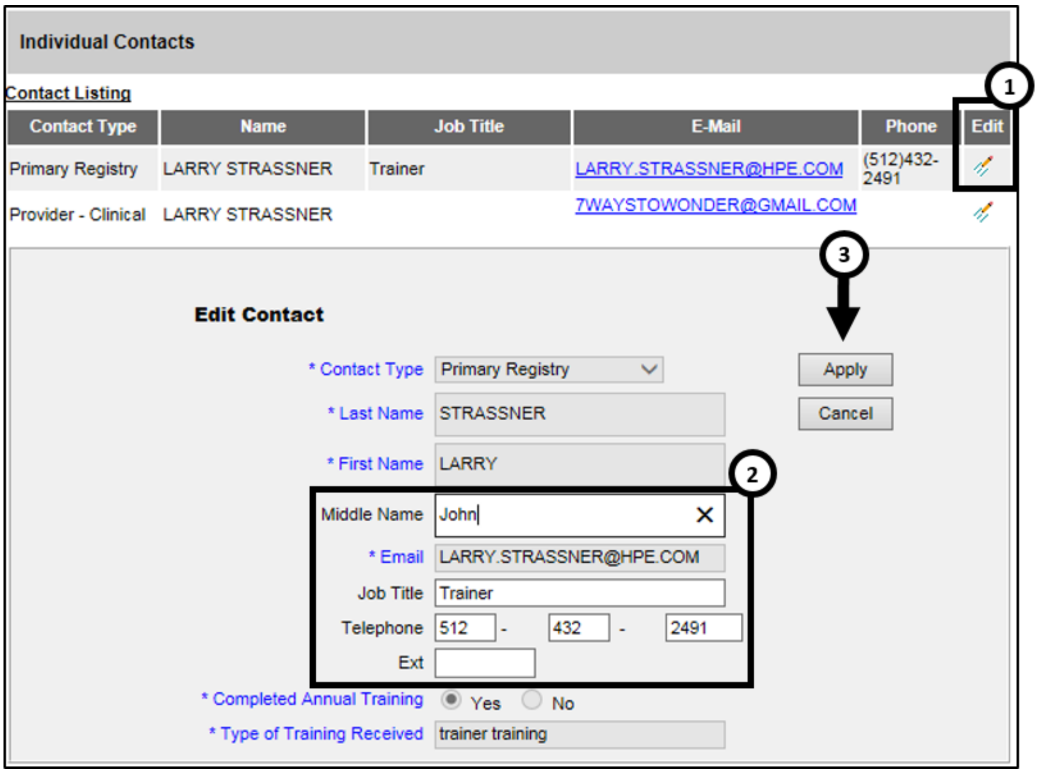


Figure 469 - Edit Organization Steps 1-3

Chapter 24: ImmTrac2 Enrollment

Modified Access Sub State users have the ability to manage registration and renewal. More specifically, these users can approve or deny TVFC and (or) ASN program enrollment for provider organizations within their responsible entity jurisdiction.

Manage Registrations & Renewals

As part of the registration / renewal process, each registration and renewal that is submitted must be reviewed and either approved or denied by the **Organization's Responsible Entity <u>and</u> a State representative**.

Responsible Entities with a Modified Access Sub State user role will have the ability to review and approve an Organization's request to enroll or reenroll in TVFC and ASN programs using the Manage Registrations and Renewal screen. Modified Access Sub State users will only have access to organizations within their jurisdiction.

Access to ImmTrac2 and overall enrollment / renewal will be given to DSHS State Users with a Full Access State user role.

To approve or deny TVFC and ASN programs, follow the steps below.

See Figure 470: Manage Registrations & Renewals Steps 1-4.

1. Click on the Manage Registrations & Renewals link under the ImmTrac2 Enrollment menu group. User is navigated to the Manage Registration / Renewal screen.
2. Use the Filter Option to narrow the search for a specific organization, or by Type, Status, and / or Submit Date. *See Table 53: Manage Registrations Filter Option Descriptions for details.*
3. Click the "Search" button.
4. To view a Registration / Renewal screen for a specific Organization, click on the Form ID hyperlink under the Form ID column.

Table 53 – Manage Registrations Filter Option Descriptions

Field	***Description***
Form ID	Locate a specific Registration or Renewal by entering the associated Form ID.
Type	View by Registration, Renewal, or All (both Registrations and Renewals).

Field	Description
Program Status	View by Status – Pending, Approved, Denied, or N/A This option will return search results if one or more Program status (ImmTrac2, TVFC, or ASN) is Pending.
Enrollment Status	View by Enrollment Status – Incomplete, Pending, or Complete.
Organization Name	Locate a specific Registration or Renewal by entering the Organization's name.
TVFC PIN	Located a specific Registration or Renewal by entering the Organization's TVFC PIN.
Submit Date	View Registrations and / or Renewals submitted within a specific date range.

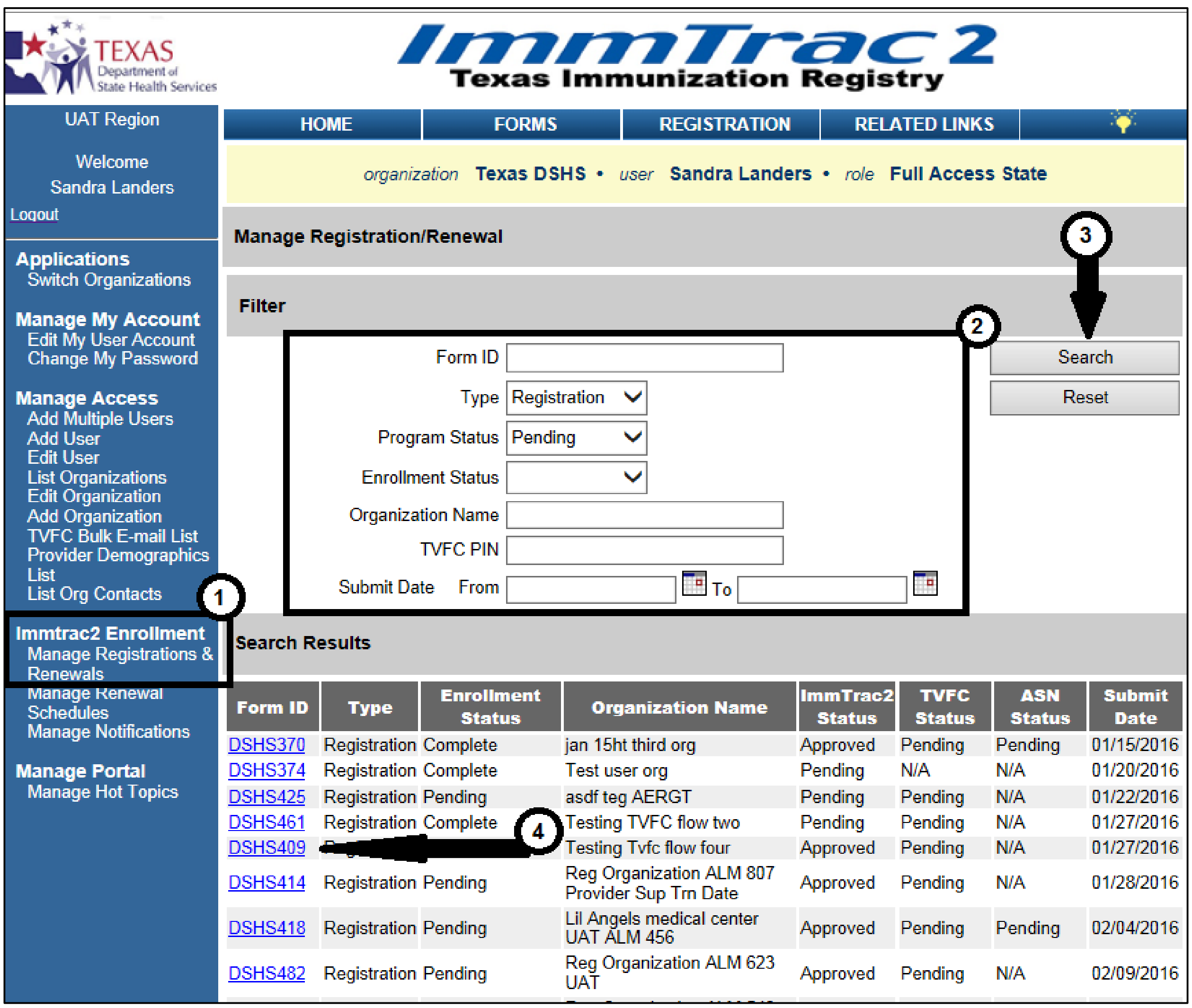


Figure 470 - Manage Registrations & Renewals Steps 1-4

Registration / Renewal Checklist

During the Review and Approval process a list of items to check during the approval process displays. Each item has a checkbox that allows the user to see what portions of the Registration / Renewal have been reviewed or verified. These items are not required as part of the approval process to complete the Registration / Renewal but are to be used to ensure that all required information is validated and obtained prior to enrollment approval. Each box checked will be saved and viewable by another authorized user once checked and saved. *See Figure 471: Registrations & Renewals Checklist.*

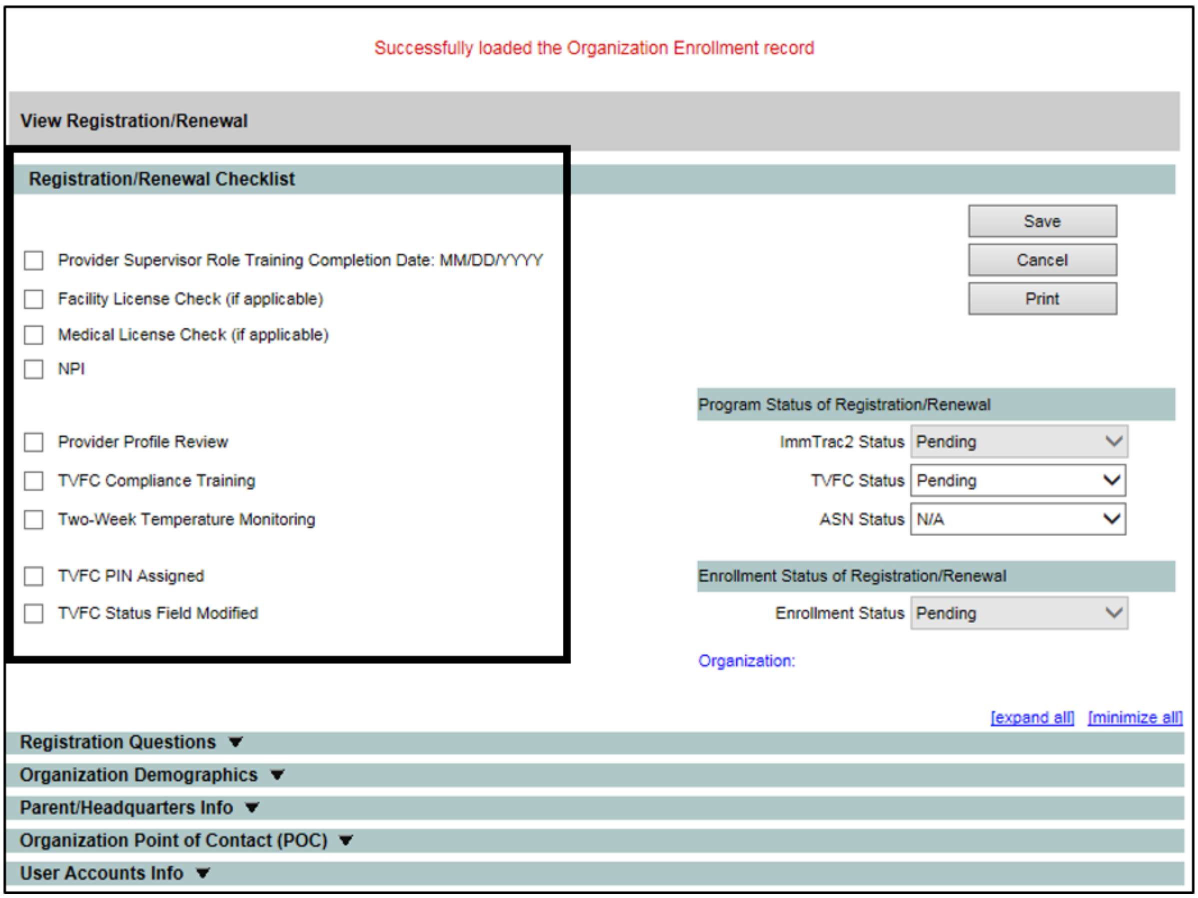


Figure 471 - Registrations & Renewals Checklist

Program Status of Registration / Renewal

The progress and acceptance regarding ImmTrac2 Organization access, TVFC, and if applicable, ASN program enrollment is updated using Program Status dropdown lists. Each Program status can be updated from Pending to Approved or Denied depending on the review of the Registration or Renewal information submitted by the Provider.

If the Provider has not elected to enroll in the TVFC and / or ASN Programs, the statuses display as N/A. Statuses in N/A cannot be updated unless the original Registration Questions are changed on the Registration / Renewal form. As the default, when a Registration or Renewal form is submitted for approval the Program statuses are set to Pending or N/A based on registration questions answered under the Registration Questions accordion tab. *See Figure 472: Manage Registrations & Renewals Program Status.*

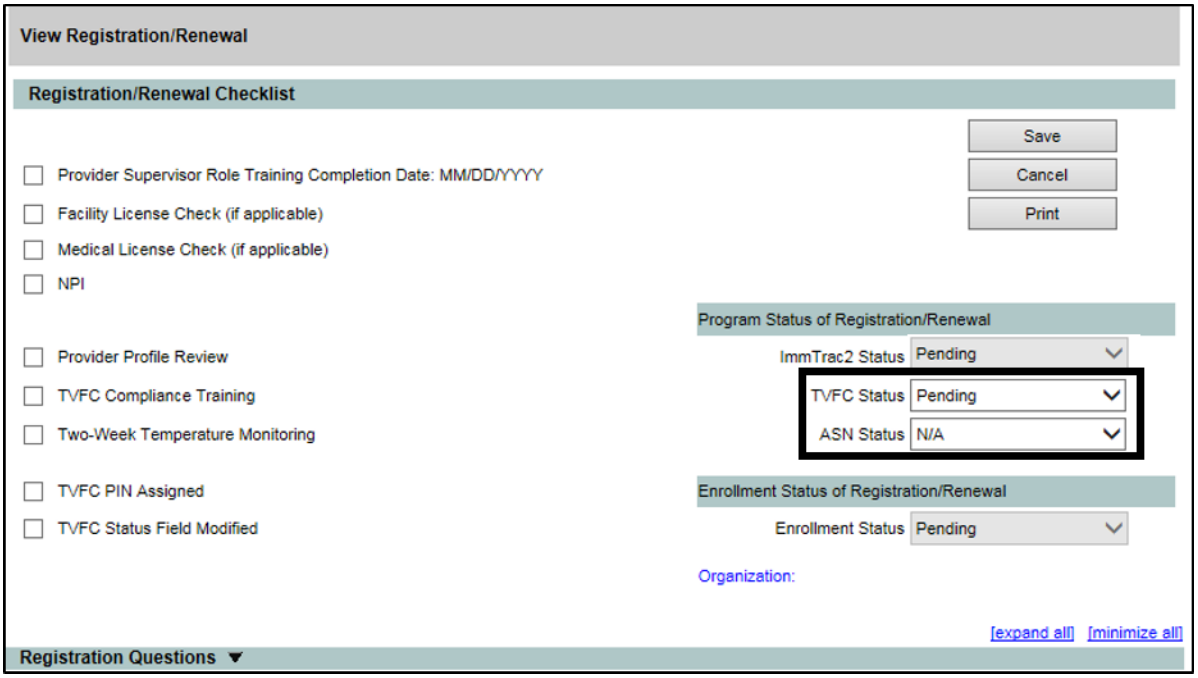


Figure 472 - Manage Registrations & Renewals Program Status

- **TVFC / ASN Status** (Modified Access Sub State and Full Access State user): The initial status will be pending (if the submitting organization elected to participate in these programs; otherwise they will be N/A). Select the appropriate status option from the dropdown list.
  - If approved, the Point of Contact identified in the Registration / Renewal form will receive a welcome to the TVFC and / or ASN program and the Organization profile will be updated.
  - If denied, the Point of Contact identified in the Registration / Renewal form will receive an email notifying them that the request for enrollment into TVFC and / or ASN has been denied.

Enrollment Status of Registration / Renewal

Initially, when the Registration or Renewal form is submitted for approval, the Enrollment status displays as Pending. The status can only be updated to Complete or Incomplete by a Full Access State user. Setting the status to Complete and clicking the “Save” button will generate a “Welcome to ImmTrac2” email to the Point of Contact and the Primary and Secondary Inventory contacts. The Site Agreement Date will not update until the Enrollment Status has been set to Complete. *See Figure 473: Manage Registrations & Renewals Enrollment Status.*

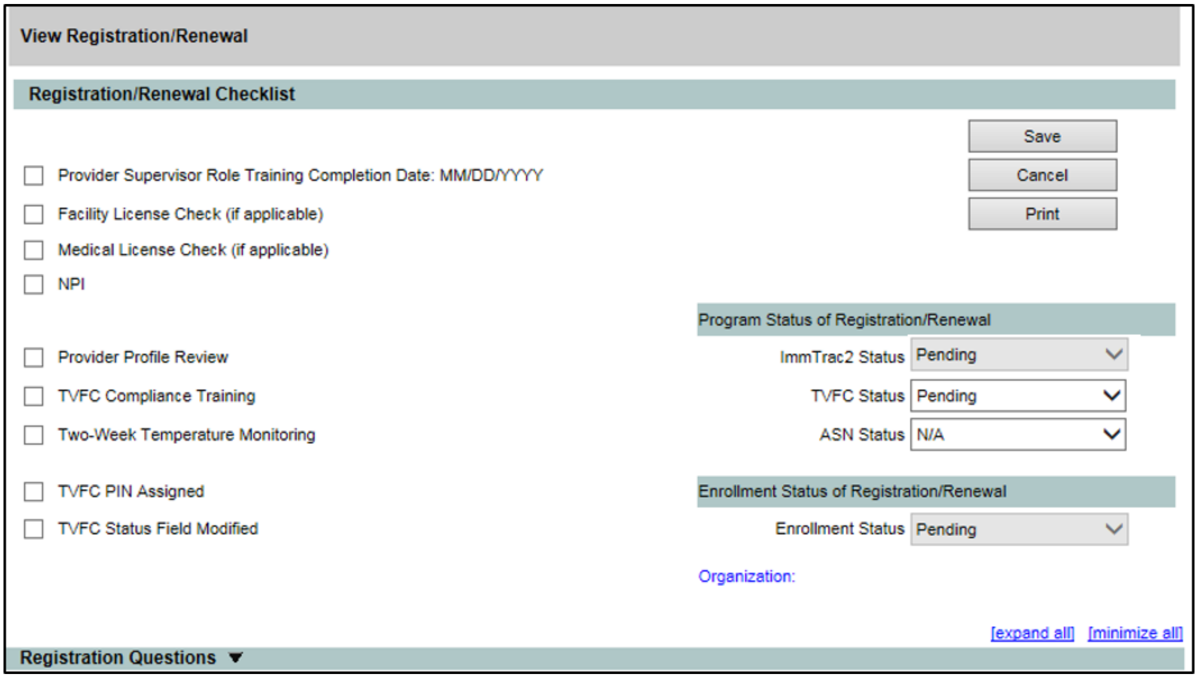


Figure 473 - Manage Registrations & Renewals Enrollment Status

Incomplete Status of Registration / Renewal

When a Registration form for a Provider is started and saved but not submitted for approval, the Enrollment Status displays as Incomplete. Registration forms started and currently in an ‘Incomplete’ status are not accessible from the Manage Registration and Renewal screen.

Random Access Code

When a registration is submitted using the ImmTrac2 landing page, not signed into ImmTrac2, users will received an email with the Random Access Code (RAC) after an incomplete registration is saved. These users will need the RAC to re-access a saved registration that has not yet been submitted for approval.

If a RAC needs to be resent, set the Enrollment Status filter to “Incomplete” to access the “Resend Access Code Email” button. When the RAC is resent, an email is sent to the Provider’s Point of Contact, or if not supplied, the email will be sent to the Organization’s Email. If neither email address has been entered, then the email will be sent to the email address originally entered to access the Registration form.

Registration and Renewal forms started by users who have access to the ImmTrac2 system but not yet submitted for approval will not display. These incomplete forms can be accessed by the user when clicking the “Access saved / in progress Registration” or Renewal link under the registration / renewal tab.

To resend a Random Access Code in an email follow the steps below.

See Figure 474: Resend Random Access Code Steps 1-3.

1. Set Enrollment Status filter to ‘Incomplete’.
    - **Note:** search results can be narrowed by using additional search filters.
2. Click the “Search” button.
3. Click the corresponding “Resend Access Code Email” button. Once the button is clicked the screen will refresh and only display the filter options.

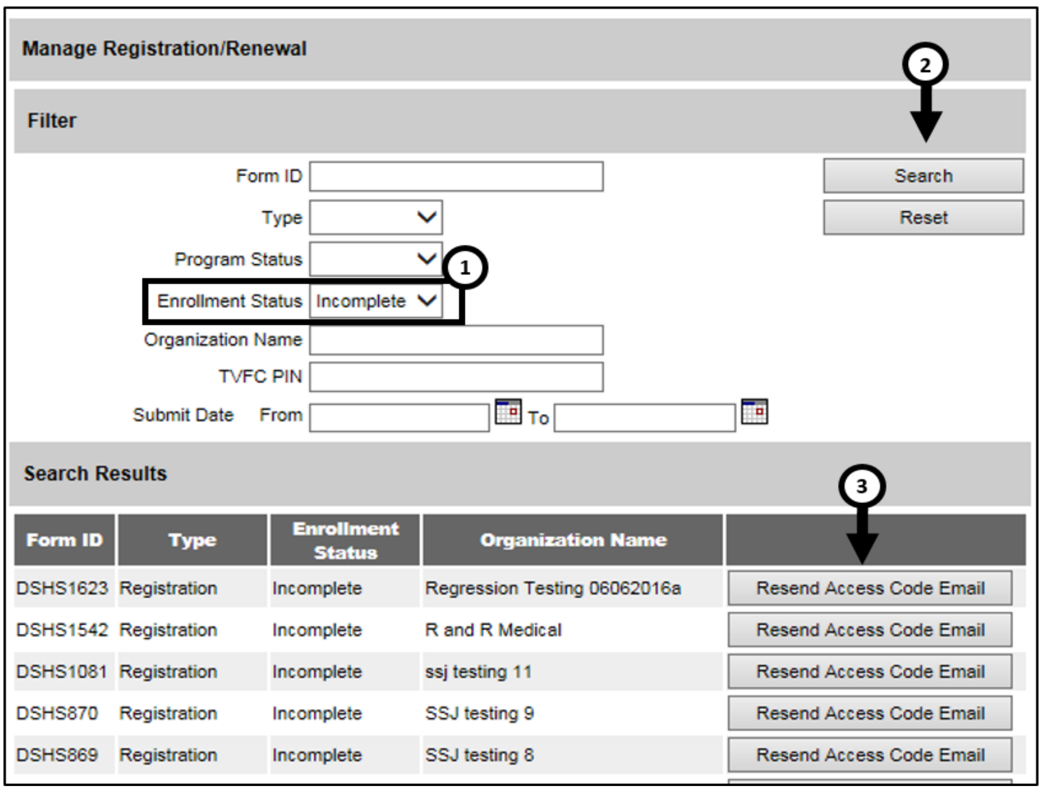


Figure 474 - Resend Random Access Code Steps 1-3

Update Program & Enrollment Statuses

Program and Enrollment status can only be updated by authorized users. The ImmTrac2 Program Status and Enrollment Status can only be updated by those assigned with a Full Access State user role. The TVFC and ASN Program statuses can be modified by either a Full Access State or Modified Access Sub-State user role. *See Table 54: Program & Enrollment Status* below to determine which statuses can be updated by user role.

