

Texas ImmTrac2



User Manual

Version 0.0.1

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DRAFT

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Chapter 1

Introduction

In this chapter:

What Are Immunization Information systems (IIS)
Why We Need Immunization Information systems (IIS)
The ImmTrac2 Immunization Information System

The following sections are an overview of Immunization Information Systems (IIS), reproduced with the permission of All Kids Count, a nonprofit organization dedicated to the improvement of immunization rates in children.

What Are Immunization Information Systems

Immunization information systems are confidential, computerized state- or community-based information systems. In the *Healthy People 2010* program, the U.S. Department of Health and Human Services set a goal of enrolling 95% of children from birth through age five in a fully functioning immunization information system, noting, “Population-based immunization information systems will be a cornerstone of the nation’s immunization system by 2010”.

Immunization information systems enable public and private health care providers to consolidate and maintain computerized immunization records on all children within a given geographic area. They enable multiple authorized health care professionals to access the consolidated information on the immunizations that any child has received. They help doctors remind parents when their children are due or overdue for immunizations. They help health care professionals stay abreast of the complex immunization schedule.

Why We Need Immunization Information Systems

The U.S. now enjoys the highest immunization rates and lowest disease levels ever, but sustaining them is not easy. One of the greatest challenges is the growing complexity and volume of immunization information:

- Over 11,000 children are born each day, each needing 18-22 shots by age six to protect them from debilitating, life-threatening diseases.
- An increasingly complex childhood immunization schedule makes it difficult for health professionals to keep up, even with the help of books, charts, and training.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change health care providers with increasing frequency. This may lead to immunization records that are fragmented between multiple clinics making it difficult to assess whether a client is truly up-to-date.
- Some parents may not choose to immunize their children, because of increasing concerns about vaccine safety. With better access to data, providers can address the vaccine safety concerns in their community.
- Immunization information systems help to avoid disease outbreaks by providing accurate, up-to-date information about the immunizations that people receive.

The ImmTrac2 Immunization Information System

The ImmTrac2 Immunization Information System (ImmTrac2) is a lifespan, population-based web application containing consolidated immunization records for nearly all Texans. ImmTrac2 is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts for shots due and past due
- Producing recall and reminder notices, vaccine usage and client reports
- Managing vaccine inventory
- Ordering state supplied vaccine

Access to the web-based system is available through www.ImmTrac2.org. By law, only authorized users are allowed to access immunization information in ImmTrac2. Authorized users include health care providers, local health departments, health plans, schools, and children's facilities. Health care providers, health departments, and health plans may only obtain information on their own clients. Schools and childcare facilities may only access records on their enrollees.

Commented [HD1]: Need website

Adults, parents, and guardians are also considered authorized users. Adults may obtain their own immunization record and parents or guardians may obtain their minor child's immunization record by calling ImmTrac2 Help Desk at 1-800-xxx-xxxx. When providers begin participation in ImmTrac2, they can manually enter immunization data directly into the system or use their existing electronic data systems to create a data exchange link with ImmTrac2. ImmTrac2 encourages weekly data submissions for all providers. Public clinics are required to submit data within 14 days of administration. Real-time data submission is also possible via Health Level Seven (HL7) real-time messaging.

Commented [HD2]: Need phone number

Commented [HD3]: Is this true?

For more information on how to submit data to or receive data from ImmTrac2, contact the ImmTrac2 Help Desk at 1-800-xxx-xxxx.

Commented [HD4]: Need help desk number



Chapter 2

System Requirements

In this chapter:

Internet Access
Hardware Requirements
Software Requirements

Internet Access

ImmTrac2 is a web-based application. You will need reliable Internet access, preferably with a dedicated high-speed connection. A dial-up connection will also work but is not recommended.

Hardware Requirements

The following are minimum hardware requirements for accessing ImmTrac2:

- Pentium 500 MHz computer
- 64 MB RAM
- 500 MB free disk space
- Screen display set at a minimum of 800 x 600 resolution and 256 colors
- Mouse and keyboard

Software Requirements

The following are minimum software requirements for accessing ImmTrac2:

- Microsoft® Internet Explorer, version 6.0
- Windows® 98 and all subsequent Windows® versions
- Adobe Acrobat Reader® 6.0 or higher



Chapter 3

Accessing ImmTrac2

In this chapter:

- Opening ImmTrac2
- Post Login
- Exiting ImmTrac2
- ImmTrac2 Security

Opening ImmTrac2

To access the ImmTrac2 Web site, follow these steps:

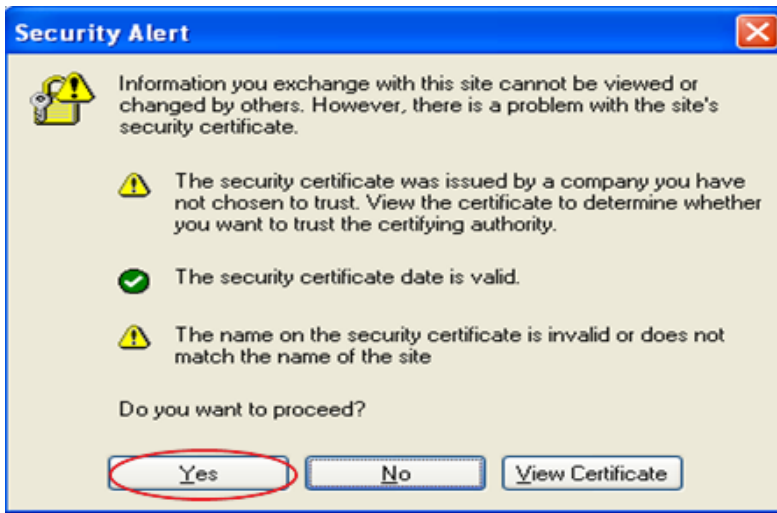
1. Open Internet Explorer.
2. Type the internet address for the ImmTrac2 website, www.ImmTrac2.org, in the address box at the top of the browser. Once this page displays, you may want to save this link in your favorites.

Commented [HD5]: Check website



3. On the login page for ImmTrac2, enter your Organization Code (Org Code), Username and Password. Click the Login button. If you do not know your clinic's Org Code, contact the ImmTrac2 Help Desk at [1-800-xxx-xxxx](tel:1-800-xxx-xxxx).
4. Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates (click Yes to proceed). Internet Explorer will give you the option of turning off these warnings for future use.

Commented [HD6]: Help Desk Number



- The content that displays upon logging into ImmTrac2 is determined by your individual user rights.
- User accounts set up with access to one organization will be taken to the ImmTrac2 home page shown below.

Commented [HD7]: Need new screenshot after vaccine information is removed.

home manage access/account forms related links logout help desk

organization IR Physicians • user Denise Hamann • role ImmTrac2 Developer

exceptions:

- NEW 09/09/2014 ~ [inventory_db.insertVaccineLot](#)
- NEW 09/09/2014 ~ [security_db.getUserRecord](#)
- NEW 09/09/2014 ~ [security_db.getUserRecord](#)

[more exceptions](#)

announcements:

- NEW 08/27/2014 ~ [UAT BABY](#)
- NEW 07/31/2014 ~ [Release to TEST Region](#)
- 05/06/2014 ~ [Adding Announcement for Testing](#)
- NEW 01/23/2014 ~ [Welcome](#)

release notes:

- 09/02/2014 ~ [Release Version 2.0.1](#) Release

[more release notes](#)

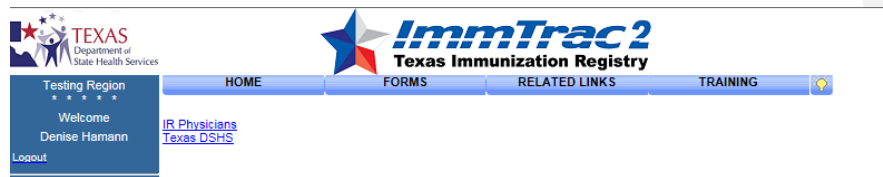
Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)		No Order Notification	
Transfer(s)		No Transfer Notification	

Active Inventory that is Going to Expire or Expired Lots with a Quantity ...

Site Name	Trade Name	Lot Number	Funding Source	On Hand	Exp Date
IR PHYSICIANS	DTP	767676777	Privately Purchased	25	09/30/2014
IR PHYSICIANS	Accel-Imune	455	State-Supplied	45	09/24/2014
IR PHYSICIANS	BabyBIG	87654321	State-Supplied	40	08/31/2014
IR PHYSICIANS	Biavax II	12345678	Privately Purchased	49	08/31/2014
IR PHYSICIANS	Comvax	BB99887766	Privately Purchased	18	08/31/2014
IR PHYSICIANS	Adacel	54321987	State-Supplied	24	08/15/2014

7. User accounts set up with access to more than one organization will be taken to the Manage Access/Account screen shown below.



Note: Org Code, Username, and Password are case-sensitive. They must be entered in the exact way you receive them from the ImmTrac2 Help Desk.



Post Login

Once in ImmTrac2, you may access the Manage Access/Account screen to switch organizations, manage users, or manage your own account depending upon the specific role that was assigned to you when your account was set up. To do this, click the Manage Access/Account button at the top of the screen in ImmTrac2. The Manage Access/Account screen will display. For more information on the functions available on the Manage Access/Account screen, refer to the Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual.

Exiting ImmTrac2

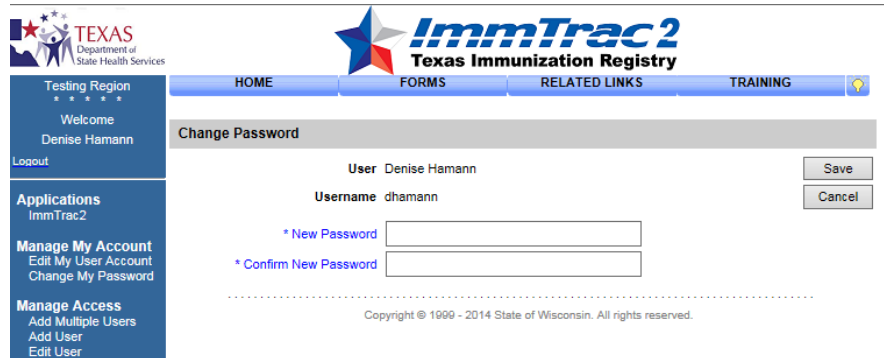
To exit from the ImmTrac2 application, click the **logout** button on the menu bar at the top of the ImmTrac2 screen. You may logout in this manner from any screen within ImmTrac2.

ImmTrac2 Security

ImmTrac2 provides warning messages after one, two, and three unsuccessful login attempts. Upon the third unsuccessful login attempt, ImmTrac2 will lockout the user and require contact with the local system-administrator or ImmTrac2 Helpdesk.

You will be required to change your ImmTrac2 password periodically. ImmTrac2 will display the Change Password screen when your password has

expired or has been set or reset by your local system administrator or the ImmTrac2 Helpdesk.



TEXAS Department of State Health Services

ImmTrac2 Texas Immunization Registry

HOME FORMS RELATED LINKS TRAINING

Testing Region

Welcome
Denise Hamann
Logout

Applications
ImmTrac2

Manage My Account
Edit My User Account
Change My Password

Manage Access
Add Multiple Users
Add User
Edit User

Change Password

User Denise Hamann Save

Username dhamann Cancel

* New Password

* Confirm New Password

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Note: Each person that will be accessing ImmTrac2 is required to have their own user account. ImmTrac2 accounts cannot be shared.





