TEXAS Health and Human Services | Texas Department of State Health Services

The Texas Immunization Registry

ImmTrac2 Manage Client Status Criteria

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Introduction

To use the Manage Client Status feature, select the “manage client status criteria”link in the menu bar on the left side of the screen (see Figure 1 – Link to Manage Client Status Criteria).

Figure 1 - Link to Manage Client Status Criteria

With the Manage Client Status Criteria feature, providers can retrieve a group of clients based on specific search criteria and perform bulk changes to the client status without having to go into each client record individually through the ImmTrac2 Manage Client screen. Exception: Clients with a status of “Deceased” will be updated individually through the “Manage Client” screen.

For example, providers who had clients that had moved away but were still listed as their clients now have an efficient way to change clients’ status in their organization from “active” to “inactive”. See Figure 2 – Manage Client Status Criteria.

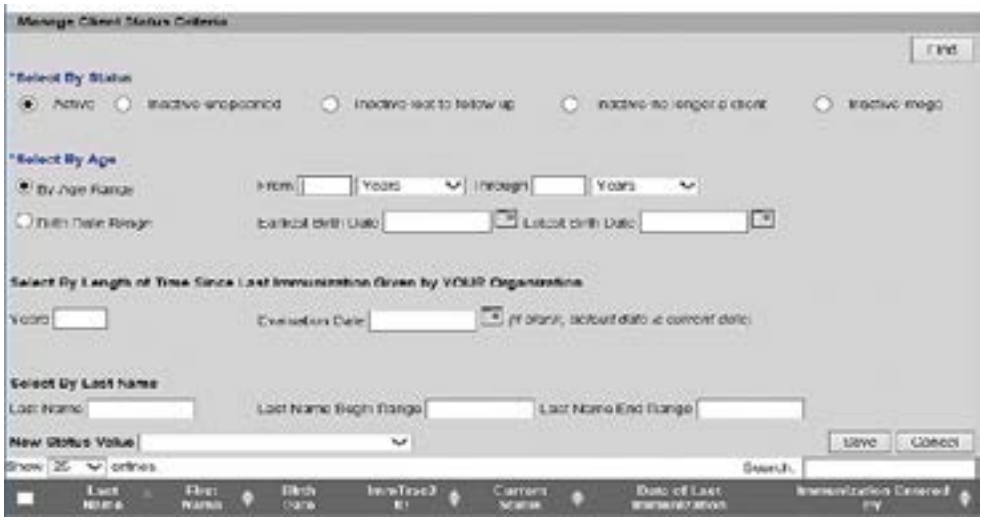


Figure 2 - Manage Client Status Criteria

The four areas of the Manage Client Status Criteria are (see Figure 3: The Filters and Display Table below):

- **Required Filters** These filters by status and range of ages or birth dates must be used.
- **Optional Filters** These filters are not required and include selecting clients by the number of years since a specified date.

- **Optional Real-Time Search Filter** This filter works with the Display/Change Status Table below it. Any set of characters that you enter in the “Search” field will be used to search each row in the table below and if it finds a match, the client on that row is included in the selection.

- **Display/Change Status Table** This table lists the clients that have met all the criteria you enter in the filters above. Only clients that met the requirements of the Required Filters AND the Optional Filters and the Option Real-Time Filter will be displayed I the Display/Change Status table. By selecting clients listed in the table and using the New Status Value field and the Save button, the status of all selected clients can be changed.

Clients with the Allow Reminder and Recall Contact flag set to “No” will be excluded from the search results.