Table 54 - Program & Enrollment Status

Status Category	***Status***	***Updated by User Role***
ImmTrac2	Pending, Approved, or Denied	Full Access State
TVFC	Pending, Approved, Denied, or N/A	Full Access State **OR** Modified Access Sub-State
ASN	Pending, Approved, Denied, or N/A	Full Access State **OR** Modified Access Sub-State
Enrollment Status	Incomplete	None
Enrollment Status	Incomplete, Pending, or Complete	Full Access State

To update the Program or Enrollment status, search and open an organization's registration / renewal by clicking on the Form ID hyperlink on the Manage Registration / Renewal screen. See the Manage Registration & Renewal section for more details. Once on the View Registration / Renewal screen, use the drop down arrows under the Program Statue and Enrollment Status to make changes to the statuses.

See Figure 475: Update Enrollment Statuses.

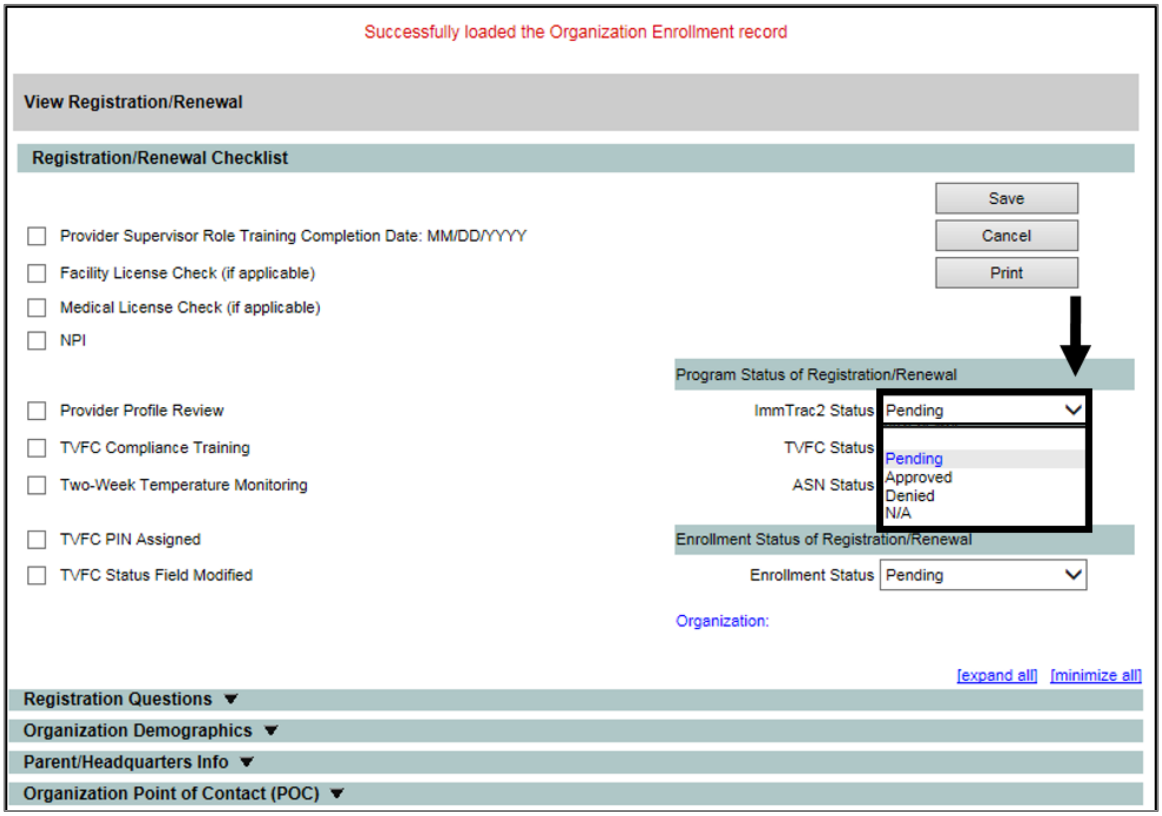


Figure 475 - Update Enrollment Statuses

- **ImmTrac2 Status** (Full Access State users only): The initial status will be pending. Select the appropriate status option from the dropdown list.
  - If approved, an ImmTrac2 Organization profile is created.
  - If denied, the Point of Contact identified in the Registration / Renewal form will receive an email notifying them that the ImmTrac2 request has been denied.
- **TVFC / ASN Status** (Modified Access Sub State and Full Access State user): The initial status will be pending. Select the appropriate status option from the dropdown list.
  - If approved, the Point of Contact identified in the Registration / Renewal form will receive a welcome to the TVFC and / or ASN program and the Organization profile will be updated.
  - If denied, the Point of Contact identified in the Registration / Renewal form will receive an email notifying them that the request for enrollment into TVFC and / or ASN has been denied.
- **Enrollment Status** (Full Access State users only): The initial status will be pending. In order to complete the Registration/Renewal

approval process the Enrollment Status must be changed from Pending to the appropriate status.

- If changed to Complete, all reviews and approvals for the Registration / Renewal have been approved or denied and no more updated can be made to the form.
- If status is set to Incomplete, changes can still be made to the form and the organization profile will remain unchanged.

During the review and approval process, each accordion tab can be expanded to view all associated information entered.

Chapter 25: Soft Access

Hard access is used to describe the normal log in procedure, which allows a person to log into an organization and access the menu items / menu groups as defined by their assigned user role.

Soft access is used to describe how a Modified Access Sub-State user and a Full Access State user can switch between the state role and lower level roles after a hard login, in order to view ImmTrac2 from the organization's perspective when assisting other users.

Switching between user roles is managed in the portal view. When in the application view, click the "Manage Access / Account" tab in the menu bar in navigate to the portal view.

To switch between users roles using Soft Access follow the steps below.

See Figure 476: Soft Access Steps 1-5.

1. Click the Switch Organization menu option.
2. Select the "Role" you want to soft access using the drop down arrow.
3. Select and/or enter the search criteria.
4. Click the "Search" button.
5. From the search results, click the "ImmTrac2" button or the "Manage Access" button.
   - Select "ImmTrac2" to navigate to the application view.
   - Select "Manage Access" to navigate to the portal view.

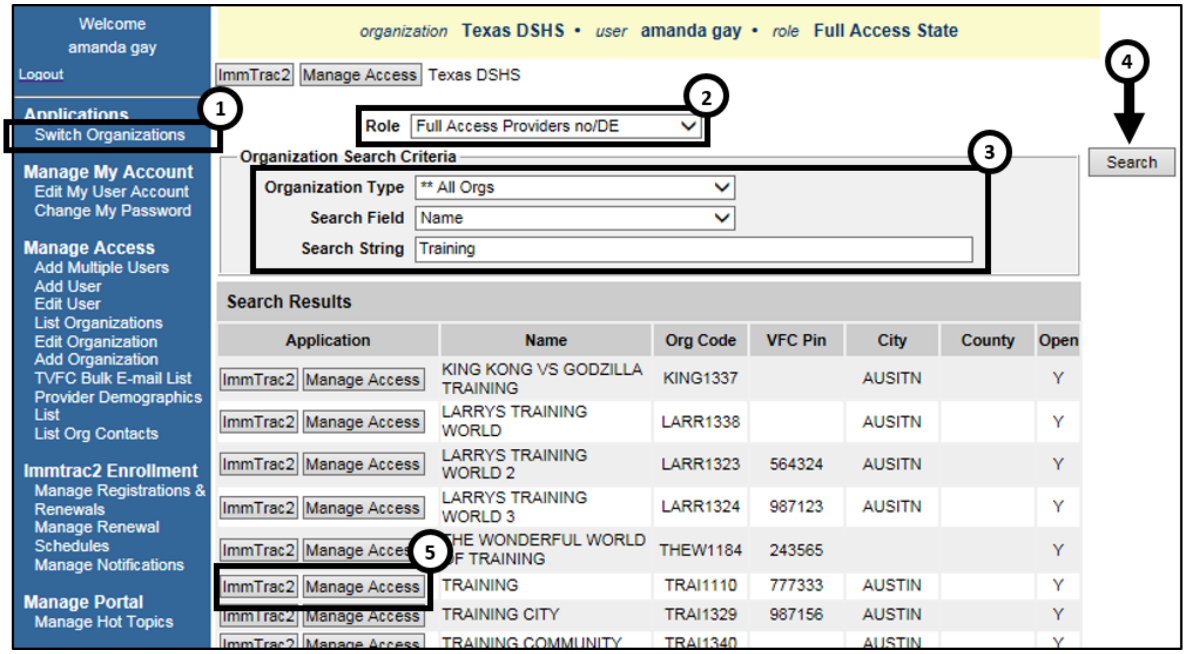


Figure 476 - Soft Access Steps 1-5

After selecting the “ImmTrac2” button users are redirected to the ImmTrac2 application registry of the selected organization at the lower level user role. In this case, the user is redirected to the Application home page as a Full Access Provider User in the “Training” organization. Notice the organization and role information has changed to the new org and lower level user role. *See Figure 477: Soft Access ImmTrac2 Example.*

To navigate to the portal view of the Training organization as the lower level role, click the “Manage Access/Account” tab in the menu bar.

Figure 477 - Soft Access ImmTrac2 Example

After selecting the “Manage Access” button when soft accessing, user are redirected to the ImmTrac2 portal screen of the selected organization at the lower level user role. In this example, the user is redirected to the Portal page as a Full Access Provider User in the “Training” organization. Notice the organization and role information has changed to the new org and lower level user role. *See Figure 478: Soft Access Manage Access Example.*

This is also the same screen users will see after clicking the “Manage Access / Account” tab in the menu bar of the application screen. Select the appropriate button to return to the desired screen of the original user role and organization.

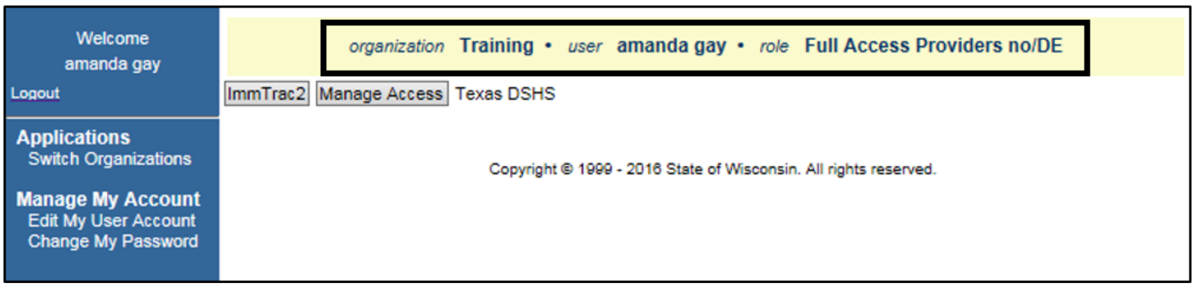


Figure 478 - Soft Access Manage Access Example

Appendices

Appendix A

Validation of Client Entry Data

ImmTrac2 validates the information you enter on the client screen when you attempt to save the entries. If you have entered data that ImmTrac2 considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Table 55 - Appendix A: Validation of Client Entry Data Fields

Field Name	Web Page / Section	Characters Allowed
First Name	Enter New Client / Personal Information, Manage Client / Personal Information.	Allow only alpha characters, dashes, and apostrophes. Will not save an entry that matches a disallowed name.
Middle Name	Enter New Client / Personal Information, Manage Client / Personal Information.	Allows only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Client / Personal Information, Manage Client / Personal Information.	Allows only alpha characters, dashes, apostrophes, and periods. Will not save an entry that matches a disallowed name.
Mother's First Name	Enter New Client / Personal Information, Manage Client / Personal Information.	Allows only alpha characters, dashes, and apostrophes.
Mother's Maiden Last Name	Enter New Client / Personal Information, Manage Client / Personal Information.	Allows only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows only alpha characters, dashes, and apostrophes.

Field Name	***Web Page / Section***	***Characters Allowed***
Street Address	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Will not save quotes. Will not save an entry that matches a disallowed address.
Other Address	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Will not save quotes. Will not save an entry that matches a disallowed address.
P.O. Box	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows alpha or numeric characters, backslashes, number symbols, dashes, and periods. Will not save an entry that matches a disallowed address. Will not save quotes.
E-mail Address	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Must contain "@" symbol and period. Does not save quotes.
Phone Number	Enter New Client / Responsible Person(s), Manage Client / Responsible Person(s).	Allows only numeric characters and dashes. Does not save quotes.
City	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s).	Allows only alpha characters, dashes, and apostrophes. Does not save quotes.
Zip	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s).	Allows only numeric characters. Does not save quotes.

Disallowed Address Entries

The following chart lists address entries that are not accepted in ImmTrac2. This list could change over time as new disallowed entries are identified.

Table 56 - Appendix A: Disallowed Address Entries Table

DO NOT USE	FAMILY PLANNING	COMMENT
UNKNOWN	PLANN PARENTHOO	FAMILY PLANNING SERVICES
GENERAL DELIVERY	NO CURRENT	PLANNED PARENTHOOD
DECEASED	MOVED	
ADDRESS	UPDATE	

Disallowed First Name Entries

The following chart lists first name entries that are not accepted in ImmTrac2. This list could change over time as new disallowed entries are identified.

Table 57 - Appendix A: Disallowed First Name Entries Table

ADOPT	HBS	LSS	UNK
ADOPTIVE	HRH	LSS BABY	UNKN
AF BABY	I	LWG	UNKNOWN
BB	ILLEGIBLE SIGNATURE	MALE	UNKNOEN
BABY	INFANT	MR	UNKOWN
BABY B	INFANT BO	MRS	UNNAMED
BABY BOY	INFANT BOY	MS	UNREADABLE
BABY G	INFANT FE	NEWBORN	V
BABY GIRL	INFANT FEM	NFN	WLCFS
BABYB	INFANT G	NTXHW	XWM
BABYBOY	INFANT GI	PARENT	XXX
BABYGIRL	INFANT GIR	PARENTS	UFA

Disallowed Last Name Entries

The following table lists last name entries that are not accepted in ImmTrac2. This list could change over time as new disallowed entries are identified.

Table 58 - Appendix A: Disallowed Last Name Entries Table

ADOPT	CSS BABY	LSDKFSLDK	UNKNOEN
ADOPTIVE	CSSW	LSS	UNKOWN
A BABY	D S S	LSSFC	UNNAMED
A F BABY	DCS	LTJR	UNREADABLE
AF	DFS	MBABY	V
AF BABY	DSS	M BABY BOY	VBABY
AF BABY BO	E BABY	MALE	VLK
AF BABY GI	F BABY	NEWBORN	WLCFS
AFBABY	FF	NLN	ZBABY
B C S	FIRE DEPT	OBABY	UFA
B S C	FWV	PBABY	
BABY	G BABY	PCS	
BABY BOY	GARCIA INF	PENDING	
BABYBOY	GIRL	RBABY	
BABY GIRL	GSST	SBA	
BABYGIRL	H BABY BOY	SBABY	
BCS	I	SCI	
BCSW	INFANT	SB	
BOY	INFANT BOY	SC	
BRT	INFANT FEM	SIGNATURE	
BSC	INFANT GIRL	SMRT	
CAC	INFANTBOY	SRB	
CS	INFANTGIRL	SRFC	
C S S	INFANTMALE	SRP	
CAC	LSS	SS	

CBS	LCFD	TAO	
CCS	LCFS	UN	
CFCFS	LCSF	UNK	
CS	LNAME	UNKN	
CSS	LS	UNKNOWN	

Appendix B – Client Comments Triggers

Below is a table of Client Comments that activate the “Contraindicated” description in the client’s schedule of recommended vaccines.

Table 59 - Appendix B: Client Comments – Contraindicated

Comment	Recommended Schedule Description	Vaccine
Allergy to POLYMYXIN B.	CONTRAINDICATE	Polio-Inject
Allergy to baker's yeast (anaphylactic).	CONTRAINDICATE	HepB
Allergy to egg ingestion (anaphylactic).	CONTRAINDICATE	Influenza-seasnl
Allergy to gelatin (anaphylactic).	CONTRAINDICATE	Measles Mumps Rubella Varicella Zoster
Allergy to neomycin (anaphylactic).	CONTRAINDICATE	Measles Mumps Rubella Varicella Zoster Polio-Inject
Allergy to streptomycin (anaphylactic).	CONTRAINDICATE	Polio-Inject
Arthus type reaction to previous dose of tetanus containing vaccine.	CONTRAINDICATE	DTP/aP
Chronic gastrointestinal disease.	CONTRAINDICATE	Rotavirus
Collapse or shock like state within 48 hours to previous dose of DTP / DTaP.	CONTRAINDICATE	DTaP
Convulsions (fits, seizures) within 72 hours of previous dose of DTP / DTaP.	CONTRAINDICATE	DTaP
Encephalopathy within 7 days of previous dose of DTP or DTaP.	CONTRAINDICATE	DTaP Tdap

Comment	Recommended Schedule Description	Vaccine
Fever of 40.5°C (105°F) within 48 hours of previous dose of DTP / DTaP.	CONTRAINDICATE	DTaP
Guillain-Barre Syndrome (GBS) within 6 weeks of previous dose of tetanus containing vaccine.	CONTRAINDICATE	DTP/aP
History of Guillain-Barre Syndrome (GBS).	CONTRAINDICATE	Flu trivalent nasal MCV4O
History of varicella (chicken pox).	CONTRAINDICATE	Varicella
PRIOR doses of DTAP caused anaphylactic reaction.	CONTRAINDICATE	DTP / aP
PRIOR doses of ENCEPHALITIS caused anaphylactic reaction.	CONTRAINDICATE	Encephalitis
PRIOR doses of HEPA caused anaphylactic reaction.	CONTRAINDICATE	HepA
PRIOR doses of HEPB caused anaphylactic reaction.	CONTRAINDICATE	HepB
PRIOR doses of HIB caused anaphylactic reaction.	CONTRAINDICATE	Hib
PRIOR doses of HUMAN PAPILLOMA VIRUS caused anaphylactic reaction.	CONTRAINDICATE	HPV
PRIOR doses of IG-RSV caused anaphylactic reaction.	CONTRAINDICATE	Ig-RSV
PRIOR doses of INFLUENZA caused anaphylactic reaction.	CONTRAINDICATE	Influenza-seasnl
PRIOR doses of MENINGO caused anaphylactic reaction.	CONTRAINDICATE	Meningo
PRIOR doses of MMR caused anaphylactic reaction.	CONTRAINDICATE	Measles Mumps Rubella
PRIOR doses of PNEUMOCONJUGATE caused anaphylactic reaction.	CONTRAINDICATE	PneumoConjugate

Comment	Recommended Schedule Description	Vaccine
PRIOR doses of PNEUMOPOLY 23 caused anaphylactic reaction.	CONTRAINDICATE	PneumoPoly 23
PRIOR doses of POLIO caused anaphylactic reaction.	CONTRAINDICATE	Polio
PRIOR doses of ROTAVIRUS caused anaphylactic reaction.	CONTRAINDICATE	Rotavirus
PRIOR doses of TD / TDAP caused anaphylactic reaction.	CONTRAINDICATE	Td / Tdap
PRIOR doses of TETANUS caused anaphylactic reaction.	CONTRAINDICATE	Tetanus
PRIOR doses of TYPHOID caused anaphylactic reaction.	CONTRAINDICATE	Typhoid
PRIOR doses of VARICELLA caused anaphylactic reaction.	CONTRAINDICATE	Varicella Zoster
PRIOR doses of YELLOW FEVER caused anaphylactic reaction.	CONTRAINDICATE	Yellow Fever
PRIOR doses of ZOSTER caused anaphylactic reaction.	CONTRAINDICATE	Varicella Zoster
Permanent immunodeficiency due to any cause.	CONTRAINDICATE	Measles Mumps Rotavirus Rubella Varicella Zoster Flu trivalent nasal
Persistent, inconsolable crying lasting >= 3 hours within 48 hours of previous dose of DTP / DTaP.	CONTRAINDICATE	DTaP
Pregnancy (in recipient).	CONTRAINDICATE	HPV Measles Mumps Rubella Varicella Zoster Flu trivalent nasal

Comment	Recommended Schedule Description	Vaccine
Temporary immunodeficiency caused by immunosuppressive therapy, including steroids, radiation treatment, or chemotherapy.	CONTRAINDICATE	Measles Mumps Rotavirus Rubella Varicella Zoster Flu trivalent nasal
Thrombocytopenia.	CONTRAINDICATE	Measles Mumps Rubella
Thrombocytopenia purpura (history).	CONTRAINDICATE	Measles Mumps Rubella
Recent or simultaneous administration of an antibody-containing blood product (immune globulin).	CONTRAINDICATE	Measles Mumps Rotavirus Rubella Varicella Zoster
underlying unstable, evolving neurologic conditions.	CONTRAINDICATE	DTaP Tdap

Below is a table of Client Comments that activate the "Immunity" description in the client's schedule of recommended vaccines.