Chapter 4

Optimizing ImmTrac2

In this chapter:

Optimizing Browser Performance
Running Reports with Adobe Acrobat® Reader
Efficient Screen Navigation

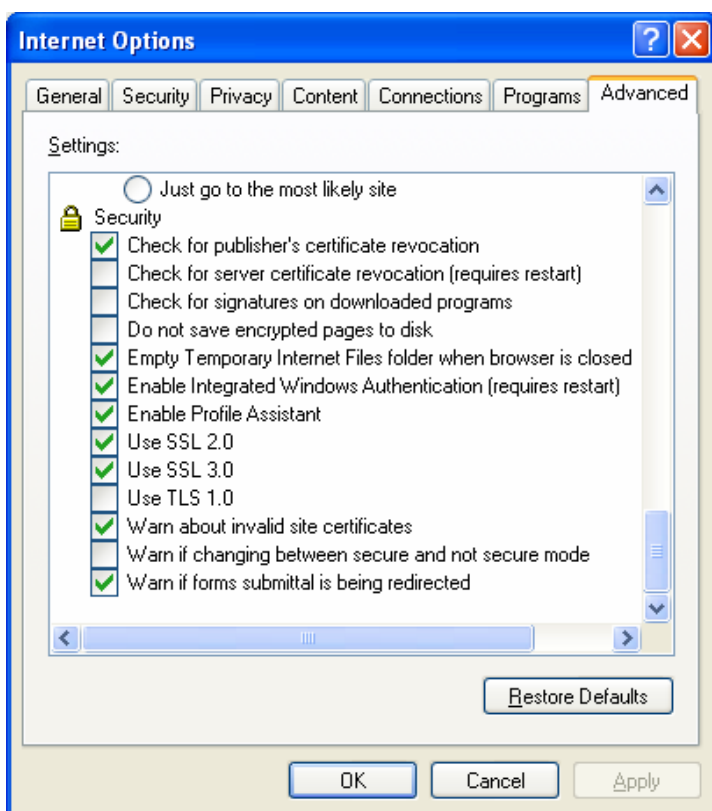
Optimizing Browser Performance

Your Internet browser automatically saves a copy of each new web page visited to the computer's hard drive by default. Over time, these saved files can slow down the browser's performance. This potential problem is avoided by changing browser settings to automatically delete the temporary Internet files each time the browser is closed.

Deleting Temporary Internet Files (Internet Explorer)

To automatically delete all temporary Internet files each time Internet Explorer is closed:

1. Click **Tools** on your browser's menu bar.
2. Click **Internet Options**.
3. Click the **Advanced** tab.



4. Scroll to the **Security** heading and check the box next to the command, "Empty Temporary Internet Files folder when browser is closed".
5. Click **OK**.

Operating in Full-Screen Mode (Internet Explorer)

To view most elements of ImmTrac2 with a minimal amount of scrolling, change the browser to full screen mode by pressing F11 on the keyboard. This mode allows minimal browser commands and maximum viewing area for ImmTrac2. To return to normal screen mode, press F11 again.

Running Reports with Adobe Acrobat Reader®

ImmTrac2 uses at a minimum Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Click "Run the file" and "Do not display this message again".

If you try to print a report in Acrobat® and find that some of the text is illegible, choose File, Preferences and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the "Smooth Text and Images" box is checked.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a Rubik's cube and the report does not display Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Click the Start button on the lower left corner of your computer screen
2. Click Programs
3. Click Adobe Acrobat® 6.0
4. On the Acrobat Reader® menu bar, click on File
5. Choose Preferences
6. Choose General
7. Under Options, uncheck Web Browser Integration
8. Click OK

Try to run your report again. If you continue to have problems contact the ImmTrac2 Help Desk at (800) xxx-xxxx.

Commented [HD8]: Check number

File Transfer Protocol (FTP) Server Access

When running reports and data downloads, ImmTrac2 queries a File Transfer Protocol (FTP) server to read the file. If your network has blocked FTP access for any reason, or if FTP was not installed with your browser, you will be unable to run reports or download data. Contact your information technology (IT) staff if you suspect your FTP access is blocked.

Efficient Screen Navigation

Microsoft Windows® often allows users several ways to accomplish certain tasks. Because ImmTrac2 runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in ImmTrac2, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

Keyboard Shortcuts in ImmTrac2

- Deleting data:** When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you press the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.
- Tab:** The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.
- Shift+Tab:** Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the web page.
- Enter:** In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK,

etc. However, you should always confirm that you have clicked the “Save” button if needed to retain any changes or updates you have made to the system.

- ← (Left Arrow):** The left arrow key moves the cursor one character to the left.
- (Right Arrow):** The right arrow key moves the cursor one character to the right.
- Ctrl+←:** Holding the Ctrl key and pressing the left arrow key moves the cursor one word to the left.
- Ctrl+→:** Holding the Ctrl key and pressing the right arrow key moves the cursor one word to the right.
- Ctrl+A:** Holding down the Ctrl key and pressing the A key will select all the text in the current field.
- Ctrl+C:** Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.
- Ctrl+V:** Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.
- Ctrl+X:** Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.
- Delete:** The Delete key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.
- Backspace:** The Backspace key deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.
- Home:** The Home key positions the cursor to the left of the first character in the field.
- End:** The End key positions the cursor to the right of the last character in the field.
- Shift:** Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor

position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.

Mouse Shortcuts in ImmTrac2

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double-clicking in a field: When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple-clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right-clicking in a field: When you right-click in a field, ImmTrac2 displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu or toolbar options are as follows:

- Undo:** Selecting the Undo option reverses your last action. Undo may be repeated several times.
- Cut:** Selecting the Cut option deletes all highlighted text in the current field and places it on the clipboard.
- Copy:** Selecting the Copy option duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.
- Paste:** Selecting the Paste option inserts the contents of the clipboard into the current field.
- Delete:** Selecting the Delete option removes the highlighted text without placing it on the clipboard.
- Select All:** Selecting the Select All option highlights all text in the current field.



Chapter 5

Home Page

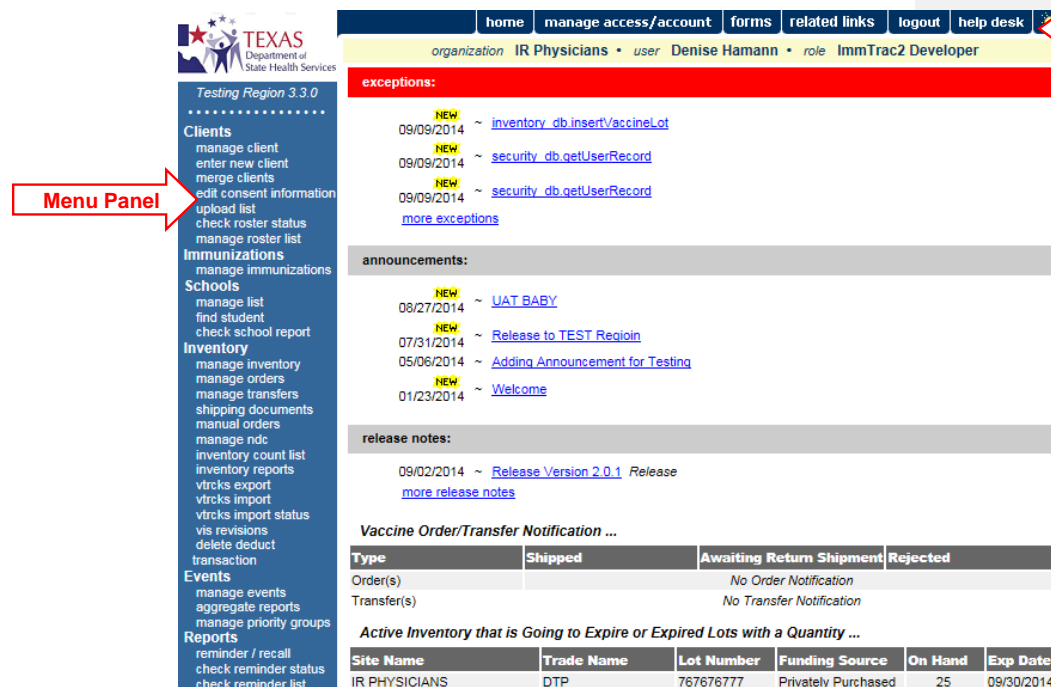
In this chapter:

- Menu Bar
- Menu Panel
- Announcements
- Release Notes
- Inventory Alerts**

To access the ImmTrac2 home page please follow the instructions outlined in the Chapter 3 of the ImmTrac2 User Manual.

The home page of ImmTrac2 is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the ImmTrac2 screen to view all sections of the home page.

Commented [HD9]: Need new screen shot after vaccine information is removed.



Menu Bar

At the top of the page, you have several menu options. These menu options will appear on every page within ImmTrac2. The options available are the following:

Home: Clicking this menu option will return you to the ImmTrac2 home page from anywhere in the application.

Manage Access/Account: Clicking this menu option will bring you to the Manage Access/Account page. Here you may switch organizations, manage your account, manage access to other accounts, and manage training. Refer to Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual for more information on these functions.

Forms: Clicking this menu option shows a list of hyperlinks for printing blank forms and supporting documentation: user manual, data exchange specifications, site and user agreements, parent information, and policies.

Related Links: Clicking this menu option displays links to other web sites that contain information of interest to the immunization community.

Logout: Clicking this menu option will log you out of your current ImmTrac2 session. You may logout from any screen within ImmTrac2.

Help Desk: Clicking the Help Desk menu option will give you a screen with contact information for the ImmTrac2 Help Desk.

Online Help: Clicking the light bulb brings up page-specific help. Refer to the Appendix of this manual for more information about online help.

Directly below the menu bar is a row of information highlighted in light yellow. This row contains your organization's name, your first and last name, and your role within ImmTrac2 for your organization. If any of this information is incorrect contact your organization's Full Access State User (or Help Desk if your site does not have a Super User)-The Full Access State User should refer to Managing Users and Organizations (Chapter 6) for instructions on revising organization and user information.

Menu Panel

The menu panel is blue and appears on the left side of all screens within ImmTrac2.

Menu Selections

These links are used to navigate the ImmTrac2 application. They are grouped under categories such as: Clients, Immunizations, Reports, **Inventory** and others. To perform a particular function in ImmTrac2 click on the appropriate link. Your role will determine your access to these functions.

Announcements

The center portion of the home page contains important information on enhancements and maintenance relating to ImmTrac2. Announcements that have not been viewed will be marked "New". To view a full announcement:

1. Click the underlined announcement title. The ImmTrac2 Announcement screen will display the details and the posting date.
2. Click the Return to Main Page link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of ImmTrac2. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts

Commented [HD10]: This will be hidden for Registry only implementation. Should this section be removed from manual?

The inventory alerts section will appear on the ImmTrac2 home page under the Release Notes section. This section consists of four tables.

- The first table, *Vaccine Order/Transfer Notification*, lists orders/transfers that have been shipped, are awaiting return shipment, or have been rejected.
- The second table, *Active Inventory That is Going to Expire or Expired Lots with a Quantity*, lists vaccines that are going to expire (within 30 days is the default setting) as well as lots which have expired and still have a quantity.
- The third table, *Inventory that is Running Low by Vaccine Group*, lists inventory that is nearly depleted by vaccine group.
- The fourth table, *Inventory that is Running Low by Trade Name*, lists inventory that is nearly depleted by trade name.