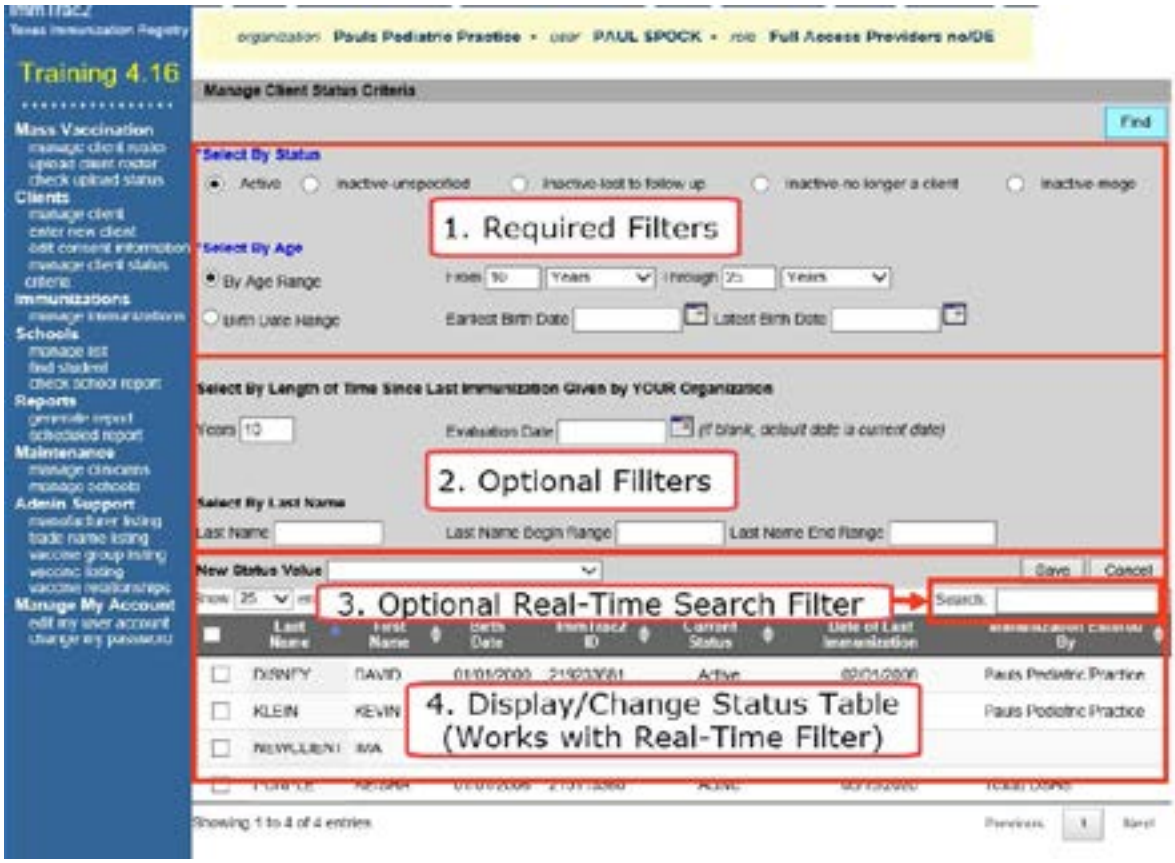


Figure 3 - The Filters and Display Table

Required Filters

Select by Status

See Figure 4 – Select by Status.

Figure 4 - Select by Status

Description of this filter - The status options below allow you to select clients that have one of the following statuses for your organization:

- Active
- Inactive – unspecified
- Inactive – lost to follow-up
- Inactive – no longer a client
- Inactive – moge (moved or gone elsewhere)

Select by Age

See Figure 5 – Select by Age.

Figure 5 - Select by Age

Description of this filter:

- By Age Range – Select clients with an age range From (years or months) Through (years or months).
- Birth Date Range – Select clients with an Earliest Birth Date (mm/dd/yyyy format, or use the calendar) to Latest Birth Date (mm/dd/yyyy format, or use the calendar).

Optional Filters

Select by Length of Time Since Last Immunization Given by your Organization

This is an optional filter. See Figure 6 – Select by Length of Time Since Last Immunization.

Figure 6 - Select by Length of Time Since Last Immunization

Description of this filter:

- Evaluation Date is in mm/dd/yyyy format or use the calendar.
- If you do not enter anything in the "Years" field but enter an evaluation date, an error message will popup: "You must enter the number of years if the Evaluation Date is entered" (see Figure 7 – Error Message for Evaluation Date but No Years).

Figure 7 – Error Message for Evaluation Date but No Years

- If you do not enter anything in the Evaluation Date field, the current date is the default date.
- If you enter the number of "Years", and either enter an Evaluation Date or take the current date as the default, and then click "Find", clients who had immunizations administered by your organization between the Evaluation Date and going back for the number of years specified will not be displayed.

Select by Last Name

Select by last name is an optional filter. See Figure 8 - Select by Last Name

Figure 8 - Select by Last Name

Description of this filter:

- If the Last Name is entered, at least the first two letters of the last name are required.
- If the Last Name Begin Range is entered, the first 2 characters of the last name are required, and you must also enter at least 2 characters in the Last Name End Range.
- If the Last Name End Range is entered, the first 2 characters of the last name are required, and you must enter at least 2 characters in the Last Name Begin Range.
- Last name has priority over the Last Name Begin Range and Last Name End
- Range. If anything is entered into the Last Name field, it will ignore anything entered in the Last Name Begin Range and Last Name End Range fields. It will use the Last Name field instead of the range fields.
- If nothing is entered into the Last Name field and data is entered in the Last Name Begin Range and Last Name End Range fields, it will search using the range data.

Optional Real-Time Search Filter

The optional real-time search filter is used in conjunction with the Display/Change table listed below it. This filter acts differently than the other filters in that you don't have to select the "Find" button in the upper right corner of the screen to make a change in clients displayed. Instead, any characters (numbers or letters) that you enter in the search field are used to search through each and every field in the display table to find a match. If a match is found on any row in the table, then the client on that row is included in the display table; otherwise the client is no longer displayed. See Figure 9 – Real-Time Search Filter Match.