Table 60 - Appendix B: Client Comments – Immunity

Comment	Recommended Schedule Description	Vaccine
Immunity: hepatitis A	IMMUNE	HepA
Immunity: hepatitis B	IMMUNE	HepB
Immunity: measles	IMMUNE	Measles
Immunity: mumps	IMMUNE	Mumps
Immunity: rubella	IMMUNE	Rubella
Immunity: varicella (chicken pox)	IMMUNE	Varicella

Below is a table of Client Comments that do not affect the client's schedule of recommended vaccines.

Table 61 - Appendix B: Client Comments – No Impact to Recommendations

Comment	Recommended Schedule Description	Vaccine
Allergy to latex (anaphylactic).	[NO EFFECT ON RECOMMENDATIONS]	N/A
Allergy to thimerosal (anaphylactic).	[NO EFFECT ON RECOMMENDATIONS]	N/A
Current acute illness, moderate to severe (with or without fever)(e.g., diarrhea, vomiting).	[NO EFFECT ON RECOMMENDATIONS]	N/A
High Risk Condition(s).	[NO EFFECT ON RECOMMENDATIONS]	N/A
Immunity: other lab confirmed.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Patient has been exposed to Rabies.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of All Childhood Vaccines.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of DT / DTaP.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of HPV.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of HepA.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of HepB.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Hib.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Influenza.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of MMR.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Meningococcal.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Pertussis.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of PneumoConjugate.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Polio.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Rotavirus.	[NO EFFECT ON RECOMMENDATIONS]	N/A

Comment	***Recommended Schedule Description***	***Vaccine***
Refusal of Smallpox.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Td / Tdap.	[NO EFFECT ON RECOMMENDATIONS]	N/A
Refusal of Varicella.	[NO EFFECT ON RECOMMENDATIONS]	N/A

Appendix C - Data Exchange

Getting immunization data into ImmTrac2 is important for a clinic and for the individuals its serve. ImmTrac2 provides an interactive user interface on the Internet for authorized users to enter, query, and update client immunization records. However, some immunization providers already store and process similar data in their own information systems and do not want to enter data into two diverse systems, but still want to use ImmTrac2. For many of these healthcare entities electronic transfer of immunization data is the preferred method to accomplish this goal.

This section explains how to exchange electronic immunization data files with ImmTrac2 by sending data from the provider's own information system. After the Registration of Intent process the provider will be contacted by the Meaningful Use Team to set up the data exchange specifications, perform data exchange testing, and assist with data submissions. See the Registration of Intent section for more details on this process. Contact ImmTrac2 Customer Support at 1-800-348-9158 or ImmTrac2@dshs.texas.gov if additional help is required.

Overview

Organizations can electronically export their organization's clients and immunization data into ImmTrac2 in a variety of file formats using a variety of reporting options.

- ImmTrac2 Web Application – Use ImmTrac2 to manually upload files for your organization.
- Secure FTP – Files are uploaded to a secure server provided by DSHS to transmit files to ImmTrac2.
- Secure Object Access Protocol (SOAP) – Use secure web services to transmit HL7 files to ImmTrac2. This option provides an immediate, real-time, system to system response.

DSHS will work with organizations using an onboarding process to establish, test and implement the best method for data exchange. Organizations that have existing data exchange processes established for legacy ImmTrac will be able to continue to submit using the same established methods in ImmTrac2 unless told otherwise by DSHS staff.

Automatic or Manual Uploads

Data Exchange may be done manually or through an automated process. DSHS will work with providers to establish and test data exchange processes.

Data Frequency

ImmTrac2 encourages weekly data submissions wherever possible for all providers. Public clinics are required to submit data within 14 days of immunization administration.

Data Formats Accepted:

If you have both EHR and billing data systems, you are encouraged to send data from the EHR, as this data has been found to be more complete (e.g., self-pay, history of disease, and historical immunizations are often in the EHR but not in billing databases).

ImmTrac2 currently accepts the following electronic file types:

- Health Level Seven (HL7) Version 2.5.1 Release 1.4
- Health Level Seven (HL7) Version 2.4 Release 1.4
- Health Level Seven (HL7) Version 2.3.1 Release 1.4
- Fixed format flat text files (format pre-defined by DSHS)

Single Message or Batch Uploads

Data Exchange may be done with single message transfers or with batch data that is grouped together.

For Secure FTP, only batch file submissions are allowed. For SOAP, only single message submissions are allowed.

Discuss with your Electronic Health Record (EHR) vendor which method they recommend and consider the advantages and disadvantages of each process.

Meaningful Use Compliant (HL7 & Real-Time)

ImmTrac2 accepts and transmits messages compliant with Health Level Seven (HL7) Version 2.3.1, 2.4 and 2.5.1 standards for batch data loads by secure FTP to submit client and immunization information to ImmTrac2. Additionally, ImmTrac2 allows providers to submit client and immunization information, and queries for this information, through real-time messaging. FTP and SOAP are the preferred reporting methods.

If your office is not already HL7 and meaningful use compliant, consider discussing with your Electronic Health Record (EHR) vendor which method they recommend and consider the advantages and disadvantages of becoming HL7 and meaningful use compliant. If you do not have an EHR, or you have additional questions pertaining to this option contact ImmTrac2 Customer Support at 1-800-348-9158.

Registration of Intent

Before you can exchange date you must register intent to pursue electronic data exchange and immunization reporting with ImmTrac2 through the **Registration of Intent (ROI)** form. The ROI informs ImmTrac2 that your organization wants to begin the process of exchanging electronic immunization data. Once submitted it allows ImmTrac2 to setup the necessary accounts for your organization to begin the configuration at the providers organization. Organizations that have already established data exchange in the legacy system are not required to reregister and do not need to fill out the Registration of Intent form in ImmTrac2.

The Registration of Intent is only submitted once and it is submitted by Standalone or Parent Organizations. If a Standalone or Parent Organization has previously submitted a Registration of Intent refer to the "**Previously Submitted Registration of Intent**" section. A Parent Organization has sub-organizations within its overall organization and will be reporting all as one entity. Any sub-organization who is associated to a Parent Organization in ImmTrac2 will be automatically associated with the ROI previously submitted by the Parent Organization. Sub-organizations are not be allowed to submit the ROI.

Parent Organizations need to ensure all their sub-organizations have up to date Site Agreements and that the ImmTrac2 Points of Contact are up to date prior to accessing the ROI as the system will not allow an organization to continue with the ROI if they are not. See the Site Agreement and Point of Contact sections below.

To access the Registration of Intent, follow the steps below.

See Figure 480: Access Registration of Intent Steps 1-2.

1. In the Menu bar, click the **Registration / Renewal** tab.
2. Then select the **Registration of Intent** option.

Figure 330 - Access Registration of Intent Steps 1-2

See Figure: Access Registration of Intent.

3. The *Data Exchange Registration of Intent* screen displays and the first 2 questions will display. After the questions are answered, the remaining questions will load. *See Figure 481: Registration of Intent Questionnaire.*

Data Exchange Registration of Intent

Is your organization pursuing Meaningful Use?

(•) Yes ( ) No

Can your organization submit data in HL7 format?

Selection of "Yes" here will require your organization to submit files per current approved HL7 Implementation Guide standards. Please select the link here to view the current HL7 Implementation Guide standards.

(•) Yes ( ) No

***Which method will your organization use to report data electronically to ImmTrac2?**

REPORTING METHOD:

- [ ] Secure FTP – Files generated and uploaded to a secure server provided by DSHS
- [ ] Web Application – Log into ImmTrac2 and use the web interface to manually upload files for your organization(s)
- [ ] SOAP – Use secure web services to transmit files

***Who is your EHR Vendor?** (please specify by selecting from the dropdown list below):

-

If you do not see your EHR Vendor listed, please contact ImmTrac2 Customer Support at 1-800-348-9158 for support to facilitate addition of the Vendor.

***Which EHR software do you use?** (please specify by selecting from the dropdown list below):

-

Please list the name of your team members who need to receive acknowledgment emails about your file activity from ImmTrac2:

(•) Suggested team members include: EHR vendor support members, IT support services, physicians, clinical staff, and office administration staff.
(•) Do not enter generic names or email addresses for any of your team members (e.g. Name: Nurse).

*Add Team Member

Title: EHR *First Name: *Last Name:

*Email:

Add

Last Name	First Name	Title	Email	Edit	Del

Your organization's point of contact:

Name of the individual from your organization who authorizes credentials to be issued to the team members listed above.

*Name: LARRY STRASSNER *Email: LARRY.STRASSNER@DSHS.TEXAS.(

How often will your organization submit immunization data?

Weekly

Here is a summary of your current organizational site information for your review.

If there are sites not registered with ImmTrac2, sites that need to be updated, or any other changes needed to your organization go to the ImmTrac2 Registration/Renewal to complete the registration and renewal process **before submitting your organization's Registration of Intent.**

If you have any site registration or renewal issues, please contact ImmTrac2 Customer Support at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov for assistance.

Your TXIIS ID: 1111327000

TXIIS ID	Site Name	Site Address	Site Agreement Date
1111327000	Training Ground	1111 SMKE ROAD, AUSTIN, TX 78749	04/29/2016

Submit

Figure 331 - Registration of Intent Questionnaire

Table 62 - Registration of Intent Data Fields

Field	Description
Is your organization pursuing Meaningful Use?	Select “Yes” or “No” using the radio buttons.
Can your organization submit data in an HL7 format?	Select “Yes” or “No” using the radio buttons. If you select “No”, other data questions will not be necessary.
Which method will your organization use to submit data electronically to ImmTrac2?	Select between Secure FTP, Web Application, and SOAP using the check boxes. (SOAP will not be available if you selected No, your organization cannot submit data in an HL& format.)
Will your organization submit data for a single organization or for multiple locations?	Select the appropriate option depending on if you are submitting data for a single organization or multiple organizations.
Who is you EHR Vendor?	Use the drop down list to select a Vendor. (This selection will not be available if you selected “No”, indicating your organization cannot submit data in an HL7 format.)
Which EHR software do you use?	The available options are dependent upon the selected Vendor. (This selection will not be available if you selected “No”, indicating your organization cannot submit data in an HL7 format.)
Title:	Title of the team members who need to receive acknowledgment emails about your file activity from ImmTrac2.
First Name	*Required Fields* First Name, Last Name, and Email address of the team members who need to receive acknowledgment emails about your file activity from ImmTrac2. You must click the “Add” button to finalize the contact information. You may add multiple contacts using the “Add” button.
Last Name	
Email	
How often will your organization submit immunization data?	Use the drop down list to select between Weekly, Bi-Weekly, Monthly, and Annually.

Submitting the ROI

If a user that is assigned to a Sub-Organization accesses the ROI, and the Parent Organization **has not yet** submitted their Registration of Intent, the system will notify the user in a validation message that they are unable to continue. The Sub-Organization will need to contact the listed Point of Contact to get further information on the Parent Org and when they will be submitting the ROI for the entire organization. *See Figure 482: Parent Org Must Submit ROI Error Message.*

The validation message will indicate the following: Only parent organizations can submit a Registration of Intent with ImmTrac2. Your parent organization is *<PARENT ORG NAME>*. It is recommended that you communicate with the below point of contact for your parent organization so they may submit the Registration of Intent. *<PARENT ORGS POC NAME>; <PHONE #>;<EMAIL ADDRESS>*"

Note: *The person's name listed will be the Parent Org's Primary Registry contact listed in the Parent Org Profile. The email address listed will be that of the Primary Registry contact as listed in the Parent Org Profile.*

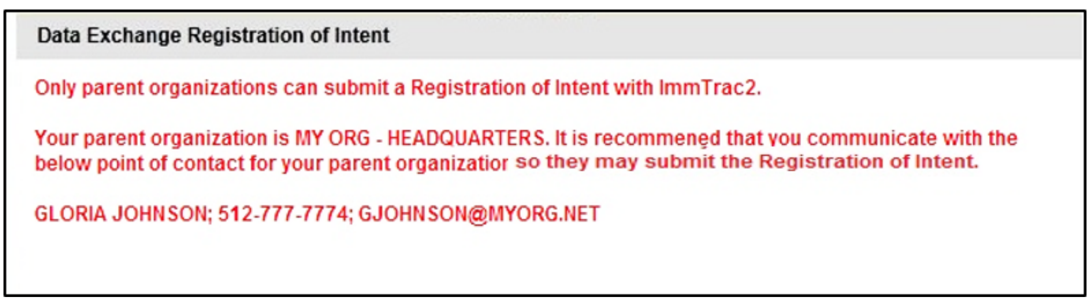


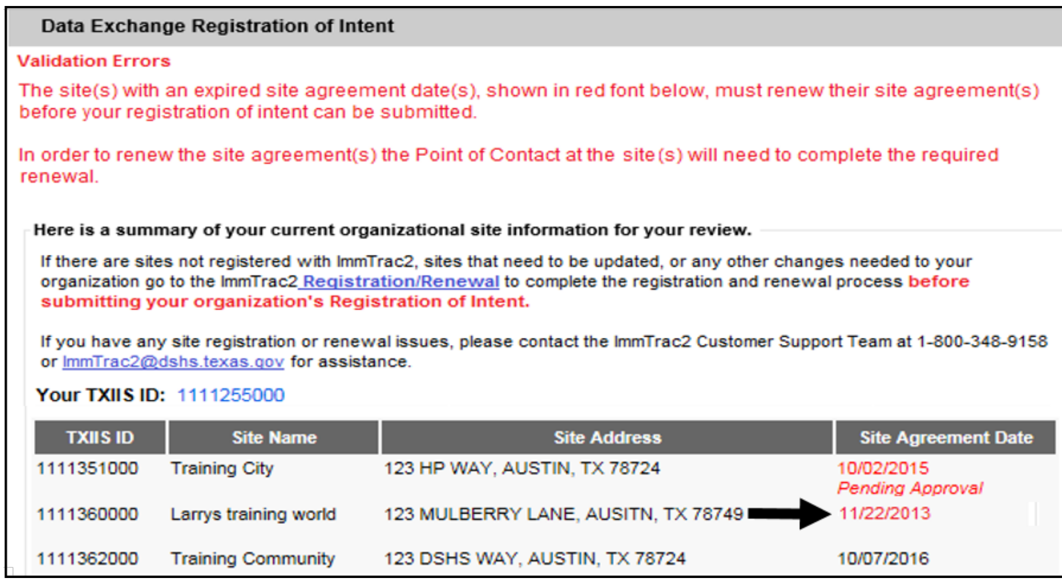
Figure 482 - Parent Org Must Submit ROI Error Message

Site Agreements

As stated previously, sub-organizations within a Parent Organization must have up to date Site Agreements in order for the Parent to complete the ROI. At the time of accessing the ROI, the system will immediately notify the Parent Organization if there are sub-organizations with expired Site Agreements by displaying a validation message and the summary of their organizational setup as in ImmTrac2. *See Figure 483: Site Agreement Expired.*

The Site Agreement validation message will indicate the following: “The site(s) with an expired site agreement date(s), shown in red font below, must renew their site agreement(s) before your Registration of Intent can be submitted. In order to renew the site agreement(s) the Point of Contact at the site(s) will need to complete the required renewal.

The Parent Organization must ensure the sub-organization(s) with expired Site Agreements are renewed or the system will not allow them to continue. Once the sub-organizations have submitted their renewal of the Site Agreements the system will allow the Parent Organization to continue with the ROI.



Data Exchange Registration of Intent

Validation Errors

The site(s) with an expired site agreement date(s), shown in red font below, must renew their site agreement(s) before your registration of intent can be submitted.

In order to renew the site agreement(s) the Point of Contact at the site(s) will need to complete the required renewal.

Here is a summary of your current organizational site information for your review.

If there are sites not registered with ImmTrac2, sites that need to be updated, or any other changes needed to your organization go to the ImmTrac2 Registration/Renewal to complete the registration and renewal process **before submitting your organization's Registration of Intent.**

If you have any site registration or renewal issues, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or ImmTrac2@dshs.texas.gov for assistance.

Your TXIIS ID: 1111255000

TXIIS ID	Site Name	Site Address	Site Agreement Date
1111351000	Training City	123 HP WAY, AUSTIN, TX 78724	10/02/2015 *Pending Approval*
1111360000	Larrys training world	123 MULBERRY LANE, AUSITN, TX 78749	11/22/2013
1111362000	Training Community	123 DSHS WAY, AUSTIN, TX 78724	10/07/2016

Figure 483 - Site Agreement Expired

Point of Contact

Each organization registered with ImmTrac2 must have a designated contact listed as the Point of Contact. This Point of Contact (POC) will be the Primary Registry contact type in the Edit Org Profile for the organization. If an Orgs POC is not up to date or is missing from the Edit Org Profile the system will not allow the User to proceed with ROI. The system displays a validation message indicating the need to update the Org POC information. *See Figure 484: Update Point of Contact Error Message.*

The validation message will indicate the following: “Your organization's Point of Contact must include a valid Name (First and Last) and Email address. This information must be updated prior to submitting your Registration of Intent. Please contact ImmTrac2 Customer Support for further assistance.”

The Organization's Name and Email fields will appear below the validation message so the User can see what data needs to be updated.

***Note**: In order to update the information, please contact ImmTrac2 Customer Support at 1-800-348-9158 or ImmTrac2@dshs.texas.gov.*

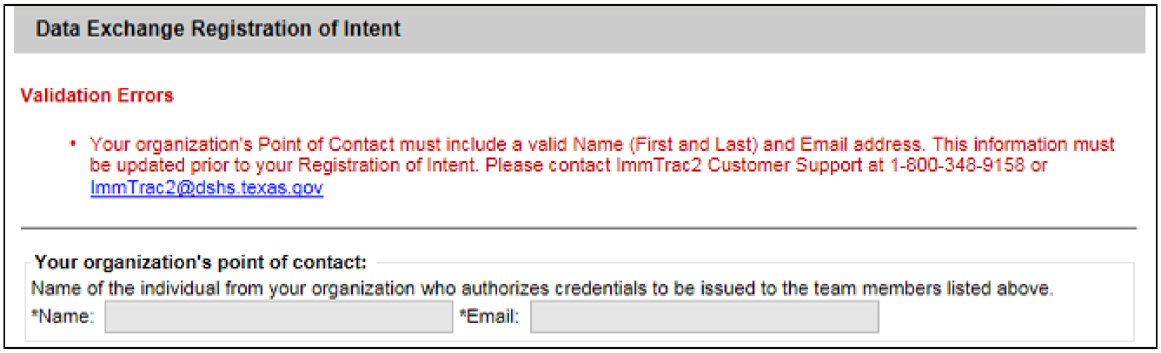


Figure 332 - Update Point of Contact Error Message

Completing the ROI Form

The ROI can only be completed by users assigned to a Standalone or Parent Organization that **has not yet** submitted their Registration of Intent. Sub-Organizations cannot fill out or submit the ROI.

Only if the Site Agreements and Point of Contact are up to date then the first ROI questions displays to be answered. These first questions must be answered in order to determine if the User is able to continue with the remaining ROI questions in order to submit the ROI.

For assistance in answering the Registration of Intent questions consult with your Electronic Health Records Vendor (EHR) first as your EHR Vendor will be able to assist with answering the more technical questions. Then contact ImmTrac2 Customer Support at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov for additional assistance, or if you don't have an EHR.

To answer the ROI questions and submit the form, follow the steps below.

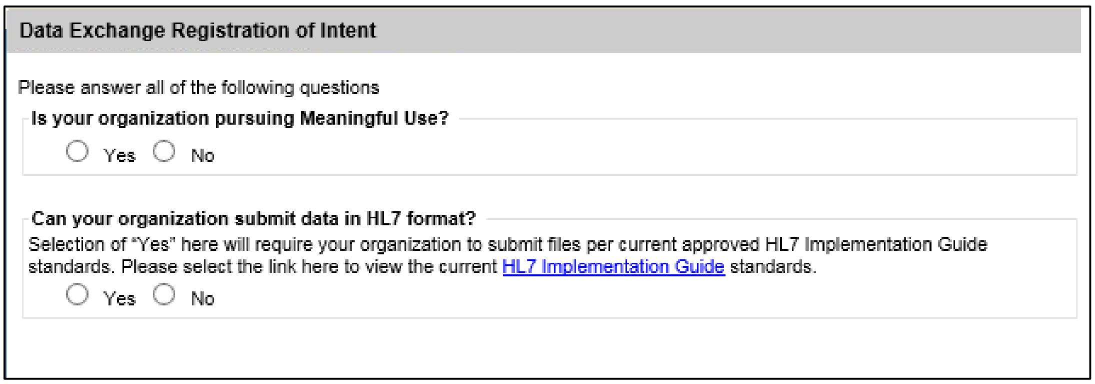
See Figure 485: Submitting the ROI Steps 1-2.

1. **Question** – ***Is your organization pursuing Meaningful Use?*** Answer Yes or NO.
    - Yes - If your organization is pursuing Meaningful Use measures set forth by Centers of Medicare & Medicare Services (CMS).

- No - If you organization is not pursuing Meaningful Use but wants to send your immunization data electronically to ImmTrac2.

2. **Question** – ***Can your organization submit data in HL7 format?*** Answer Yes or NO.
    - Yes - If your organization is able to submit immunization data in HL7 format.
    - No - If your organization is not able to submit immunization data in HL7 format.

Note*: The remaining questions on the ROI will populate bases on the answers to questions 1 & 2.*


Data Exchange Registration of Intent

Please answer all of the following questions

Is your organization pursuing Meaningful Use?

○ Yes ○ No

Can your organization submit data in HL7 format?

Selection of "Yes" here will require your organization to submit files per current approved HL7 Implementation Guide standards. Please select the link here to view the current HL7 Implementation Guide standards.

○ Yes ○ No

Figure 333 - Submitting the ROI Steps 1-2

Selecting **Yes** to Question #1 and **No** to Question #2 **will not** allow the remaining Registration of Intent questions to be displayed on the screen but the system displays a validation message for the User. *See Figure 486: ROI – Organization POC Error Message.*

The validation message will indicate the following: "In order to pursue meaningful use your organization must submit data in HL7 format. CMS requires you to submit your first HL7 test file within 30 days of receiving your invitation to on-board. Please work with your EHR Vendor in order to attain this capability…".