Chapter 6

Managing Users and Organizations

In this chapter:

- User Roles
- Adding Users
- Adding Multiple Users
- Maintaining Users
- Editing Organizations

The Manage Access function allows the ImmTrac2 System Administrator (state level) and Super User (clinic level) to add and update information on both users and their organization(s).

Standard Users are able to update their own user information using the Manage My Account function. See Chapter 7 of this manual for more information.

User Roles

ImmTrac2 is set up to accommodate a variety of user types. Each user will have access to certain features in the application based on the role that is assigned:

System Administrator

- Registry + Inventory (Note: This role isn't assigned to a user. The Full Access State User has soft access to this role. Only the System Administrator can update ACIP schedule)

Full Access State (Austin staff only)

- Registry + Inventory (full geographic access)

Modified Access Sub-state

- Registry + Inventory (limited geographic access)

Full Access Providers with Data Exchange

- Registry + Inventory (limited geographic access)

Full Access Providers No Data Exchange

- Registry + Inventory (limited geographic access)

View Only Non-Provider with Data Exchange

- Registry Only

View Only Non-Provider No Data Exchange

- Registry Only



Note: Required fields have asterisks and display in blue text. Input fields not shown in blue are optional, although we strongly recommend that an email address be included in every ImmTrac2 user account.



Adding Users

Full Access State or Modified Access Sub-State Users are responsible for adding additional users to their organizations.

To add a user to ImmTrac2:

1. Click the **Manage Access/Account** tab at the top of the ImmTrac2 home page.
2. Click **Add User** under the Manage Access section of the menu panel.

Add User

		Permission to View:		Yes	No
* User First Name	<input type="text"/>	View	Pending Verification	<input type="radio"/>	<input checked="" type="radio"/>
* User Last Name	<input type="text"/>	Permissions: FR/FM		<input type="radio"/>	<input checked="" type="radio"/>
User Middle Initial	<input type="text"/>	Client Disaster		<input type="radio"/>	<input checked="" type="radio"/>
* Username	<input type="text"/>	Disaster		<input type="radio"/>	<input checked="" type="radio"/>
* Password	<input type="password"/>				
Street Address	<input type="text"/>				
Other Address	<input type="text"/>				
P.O. Box	<input type="text"/>				
City	<input type="text"/>				
State	TX	Zip	<input type="text"/> - <input type="text"/>		
* Email	<input type="text"/>				
Phone Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	Ext	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>					

3. You must enter the user's First and Last Name and assign a Username and Password.
4. Enter additional information if available.
5. Click the **Save** button
6. Once a user is successfully saved in the database, the following message will be displayed at the top of the Edit User screen:
7. "User Added, please proceed to the Modify Access Tab. User does not have access until you do."

Modifying Access

After adding a user, you must complete the **Modify Access** screen to assign the user access to the appropriate organization. To give a user access:

1. At the Edit User screen, click the **Modify Access** tab.

[Edit User](#) [Modify Access](#)

Add or remove applications and organizations to which this user has access.

User: role test

Application	Organization Type	Organization	Role	Add Access
ImmTrac2	All Types			Add

Current list of organizations and applications. Select user from this list to update their role or status.

Application	Organization	Role	Status	Select
ImmTrac2	IR Physicians	Full Access State	Active	<input type="checkbox"/>

2. Working left to right, start by selecting the ImmTrac2 Application.
3. Select the appropriate Organization type to minimize the Organization drop down list. If Organization Type is unknown leave as "All Types". If you are a Full Access State user for a single organization, you will only have the option of choosing your organization.
4. Select the user's organization from the drop down list.
5. Select the appropriate role for the new user.
6. Click the **Add** button under Add Access. (For some user roles, a second user role will automatically be added for accessing the Portal Application.)
7. Click the **Save** button when you have finished entering access information for this user.



Note: If you give a user access to more than one organization, he or she will need to select a specific organization to access upon logging in.



Adding Multiple Users

Super users (Full Access State and Modified Access Sub-State) also have the option of adding multiple standard users at once for their organization. This is the quickest way to set-up standard user accounts. To add multiple standard users follow these steps:

1. Click the **Manage Access/Account** button at the top of the ImmTrac2 Home Page.
2. Click **Add Multiple Users** under the Manage Access section of the menu panel.
3. On the Add Multiple Users screen, click ImmTrac2 from Application drop-down list and then click your organization's name from the Organization drop down list. You can narrow down this list by selecting an organization type in the Organization Type drop down list. If you do not see your organization's name in this field contact the ImmTrac2 Help Desk for assistance.
4. You must enter the First and Last Names, and assign Username, Password, and Role. Click the **Add** button.

Testing Region

Welcome
Denise Hamann
Logout

Applications
ImmTrac2

Manage My Account
Edit My User Account
Change My Password

Manage Access
Add Multiple Users
Add User
Edit User
Assign View
Permissions
List Organizations
Edit Organization
Add Organization
Applications
Security Options
Menu Items
Menu Groups
Roles

HOME FORMS RELATED LINKS TRAINING

Add Multiple Users

Application: All Apps
Organization Type: All Types
Organization: Refresh

Select Add between each user you want to add.
Once you change application or organization, a new list starts.

Last Name	First Name	User Name	Password	Role	Add User
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add

Current users

Last Name	First Name	User Name	Role	Status
-----------	------------	-----------	------	--------

5. Follow Steps 3-5 for each additional user.
6. When finished adding the last user, you may return to the ImmTrac2 home page by clicking on the ImmTrac2 link under the Applications section of the menu panel. Although email address is not available to

enter when adding multiple users, we strongly recommend that each individual user navigate to “Edit my user account” and add their email address to their user information.

Note: Org Code, Username, and passwords are case sensitive.

Maintaining Users

ImmTrac2 allows Super Users (Full Access State and Modified Access Sub-State) to edit user accounts for their organization(s).

Finding Users

To find a user account within your organization:

1. Click the **Manage Access/Account** tab at the top of the ImmTrac2 home page.
2. Click **Edit User** under the Manage Access section of the menu panel.

Last Name	First Name	MI	User Name
test	role		rtest
test	role		rtest

3. At the Edit User - Search screen, select the user's organization from the Organization drop-down list. If you are associated with only one organization, ImmTrac2 will default to your organization's name. If you are associated with multiple organizations, select the appropriate organization before moving on to Step 4.
4. Select the Status of the user you are searching for in ImmTrac2. The Status field will always default to Active, Disabled and Terminated. This means ImmTrac2 will search and find active, disabled and terminated

users for your organization. If you are searching for Active user accounts deselect the disabled and terminated box before moving on to Step 5. If you are unsure of the user's status, select all three.

5. Enter the Last and/or First Name of the user for whom you are searching. Leaving both fields blank will bring up a complete list of users associated with your organization.
6. Click the **Find** button.
7. All names matching the search criteria will be listed under the Search Results portion of the screen. Click the user's last name to display the Edit User page for a specific user.



Note: If a user has not accessed ImmTrac2 for 90 days or more the user's account is automatically disabled. The Full Access State User role will need to change the user's status to active on the Modify Access tab.



Editing Users

The Edit User function allows you to change any previously entered information about a user, including their status (active, disabled or terminated). To edit user information:

1. After completing steps outlined above in Finding Users, click the user's last name (which is a hyperlink) to access the Edit User screen. You may also click Edit User on the menu bar, and search for and select a specific user.
2. Edit appropriate user information.
3. Click the **Save** button.
4. Once a user is successfully saved in the database "User Updated" will appear at the top of the Edit User screen.
5. Click the **Modify Access** tab to modify the user's access.

Testing Region
Welcome
Denise Hamann
Logout

HOME FORMS RELATED LINKS TRAINING

Applications
ImmTrac2

Manage My Account
Edit My User Account
Change My Password

Manage Access
Add Multiple Users
Add User
Edit User
Assign View
Permissions
List Organizations
Edit Organization
Add Organization
Applications
Security Options
Menu Items
Menu Groups
Roles

Manage Portal
Manage Hot Topics

HOME FORMS RELATED LINKS TRAINING

Edit User Modify Access

Add or remove applications and organizations to which this user has access.

User role test

Application	Organization	Role	Add Access
<input type="text"/>		<input type="text"/>	<input type="button" value="Add"/>

Current list of organizations and applications. *Select user from this list to update their role or status.*

Application	Organization	Role	Status	Select
ImmTrac2	IR Physicians	Full Access State	Active	<input type="checkbox"/>

- To edit current access, check the **Select** box for the access to be edited. Click the **Select** button.
- Update the user's role and/or status for the selected access and click the **Update** button.
- Once a user's access is updated, "Update in progress, press Save to keep" will appear within the Modify Access page.
- Click the **Save** button. "User Updated" displays at the top of the page.

Editing Organizations

Full Access State User and Modified Access Sub-State roles may also edit their organization information by:

- Click the **Manage Access/Account** tab at the top of the ImmTrac2 home page.
- Click **Edit Organization** under the Manage Access section of the menu panel.
- Click the organization's name you wish to edit (which is a hyperlink). An asterisk before the organization's name indicates that it is the parent organization.
- Enter updates to organization information.
- Click the **Save** button. The message "Organization Updated" will display at the top of the screen.



Chapter 7

Managing My Account

In this chapter:

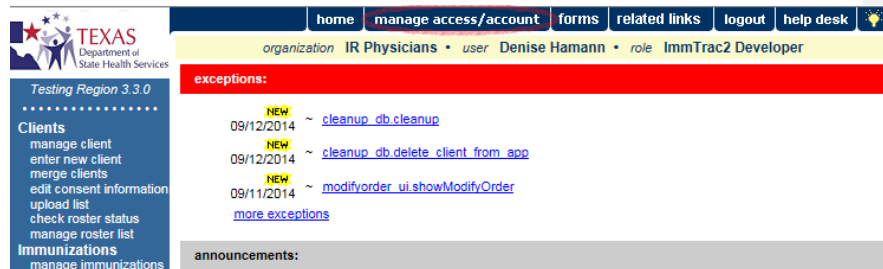
Editing User Information

Editing User Information

Editing My User Account

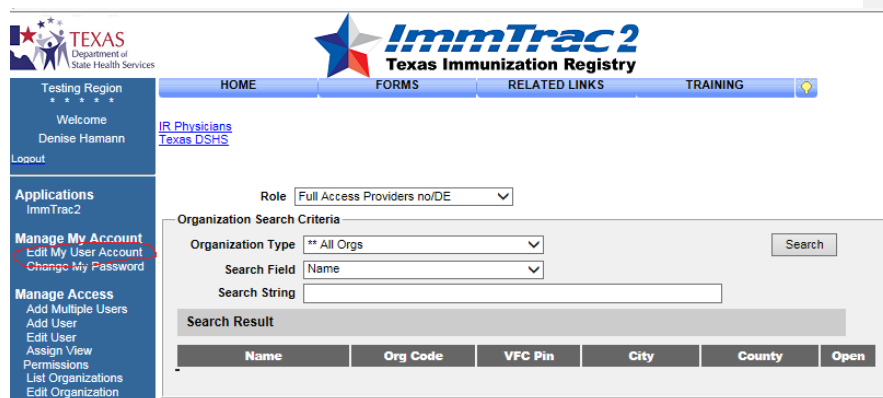
ImmTrac2 allows all users to manage their own user account information.