Figure 9 – Real-Time Search Filter Match.

Display/Change Status Table

The Display/Change Status table lists all the clients of your organization and their current status in relation to your organization. The table lists all clients related to your organization that match all the selection criteria listed in the required and optional filters.

Important Note: The "Date of Last Immunization" column in the table lists the date of the last immunization given by any organization. To the right of that field is the column "Immunization Entered By" that lists which organization gave the last immunization that the client received. If a different organization from yours gave the last immunization that the client received, that has no effect on the filter "Select by length of time from last immunization given by YOUR organization". See Figure 10 – Date of Last Immunization.

Last Name	First Name	Birth Date	ImmTrac2 ID	Current Status	Date of Last Immunization	Immunization Entered By
BADGER	BILLY	01/01/1990	219234341	Active		
DISNEY	DAVID	01/01/2000	219233681	Active	01/01/2016	Texas DSHS
JONES	JESSICA	01/01/2000	219233682	Active	08/01/2012	Pauls Pediatric Practice
KLEIN	KEVIN	01/01/2010	219233683	Active	03/01/2010	Pauls Pediatric Practice

Figure 10 - Date of Last Immunization

You can change the status of one or more clients in the table by

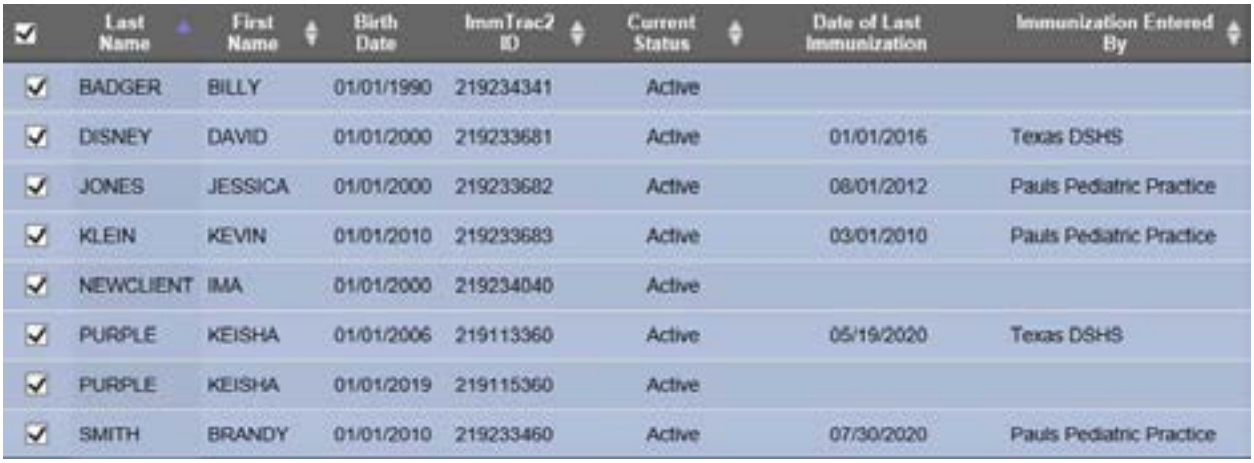
- Clicking on the selection box on the left-most column of any rows, or
- Clicking the left-most box in the heading to select all rows (clients).

Next, select the arrow on the drop-down box in the "New Status Value" field to list possible new statuses for the clients you have selected. See Figure 11– Drop-Down Box of New Status Value.

Figure 11 - Drop-Down Box of New Status Value

Select the new status for the select clients. In the above figure, Jessica Jones was selected. Then click the save button to save the new status for the selected client(s).

If you wish to select all the clients in the table to make a change in their status, click the box on the far left in the column header (see Figure 12 – Select All Rows).



	Last Name	First Name	Birth Date	ImmTrac2 ID	Current Status	Date of Last Immunization	Immunization Entered By
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☑	DISNEY	DAVID	01/01/2000	219233681	Active	01/01/2016	Texas DSHS
☑	JONES	JESSICA	01/01/2000	219233682	Active	08/01/2012	Pauls Pediatric Practice
☑	KLEIN	KEVIN	01/01/2010	219233683	Active	03/01/2010	Pauls Pediatric Practice
☑	NEWCLIENT	IMA	01/01/2000	219234040	Active		
☑	PURPLE	KEISHA	01/01/2006	219113360	Active	05/19/2020	Texas DSHS
☑	PURPLE	KEISHA	01/01/2019	219115360	Active		
☑	SMITH	BRANDY	01/01/2010	219233460	Active	07/30/2020	Pauls Pediatric Practice

Figure 12 - Select All Rows