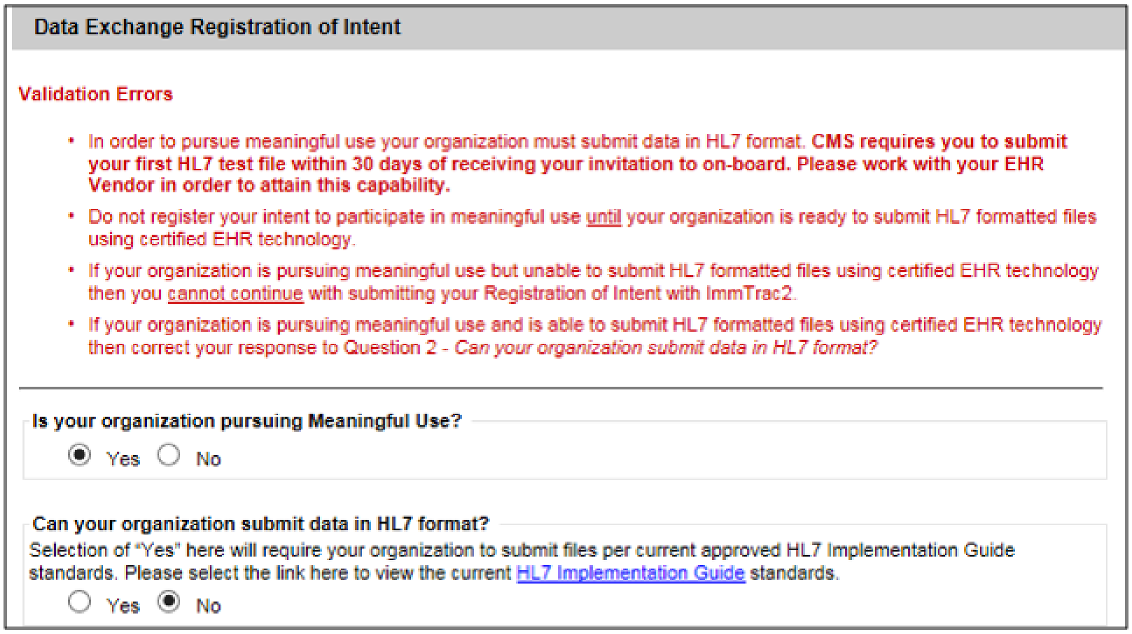


Figure 486 - ROI – Organization POC Error Message

See Figure 487: Submitting the ROI Step 3.

3. **Question** – ***Which method will your organization use to report data electronically to ImmTrac2?*** Select one or more of the following: Secure FTP, Web Application, or SOAP.
   - Secure FTP - By selecting Secure FTP, ImmTrac2 will create a Secure File Transfer Protocol (FTP) account on our servers for your organization to submit immunization data and receive data quality assurance reports. The organization will need to work with its IT Support Staff and EHR Vendor (if applicable) to send the data through the FTP account.
   - Web Application - This option is an older format of sending immunization data and will not be used. If a user selects the Web option then ImmTrac2 staff will assign an FTP account for the organization by default.
   - SOAP - By selecting SOAP, DSHS will create a special account for your organization to submit immunization data using real-time web services. Unlike FTP, this option is an immediate system-to-system connection.

***Note**: FTP and SOAP are the preferred reporting method. The Secure FTP and SOAP login credentials are separate accounts from those assigned to individual users used to access ImmTrac2. If the User selected the “No” radio button for both Questions 1 and 2 the system will automatically remove the SOAP option from the Reporting Methods as it requires HL7 format.*

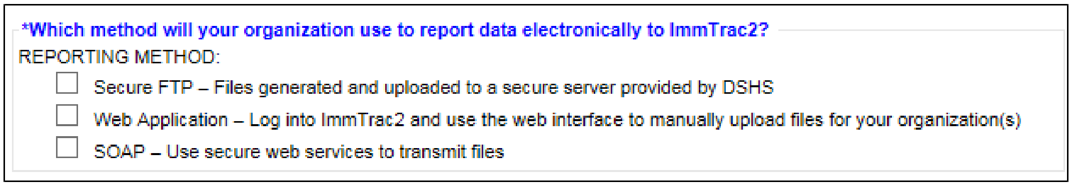


Figure 334 - Submitting the ROI Step 3

See Figure 488: Submitting the ROI Steps 4-5.

4. **Question** – ***Who is your EHR Vendor?*** Select an EHR Vendor using the drop down arrow.
    - The EHR Vendor list contains only certified electronic health technology for the Medicare and Medicaid EHR Incentive Programs which are for meaningful use.
    - If Questions 1 and 2 were NO, the system will automatically default the response to “N/A” for this question.
5. **Question** – ***Which EHR software do you use?*** Select an EHR software using the drop down arrow.
    - The EHR Software list contains only certified electronic health technology for the Medicare and Medicaid EHR Incentive Programs which are for meaningful use.
    - If Questions 1 and 2 were NO, the system will automatically default the response to “N/A” for this question.

***Note**: If the User selected the “No” radio button for Question 1 and the “Yes” radio button for Question 2 the system will automatically default the response to “OT EHR – EHR NOT LISTED” for both these questions. The default selection of OT EHR – EHR NOT LISTED can be changed or if the correct ERR options is not available through the drop down arrow, continue with the “OT EHR – EHR NOT LISTED” option.*

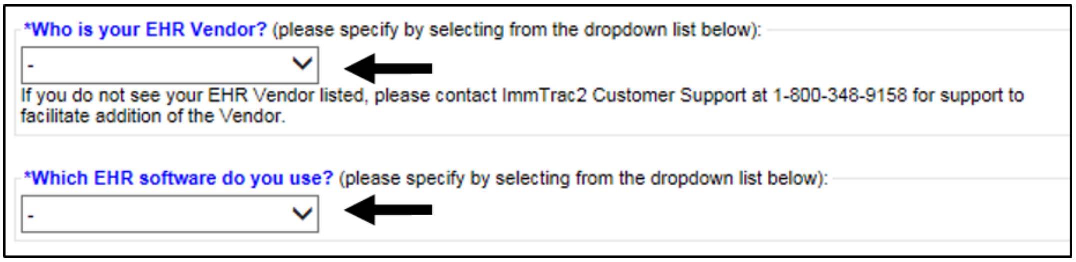
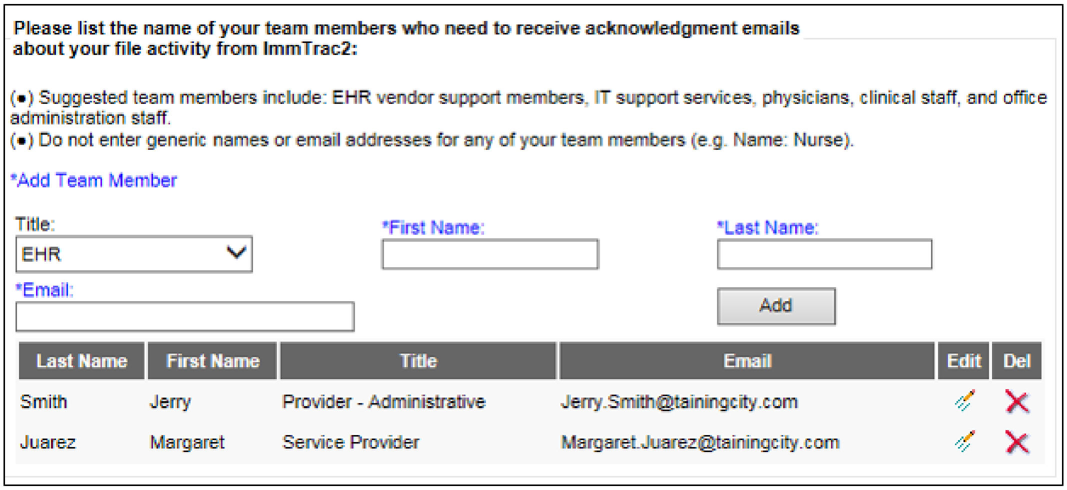


Figure 335 - Submitting the ROI Steps 4-5

See Figure 489: Submitting the ROI Step 6.

6. **Question** – ***Please list the name of your team members who need to receive acknowledgement emails about your file activity from ImmTrac2.*** You must enter at least one team member of the following persons: physicians, clinical staff, office administration staff, information technology support services (staff), and EHR staff.
    - ImmTrac2 will send your organization regular email notifications pertaining to the organization's file activity.
    - The email notifications will include acknowledgement of files received, notification of any data quality errors, or issues pertaining to the file including patient and immunization data.
    - Email addressed must be unique for each team member.
    - Each team member entered must include the following data: Title (Select one of the following: Provider – Clinical, Provider – Administrative, Provider – IT Support, EHR, Service Provider), First Name, Last Name, and Email Address.

***Note**: To edit team member information, or to delete a member, click the **Edit** or **Delete** icon of the desired team member. Once the Edit icon is selected the fields for that specific team member will become editable and the "Apply" and "Cancel" buttons display at the bottom of the table. Once the "Delete" icon is selected, the team member will be removed with no validate warning message.*


Please list the name of your team members who need to receive acknowledgment emails about your file activity from ImmTrac2:

(•) Suggested team members include: EHR vendor support members, IT support services, physicians, clinical staff, and office administration staff.
(•) Do not enter generic names or email addresses for any of your team members (e.g. Name: Nurse).

*Add Team Member

Title: EHR

*First Name:

*Last Name:

*Email:

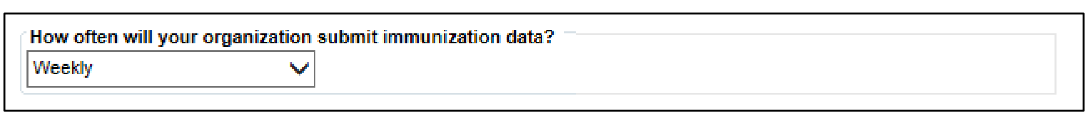
Add

Last Name	First Name	Title	Email	Edit	Del
Smith	Jerry	Provider - Administrative	Jerry.Smith@tainingcity.com		
Juarez	Margaret	Service Provider	Margaret.Juarez@tainingcity.com		

Figure 336 - Submitting the ROI Step 6

See Figure 490: Submitting the ROI Step 7.

7. **Question – *How often will your organization submit immunization data?*** Select Weekly, Bi-Weekly, Monthly, or Annually using the drop down arrow.
    - The system will default the response to “Weekly” but the User can change the selection to Bi-Weekly, Monthly, or Annually.
    - If an organization selected FTP and SOAP as the reporting method then the system will return back to the primary default selection of “Weekly” and can be editable by the User.
    - If an organization selected only SOAP as the reporting method then the system will default the response to this question to “N/A”. SOAP submissions are sent in real-time which is not applicable to the question.


How often will your organization submit immunization data?

Weekly

Figure 337 - Submitting the ROI Step 7

8. Click the “Submit” button to submit the ROI.
    - Review all the questions to ensure they are all answered and that all the information entered is correct.
    - Unsuccessful Submission of the ROI - If the system identifies that there were unanswered questions there will be validation messages at the top of the screen indicating what information is missing. See Figure 491: Saving the ROI - Validation Error Example.

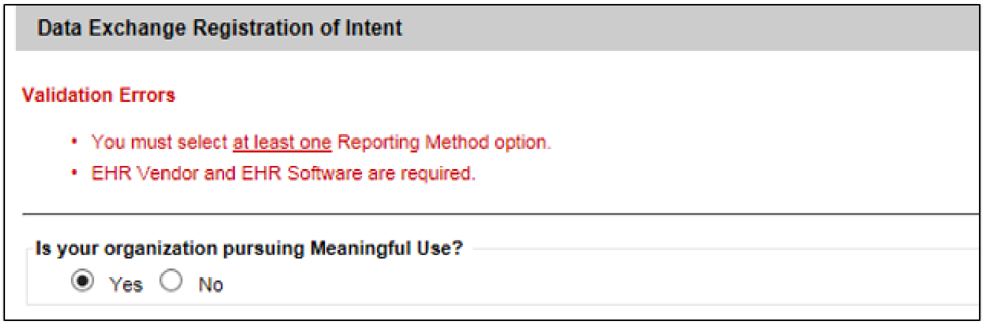


Figure 338 - Saving the ROI - Validation Error Example

Successful Submission of the ROI

If ImmTrac2 finds no issue with the information the ROI is successfully submitted and the Data Exchange Registration of Intent screen displays providing information on the next steps and the responses to the ROI questions that were submitted in a read-only format. Once a ROI is received and reviewed by the ImmTrac2 staff, the POC will be contacted by email with the necessary instructions to implement electronic reporting of immunization data. *See Figure 492: Registration of Intent Submission Confirmation*.

Data Exchange Registration of Intent

Date of Registration of Intent: 02/14/2016

Thank you for registering your organization's intent to pursue electronic data exchange and immunization reporting with ImmTrac2.

Please print and keep all email exchanges with ImmTrac2 for your records.

Step 1: Registration of Intent (*in progress*)

- ImmTrac2, the Texas Immunization Registry, will process your Registration of Intent within 5 business days. At that time, you will receive an email acknowledging receipt of your Registration of Intent. Please print and keep this e-mail for your records.

Step 2: On-Boarding & Testing

- You will receive an Invitation to Onboard (via e-mail) that confirms completion and acceptance of your Registration of Intent. It will include additional instructions and login credentials needed for your organization to establish connectivity to ImmTrac2.
- Once you have received your Invitation to Onboard, your organization will officially be in test with ImmTrac2. Testing requirements are as follows:
    - At least one (1) test file must be submitted to ImmTrac2 within 30 days of receiving your Invitation to Onboard.
    - As your organization submits test files, you will receive e-mails acknowledging that test files have been received by ImmTrac2.
        - All files will be automatically reviewed and validated by our system. If issues or errors are indicated, you will receive additional email notifications requesting action.
        - In test, you must continue to submit test files to ImmTrac2 on a regular, on-going basis until receiving notification of promotion to production (live) status.
- Meaningful Use Participants: According to the Meaningful Use guidelines, given by CMS (77 FR 54021), a provider who fails to respond to written requests for action within 30 days on two separate occasions will not meet the public health measure for which action was requested (77 FR 54021| http://www.federalregister.gov/a/2012-21050/p-1009).
    - If you have questions pertaining to Meaningful Use, please contact the ImmTrac2 Meaningful Use Team at ImmTracMU@dshs.texas.gov.

Step 3: Test Completion & Production (ongoing submission)

- After ImmTrac2 determines that you have achieved a successful submission of test files, you will receive an e-mail notification that testing is complete and all future files that you send should contain production data.
- Once promoted to production, you must continue to submit files to ImmTrac2 on a regular, on-going basis (once weekly, bi-weekly, monthly, or annually).
- You will continue to receive emails acknowledging that ImmTrac2 has received files. The files will continue to be automatically reviewed and validated by our system. If issues or errors are indicated, you will receive additional email notifications requesting action.

If you have any questions, please contact ImmTrac2 Customer Support at 1-800-348-9158 or ImmTrac2@dshs.texas.gov.

Is your organization pursuing Meaningful Use? Yes

Can your organization submit data in HL7 format? Yes
Please select the link here to view the current HL7 Implementation Guide standards.

Which method will your organization use to report data electronically to ImmTrac2? Secure FTP; SOAP

Who is your EHR Vendor? Allscripts

Which EHR software do you use? Allscripts ED

The name of your team members who need to receive acknowledgment emails about your file activity from ImmTrac2:

Last Name	First Name	Title	Email
Smith	Bobby	Provider - Administrative	admin@myorgchc12.com
Gonzalez	Sara	Provider - Administrative	co_admin@myorgchc12.com
Hernandez	Elaine	Provider - Clinical	staff_myorgchc_12@gmail.com
Branson	Jacob	Provider - IT Support	jacob_branson@gmail.com
Wesley	Daniel	EHR	wdaniel@ehrsupport.com

Your organization's point of contact: BETTY BINK ; MYORGCHC_12@GMAIL.COM

How often will your organization submit immunization data? Weekly

Here is a summary of your current organizational site information for your review.

Your TXIIS ID: 1111255000

TXIIS ID	Site Name	Site Address	Site Agreement Date
1111255000	MY ORGANIZATION CHC	785 VACCINATION LANE, AUSTIN, TX 78755	01/01/2016
1111255001	MY ORGANIZATION CHC - #2	684 SYRINGE DR, AUSTIN, TX 78754	05/22/2016
1111255002	MY ORGANIZATION CHC - #3	888 BILLING RAIL, AUSTIN, TX 78756	11/22/2013 *Pending Approval*

Figure 339 - Registration of Intent Submission Confirmation

The Organization's Point of Contact listed in the ROI will be automatically sent an email as confirmation of the submitted Registration of Intent. The email will provide further instructions on the next steps to be taken and the responses to the ROI questions that were submitted in a read-only format. Please read the information provided to you on the screen and the email for further guidance on the next steps.

See Figure 493: Data Exchange - Registration of Intent Submission Confirmation.

Texas Immunization Registry (ImmTrac2): Registration of Intent Submitted Inbox x

DSHS ImmTrac2 <ImmTrac2@dshs.state.tx.us> 4:26 PM (0 minutes ago)

to me

ABC DOCTORS, TX IIS ID: 0000000153, ORG CODE: ABCD0001
Date of Registration of Intent - 01/01/2016

Thank you for registering your organization's intent to pursue electronic data exchange and immunization reporting with ImmTrac.

Please print and keep all email exchanges with ImmTrac for your records.

Step 1: Registration of Intent (*in progress*)

- ImmTrac, the Texas Immunization Registry, will process your Registration of Intent within 5 business days. At that time, you will receive an email acknowledging receipt of your Registration of Intent. Please print and keep this e-mail for your records.

Step 2: On-Boarding & Testing

- You will receive an Invitation to Onboard (via e-mail) that confirms completion and acceptance of your Registration of Intent. It will include additional instructions and login credentials needed for your organization to establish connectivity to ImmTrac.
- Once you have received your Invitation to Onboard, your organization will officially be in test with ImmTrac. Testing requirements are as follows:
  - At least one (1) test file must be submitted to ImmTrac within 30 days of receiving your Invitation to Onboard.
  - As your organization submits test files, you will receive e-mails acknowledging that test files have been received by ImmTrac.
    - All files will be automatically reviewed and validated by our system. If issues or errors are indicated, you will receive additional email notifications requesting action.
    - In test, you must continue to submit test files to ImmTrac on a regular, on-going basis until receiving notification of promotion to production (live) status.
- Meaningful Use Participants: According to the Meaningful Use guidelines, given by CMS (77 FR 54021), a provider who fails to respond to written requests for action within 30 days on two separate occasions will not meet the public health measure for which action was requested (77 FR 54021| http://www.federalregister.gov/a/2012-21050/p-1009).
  - If you have questions pertaining to Meaningful Use, please contact the ImmTrac2 Meaningful Use Team at immtracmu@dshs.texas.gov.

Step 3: Test Completion & Production (ongoing submission)

- After ImmTrac determines that you have achieved a successful submission of test files, you will receive an e-mail notification that testing is complete and all future files that you send should contain production data.
- Once promoted to production, you must continue to submit files to ImmTrac on a regular, on-going basis (once weekly, bi-weekly, monthly, or annually).
- You will continue to receive emails acknowledging that ImmTrac has received files. The files will continue to be automatically reviewed and validated by our system. If issues or errors are indicated, you will receive additional email notifications requesting action.

Figure 340 - Data Exchange - Registration of Intent Submission Confirmation

***Note**: If you have any registration issues or questions regarding the ROI form, please contact ImmTrac2 Customer Support at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov to resolve those issues before completing your Registration of Intent for immunizations.*

Previously Submitted Registration of Intent

If an organization previously submitted its Registration of Intent either in our Legacy ImmTrac system (prior system) or in ImmTrac2, the system will notify you upon clicking on the Registration of Intent link. If you are assigned to a Sub-Organization of a Parent Organization the notification will reference the Parent Organization having submitted the ROI previously.

If you are assigned to the Parent or Standalone Organization the validation message will indicate the following: “Our records indicate that your organization, *<ORG NAME>*, previously submitted a Registration of Intent on *MM/DD/YYYY*. If you have questions pertaining to the electronic reporting of immunizations and / or the Registration of Intent please contact your parent organization’s Point of Contact, listed below. *<POC NAME>; <PHONE #>; <EMAIL ADDRESS>.*” *See Figure 494: Previously Submitted Registration of Intent Message.*

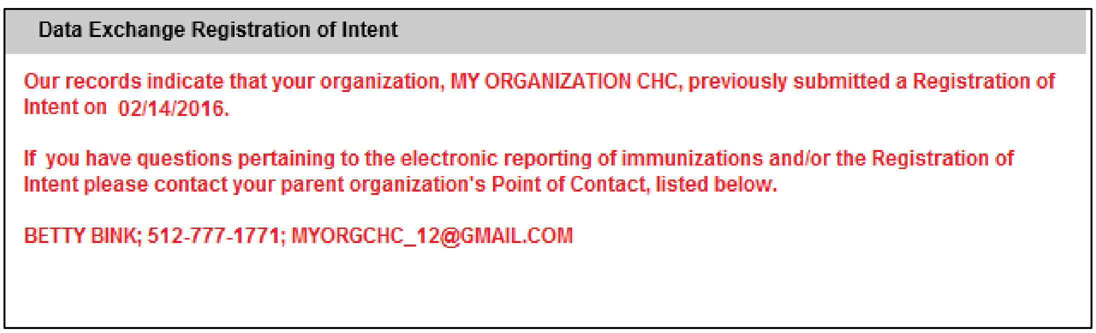


Figure 341 - Previously Submitted Registration of Intent Message

If you are assigned to a Sub-Organization of a Parent Organization the validation message will indicate the following: “Our records indicate that your parent organization, *<PARENT ORG NAME>*, previously submitted a Registration of Intent on *MM/DD/YYYY*. If you have questions pertaining to the electronic reporting of immunizations and / or the Registration of Intent contact your parent organization's Point of Contact, listed below. *<PARENT ORGS POC NAME>; <PHONE #>; <EMAIL ADDRESS>.*”

See Figure 495: Parent Org Submitted Registration of Intent Message.

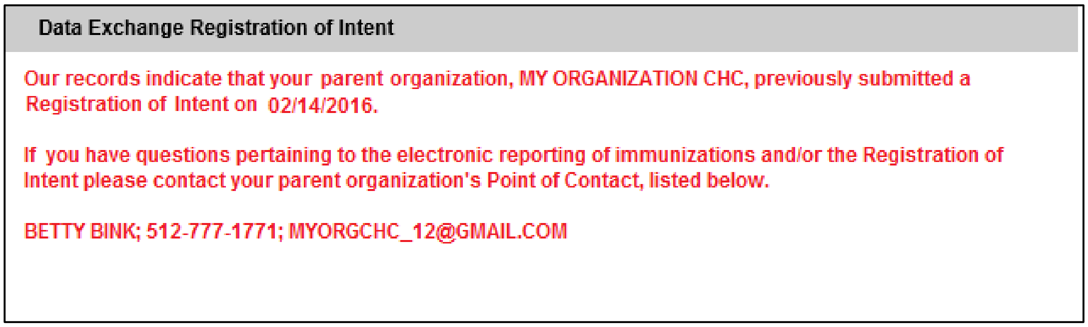


Figure 342 - Parent Org Submitted Registration of Intent Message

Exchange Data

The data exchange feature of ImmTrac2 allows the capability to exchange client and immunization data files through various routes – Web, SFTP, or SOAP. All ImmTrac2 Organizations which have submitted a Registration of Intent will be able to perform data exchange. Data Exchange refers to Organizations sending immunization and patient data to ImmTrac2 while ImmTrac2returns client notifications and data quality reports to Organizations.