1. Click the **Manage Access/Account** tab on the ImmTrac2 home page header.



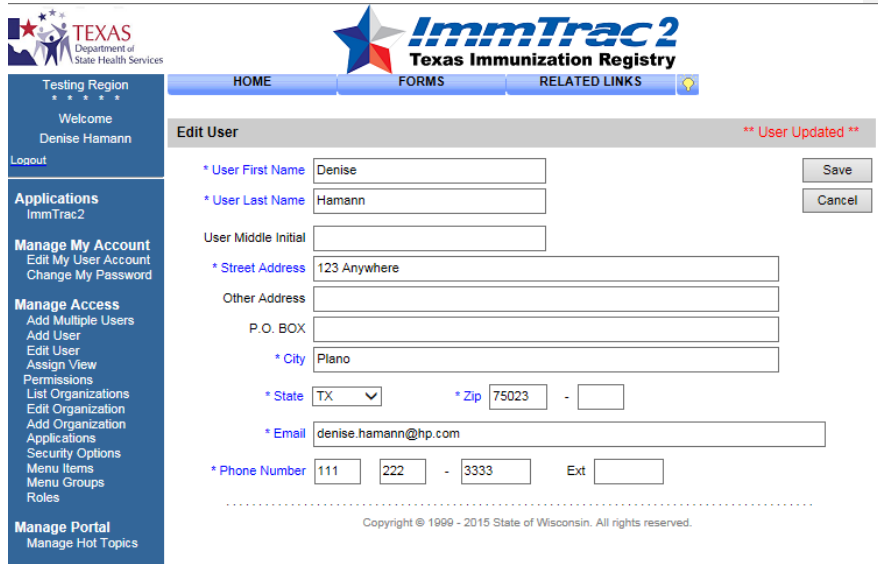
The screenshot shows the top navigation bar of the ImmTrac2 application. The 'manage access/account' tab is highlighted in red. Below the navigation bar, the user's current session information is displayed: 'organization IR Physicians • user Denise Hamann • role ImmTrac2 Developer'. A red banner labeled 'exceptions:' contains a list of recent actions with dates and links, such as '09/12/2014 ~ cleanup_db.cleanup'. Below this, an 'announcements:' section is visible.

2. Under the Manage My Account section of the menu panel, click **Edit My User Account**. This displays the Edit User page, as shown below:



The screenshot shows the 'Edit My User Account' page. The left sidebar contains a 'Manage My Account' section with 'Edit My User Account' highlighted. The main content area features a search form for organizations. The 'Role' dropdown is set to 'Full Access Providers noIDE'. The 'Organization Search Criteria' section includes a dropdown for 'Organization Type' set to '** All Orgs', a 'Search Field' dropdown set to 'Name', and a 'Search String' input field. A 'Search' button is located to the right of the search criteria. Below the search form is a 'Search Result' table with columns for Name, Org Code, VFC Pin, City, County, and Open.

3. Edit your first or last name in the appropriate fields. You may also enter or edit any additional fields as necessary. Verify that your email address or business phone number is correct. We strongly recommend that all users maintain a current email address in the.



- Click the **Save** button. If changes were made the message, “User Updated” appears on the screen.



Note: The first and last name, street address, city, state, zip, e-mail and phone number fields on the Edit User screen are required fields, which is why they show in blue with an asterisk.





Chapter 8

Maintenance

In this chapter:

Managing Schools
Managing Physicians
Managing Clinicians

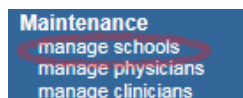
The Maintenance section on the menu panel allows ImmTrac2 State and Provider users to add and update information on schools, physicians, and clinicians. Adding and maintaining this information is optional; however, these components will allow clinics to utilize more functionality within the (e.g., generating reports specific to a clinic physician, school, etc.).

Managing Schools

ImmTrac2 State and Provider users may enter schools and daycare centers in their area using the Manage Schools function. Schools entered using this function will be available for selection from a drop down list on the Client Demographic page. Reports may then be generated by school.

Adding Schools

1. Click **Manage Schools** under the Maintenance section of the ImmTrac2 home page.



2. Click the **Add School** button on the Manage Schools page.

A screenshot of the ImmTrac2 web application interface. At the top, there is a navigation bar with links: "home", "manage access/account", "forms", "related links", "logout", and "help desk". Below this is a user information bar showing "organization IR Physicians", "user Denise Hamann", and "role ImmTrac2 Developer". The main content area is titled "Select a School to Edit" and features a "School Name" dropdown menu with "Pick a School" selected. To the right of the dropdown are two buttons: "Add School" and "List All". A red arrow points to the "Add School" button. Below the form is a "School Listing" table with columns for "Name", "Street", "City", and "Phone". The table contains three rows of data: "ABC Elementary" at "123 Main Street" in "CAPITAL CITY", "ImmTrac Training", and "Katie's school". On the left side of the page, there is a sidebar menu with the "Clients" section expanded, showing options like "manage client", "enter new client", "merge clients", "edit consent information", "upload list", "check roster status", "manage roster list", and "Immunizations".

3. Below the "Add School" header, fill in the name of the school in the appropriate text field. Enter any additional information you wish to supply for the school in the appropriate fields.

Select a School to Edit

School Name

Add School

School Name

Street Address

Other Address P.O. Box

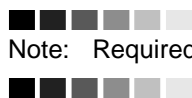
City State Zip -

Email

Telephone # () - Ext

4. Click the **Save** button.
5. Once your school information is successfully saved, "School Added" will appear in the upper right corner of the Edit School box.

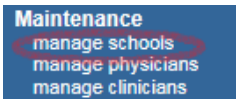
Click the **List All** button to return to the Manage Schools screen.



Note: Required fields are shown in blue text.

Editing School Information

1. Click **Manage Schools** under the Maintenance section of the menu panel.



2. On the Manage Schools page, choose the school whose information you would like to edit from the **School Name** drop down list at the top of the page. You may also click the school's name in the School Listing at the bottom of the screen.

Select a School to Edit

School Name

School Listing

Name	Street	City	Phone
ABC Elementary	123 Main Street	CAPITAL CITY	
ImmTrac Training			
Katie's school			

3. Add or change information in the **Add School** box.

Select a School to Edit

School Name

Add School

School Name

Street Address

Other Address P.O. Box

City State Zip -

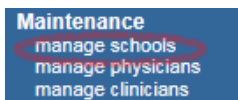
Email

Telephone # () - Ext

4. Click the **Save** button.
5. Once your changes are successfully saved, "School Updated" will appear in the upper right corner of the box.
6. Click the **Cancel** button, or the List All button to return to the Manage Schools screen.

Deleting Schools

1. Click **Manage Schools** under the Maintenance section of the menu panel.



2. On the Manage Schools page, choose the school whose information you would like to delete from the School Name drop down list at the top of the screen.

Select a School to Edit

School Name

School Listing

Name	Street	City	Phone
ABC Elementary	123 Main Street	CAPITAL CITY	
ImmTrac Training			
Katie's school			

3. In the Edit School box, click the **Delete** button.

Select a School to Edit

School Name

Add School

School Name

Street Address

Other Address P.O. Box

City State Zip -

Email

Telephone # () - Ext

4. A box will open asking if you want to delete this school. Click the **OK** button.
5. ImmTrac2 will return to the Manage Schools screen and the message "School deleted" will appear at the upper right corner of the screen.

Select a School to Edit **** School Deleted****

School Name

Listing All Schools

A list of all schools entered into an organization's database may be viewed by clicking the List All button on the Manage Schools page.

Select a School to Edit

School Name

School Listing

Name	Street	City	Phone
ABC Elementary	123 Main Street	CAPITAL CITY	
ImmTrac Training			

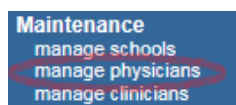
Managing Physicians

Physicians are considered Primary Care Providers (PCPs) in ImmTrac2. State and Provider users can utilize the Add Physician/Edit Physician pages to enter PCPs. Health care organizations or clinic names may also be entered in the Add Physician page. Physicians or health care organizations entered on this page will be available for selection from the Provider-PCP drop-down list on the Client Demographic page. Reports may then be

generated from data for specific providers. For example, reminder recall reports could be run for a specific PCP, rather than for an entire clinic.

Adding Physicians

1. Click **Manage Physicians** under the Maintenance section of the menu panel.



2. On the Manage Physicians page, click the **Add Physician** button.

A screenshot of the "Manage Physicians" page. At the top, there is a section titled "Select a Physician to Edit" with a dropdown menu labeled "Physician Name" containing the text "Pick a Physician". To the right of the dropdown are two buttons: "Add Physician" and "List All". A red arrow points to the "Add Physician" button. Below this is a "Physician Listing" table with columns: Name, Street, City/State/ZIP, Email, and Physician Activity Status. The table contains two rows: "Burns, Derek" and "Doctor, Cat".

3. In the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. To add a clinic name, type the site name in the Last Name field and the location in the First Name field.

A screenshot of the "Add Physician" form. The form is titled "Add Physician" and contains several input fields: "Prefix/Title", "First Name", "Middle Name", "Last Name", "Suffix", "Street Address", "Other Address", "City", "State" (a dropdown menu with "TX" selected), "Zip", "P.O. Box", "Email", and "Provider Activity Status" (a dropdown menu). There are "Save" and "Cancel" buttons. The "Last Name" field is highlighted in blue.

4. Click the **Save** button.
5. Once the physician is successfully saved, "Physician Added" displays in the upper right corner of the Edit Physician box.

Select a Physician to Edit

Physician Name

Edit Physician **Physician Added**

Prefix/Title <input type="text" value="Dr"/>	<input type="button" value="Save"/>
First Name <input type="text" value="Sam"/>	<input type="button" value="Delete"/>
Middle Name <input type="text" value="J"/>	<input type="button" value="Cancel"/>
Last Name <input type="text" value="Physician"/>	
Suffix <input type="text"/>	
Street Address <input type="text" value="1212 S. Drive"/>	
Other Address <input type="text"/>	P.O. Box <input type="text"/>
City <input type="text" value="DALLAS"/>	State <input type="text" value="TX"/> <input type="button" value="v"/>
Zip <input type="text" value="12345"/>	<input type="text" value="-"/> <input type="text"/>
Email <input type="text"/>	
Provider Activity Status <input type="text" value="v"/>	

6. Click the **List All** button to return to the Manage Physicians page.

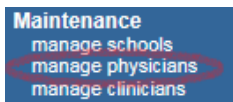


Note: When entering a physician on the Add Physician page, keep in mind that this is a primary care provider associated to the client, not to a vaccination. Provider-PCP may be used for filtering when running a Reminder/Recall report.



Editing Physician Information

1. Click **Manage Physicians** under the Maintenance section of the menu panel.



2. On the Manage Physicians page, choose the physician whose information you would like to edit from the Physician Name drop down list at the top of the screen. You may also click the physician's name in the Physician Listing at the bottom of the page.

Select a Physician to Edit

Physician Name

Physician List

Name	City/State/ZIP	Email	Physician Activity Status
Burns, Derek			
Doctor, Cat			
Doctor, Dog			
Howser, Don			
ImmTrac, Doctor	1100 West 49TH Street	AUSTIN, OR	
Physician, Cat			
Physician, Sam J.	1212 S. Drive	DALLAS, TX 12345	
Welby, Marcus	24 Wellness Dr	AUSTIN, TX	Active
Who			

3. Add or change information in the Edit Physician box.

Select a Physician to Edit

Physician Name

Edit Physician

Prefix/Title

First Name

Middle Name

Last Name

Suffix

Street Address

Other Address P.O. Box

City State Zip -

Email

Provider Activity Status

4. Click the **Save** button

5. Once your changes are successfully saved, "Physician Updated" will appear in the upper right corner of the Edit Physician box.