Due to the large volume of records ImmTrac2 receives from various sources, complete demographic and immunization information is essential to ensure ImmTrac2 matches immunization records reported from multiple sources appropriately. If you are unable to supply this information, ImmTrac2 will not be able to merge data with other sources to obtain one complete immunization record. Providers are encouraged to send as many client demographic elements as possible (e.g., Address, Telephone number, Social Security Number, Mother's maiden name, Parent / Guardian name, or Medicaid Number) to improve appropriate record matching.

***Note**: There is an option to perform data exchange through the ImmTrac2 user interface. In order to manually exchange data through the UI, you must request privileges from ImmTrac2 Customer Support. For more information on how to use the Data Exchange user interface see Appendix B.*

Required Testing Submissions

The ImmTrac2 Staff will set up your organization’s data exchange specifications, which includes the file format that your organization will need to use, and provide these to your organization’s Point of Contact after the submission of the Registration of Intent. We will also provide you with the required testing of data and files before allowing your organization to achieve data exchange in a live production environment. During the testing of data and files no immunization or client data will be updated in ImmTrac2. Testing of data and files is required in order to ensure that your organization is sending information in the proper format, using correct coding, and ensure high data quality.

When a file is submitted for testing the ImmTrac2 System will check the data within the file for data quality issues. If issues or errors are identified it is the organization's responsibility to correct the issues. Once the errors are corrected the organization will need to submit a new immunization file. This continual process of uploading data, identifying errors and correcting errors will be an essential part of the testing in moving forward to production. Once an organization has submitted a series of 3-5 error free test files ImmTrac2 Staff will consider promoting your organization to production.

Data Exchange by SFTP

Uploading files by SFTP (Secure File Transfer Protocol) is the **preferred method** to be used by Organizations when reporting immunization data to ImmTrac2. The use of SFTP allows the Organization to send their immunization data through the SFTP account created for the Organization on ImmTrac2 servers.

The Reporting Method used by an Organization should be discussed with the Organization's Electronic Health Records Vendor prior to submitting the Registration of Intent to ensure proper selection is made.

Once an ROI is received for the Organization ImmTrac Staff will setup the SFTP for the Organization. **Note:** SFTP will only be setup if the Organization selected SFTP or Web under their Reporting Methods of the ROI Questions. The login credentials for the SFTP will be emailed securely to the Organization's Point of Contact with further instruction on how to access and use the SFTP account.

***Note**: For a deeper understanding of data exchange by SFTP please contact ImmTrac2 Customer Support.*

Data Exchange by SOAP Secure Web Services

Data Exchange by SOAP (Simple Object Access Protocol) is another alternative when reporting immunization data to ImmTrac2.

SOAP is a messaging protocol that allows systems to communicate using Hypertext Transfer Protocol Secure (HTTPS) and Extensible Markup Language (XML). SOAP defines the XML-based message format that web service-enabled applications use to communicate and interoperate with each other over the Internet.

Soap secure web services can be used to automate data submissions from the organization's EHR software to ImmaTrac2. To utilize SOAP secure web services, please consult with the organization's EHR vendor and with ImmTrac2 Customer Support so your organization's EHR may property configure their software to be able to exchange data files automatically with ImmTrac2.

The login credentials for SOAP will be emailed securely to the Organization's Point of Contact with further instruction on how to report through SOAP after the ROI is received by ImmTrac2.

***Note**: For a deeper understanding of data exchange by SFTP please contact ImmTrac2 Customer Support.*

Data Exchange by the ImmTrac2 User Interface

ImmTrac2 allows for immunization files to be uploaded through the web application's user interface by users with Data Exchange rights. If you are not assigned a user role with Data Exchange rights, contact ImmTrac2 Customer Support for further guidance on Data Exchange for your organization.

ImmTrac2 Customer Support will help to determine the provider's organization data exchange specifications, which include the file format that will be used. They will also assist with the first data exchange. Providers will be asked to submit a file to ImmTrac2 in test mode with no update to the actual client records. Once the first file has been accepted in ImmTrac2, it will be reviewed by the provider organization and ImmTrac2 Customer Support. If both parties agree that the Data Exchange was successful, then the provider organization will continue sending data into the ImmTrac2 application.

To upload immunization data files using the Exchange Date user interface, follow the steps below.

See Figure 496: Exchange Data Steps 1-3.

1. Click the **Exchange Data** menu option.
2. Enter a Job Name. *If no Job Name is entered, today's date will be used.*

3. Click **Browse** and select the file to upload. (This client and immunization data file must be obtained through.)

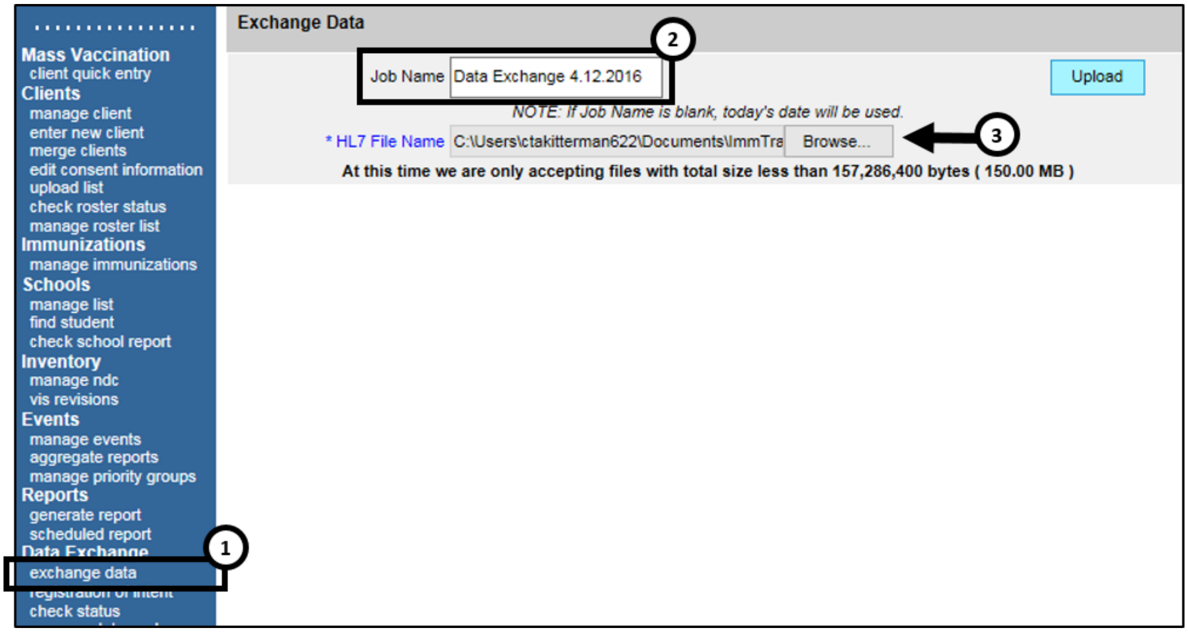


Figure 343 - Exchange Data Steps 1-3

See Figure 497: Exchange Data Steps 4-5.

4. Click the “Upload” button.
5. Click “OK” when the “Please wait...” message displays.

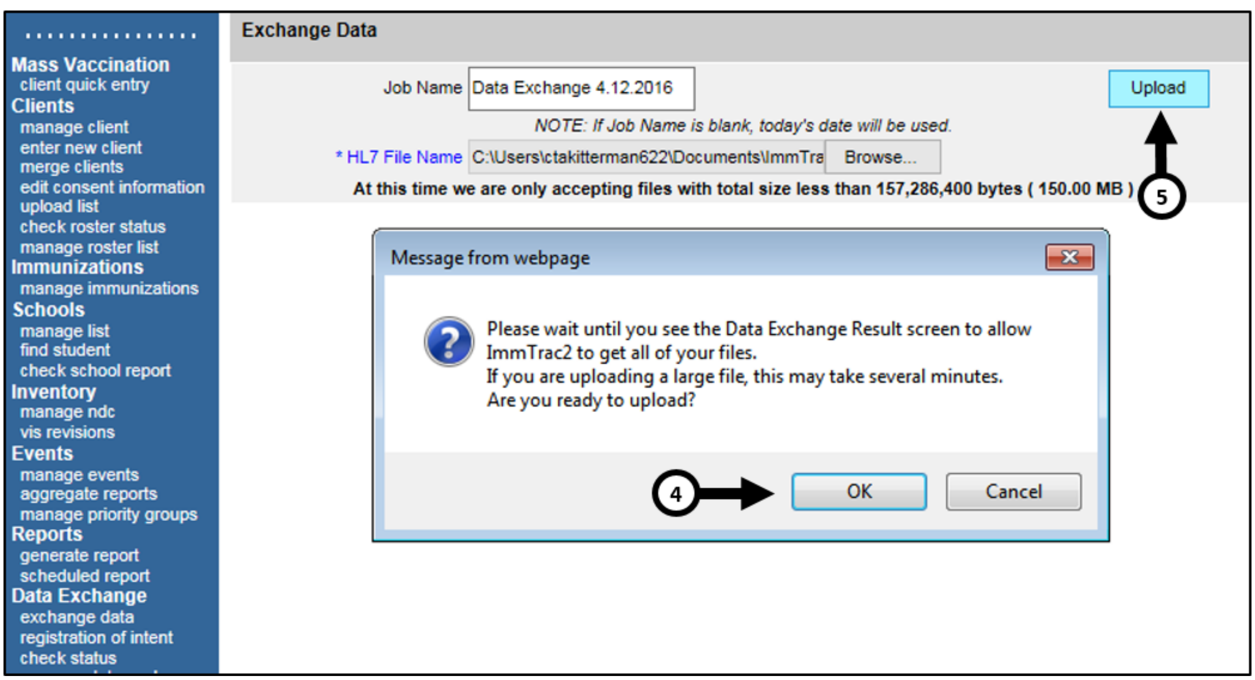


Figure 344 - Exchange Data Steps 4-5

See Figure 498: Exchange Data Step 6.

6. When redirected to the *Exchange Data Result* screen, click the "Check Status" button to monitor the job status.

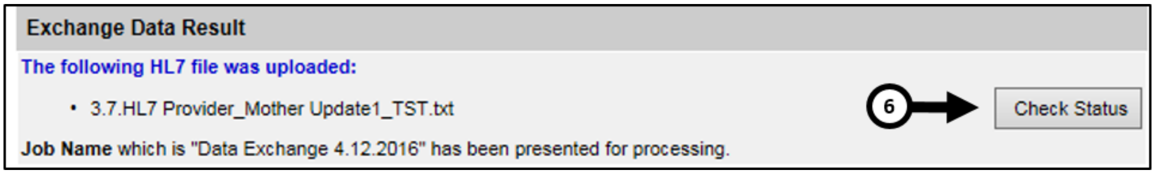


Figure 345 - Exchange Data Step 6

Check Status

After submitting data exchange files, the *Exchange Data Status* screen can be used to monitor the job status and to review previously submitted jobs. A user can see all data exchange jobs submitted by any user in the organizations to which they are associated.

Use the "Show" filter option to narrow or expand the job results to 1, 7, 15, or 30 days, with the default set 7 days. The "Realtime" filter will allow user to view data exchange jobs only submitted through an external electronic method by selecting "Yes".

To check exchange data status, follow the steps below.

See Figure 499: Data Exchange – Check Status Steps 1-3.

1. Click the "Check Status" button.
2. On the Exchange Data Status screen the recent exchange job will be listed at the top of the page.
    - No other exchange jobs can be submitted until the current job is in a COMPLETE status.
3. Click the "Refresh" button until the status is COMPLETE. *See Figure 500: Data Exchange Job Status Table.*

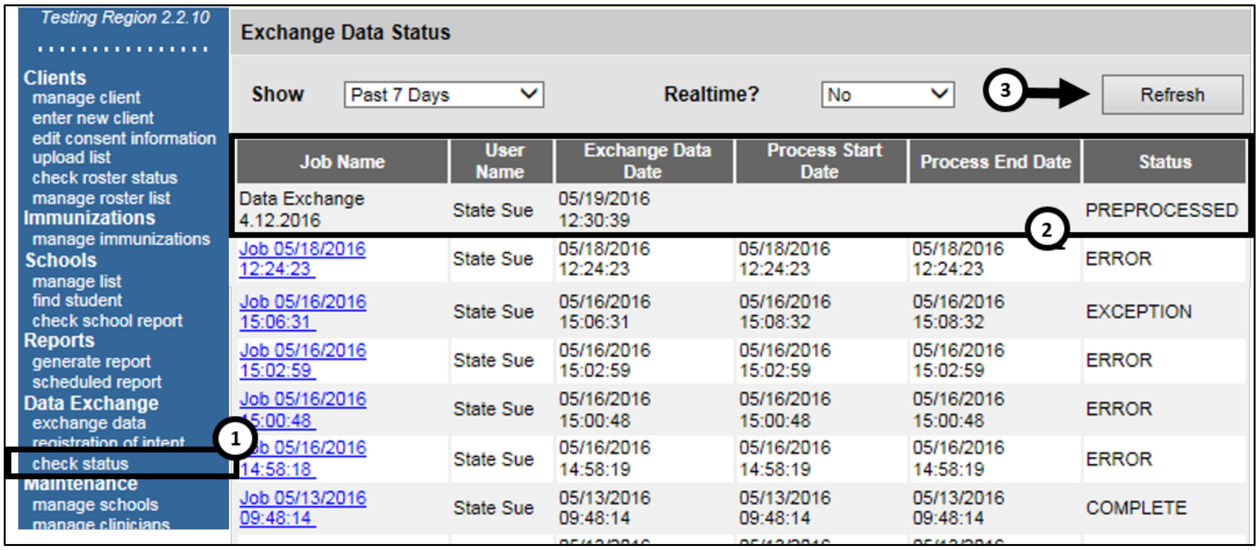


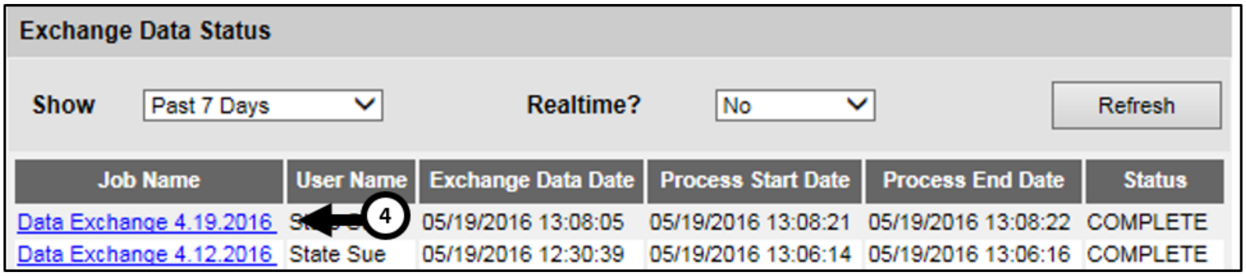
Figure 346 - Data Exchange – Check Status Steps 1-3

Table 63 - Data Exchange – Job Status Table

Status	**Description**
PREPROCESSED	When an organization is not set up for 'Bypass Preprocessing,' a data exchange job will go into a preprocessed statue until it is reviewed and approved by a Full Access State user.
PREPROCESSING	Once a data exchange job has been reviewed and validated by a Full Access State user, or if an organization is set up to bypass 'Preprocessing' it is moved to a processing status.
PRECERTED	This is the status displayed once a Full State Access user begins the processing.
PRECERTING	Provides user with a summary of any violations associated with any immunizations included in the DX file. PRECERTING also allows the user to Reject submitting the file if they see any issues related the data in their submitted file.
EXCEPTION	Could occur for various reasons like DX can be down, issues with the network, servers not processing the files or servers being down, possible bug in the code or low space in the database.
ERROR	Status when a job encounters issues like incorrect file formats and errors out.
COMPLETE	Status when a job runs through the USER INTERFACE or FTP without any issues and completes.

See Figure: Data Exchange – Check Status Step 4

4. Once the status reaches complete click the Job Name hyperlink to view the exchange summary information.



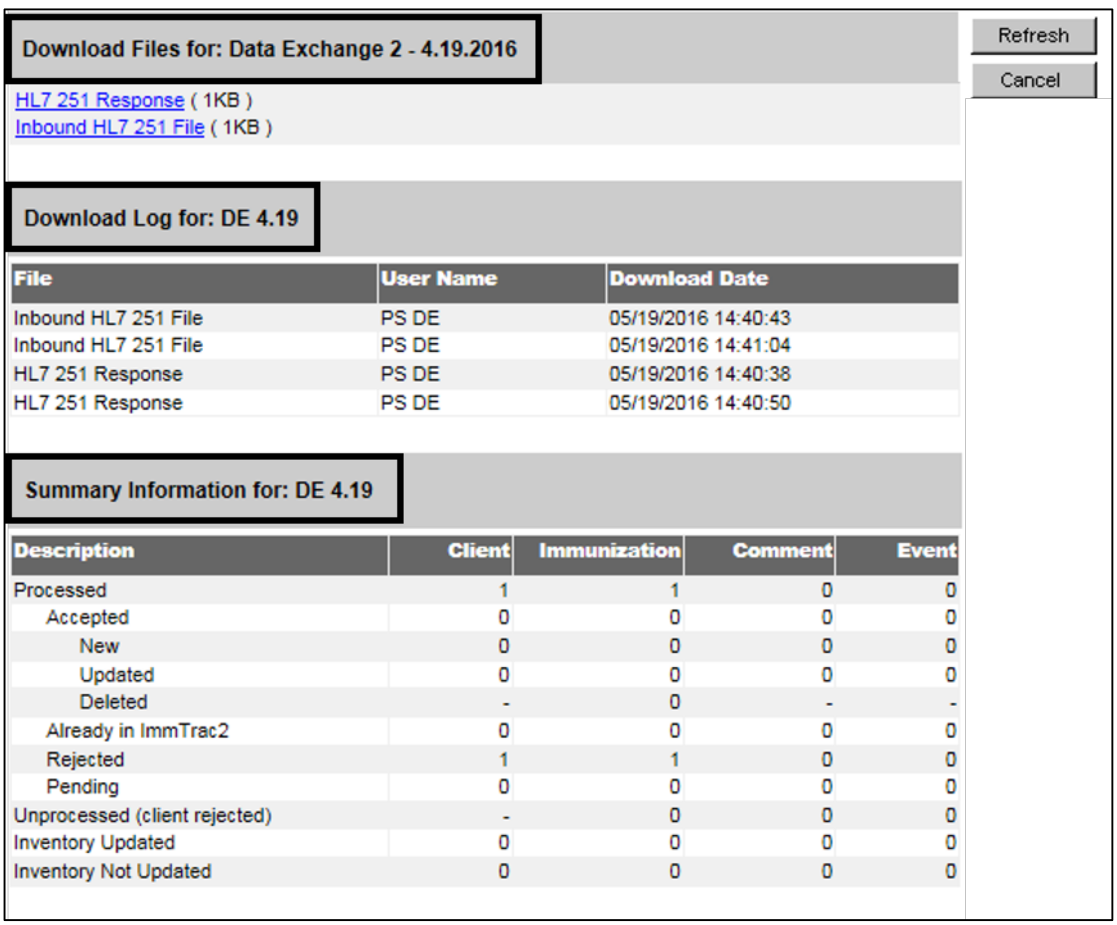
Exchange Data Status

Show: Past 7 Days | Realtime? No | Refresh

Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
Data Exchange 4.19.2016	[illegible] 4	05/19/2016 13:08:05	05/19/2016 13:08:21	05/19/2016 13:08:22	COMPLETE
Data Exchange 4.12.2016	State Sue	05/19/2016 12:30:39	05/19/2016 13:06:14	05/19/2016 13:06:16	COMPLETE

Figure 347 - Data Exchange – Check Status Step 4

Once the data exchange is complete, view the results in the Summary Information section. This page has three sections: Download Files, Download Log, and the Summary Information. *See Figure 501: Data Exchange Summary Screen.*



Refresh | Cancel

Download Files for: Data Exchange 2 - 4.19.2016

HL7 251 Response (1KB)
Inbound HL7 251 File (1KB)

Download Log for: DE 4.19

File	User Name	Download Date
Inbound HL7 251 File	PS DE	05/19/2016 14:40:43
Inbound HL7 251 File	PS DE	05/19/2016 14:41:04
HL7 251 Response	PS DE	05/19/2016 14:40:38
HL7 251 Response	PS DE	05/19/2016 14:40:50

Summary Information for: DE 4.19

Description	Client	Immunization	Comment	Event
Processed	1	1	0	0
Accepted	0	0	0	0
New	0	0	0	0
Updated	0	0	0	0
Deleted	-	0	-	-
Already in ImmTrac2	0	0	0	0
Rejected	1	1	0	0
Pending	0	0	0	0
Unprocessed (client rejected)	-	0	0	0
Inventory Updated	0	0	0	0
Inventory Not Updated	0	0	0	0

Figure 348 - Data Exchange Summary Screen

Download Files: Displays the files available for the user to download as hyperlinks. Listed below are all the possible types of files that may be available in this section.

- **Inbound File** *(See Figure xxx)*: this is the file that was uploaded by the submitter. This file will be available only if the data file was accepted during the date exchange process. This only means the file was accepted, but it has not yet been processed or upload to ImmTrac2.
- **Response File** *(See Figure xxx)***:** can be viewed for more detailed information about the results of the 'Summary Information' section listed at the bottom of the screen. This file will only be available if the data exchange job was processed successfully and is in a completed status.
- **PreProcessor Information**: this link displays the 'PreProcess Information' screen that was reviewed by a state user for the correct file type and file structure before the date file was submitted for processing. This option will only be available if an organization's data exchange settings are configured to 'Bypass PreProcessing'.
- **PreCertification Information**: this link displays the 'PreCertification Information' screen that was viewed by a state user for data violations before the date file information is accepted into ImmTrac2. This option will only be available if an organization's data exchange settings are configured to 'Bypass PreCertification'.
- **Data Quality Report**: this link displays an Immunization Import Summary report in a PDF format.