6. Click the **Cancel** button twice, or the List All button to return to the Manage Physicians screen.

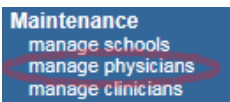


Note: Adding Physicians and Clinicians into your physicians' list does not create an ImmTrac2 User Account for them. Please refer to Managing Users and Organizations (Chapter 6), for instructions on adding users into ImmTrac2.



Deleting Physicians

1. Click **Manage Physicians** under the Maintenance section of the menu panel.



2. On the Manage Physicians page, choose the physician whose information you would like to delete from the Physician Name drop down list at the top of the screen or click on the physician's name in the Physician Listing at the bottom of the screen.

Select a Physician to Edit

Physician Name:

Physician List

Name	City/State/ZIP	Email	Physician Activity Status
Burns, Derek			
Doctor, Cat			
Doctor, Dog			
Howser, Don			
ImmTrac, Doctor	1100 West 49TH Street	AUSTIN, OR	
Physician, Cat			
Physician, Sam J.	1212 S. Drive	DALLAS, TX 12345	
Welby, Marcus	24 Wellness Dr	AUSTIN, TX	Active
Who			

3. In the Edit Physician box, click the **Delete** button.

Select a Physician to Edit

Physician Name:

Edit Physician

Prefix/Title:

First Name:

Middle Name:

Last Name:

Suffix:

Street Address:

Other Address: P.O. Box:

City: State: Zip: -

Email:

Provider Activity Status:

4. A box will open asking if you want to delete this physician. Click the **OK** button.

Message from webpage

Are you sure you want to permanently delete this Physician from your organization?

5. Once your changes are successfully saved, "Physician Deleted" will appear in the upper right corner of the Manage Physicians page.

Select a Physician to Edit **Physician Deleted**

Physician Name:

Name	Street	City/State/ZIP	Email	Physician Activity Status
Burns, Derek				
Doctor, Cat				
Doctor, Dog				
Howser, Don				
ImmTrac, Doctor	1100 West 49TH Street	AUSTIN, OR		
Physician, Cat				
Welby, Marcus	24 Wellness Dr	AUSTIN, TX		Active
Who				

Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by clicking the List All button on the Select a Physician to Edit page.

Select a Physician to Edit

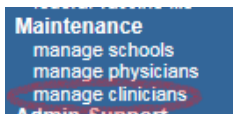
Physician Name:

Managing Clinicians

Clinicians are the individuals within the organization who administer vaccines to clients. A clinician may be associated with one or more clinic sites. ImmTrac2 Super users will use the Manage Clinicians function to enter clinicians within the organization. Clinicians added to ImmTrac2 through this function will be available from the Administered By drop down list used for recording immunizations.

Adding Clinicians


1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



2. Click the **Add Clinicians** button.

Organization Name: IR Physicians

Site List:



Clinician Name	Role	Signature
Boswell, Katie	Ordering Authority	N
Burns, Derek	Clinician	N
Clinician, ImmTrac	Clinician	N
Reed, K	Clinician	N

- At the Edit Clinician Information page, choose a role for the clinician.

Edit Clinician Information

Role Clinician Ordering Authority Ordering Authority / Clinician

Prefix


Last Name


First Name

Middle Name

Suffix

Complete Site Listing **Selected Sites**





Address Information

Street 1

Street 2

PO Box

City

State

Zip -

Email

Area Code Phone Number - Ext.

Signature Information

Signature not on file.

- Fill in the Last Name field and any other fields you wish to complete.
- In the Complete Site Listing field at the bottom of the screen, highlight a site(s) that are associated with the clinician and click the **Add**

button. If the clinician is associated with all sites, click the **Add All** button.

6. Click the **Save** button.
7. After the clinician is successfully saved the message, "Record Updated" will appear at the top of the screen.
8. Click the **Cancel** button to return to the Manage Clinicians page.

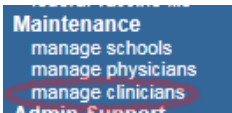


Note: Required fields are shown in blue text. Input fields not shown in blue are optional.



Editing Clinician Information

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



2. Click the **Find Clinician** button or click on the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.

Organization Name: IR Physicians

Site List:

Clinician Name	Role	Signature
Boswell, Katie	Ordering Authority	N
Burns, Derek	Clinician	N
Clinician_ImmTrac	Clinician	N
Reed, K	Clinician	N

3. At the Clinician Search page, enter the last and/or first names of the clinician and click the Find button. Then, click the last name in the Search Results table. You can also leave both fields blank and click the Find button to display a list of clinicians within the organization.

Clinician Search

Last Name: First Name:

To get a complete list of clinicians, leave both fields blank and press the find button.

- Click the last name of the clinician within the Search Results table to bring up his or her information.

Clinician Search

Last Name: First Name:

To get a complete list of clinicians, leave both fields blank and press the find button.

Find Merge Cancel

Search Results Count: 1

Select	Clinician Name	Role	Active
<input type="checkbox"/>	Reed, K	Clinician	Y

- Make the desired changes to the clinician's information.
- Click the **Save** button.
- Once the clinician's information is successfully updated, the message "Updated clinician: <last name>, <first name>" will appear at the bottom of the screen.

Address Information (optional)

Street 1:

Street 2:

PO Box:

City:

State: TX Zip:

Email:

Area Code: Phone Number: Ext:

Updated clinician: Reed, K

- To return to the Manage Clinicians page, click the **Cancel** button.

Merging Clinicians

Occasionally clinicians are entered more than once creating duplicate records. To eliminate extraneous records using ImmTrac2 merge clinician feature, follow these steps:

- Click **Manage Clinicians** under Maintenance section of the menu panel.

2. Click the **Find Clinician** button.
3. Enter the last and/or first names of the clinician. Click the **Find** button.
4. Select at least two clinicians from the search results table and click the **Merge** button.

Clinician Search

Last Name: First Name:

To get a complete list of clinicians, leave both fields blank and press the find button.

Search Results Count: 2

Select	Clinician Name	Role	Active
<input checked="" type="checkbox"/>	mez_john	Clinician	Y
<input checked="" type="checkbox"/>	mez_paul	Clinician	Y

5. Select the Clinician you wish to keep and click the **Keep Selected** button.

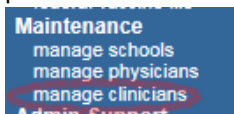
Clinician Merge

Select the clinician to keep. All references to the other clinicians will be redirected to the kept clinician.

Select	Clinician Name	Role	Active
<input checked="" type="radio"/>	mez_john	Clinician	Y
<input type="radio"/>	mez_paul	Clinician	Y

Deleting Clinicians

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



2. On the Manage Clinicians page click the **Find Clinicians** button or click the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose the latter option, skip to step 4.

- At the Clinician Search screen, enter the first and/or last name of the clinician and click the **Find** button.
- Then click the last name in the Search Results table or leave both fields blank and click the **Find** button to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.

Clinician Search

Last Name: First Name:

To get a complete list of clinicians, leave both fields blank and press the find button.

Search Results Count: 1

Select	Clinician Name	Role	Active
<input type="checkbox"/>	Miller, Mary	Clinician	Y

- At the Edit Clinician Information page, click the **Delete** button

Edit Clinician Information

Role Clinician Ordering Authority Ordering Authority / Clinician

Prefix

Last Name

First Name

Middle Name

Suffix

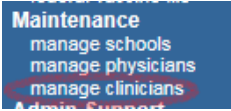
Complete Site Listing Selected Sites

IR Physicians	<input type="button" value="Add >"/> <input type="button" value="Add All >>"/> <input type="button" value="< Remove"/> <input type="button" value="<< Remove All"/>	
---------------	--	--

- A box will open asking if you want to delete this clinician. Click the **OK** button.
- ImmTrac2 will return you to the Manage Clinicians page.

Listing All Clinicians

- Click **Manage Clinicians** under the Maintenance section of the menu panel.



2. On the Manage Clinicians page, click the **Clinician List** button.

Organization Name: IR Physicians

Site List:

Clinician Name	Role	Signature
Clinician, Test A.	Clinician	N

3. The Clinician Listing page will open showing all available clinicians, their organization association, and their role(s).

Clinician Listing

For Organization Name: IR Physicians

Clinician Name	Associated Sites	Role
Clinician, Test A.	IR Physicians	Clinician

4. Click the **Close** button to return to the Manage Clinicians page.



Chapter 9

Managing Inventory

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In this chapter:

- Adding New Inventory
- Viewing Inventory
- Updating Inventory
- Inventory Alerts
- Viewing Inventory Transactions
- Viewing Vaccine Orders
- Ordering Vaccines
- Creating Transfers
- Accepting or Rejecting Shipments
- Shipping and Restocking Transfers
- Transaction Summary Report
- Doses Administered Report

The Inventory Module in ImmTrac2 is designed to be a complete tracking system for an organization's vaccine inventory. Full Access users of ImmTrac2 have the ability to set up the inventory module for their organization and can view, add or update any vaccine in an organization's inventory. Inventory will automatically decrement doses entered through the web-based User Interface, assuming that "From Inventory" is checked on the "Add Immunizations" page. Functionality to decrement inventory from data reported through electronic data exchange is also available, assuming that sending organization indicates that the doses administered came from inventory and the data matches an existing inventory lot in ImmTrac2.

Adding New Inventory

Use the Add Vaccine function only if you are setting up your inventory for the first time, or if you are adding a vaccine with a *new* lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to the *Updating Inventory* section in this chapter.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. On the Inventory Alerts page, click the **Show Inventory** button.
3. Click the **Add Inventory** button.
4. On the Add Vaccine Inventory Information page:

The screenshot shows a web form titled "Add Vaccine Inventory Information". At the top left, it says "Site: IR Physicians". On the right side, there are "Save" and "Cancel" buttons. The form contains several fields:

- Trade Name: A dropdown menu with "ACAM2000" selected.
- Manufacturer: A dropdown menu with "Sanofi Pasteur Inc." selected.
- NDC: A dropdown menu.
- Packaging: A dropdown menu.
- Lot Number: A text input field.
- Dose: A dropdown menu.
- Expiration Date: A date picker field.
- Funding Source: A dropdown menu.
- Lot Active: A dropdown menu with "Yes" selected.
- Quantity on Hand: A text input field.
- Cost Per Dose (\$): A text input field.

- a. Choose the vaccine's trade name from the drop down list provided. Once you have selected a Trade Name the Manufacturer field will be populated.
- b. Choose the National Drug Code (NDC) from the drop-down list that matches what you received.