Download Log: Displays a log of what files were downloaded, the Username of who downloaded the files, and the Download Dates.

Summary Information: Displays summary information for the file uploaded and will include the Client and Immunization details to indicate what occurred with the information uploaded with numeric values. *See Table 64: Data Exchange Summary Information.*

Table 64 - Data Exchange Summary Information

Status	Description
Processes	Indicates how many of the Clients and Immunizations were processed.
Accepter	Indicates how many of the Processed Clients and Immunizations were accepted by ImmTrac2.
New	Indicates how many of the Processed and Accepted Clients and Immunizations were considered New to the ImmTrac2 system.
Updated	Indicates how many of the Processed and Accepted Clients and Immunizations were already in ImmTrac2 but the information was simply updated based off the data sent in the file.
Deleted	Indicates how many of the Processed and Accepted Immunizations were deleted. ***Note:*** *Clients cannot be deleted through electronic submission, there is a separate process in place to Withdrawal Consent from ImmTrac2.*
Already in ImmTrac2	Indicates how many of the Processed Clients and Immunizations were already included in ImmTrac2.
Rejected	Indicates how many of the Processed Clients and Immunizations were rejected.
Pending	Indicates how many of the Processed Clients and Immunizations are pending. ***Note:*** *These may be pending due to duplicate records, or no consent form on file.*
Unprocessed	Indicates how many of the Clients were not processed and completely rejected. ***Note:*** *Immunizations total do not qualify for this category.*
Inventory Updated	***Note****: This field will not be used at this time.*
Inventory Not Updated	***Note****: This field will not be used at this time.*

Organizational Extract (Modified Access Sub-State Users Only)

Organizational Extract enables a Modified Access Sub-State user to generate immunization records for clients in which they have access. The feature is used to select and submit the client, immunization, and date criteria used to extract immunization records from the registry in an HL& format.

To perform an organizational extract follow the steps below.

See Figure 502: Organizational Extract Steps 1-2.

1. Click the **Vital Data Exchange** menu option.
2. Select the Organization ID.
    - This section will only appear if the organization is a Parent organization in a Parent / Child relationship in ImmTrac2.
    - For more information on selecting an Org ID *See Table 65: Select Org ID(s) Table*.

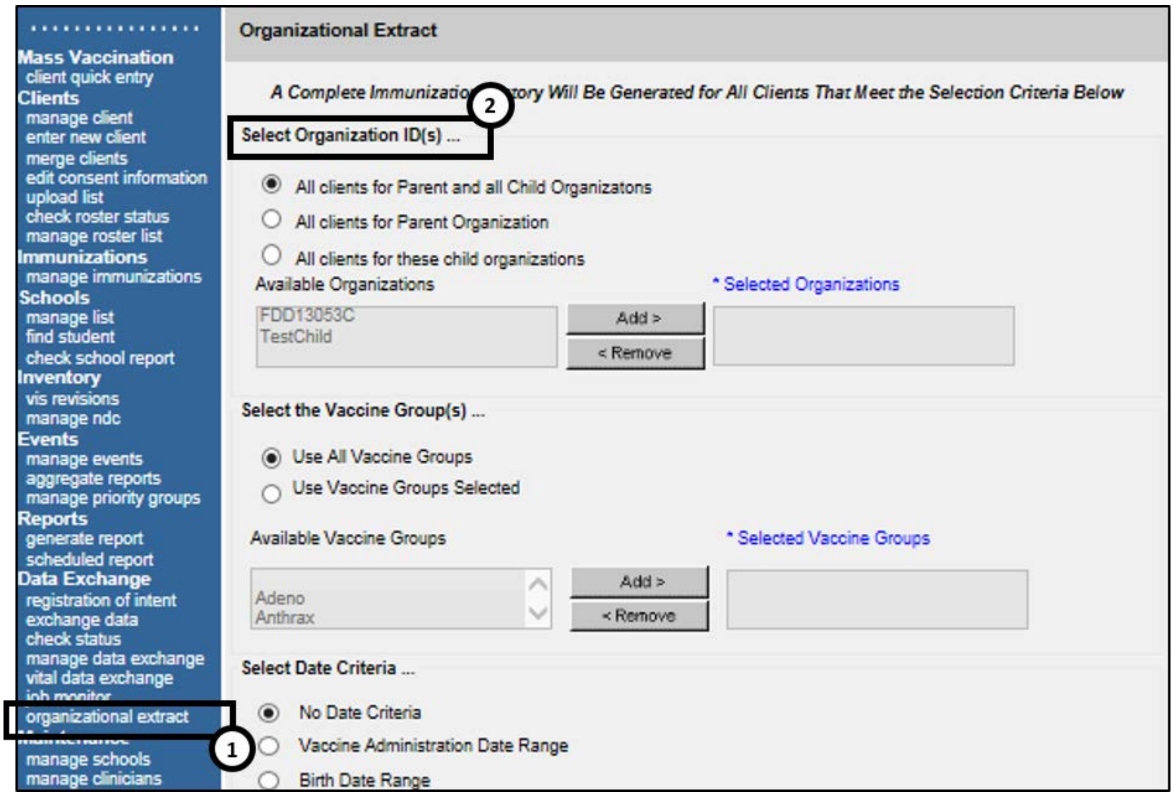


Figure 349 - Organizational Extract Steps 1-2

Table 65 - Select Org ID(s) Table

Option	**Description**
All Clients for Parent and all Child Organizations	Selecting this option will return all clients who have been administered immunizations by either the Parent organization and / or your child organizations. This is considered *normal* reporting.
All Clients for Parent Organization	Selecting this option will return all clients who have been administered immunizations by the Parent organization.
All Clients for these Child Organizations	Selecting this option will return all clients who have been administered immunizations by the selected child organizations. Select specific vaccines and click the “Add” button.

See Figure 503: Organizational Extract Steps 3-4.

3. Select the Vaccine Groups. This section defaults to *User All Vaccine Groups.* If the *Use Vaccine Groups Selected* option is selected, use the “Add” button to select specific vaccines.
4. Select Date Criteria. View Figure / Table xxx – for Organization date criteria.
    - For more information on selecting an Org ID *- See Table 66: Select Date Criteria Table.*

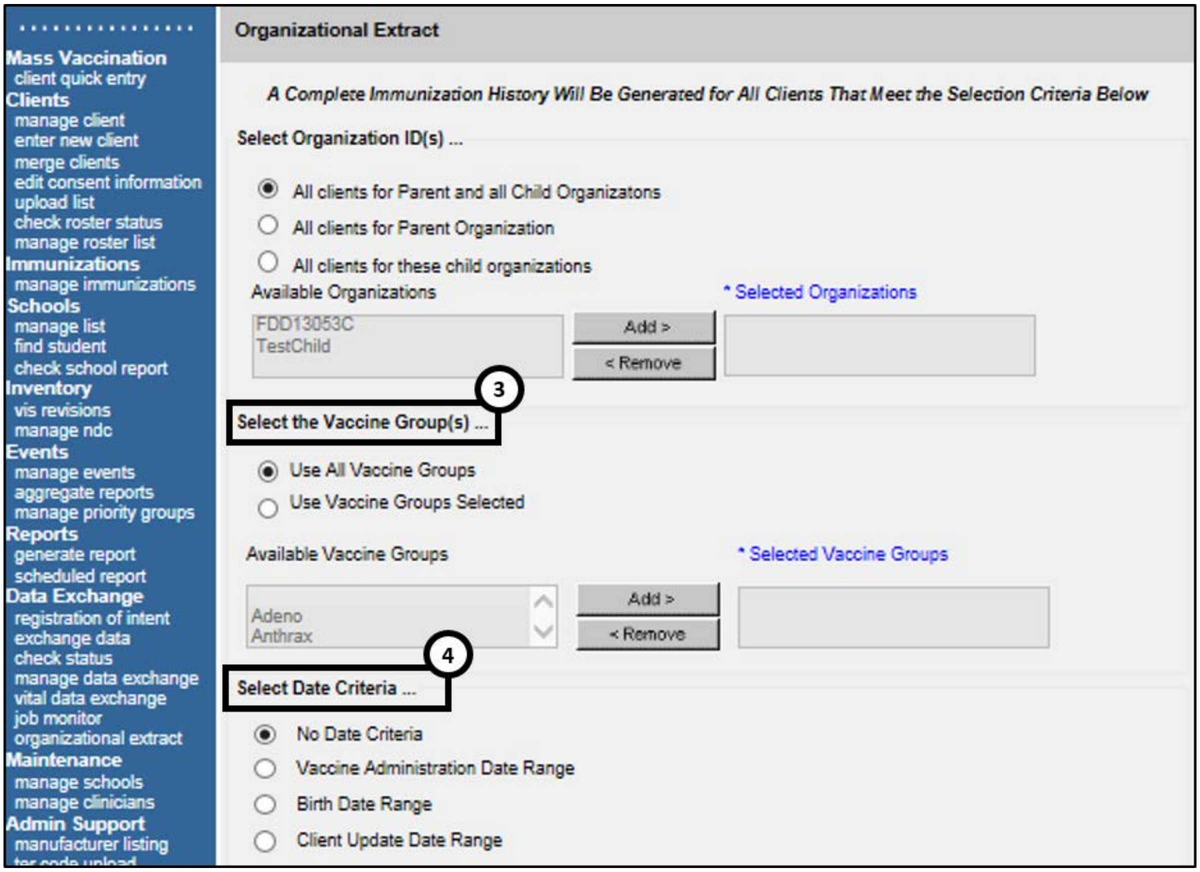


Figure 350 - Organizational Extract Steps 3-4

Table 66 - Select Date Criteria Table

Option	Description
Vaccine Administration Date Range	When these dates are specified, the report will only return those clients who have at least one vaccine that was administration within the Date Range entered. A complete immunization history will be returned for each client.
Birth Date Range	When these dates are specified, the report will only return those clients who have a birth date that falls within the Date Range entered.
Client Update Date Range	When these dates are specified, the report will only return those clients who have a client update date that falls within the Date Range entered. A complete immunization history will be returned for each client.

See Figure 504: Organizational Extract Steps 5-7.

5. Select Client Status. This section defaults *No Data Criteria*.
6. Select Extract Format and enter a Job Name. If the job name is left blank, the report will be generated using the date. Extract Format can be entered as an HL7 2.3.1, HL7 2.4, and HL7 2.5.1.
7. Click the “Generate” button.

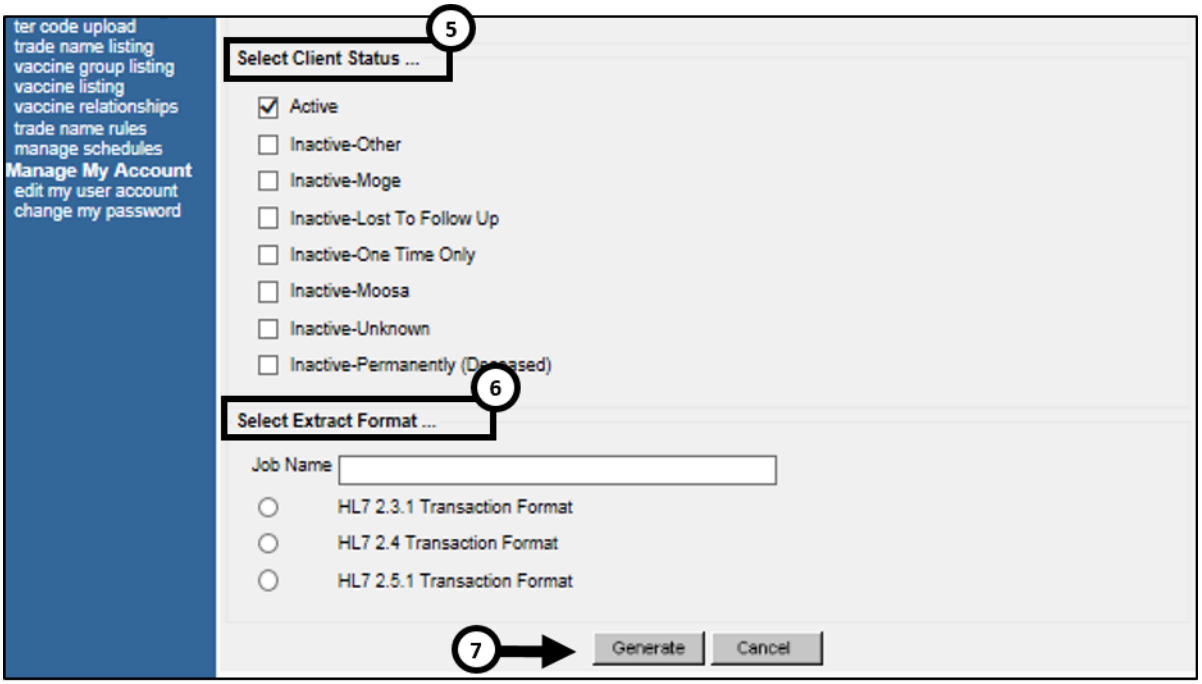


Figure 351 - Organizational Extract Steps 5-7

Appendix D

CRA Event Information

In the event of a public health emergency, or pandemic response event, ImmTrac2 may be used to track the administration of vaccine for these events. In some cases, specific client groups may be identified as being at higher risk than the general population and targeted to receive the vaccination first. These groups are called **Priority Groups**. When a public health emergency is in effect for an organization, the CRA Event Information tab will become visible in the client demographic section and the client must be assigned a Priority Group. *See Figure 505: CRA Event Information Demographic Tab.*

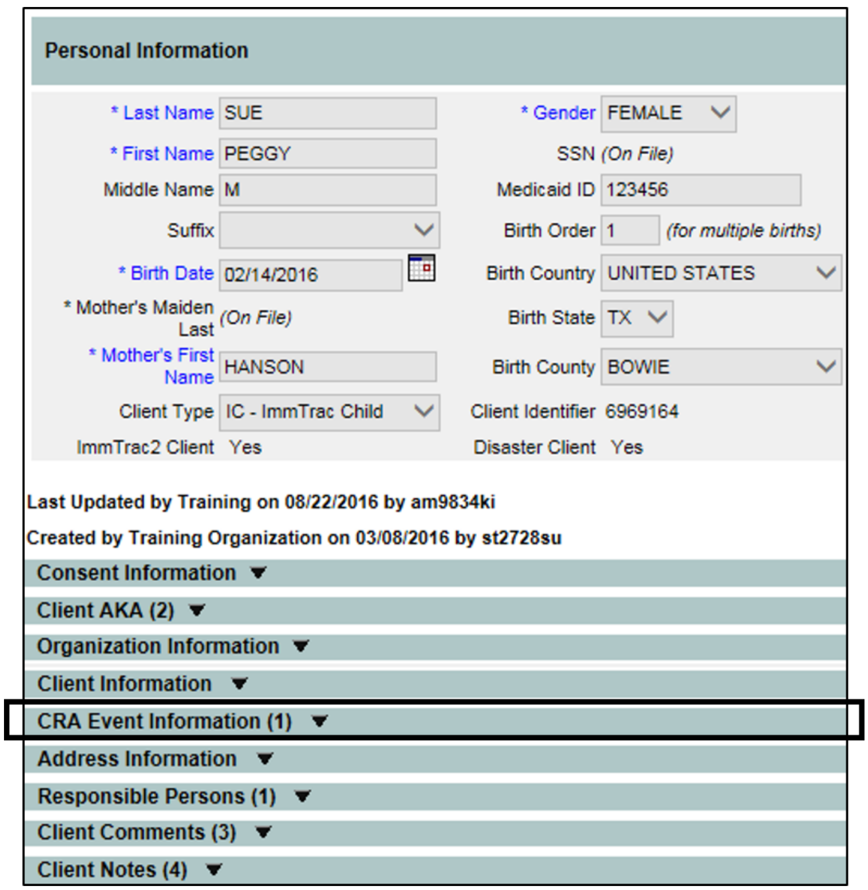


Figure 352 - CRA Event Information Demographic Tab

The CRA event information section is used to collect Public Health data during a public health emergency. When editing a client record, entering a new client, or adding immunizations, the CRA Event Information tab will be visible and the user must select the appropriate priority group category for the client before saving. *See Figure 506: CRA Event Information Demographic Tab Details.*

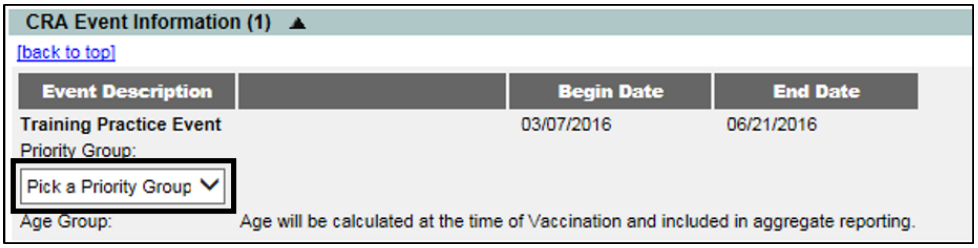


Figure 353 - CRA Event Information Demographic Tab Details

A similar CRA Event Information section will also display when updating the client's record with a new immunization, and a priority group must be assigned, regardless if the immunization is related to the public health emergency. *See Figure 507: Add Immunization – Pick a Priority Group.*

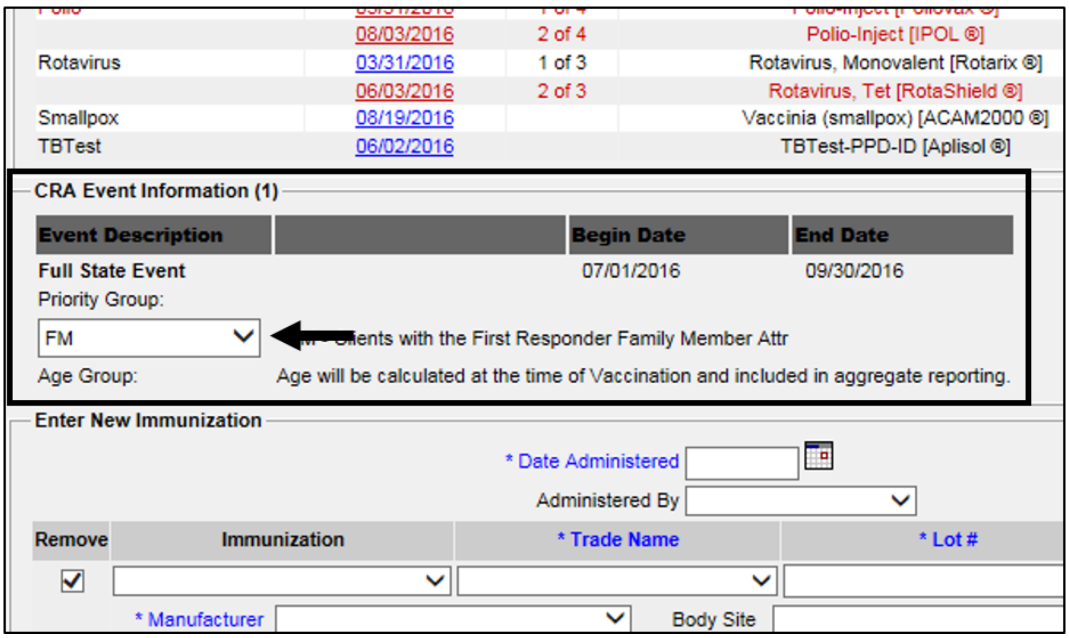


Figure 354 - Add Immunization – Pick a Priority Group

- Active Events (public health emergencies) are displayed under the *Event Description* with a beginning and end date.
- It is possible to have more than one active event.
- The *Age Group* is not required and will be calculated at the time of vaccination.
- The Priority Group Value (Code) is displayed in the drop-down list. When selected, a full description of the selected priority group will be listed to the right of the drop-down list.
- The (#) next to the CRA header displays the number of active events.

Mass Vaccinations

In some instances mass vaccinations may be administered as a result of the event.

The *Mass Vaccination* section displays in a user's menu panel only when the users organization is affected by, and associated to, an "Event" in ImmTrac2. Use the Mass Vaccinations section to update client and immunization records quickly during a public health emergency.

See Figure 508: Mass Vaccination Menu Panel View.

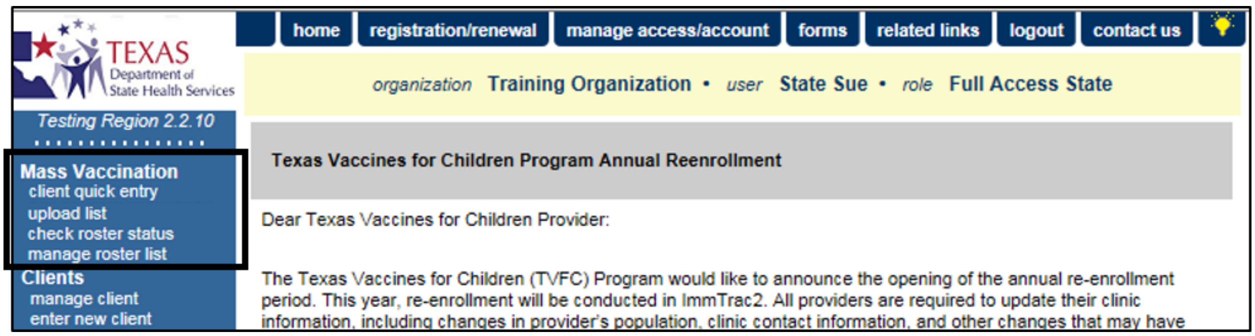


Figure 355 - Mass Vaccination Menu Panel View

Client Quick Entry

The Client Quick Entry menu option is used to enter new clients manually, but quicker than using the Enter New Client option during a disaster event.

To add clients using the Client Quick Entry process, follow the steps below.

See Figure 509: Client Quick Entry Steps 1-4.

1. Click the **Client Quick Entry** menu option.
2. Enter the client information, with required fields marked with an asterisks.
3. Select the appropriate Consent Verification option.
    - The available options are determined by the client's DOB, and will only display once the client's DOB has been populated.
4. Click the "Save / Verify" button.