- c. Once you have selected NDC, the Packaging drop-down list will populate. Choose the packaging type that matches what you received.
 - d. Enter the lot number of the vaccine in the Lot Number field.
 - e. Choose the dose from the Dose Size drop down list; choose .2, .25, .5, .65, 1, or 2 ml.
 - f. Enter the vaccine lot's expiration date. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the **OK** button. If no day is specified on the vaccine, enter the last day of the month.
 - g. Select the appropriate funding source (State-Supplied or Privately Purchased) for the lot being added.
 - h. Choose **Yes** from the Lot Active drop down list. When adding new inventory the lot may only be entered as active. This controls whether the lot appears on the drop down list on the Add Immunization page.
 - i. Enter the number of vaccine doses received in the Quantity on Hand field.
 - j. Cost Per Dose is optional for clinic use: how much clinic pays per vaccine, client fee, or clinic administration charge.
5. Click the **Save** button.
 6. If the new vaccine was saved successfully, the message "Inventory was inserted successfully" will appear at the bottom of the page.
 7. To add additional vaccines, click the **Add New** button and repeat Steps 4-5.
 8. To return to the Show Inventory page, click the **Cancel** button.

Viewing Inventory

To view your organization's vaccine inventory in ImmTrac2, follow these steps:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.

Funding Source: Both								
Show <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Non-Expired <input type="radio"/> Expired								
Select	Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date
<input type="checkbox"/>	ACAM2000	State	123456	Robert's ACAM2000 NDC Test 00	12345- 6789-00	11	N	11/06/2014
<input type="checkbox"/>	ACAM2000	State	a1	Robert's ACAM2000 NDC Test 00	12345- 6789-00	13	Y	01/25/2014

3. The inventory table shown by default will include both State-Supplied and Privately Purchased vaccine inventory associated with your organization. You can view funding sources individually by selecting either from the dropdown menu.
4. Select one of the following options:
 - a. **Active:** to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module
 - b. **Inactive:** to view only those vaccine lots that have been set to inactive by a user or automatically inactivated due to no doses remaining
 - c. **Non-Expired:** to view any active or inactive inventory that has not yet expired
 - d. **Expired:** to view any inventory that has expired



Note: The red text in the View Inventory page indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons such as the inventory for that vaccine's lot number may have been decremented to zero, the vaccine may have expired, or it may have been recalled and set to inactive by a user.

Vaccines on the View Inventory page that are highlighted in pink will expire within 30 days.



The following is an explanation of the columns in the inventory screen:

- a. **Select:** A mark in this checkbox allows you to modify the quantity of the selected vaccine.
- b. **Trade Name:** This lists the vaccine's trade name.
- c. **Funding Source:** This displays the funding source for the vaccine.
- d. **Lot Number:** This lists the lot number of the vaccine.
- e. **Packaging:** This refers to the type and quantity of doses in each package. Ex: 1x10 VIALS means a 10-pack of single-dose vials.
- f. **NDC:** This displays the National Drug Code (NDC) for the vaccine.
- g. **Inv On Hand:** This lists the number of doses remaining in the organization's inventory.
- h. **Active:** A "Y" indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (not available for use). Inactive vaccines are shown in red text.
- i. **Exp Date:** This lists the vaccine's expiration date. Vaccines that will expire in 30 days or less are highlighted in pink.

Updating Inventory

There are two ways to change information for existing vaccines.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. The inventory table will display active vaccines by default.
4. Click the vaccine's trade name (which is a hyperlink) associated with the lot number you want to update.
5. On the next page, make desired changes to any of the fields.
6. Click the **Save** button. Changes made to vaccine inventory after doses have been administered will be updated in clients' records who have previously received a dose from that vaccine lot.

Alternatively:

To only modify the quantity of doses on hand, select the checkbox under the Select column for the appropriate lot.

1. Click the **Modify Quantity** button located in the upper right hand corner of the page.
2. Choose whether you would like to Add or Subtract from the inventory on hand from the Action drop down list.
3. Enter the quantity of inventory to be added or subtracted in the Amount field.
4. Choose an option from the Reason drop down list.
5. Click the **Save** button.
6. Once your updates are saved in ImmTrac2, the message "Inventory was updated successfully" will appear at the bottom of the page.
7. Click the **Cancel** button to return to the Show Inventory/Manage Inventory page.

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites...

Return to the Previous Screen...

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Funding Source	Inv On Hand	Action	Amount	Reason
ACAM2000	123456	State	11	Add		Receipt of Inventory

- Receipt of Inventory
- Error Correction
- Doses Returned
- Doses Transferred
- Doses Recalled
- Doses Administered
- Borrowed In
- Borrowed Out
- Spoilage reported by provider
- Lost or damaged in transit to Provider
- Failure to store properly upon receipt by Provider
- Refrigeration failure reported by Provider
- Lost or unaccounted for in Provider inventory
- Other - Not Usable, reported by Provider

Table 1: Reasons for adding or subtracting inventory

Receipt of Inventory	Adding new inventory to a particular lot.
Error Correction	Adding to or subtracting from inventory doses that were incorrectly entered or when receiving extra or fewer doses from a vial.
Doses Returned	Adding inventory to a particular lot because vaccines were returned from another site associated with your organization.
Doses Transferred	Subtracting inventory that has been transferred to another site.
Doses Recalled	Subtracting inventory that has been recalled.
Doses Administered	Subtracting inventory due to giving dose(s) to a client that were not deducted from inventory.
Borrowed In	Adding vaccines borrowed in (paying back). Manual adjustment to inventory.
Borrowed Out	Subtracting vaccines borrowed out (to pay back previous borrowing). Manual adjustment to inventory.
Spoilage reported by Provider	Subtracting inventory due to vaccines spoiling prior to expiration.
Lost or damaged in transit to Provider	Subtracting inventory due to broken vials or faulty syringes that occurred during shipping.
Failure to store properly upon receipt by Provider	Subtracting inventory due to improper storage.
Refrigeration failure reported by Provider	Subtracting inventory due to improper refrigeration.
Lost or unaccounted for in Provider inventory	Subtracting inventory due to lost inventory or inventory that cannot otherwise be accounted for.
Other - Not usable, reported by Provider	Subtracting inventory due to other reasons not specified above, such as client refused vaccine.

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots:

1. Follow Steps 1-3 under the Updating Inventory section.
2. Check the box under the Select column next to the vaccine lots whose quantities you want to modify.
3. Click the **Modify Quantity** button.
4. On the Modify Quantity on Hand for Selected Site(s) page, enter the following information:

- a. Under Action, choose whether you would like to add or subtract from the inventory on hand.
- b. Under Amount, enter the quantity of inventory to be added or subtracted.
- c. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the list above for a description of the reasons for adding or subtracting inventory.

5. Click the **Save** button.

Inventory Alerts

Inventory alerts inform users of the status of their organization's vaccine inventory. These alerts are displayed on the user's ImmTrac2 homepage. Alerts for vaccines that are going to expire and vaccines that are running low are initially generated by a system default setting. These alerts can be customized.

Inventory alerts can also be viewed on the Manage Inventory page. Select **Manage Inventory** located under the Inventory heading on the menu panel.

Each table under Inventory Alerts heading contains the following information:

- **Vaccine Order/Transfer Notification:** displays current orders/transfers along with their status.
- **Active Inventory that is Going to Expire or Expired Lots with a Quantity:** displays a list of vaccines that will expire within a set amount of days (30 days is the default) as well as vaccines that are expired but still have quantity in inventory.
- **Inventory that is running low by vaccine group:** displays inventory that is below a specific threshold of volume, organized by vaccine group (the default low-level alert is 5 doses).
- **Inventory that is running low by trade name:** displays inventory that is below a specific threshold of volume, organized by trade name (the default low-level alert is 5 doses).

Updating Inventory Alert Preferences

To update Inventory Alert Preferences for expiration and low inventory alerts:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Update Alert Prefs** button.

- On the Inventory Expiration Alerts page, the system default is 30 days. To customize this alert enter the number of days you want to be notified prior to the expiration of any vaccine lot.
- For all low-level alerts, the system default is 5 doses. Select the appropriate radio button for **Vaccine Group** or **Trade Name** in the **Update Low-Level Alert Defaults** section, and enter the number of doses you prefer.

Update Low-Level Alert Defaults

Selection grouping Vaccine Group Trade Name

The current system low level default is 5 doses.

The custom organization low level default is doses.

- Click the **Save** button. If the new preferences were saved successfully, the message "Updated Alert Preferences" displays at the top of the page.

Vaccine Group

To customize low-level alerts for each individual vaccine group or trade name:

- Under Update Low-Level Alerts by Vaccine Group, enter the number of doses that will indicate the inventory is running low for each vaccine group listed for both State-Supplied and Privately Purchased vaccines.
Click the **Save** button.

Update Low-Level Alerts by Vaccine Group		
<i>(Click link to display all trade names for vaccine group.)</i>	State-Supplied	Privately Purchased
DTP/aP	<input style="width: 50px;" type="text" value="10"/>	<input style="width: 50px;" type="text" value="5"/>
HPV	<input style="width: 50px;" type="text" value="5"/>	<input style="width: 50px;" type="text" value="5"/>

Trade Name

- Under **Update Low-Level Alerts by Vaccine Group**, click the underlined vaccine group to display the trade names.
- Enter the number of doses that will indicate the inventory is running low for the trade names listed for both State-Supplied and Privately Purchased vaccine.
- Click the **Save** button.

Update Low-Level Alerts by Trade Name		
	State-Supplied	Privately Purchased
Acel-Immune	<input type="text" value="1"/>	<input type="text"/>
Adacel	<input type="text" value="20"/>	<input type="text" value="50"/>



Note: To restore all inventory alerts to ImmTrac2 system defaults, click the Restore Defaults button. Click the **OK** button. To return to the Manage Inventory page, click the **Cancel** button.



Printing Inventory

To print a list of inventory:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. Click anywhere on the page.
4. Print according to your system's requirements, which could include:
 - a. Click **File** and click **Print**.
 - b. Click the Printer icon in the browser's toolbar.
 - c. Simultaneously press **CTRL+P** on the keyboard.
5. If your printout is cut off, try setting your printer to print in landscape.

Viewing Inventory Transactions

The Show Transactions page is used to display vaccine lot track records for all inventory quantity-changing events. To run an inventory transaction report:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Transactions** button.
3. Enter the "From" and "To" dates for when the immunizations were entered in or submitted to ImmTrac2.
4. Alternatively, enter the "From" and "To" dates for when the immunizations were administered to the client(s).
5. Choose a specific user name or All User Names.
6. Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason drop down list on the Edit Vaccine Inventory Information page.
7. Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.