***Note**: Next steps will depend on if there are potential matches and an override is required, or if the client is unique. Reference the Enter New Client chapter for the appropriate user role, for more details on consent and overrides.*

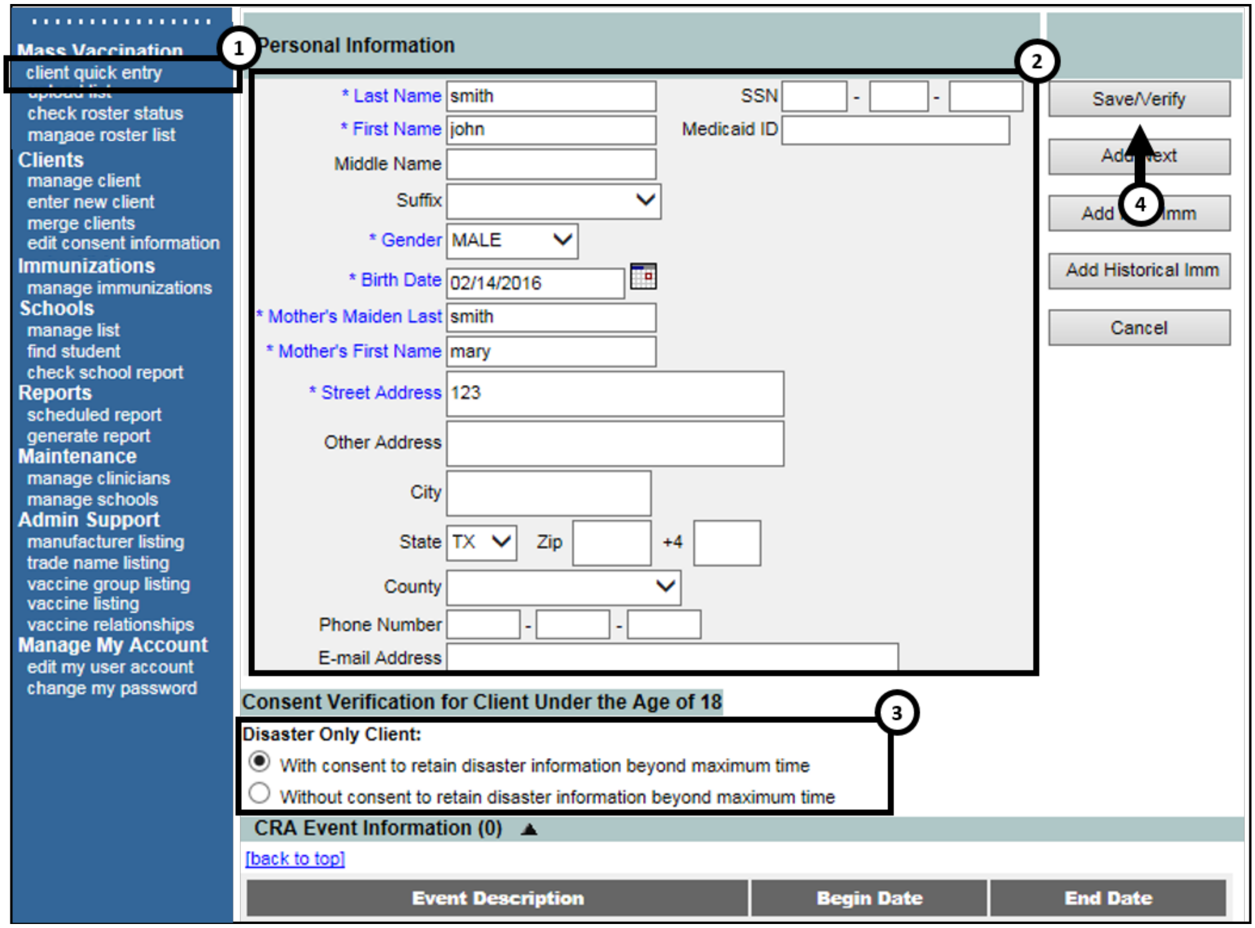


Figure 356 - Client Quick Entry Steps 1-4

See Figure 510: Mass Vaccination Menu Panel View Step 5.

5. Once the client has been verified and the CRA Event Information section appears, use the drop down arrow to pick a “Priority Group”.
    - The Consent History will also update after clicking “Save / Verify”.
6. Click the “Save / Verify” button. Users may also click the following buttons to save the client record and proceed to the next task.
    - Add Next: Clears the screen and the next client can be entered.
    - Add New Imm: Select this option to navigate to the Add New Immunization screen and enter the disaster immunization information.
    - Add Historical Imm: Displays the Add Historical Immunization screen.

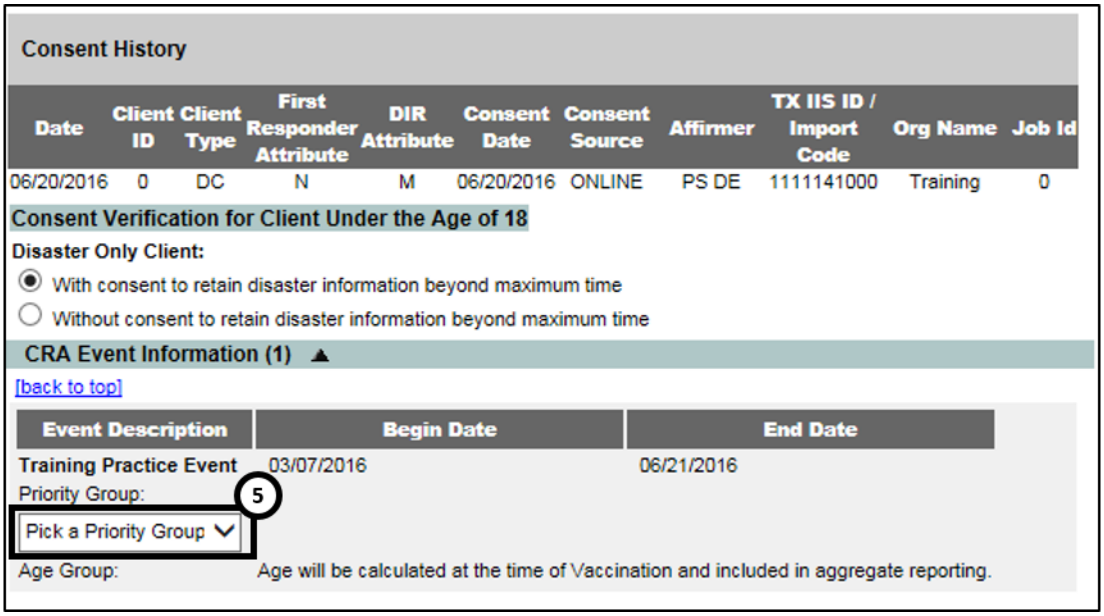


Figure 357 - Mass Vaccination Menu Panel View Step 5

Adding a Disaster Immunization

In order for an immunization to be deemed a Disaster Imm, the vaccine must be assigned to the Event and given during the event dates. Follow the Add New Immunization process to enter the disaster immunization information. For more details see the Add New Imm section.

See Figure 511: Enter New Immunization Screen.

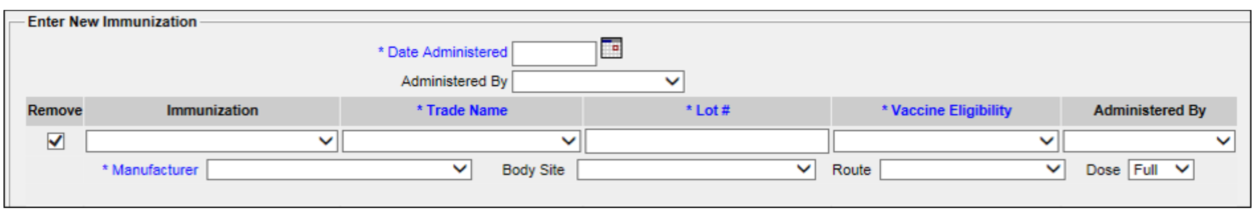


Figure 358 - Enter New Immunization Screen

Once the immunization is added and saved, users are redirected back to the *Client Immunization History* screen. The client record will list the newly added immunization and marked “Yes” for Disaster. The system will automatically display a DIR Consent Form message if the client does not have a Disaster Immunization Retention consent on file. *See Figure 512: Client Immunization History with Disaster Imm.*

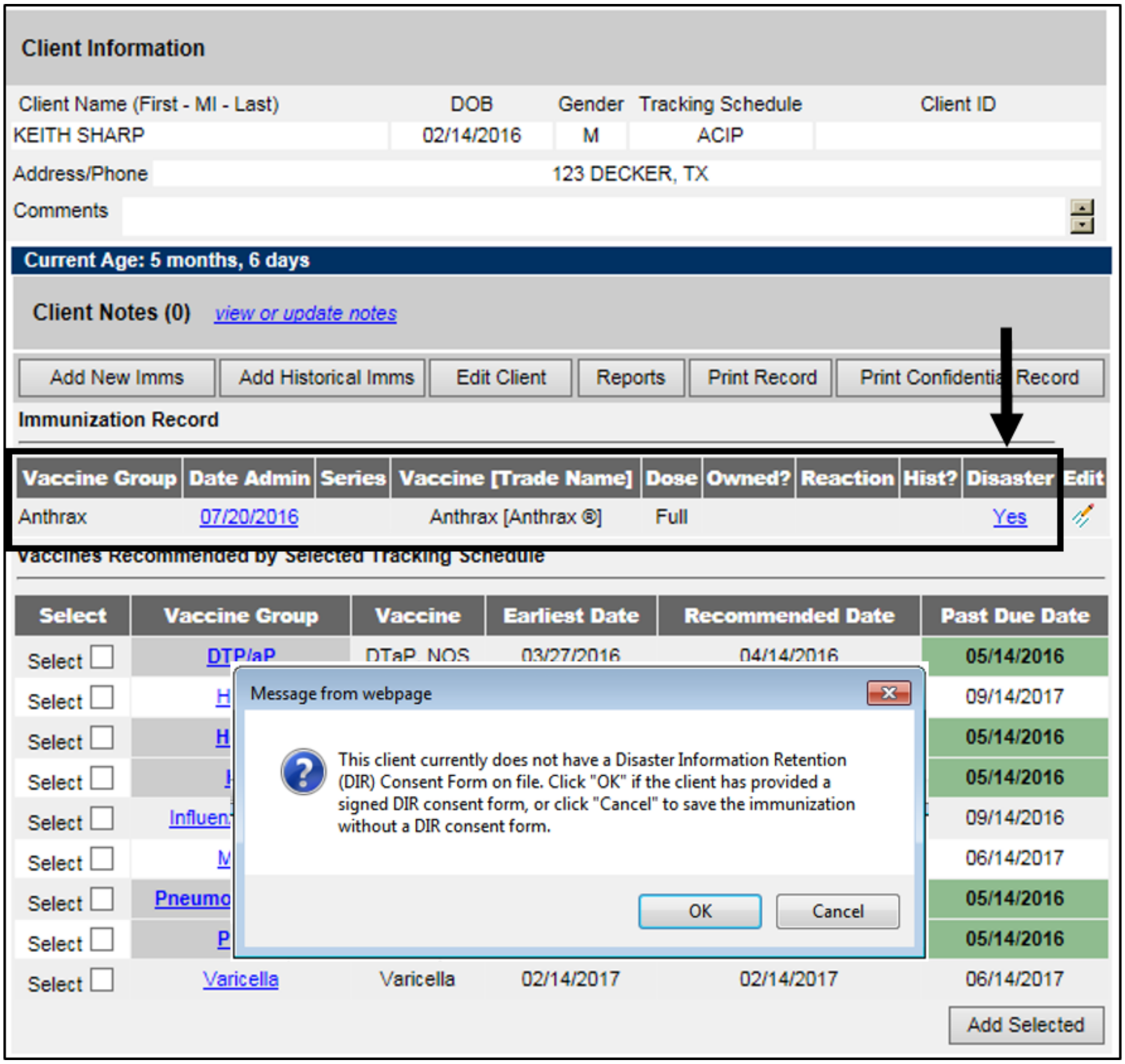


Figure 359 - Client Immunization History with Disaster Imm

Upload List

The *Upload Roster List* screen is used during a public health event to upload a list of clients or update an existing client roster list in order to add vaccination records to multiple clients at the same time. The clients must be existing ImmTrac2 clients.

The client file must be a fixed-length flat file with the following format.

See Table 67: Mass Vaccination - Upload List Flat File Format Table & Figure 513: Mass Vaccination - Upload List Flat File Example.

- Left justify and blank-fill character fields.
- Right justify and blank-fill number fields.
- Date fields use MMDDYYYY with leading zeroes.

- Any field that will be blank should be filled entirely with blanks (spaces).
- Each record must be fixed length and terminate with a carriage return / line feed.
- Generate the file using the ASCII character set.

Table 67 - Mass Vaccination - Upload List Flat File Format Table

Column	***Data type***	***Character #***	***Required***	***Notes***
Record Identifier	Char(32)	32	Y	Supplied by sender, used to uniquely identify a client.
First Name	Char(50)	33 - 82	Y	If Client does not have a first name, **"NO FIRST NAME"** must be entered in this field.
Middle Name	Char(50)	83 - 132		
Last Name	Char(50)	133 - 182	Y	
Name Suffix	Char(10)	183 - 192		JR, III, etc.
Birth Date	Date(8)	193 - 200	Y	MMDDYYYY
Mothers First Name	Char(50)	201 - 250		
Mothers Maiden Last Name	Char(50)	251 - 300		
Gender	Char(1)	301		Use the IR code set for **Gender**.
Street Address	Char(55)	302 - 356		Residential address of responsible person.
Mailing Address Line	Char(55)	357 - 411		Mailing address of responsible person. Use if mailing address is different from street address.
Other Address Line	Char(55)	412 - 466		

Column	Data type	Character #	Required	Notes
City	Char(52)	467 - 518		
State	Char(2)	519 - 520		
Zip	Char(9)	521 - 529		If +4 zip is used, the first 5 characters and second 4 characters are concatenated into a single value, without separators.

```
*************************12345LAUREN*****************************************KAY*
*******************************************SMITH********************************
*******************05141995GAIL*******************************************CARPENTE
R**************************************F125*EAST*STREET**************************
********************************************************************************
*********************************FULTON*****************************************
**OR535291234
```

Figure 360 - Mass Vaccination - Upload List Flat File Example

To upload a list and review the results, follow the steps below.

See Figure 514: Mass Vaccination Upload List Steps 1-4.

1. Click the **Upload List** menu panel option.
2. Enter a New List name or select an existing list from the drop-down option field.
3. Click the “Browse” button to locate and select a file.
4. Click the “Upload” button.

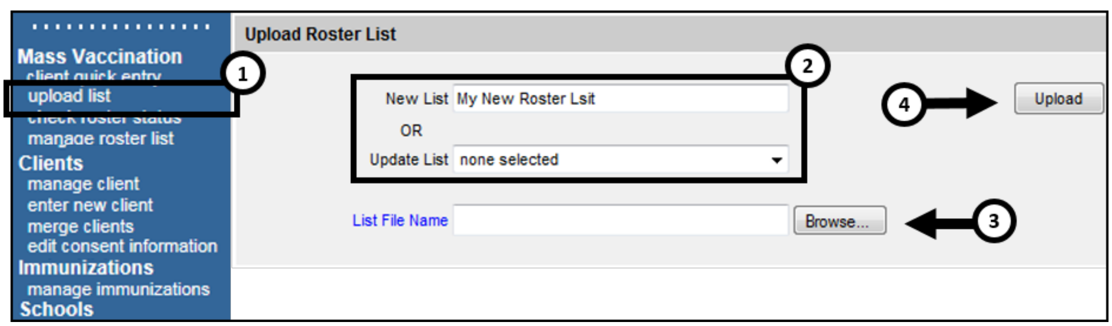


Figure 361 - Mass Vaccination Upload List Steps 1-4

See Figure 515: Mass Vaccination Upload List Step 5.

5. Click the “Check Status” button. The *Upload List Status* section displays at the bottom of the *Upload Roster List* screen.

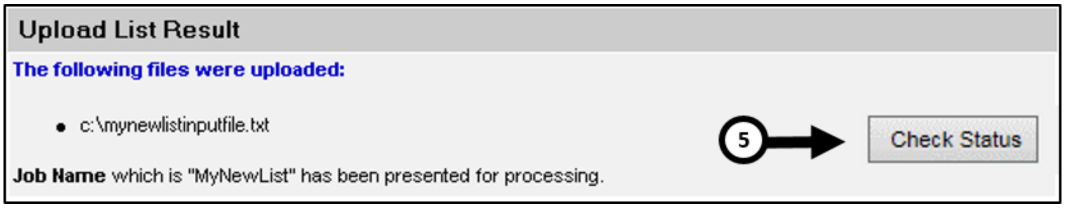


Figure 362 - Mass Vaccination Upload List Step 5

See Figure 516: Mass Vaccination Upload List Steps 6-7.

6. Click the “Refresh” button until the status is COMPLETE.
7. Click the Job Name hyperlink to view the upload results.

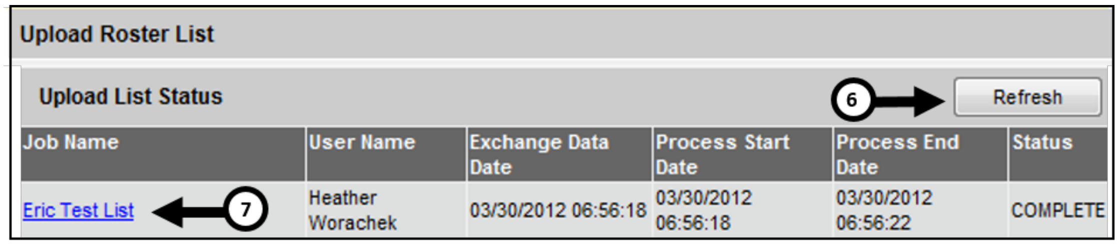


Figure 363 - Mass Vaccination Upload List Steps 6-7

Check Roster Status

Users can view the upload results from the *Check Roster Status* screen. If needed, users can continue to work elsewhere in the system while waiting for a job to reach a COMPLETE status, and later go back to check on the status of the job using this screen.

To view the results of an Upload List job, follow the steps below.

See Figure 517: Mass Vaccination – Check Roster Status Steps 1-3.

1. Click the “Check Roster Status” menu option.
2. Click the “Refresh” button until the current job status is COMPLETE.
3. Click the Job Name hyperlink to view the upload results.

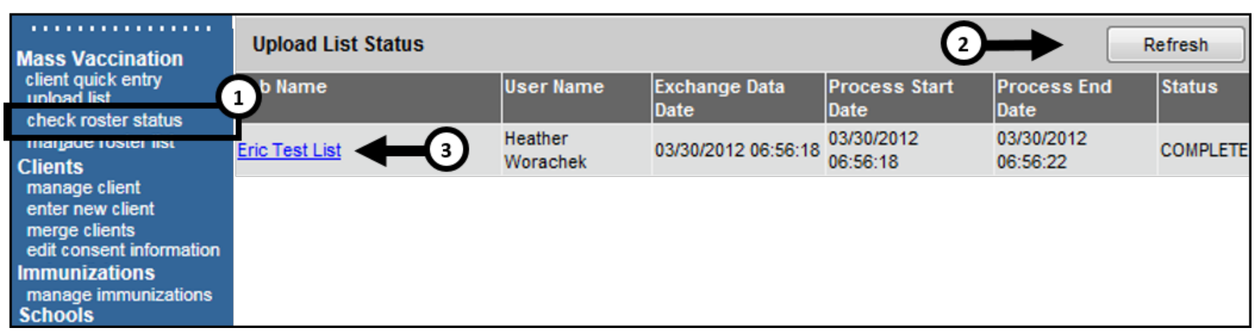


Figure 364 - Mass Vaccination – Check Roster Status Steps 1-3

There are up to four files that may be available for download:

- **Roster List Response** – Summarizes the results of the upload.
- **Roster List of Names with No Match** – ImmTrac2 could not find a client in the registry. You can enter the client into ImmTrac2, and then add the client to the roster list using Manage Roster List.
- **Roster List Rejected** – files were rejected for other reasons and require you to correct the data in your upload file in order for the system to accept it (examples: invalid or missing birth date).
- **Roster List of Names with Multiple matches** – ImmTrac2 found more than one client in the registry that matches the list criteria. Add the client into the list by using Manage Roster List.

The Summary Information section will provide quick access to the upload results without view the downloadable roster files. *See Figure 518: Mass Vaccination - Check Roster Status Results Screen.*

- **Total Clients Processed** – The total number of clients processed during the upload.
- **Added** – The total number of clients added to ImmTrac2.
- **Multiple Match** – How many of the total clients had multiple matches already in the registry. These clients will need to be manually added to the list using *Manage Roster List* screen and selecting the specific client to be added.
- **No Match** – ImmTrac2 could not find a client in the registry. You can enter the client into ImmTrac2, and then add the client to the roster list using Manage Roster List.
- **Rejected –** There were issues with the file that require the user to correct the data in order for the system to accept it. (Examples: invalid or missing birth date)

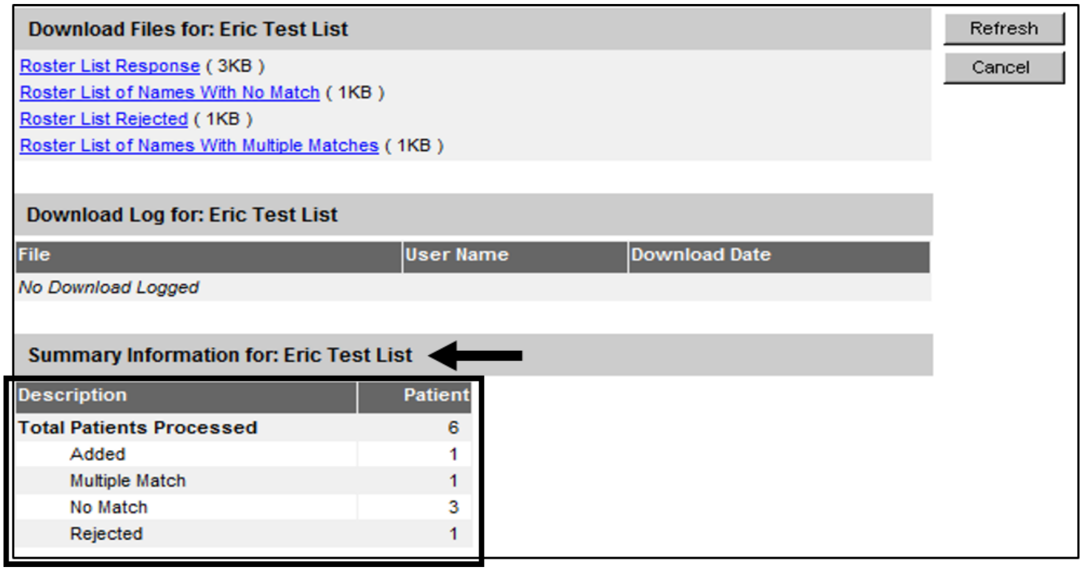


Figure 365 - Mass Vaccination - Check Roster Status Results Screen

A newly upload list will can be viewed on the *Manager Roster List* screen. After selecting the newly created list hyperlink, and the *Immunization Roster* screen opens, scroll down to the Roster List section at the bottom of the screen. The upload result statuses will be listed, and can be cleared by selected the "Clear Roster Status" button. *See Figure 519: Mass Vaccination – Client Roster.*

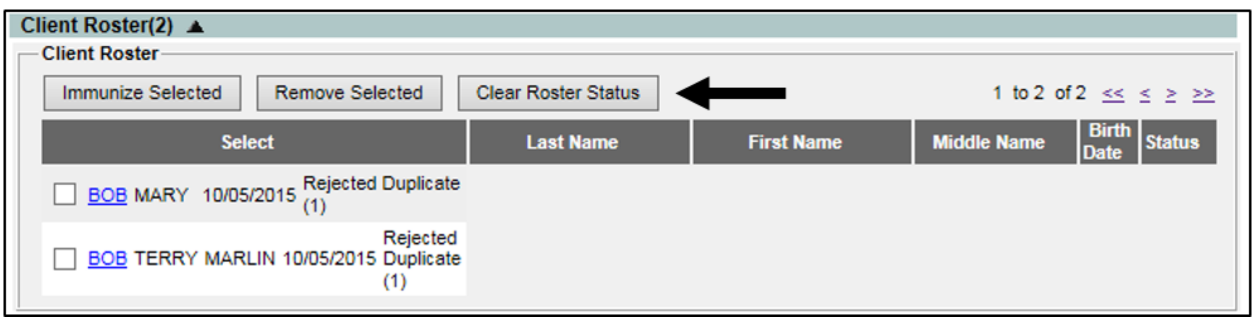


Figure 366 - Mass Vaccination – Client Roster

Manage Roster List

The *Manage Roster List* screen is used to create and manage new and existing client lists to be used for updating immunization records at the same time to multiple clients during a public health emergency. This screen displays all Roster Lists for an organization in alphabetically order, and the client count for each list. A roster list can be uploaded through the Upload List screen, or created from this screen and clients manually added to the list.