8. Choose a specific Trade Name/Lot Number/Funding Source or choose All Lot Numbers.
9. Enter the quantity of records you wish to view in the Display Last <#> Records field.
10. Click the **View** button. The Vaccine Transactions page displays:

Vaccine Transactions for Organization: IR Physicians - IRPH - Z90090						Record Count: 5	
Site Name	Trans Date	Lot \ Funding Source \ Trade Name	Type	Qty	Patient Name	DOB	
IR Physicians	01/03/2013	testlotAB \ State \ DAPTACEL	REC	10			
IR Physicians	01/03/2013	123456 \ State \ IPOL	Borrowed	-1	PATIENT, ENTERNEW	01/01/2010	
IR Physicians	01/03/2013	123456 \ State \ IPOL	Delete	1	PATIENT, ENTERNEW	01/01/2010	
IR Physicians	01/04/2013	newlot12 \ State \ ActHib	Borrowed	-1	PATIENT, TEST	01/01/2010	
IR Physicians	01/01/2013	1 \ Private \ ACAM2000	4	70			

Vaccine Transactions Totals			
Trans Code	Trans Description	Trans Count	Trans Value
REC	Receipt of Inventory	1	10
Immunize	Immunizations Given	0	0
Delete	Immunizations Deleted	1	1
TRA	Doses Transferred	0	0
3	Spoilage reported by provider	0	0
4	Expiration reported by Provider	1	70
5	Lost or damaged in transit to Provider	0	0
6	Failure to store properly upon receipt by Provider	0	0
7	Refrigeration failure reported by Provider	0	0
11	Lost or unaccounted for in Provider inventory	0	0
12	Other - Not Usable, reported by Provider	0	0
RECALL	Doses Recalled	0	0
ADMIN	Doses Administered	0	0
BORROWEDIN	Borrowed In	0	0
BORROWEDOUT	Borrowed Out	0	0
BORROWED	Borrowed Imm Given	2	-2
RET	Doses Returned	0	0
ERR	Error Correction	0	0
RECON	Doses Reconstituted	0	0
Transaction Totals:		5	79

Table 2: Transaction Types

Receipt of Inventory (REC)	Vaccines were added as new inventory.
Immunization Given (Immunize)	Vaccines were subtracted from inventory because of immunizations given.
Immunization Deleted (Delete)	Vaccines were added to inventory because they were deleted from a client's record.
Doses Transferred (TRA)	Vaccines were subtracted due to transfer to another site.
Borrowed In (BORROWEDIN)	Doses of vaccine added to inventory to pay back vaccine that was given to a client with a mismatch

	between vaccine eligibility code and vaccine lot funding source
Borrowed Out (BORROWEDOUT)	Vaccine doses removed from inventory when immunization was given from lot whose funding source does not match vaccine eligibility code; adjustment when immunization not deducted at time of vaccination
Borrowed Imm Given (Borrowed)	Vaccines were subtracted from inventory because of immunizations given to a client with a mismatched funding program.
Spoilage Reported by Provider (3)	Vaccines were subtracted due to vaccines spoiling prior to expiration.
Expiration Reported by Provider (4)	Vaccines were subtracted due to vaccines expiring.
Lost or damaged in transit to Provider (5)	Vaccines were subtracted due to broken vials or faulty injections that occurred while being shipped.
Failure to store properly upon receipt by Provider(6)	Vaccines were subtracted due to improper storage.
Refrigeration failure reported by Provider (7)	Vaccines were subtracted due to improper refrigeration.
Lost or unaccounted for in Provider inventory (11)	Vaccines were subtracted due to lost inventory.
Other - not usable, reported by Provider (12)	Vaccines were subtracted due to other reasons not specified above.
Doses Recalled (RECALL)	Vaccines were subtracted due to recall.
Doses Administered (ADMIN)	Vaccines were subtracted due to giving dose(s) to a client—used for manual adjustment of inventory for reconciliation.
Doses Returned (RET)	Vaccines were added to inventory after being returned from another site.
Error Correction (ERR)	Vaccines added or subtracted due to error correction.
Doses Reconstituted (RECON)	Number of doses that were subtracted from an un-reconstituted lot to form a new reconstituted lot
Transfer out Expired Inventory (TRAEXP)	Number of doses that were subtracted from an expired lot when a transfer of expired doses is created
Lot Deleted (LOTDELETE)	Number of doses that were subtracted from a lot when a vaccine lot was deleted

Table 3: Vaccine Transactions

The top chart on the Vaccine Transactions page gives the following information:

Site Name	Vaccines in the table are first sorted alphabetically by your site name.
Trans Date	Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.
Lot/Funding Source/Trade Name	The Lot Number, Funding Source, and Trade Name of the vaccine are listed in this column.
Type	Refer to Table 2 in this chapter for an explanation of the transaction codes shown in this column.
Qty	The quantity added to or subtracted from inventory due to the listed transaction type.
Client Name	The client associated with the transaction, if applicable.
DOB	The date of birth of the client, if applicable.

Table 4: Transaction Totals

The chart at the bottom of the Vaccine Transactions page gives a breakdown of transactions by type.

Trans Code	Abbreviated code that identifies the transaction type.
Trans Description	Full transaction type.
Trans Count	Number of times a particular transaction type was performed within the dates you specified.
Trans Value	Quantity of doses added or subtracted by transaction type.

Printing Inventory Transactions

To print a list of vaccine transactions:

1. Follow Steps 1 - 4 under Viewing Inventory Transactions.
2. Click anywhere on the page.
3. Print according to your system's requirements, which could include:
 - a. Click **File** and click **Print**.
 - b. Click the Printer icon in the browser's toolbar.
 - c. Simultaneously press **CTRL+P** on the keyboard.

If your printout is cut off, try setting your printer to landscape.

Viewing Vaccine Orders

The Manage Orders page displays vaccine orders, the user who placed the order, the date they were submitted, their Order ID, and their status. Orders are displayed as Current, Historical or Both. To view the Manage Orders page click Manage Orders under the Inventory section of the menu panel.

Current Orders

By selecting the **Current** radio button, you will be able to view all new and processed orders that have not been accepted or rejected.

These orders will show a status of one of the following:

- **Pending:** Order has been created and submitted; however, the Texas Immunization Program has not yet opened the order. You may still modify the order.
- **In Progress:** Order is being processed by the Texas Immunization Program; you may no longer modify the order through ImmTrac2. If you need to alter an order at this stage, call the ImmTrac2 [Help Desk](#) at 1-800-xxx-xxxx.
- **Sent to Distributor:** Order has been fully processed by the Texas Public Health Division and will be forwarded on to the appropriate order fulfillment facility.
- **Shipped:** Order has been shipped. Once the status of the order lists Shipped, you can accept the order into your organization's inventory through the Manage Transfers screen.

Commented [HD12]: Check number

Historical Orders

By selecting the **Historical** radio button, you will be able to view all complete orders from the last 30 days. You may also enter a date range to view other completed orders. Historical orders will show a status of one of the following:

- **Cancelled:** Order was cancelled by your organization before being processed by the Texas Immunization Program.
- **Denied:** Entire order was denied by Texas Immunization Program.
- **Accepted:** Partial or entire order was accepted by the receiving organization.
- **Rejected:** Partial or entire order was completely rejected by the receiving organization and then restocked, if applicable, by Texas Immunization Program.

Inventory Count

The CDC requires inventory counts for ordering organizations to be submitted with each VFC Vaccine Order. The CDC requires that the Inventory Counts must be entered within 14 days of the VFC vaccine order. The CDC requires Provider PIN, Inventory Date, NDC, Lot Number, Quantity, and Expiration Date.

Before submitting an order, an organization will need to submit an inventory count. To submit an inventory count:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. Click the Show Inventory button.
3. Scroll to the bottom of the inventory listed and click on the Submit Reconciled Inventory Count button.

<input type="checkbox"/>	Zostavax	State	testingtrigger01	36	Y	06/06/2016
<input type="checkbox"/>	Zostavax	State	ZZBAA233	8	Y	10/30/2015

Submit Reconciled Inventory Count

By clicking this button to submit my inventory count I confirm that my inventory has been reconciled and the quantities shown here represent a complete and accurate count of my state-supplied inventory on hand as of today's date.

4. The pop up message appears: *By submitting this inventory count you confirm that you have physically counted state-supplied inventory on hand and the count you are submitting is accurate and complete as of today's date. Click "OK" to submit your inventory count or "Cancel" to return to the Show Inventory screen.* . Click OK.
5. The screen will refresh and your inventory count will be submitted.

To see a list of all inventory counts that have been submitted for your organization:

1. Click Inventory Count list under the Inventory section of the menu panel

Inventory Count Listing		
Organization: IR Physicians		Show Inventory
* From Date	09/12/2013	* To Date 09/12/2014
		Refresh List
Inventory Count	User	Status
09/11/2014 11:44:47	Marianne Swift	Pending
08/16/2014 09:22:04	Derek Burns	Submitted
08/16/2014 09:22:04	Elizabeth Owen	Submitted

2. A list of the previous year's inventory counts will be displayed. Clicking on the blue hyperlink within the Inventory Count column will display the inventory for the organization at the time the count took place. To see inventory counts for a different date range, enter in the appropriate dates in the 'From Date' and 'To Date' field and click the Refresh List button to display the results.

Ordering Vaccines

If you are a Vaccines for Children (VFC) provider, you may order state-supplied vaccines once your organization has been trained and approved to order through ImmTrac2. Once an organization has received and accepted a state-supplied vaccine shipment in ImmTrac2, it will automatically post the shipment to the organization's inventory.

To create a vaccine order in ImmTrac2:

1. Click **Manage Orders** under the Inventory section of the menu panel.
2. Click the **Create Order** button.

Create Order

<p>VFC PIN P99999</p> <p>Initiating Organization AMJEN MEDICAL GROUP</p> <p>Initiating User Marisa Polowitz</p> <p>Org Phone (503) 252-1499 x868</p> <p>Org Fax</p> <p>Order Date 02/14/2013</p> <p>Order the number of doses of vaccine that are needed. Allow approximately 2 weeks for delivery.</p>	<p>Delivery Contact JANE Williams</p> <p>Delivery Address 1240 SE 20TH WAY SUITE 200 TROUTDALE, OR 97060-</p> <p>Delivery Days/Hours Monday 8 AM - 12 PM, 1 PM - 4 PM Tuesday 8 AM - 12 PM Wednesday 1 PM - 5 PM</p>
--	---

Pediatric State-Supplied Vaccine										
# Doses	Vaccine	Trade Name	Manufacturer	Packaging	NDC	Min Order Qty	Doses Given	Doses on Hand	Lot Numbers	Exp Date
10	DTaP	Infanrix	GlaxoSmithKline	VIALS	58160-0810-11	10		20	123CDE	10/03/2013

3. You may receive a pop-up message if you have not submitted an inventory count within the last 14 days. Press the **OK** button and you will be directed to the Show Inventory screen in order to submit a reconciled inventory count. See the Inventory Count section above.
4. You may see three distinct sections on the Create Order page: Pediatric State-Supplied Vaccine and Adult State-Supplied Vaccine. For each section listed, there will be a # Doses column as well as Vaccine, Trade Name, Manufacturer, Packaging, NDC, Minimum Order Quantity, Doses Given, Doses on Hand, Lot Number, and Expiration Date.
5. Enter in the amount of doses being ordered for each section (Pediatric State-Supplied, Adult State-Supplied,) in the # Doses field.

Pediatric State-Supplied Vaccine										
# Doses	Vaccine	Trade Name	Manufacturer	Packaging	NDC	Min Order Qty	Doses Given	Doses on Hand	Lot Numbers	Exp Date
10	DTaP	Infanrix	GlaxoSmithKline	VIALS	58160-0810-11	10		20	123CDE	10/03/2013

6. Click the **Submit Order** button.
7. Once your order is submitted, the Order Confirmation page will display the following message, “Your order has been saved and submitted to the state for review/processing”.
8. From this page, you can **Print Order** and **Modify Order**. Click the **OK** button to return to the Manage Order page.
9. From the Manage Order page, you can track the status of your order. Pending orders can be modified or cancelled by clicking the “Pending” hyperlink on the Manage Order page.



Note: On the Create Order page under each section, the Vaccine/Trade Name, Manufacturer, Packaging, NDC number, Minimum Order Quantity, Doses Given, Doses on Hand, Lot Numbers and Exp Date are listed to assist with the ordering process.