To view a roster list, follow the steps below.

See Figure 520: View Roster List Steps 1-2.

1. Click the “Manage Roster List” menu option.
2. Select a client list hyperlink.

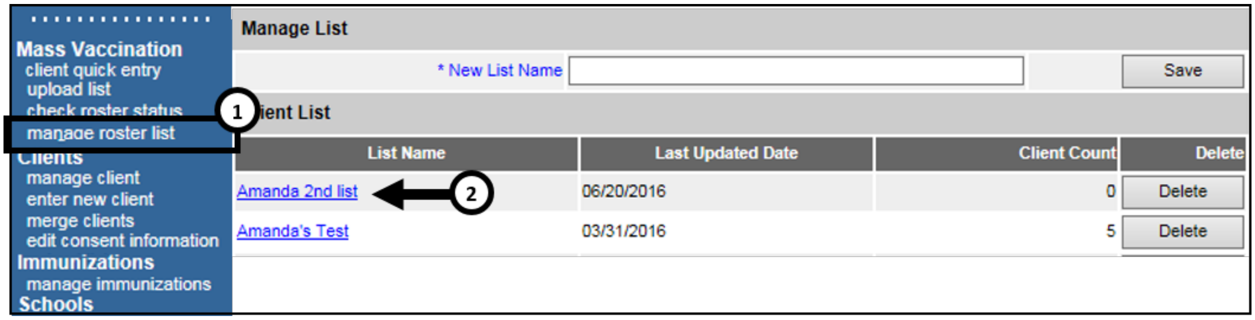


Figure 367 - View Roster List Steps 1-2

The *Immunization Roster* screen has these 4 sections: *See Figure 521: View Roster List - Immunization Roster Screen.*

- **Roster Event Information** – Use the drop down arrow to select a specific event when updateing client records with new immunizations.
- **Search and Add Clients to a Roster** – Use the search options to locate and select clients to add to the roster list.
- **Roster Immunization History** – This section is userd to add public health emergency immunizations only, to all clients who are listed on the roster.
- **Client Roster(#)** – Lists all clients who are include in the roster.

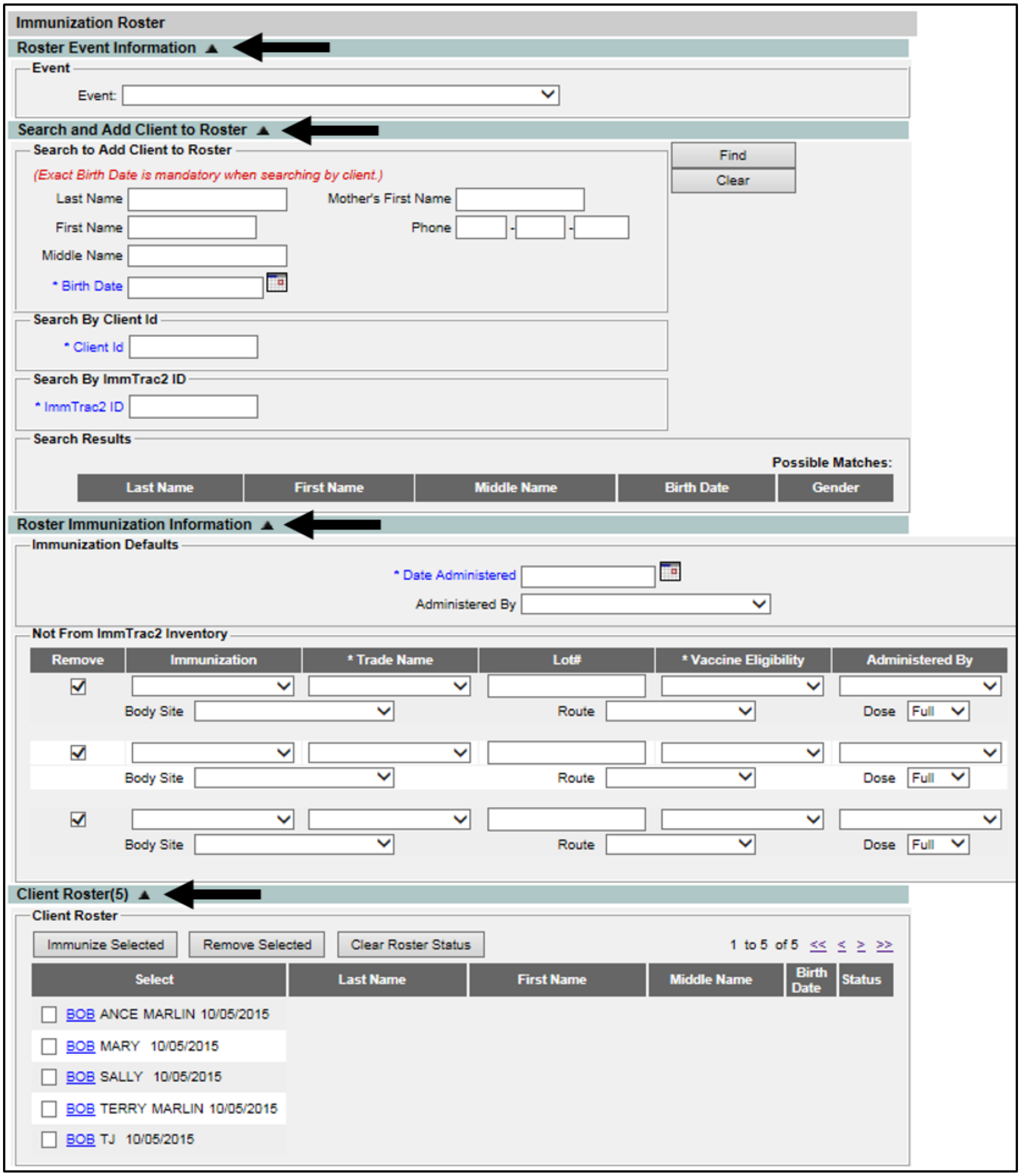


Figure 368 - View Roster List - Immunization Roster Screen

To add clients to a roster list, follow the steps below.

See Figure 522: Add Client to Roster Steps 1-3.

1. On the *Immunization Roster* screen, perform a search using one of the search options.
2. Click the "Find" button.

3. View the search results and select a client to add to the roster by clicking the plus icon. The client name displays in the *Client Roster* section at the bottom of the screen.

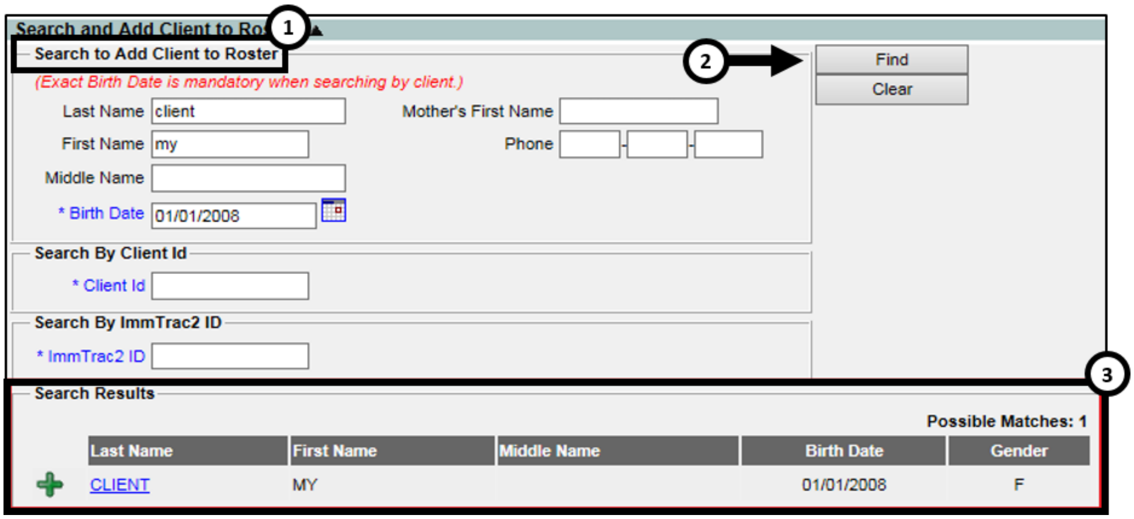


Figure 369 - Add Client to Roster Steps 1-3

To remove a client from a roster list, follow the steps below.

See Figure 523: Remove Client from Roster Steps 1-2.

1. On the *Immunization Roster* screen, use the check boxes to select one or more clients to be removed from the roster list.
2. Click the “Remove Selected” button. The screen will auto refresh and the client will no longer display in the list.

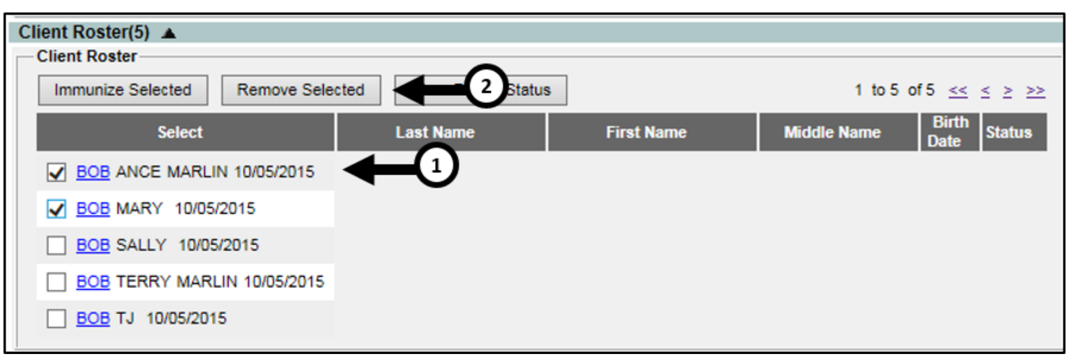


Figure 370 - Remove Client from Roster Steps 1-2

To add an immunization to all clients on the roster list, follow the steps below.

See Figure 524: Add Immunizations to Roster Clients Step 1.

1. On the *Immunization Roster* screen, use the drop down arrow to select an event for the immunization.

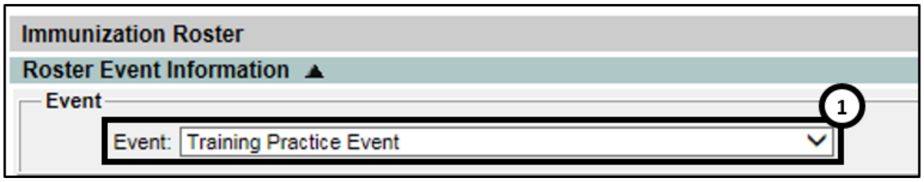


Figure 371 - Add Immunizations to Roster Clients Step 1

See Figure 525: Add Immunizations to Roster Clients Steps 2-6.

2. In the Roster Inmmunization Information section, enter the Date Administered in a MM/DD/YYYY format or use the calendar icon to select a date.
3. Input / select remaining immunization data. Required fields are marked with an asterisks.
4. Select a Priority Group using the drop down arrow.
5. Use the check boxes in the Client Roster section to select which clients have received the immunization.
6. Click the “Immunize Selected” button to update the client’s records.

***Note**: For more details on the immunization data fields when adding a new immunization, reference the Add Immunization chapters.*

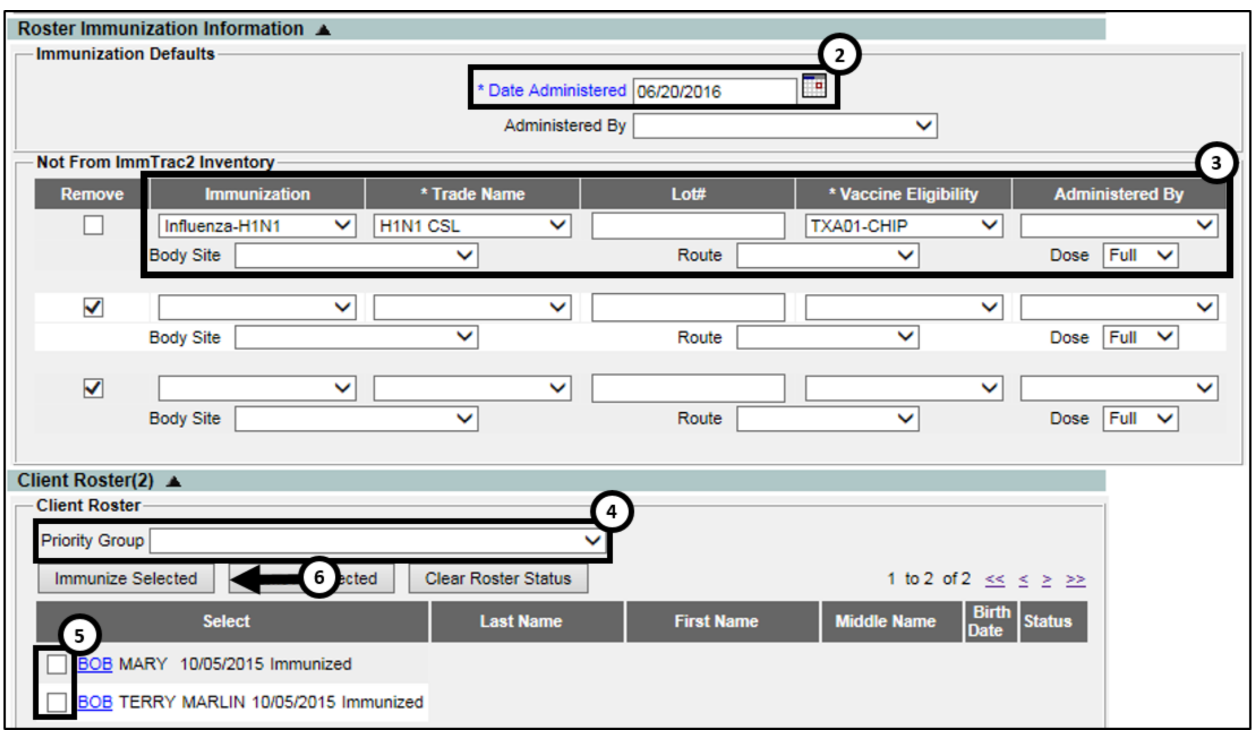


Figure 372 - Add Immunizations to Roster Clients Steps 2-6

The client status will update to “Immunized” after clicking the “Immunize Selected” button. *See Figure 526: Immunizations Status.*

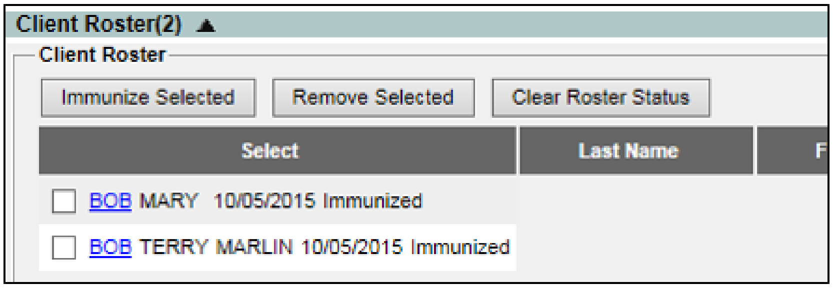


Figure 373 - Immunizations Status

Glossary

ACIP

Advisory Committee on Immunization Practices. Along with the Centers for Disease Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine.

Browser

A software program you use to access the Internet.

CoCASA

Comprehensive Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of clients for an immunization provider.

CDC

Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

Client

Anyone who has provided authorization to have an immunization recorded in ImmTrac2.

Client Identifier (Client ID)

The identifier assigned to a client by an organization. A client may have numerous Client IDs and each ID is organization specific.

Client Note

Notes regarding the client that will be helpful to other providers that is displayed to any user viewing the client’s record.

Clinician

A person who provides a health care service and for the purposes here would administer an immunization; for example, a nurse.

Consent
Written permission obtained from a parent or legal guardian for an underage client, or from a client 18 years of age or older for participation in ImmTrac2.

Contraindicated
A condition or factor that serves as a reason to withhold a certain medical treatment due to the harm that it would cause the patient.

CRA
Countermeasure and Response Administration. This is used in conjunction with “Event”. See Event.

Custom Flat File Template
A customized layout, specifying fields and field lengths, for performing data exchange.

Data exchange
A feature that allows you to automatically exchange immunization batch files with ImmTrac2.

Deduplication
An automatic process that displays potential client matches to help ensure that client records are not duplicated in ImmTrac2.

Disaster
A public health emergency, or disaster event affecting selected age groups in a specific area.

Event
A public health emergency, or disaster event affecting selected age groups in a specific area.

Historical Doses (HIS)
Doses that the client received, but it is unclear which organization administered the dose. (See also ImmTrac2 Inventory Doses and Other Owned Doses.)

HL7

Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

Home page

The first screen in ImmTrac2 that displays for users. This page contains announcements, release notes, resources, and the menu.

Hyperlink

A word or group of words that is underlined and appears in a colored font, usually blue. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

ImmTrac2 ID

An identifier assigned to each client systematically by ImmTrac2. The ImmTrac2 ID for a client is the same for all organizations viewing the client record.

Immunization Information System (IIS)

Confidential, computerized information system containing client demographics and immunization histories. Immunization Information Systems enable public and private health care providers to maintain consolidated immunization records.

Logout

Button on the ImmTrac2 menu bar that allows you to exit ImmTrac2. You may logout from any screen in ImmTrac2.

Lot number

The unique, identifying number given to each vaccine by the manufacturer.

Manage Access / Account Screen

The first screen in ImmTrac2, which displays for users who have access to multiple organizations. The user chooses one of the organizations to access.

Menu bar

The ImmTrac2 menu bar is dark blue and appears at the top of every screen within the registry. The menu bar has several menu options: home, registration / renewal, manage access / account, forms, related links, logout, help desk, and help (light bulb). The menu bar on your Internet browser, on the other hand, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

Menu panel

The ImmTrac2 menu panel is a medium blue color and appears to the left of every screen within the registry. The menu panel lists all of the ImmTrac2 functions available to the user.

Owned (Doses)

Indicates whether the user's Organization administered the vaccine or not. If the field is blank on the immunization record, the immunization data is owned by the user organization. If the value in this field is "No", the immunization data is not owned by your organization.

PCP

Primary Care Physician. A doctor who acts as first point of consultation for patients.

PDF

Portable document file. A file format that allows you to view and print a document online in its original format with Adobe Reader.

Prescribing Authority

A person with the capability of ordering an immunization for a client; a person with Prescribing Authority is generally the client's pediatrician or primary care provider or, within public health organizations, the medical director.

Radio button

An input circle that, when clicked, fills with a black dot to indicate a selection.

Recall Notice

A card or letter that informs a responsible person or client of immunizations that are overdue.

Release

A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, ImmTrac2 release version 2.0.

Reminder Notice

A card, letter that informs a responsible person or client of immunizations that are due in the future. These can be generated by the provider using the Reminder / Recall Report.

Responsible person

A parent, relative, or guardian who is associated with the client and may act as a contact. A client may also act as the responsible person for himself or herself.

Sequence

Identifies which dose is being referred to within a vaccine series. For example, a number "2" sequence indicates the second dose of the series.

Series

The compilation of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP / aP vaccine contains five doses.

SFTP

Secure File Transfer Protocol. SFTP is a standard network protocol used to transfer computer files between a client and server on a computer network. The use of SFTP allows an Organization to send their immunization data to ImmTrac2.

SOAP

Simple Object Access Protocol. SOAP is a standard network protocol used to transfer computer files between a client and server on a computer network. The use of SOAP allows an Organization to send their immunization data to ImmTrac2.

Tracking schedule

A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a client's immunization history and makes recommendations for future vaccinations based on that history.

User roles

ImmTrac2 users are categorized into roles that determine their level of access to the functions of ImmTrac2.

Users

Individuals who access ImmTrac2 in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.

Vaccine group

A category that describes one type of vaccination. For example, the vaccine trade names Engerix-B, Comvax, and Recombivax all fall under the Hepatitis B vaccine group.

Vaccine trade name

A unique, identifying name for a vaccine series given by the manufacturer. For example, Engerix-B is the trade name for a Hepatitis B vaccine manufactured by GlaxoSmithKline.

Index

1

A

B

C

E

F

G

H

S

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