Creating Transfers

ImmTrac2 allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the **New Transfer** button.
3. Enter the following information:
 - a. Sending Site will default to the organization you are logged in as.
 - b. The Internal Receiving Site is not being used, leave blank.
 - c. Receiving Organization is where the vaccine is being transferred to.
 - d. Choose between Active and Non-Expired or Inactive and Expired vaccines by clicking the appropriate radio button.
 - e. Number of doses in the Transfer Quantity field for each of the trade names being transferred
4. Click the **Save** button.
5. The message “Saved Successfully” appears to confirm your transfer.

6. You must click the **Packing List** button or the **Label** button to continue. You are not to print either document.
7. Click the **Ship** button when ready to ship the vaccines. Use either today's date or enter an alternate date in MM/DD/YYYY format.
8. Click the **Ship** button. The message "Transfer Successfully Shipped" displays. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
9. To complete an internal transfer without printing shipping documents, click the **Finish Trans** button. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site's inventory and deducted from the sending site's inventory.

Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click **Shipping Documents** under the Inventory section of the menu panel.
2. Click the **Packing List** button or the **Label** button. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today's date, using MM/DD/YYYY format.
4. Click the **Ship** button. The message "Transfer Successfully Shipped" displays in the upper right of the Manage Transfer page.

Accepting or Rejecting Transfers

Transfers made through ImmTrac2 and received by the provider organization must be accepted, rejected or partially accepted so that ImmTrac2 can post and track inventory properly. Organizations will also accept orders shipped to them via the Manage Transfers screen. To accept or reject a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. The Manage Transfer page categorizes transfers as follows:
 - a. **Outbound Transfer:** Displays transfers that are outbound from your organization
 - b. **Inbound Transfer:** Displays transfers that are inbound to your organization

- c. **Historic Transfer:** Displays completed transfers
3. To proceed to the Receive Transfers page (where you may accept or reject transfers), locate the Inbound Transfer section and click the date (which is a hyperlink) in the Create Date column.
4. Ensure that the corresponding Type column states Transfer. On the Receive Transfer page, you may accept the entire transfer, reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept Transfer

1. Click the **Accept Transfer** button to accept the transfer and add all transfer items into inventory.
2. Click the **OK** button to continue with the acceptance and be returned to the Manage Transfers page.

Reject Transfer

1. Click the **Reject Transfer** button to reject the entire transfer.
2. Select one of the following reasons from the Enter Rejection Reason drop-down list.
 - a. **Damaged**
 - b. **Not Wanted**
 - c. **Wrong Vaccine**
 - d. **Never Received**
3. After selecting a reason, click the **Reject** button.
4. Click the **OK** button to continue with the rejection and be returned to the Manage Transfers page.

Partially Accept

1. Click the **Partially Accept** button.
2. At the Partially Accept Transfer page, select the dose quantity of the each vaccine you wish to accept and a rejection reason for those you wish to reject.
3. Click the **Save** button.
4. Click the **OK** button to continue with partially accepting the transfer and to be returned to the Manage Transfer page.

Shipping and Restocking Transfers

When a transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, Never Received, or Damaged it is necessary to ship and restock the transfer in the system so that the doses are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To ship the rejected quantities back to the original sender:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the appropriate transfer date (which is a hyperlink) under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer page by entering the date in MM/DD/YYYY format.
4. Click the **Ship** button.

Accepting a Rejected Transfer

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the transfer date of the rejected transfer (which is a hyperlink) under the Create Date column.
3. Click the **Save** button at the Restock Rejected Transfer page. The Manage Transfer page will display, and the transfer will be added to the Historical section of the page.

Transaction Summary Report

The Transaction Summary Report will give you information on how many doses of each vaccine have been given within a specified date range. The report also gives information on how many doses were expired, transferred, received, restocked, wasted, or given in error. To generate a Transaction Summary Report for your organization, follow these steps:

1. Click **Transaction Summary** under the Inventory section of the menu panel.

2. At the Transaction Summary Report Criteria page, choose a site from the drop down list or choose All Sites Combined
3. In the "From" field under Report Date Range, choose a starting date for your report using the MM/DD/YYYY format.
4. In the "To" field under Report Date Range, choose an ending date for your report using the MM/DD/YYYY format.
5. Click the **Generate Report** button.
6. The report displays in Adobe Acrobat Reader®. Print according to your system specifications.
7. Click the **OK** button in the Print Dialog box.
8. Click on your browser's Back button to return to the Transaction Summary.



Note: Transaction Summary does not include deleted items from inventory.





Chapter 10

Managing Clients

In this chapter:

- Finding Clients
- Using Drop-Down Lists in ImmTrac2
- Editing/Entering Client Information
- Saving Client Information
- De-duplication of Clients
- Countermeasure and Response Administration (CRA) Module

ImmTrac2 receives immunization information from multiple provider sources, including birth record downloads. Always attempt to find a client in ImmTrac2 before entering them as a new client. ImmTrac2 will attempt to de-duplicate client records (i.e., compare entered information against information saved to the system for duplicate clients) prior to saving the information on the Enter New Client page.

Finding Clients

Searching for a client in ImmTrac2 before entering them as new will prevent duplicate client records from being entered into the system. There are many different combinations of search criteria that can be used to locate clients in ImmTrac2. Remember when searching for clients, you are searching on a statewide level and not just within your organization therefore, more information is not always better. Entering too much information about a client will decrease the odds of locating the client in the database. To review recommended search criteria examples, please see the Examples of ImmTrac2 Search Criteria section in this chapter.

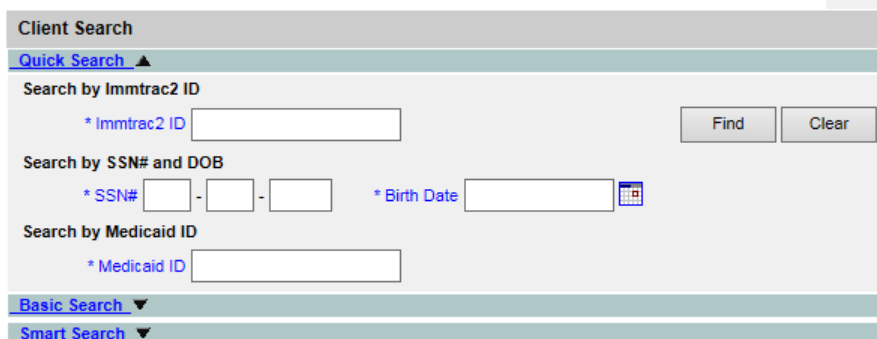
To search for a client in ImmTrac2:

1. Click **Manage Client** under the Clients menu group on the menu panel. There are three client search options:



A screenshot of the 'Client Search' menu. The menu is titled 'Client Search' and contains three options: 'Quick Search', 'Basic Search', and 'Smart Search', each with a downward-pointing arrow.

2. The Quick Search option allows user to search by ImmTrac2 ID, SSN and Birth Date or Medicaid ID.



A screenshot of the 'Quick Search' form. The form is titled 'Client Search' and has a sub-header 'Quick Search'. It contains three search sections: 'Search by Immtrac2 ID' with a text input field and 'Find' and 'Clear' buttons; 'Search by SSN# and DOB' with 'SSN#' and 'Birth Date' input fields; and 'Search by Medicaid ID' with a text input field. Below the form are links for 'Basic Search' and 'Smart Search'.

3. The Basic Search option allows the user to search by First Name, Last Name and Birth Date.

Client Search

[Quick Search](#) ▼

[Basic Search](#) ▲

* First Name Gender Children Only

* Last Name * Birth Date

(First and Last required if partial Birth Date. Birth Date required if partial First or Last)

[Smart Search](#) ▼

It is important to note that if you are searching by client information (not client ID). The minimum search criteria includes exact birth date and one additional field.

- a. **Last Name:** Entering the first two letters of the client's last name, along with the birth date, will initiate a search of all clients matching those letters and birth date. The last name requires two or more characters. Remember clients may go by more than one last name, so vary your search options.
- b. **First Name:** Entering the first two letters of the client's first name, along with the birth date, will initiate a search of all clients matching those letters and birth date. Entering a single letter along with birth date will return only clients with a single-letter first name.
- c. **Birth Date:** Birth date is a required field. Entering the client's birth date in conjunction with his or her first and/or last name will narrow a search for a common name.

4. The Smart Search allows the user to search by First Name, Last Name, Birth Date, Gender and Street Address.

Client Search

[Quick Search](#) ▼

[Basic Search](#) ▼

[Smart Search](#) ▲

Immtrac2 ID#

* First Name Mother's First Name

* Last Name Mother's Maiden Name

Middle Name Phone - -

* Birth Date * Street Address

* Gender Other Address

PO Box

Zip -

City

Entering Names

On all first and last names entered for client searches, ImmTrac2 disregards spaces, apostrophes, and hyphens entered.

- a. **Middle Name:** Entering the first two letters of the client's middle name along with the birth date will initiate a search of all clients matching those letters and birth date. Entering a single letter along with birth date will return only clients with a single-letter middle name.
 - b. **Mother's First Name:** Entering the first two letters of the mother's first name along with the birth date will initiate a search of all clients matching those letters and birth date. Entering a single letter along with birth date will return only clients whose mother has a single-letter first name.
 - c. **Phone:** Entering the client's main 7-digit phone number (area code not required) and birth date will identify clients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.
5. Click the **Find** button.
 6. If multiple records are found matching the criteria you entered, a table listing up to 75 possible matches with detailed information on each client displays. To choose a client from this list, click the client's last name (which is a hyperlink).

Client Search

[Quick Search](#) ▾

[Basic Search](#) ▾

* First Name <input type="text" value="re"/>	Gender <input type="text" value=""/>	Children Only <input type="checkbox"/>	Find
* Last Name <input type="text" value="dog"/>	* Birth Date <input type="text" value="09/01/2012"/>		Clear

(First and Last required if partial Birth Date. Birth Date required if partial First or Last)

[Smart Search](#) ▾

Click on the *ImmTrac2 Id* to access the client file. Possible Matches: 2

mmtrac2 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
966910	IC	DOG	RED			M	09/01/2012	DENISE	HAMANN	1616 BAD LANE				
966911	IC	DOG	REDI			M	09/01/2012	DENISE	HAMANN	1616 BAD LANE				

7. If only one client matches your search, ImmTrac2 displays that client's demographic page.

8. If no clients match your search, review the search criteria information you entered for accuracy. If you suspect the client has not been entered into ImmTrac2, proceed to Entering a New Client later in this chapter.
9. If multiple records are found matching the criteria you entered and there are over 75 matches, ImmTrac2 displays a warning that there are too many clients matching your search criteria. In this situation, refine your search criteria to limit your client list.

Basic Search vs. Smart Search

The basic search does queries, and what you type in needs to be part of the names, or it won't be found. For example, the user can enter the first two characters of the client's first name. Spelling is important, but doesn't need to be the complete name.

The smart search goes directly to run match. So spelling doesn't need to be the same, but names need to be similar. Sending in just a couple characters from the name won't score high enough for run match to consider it a match.

Manage Client vs. Manage Immunizations

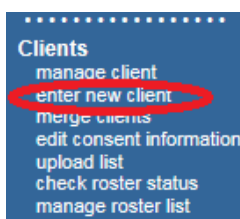
Manage Client and Manage Immunizations are the same query; in other words, they both utilize the client search function. The difference is that the Manage Client query will display the Demographic page, while the Manage Immunizations query will display the client's Immunization History page.

Searching by Client ID

A client may have numerous Client IDs; each ID is organization dependent. Entering the Client ID will produce a single name match. To find a client using this method the Client ID must have been entered previously in the client record in ImmTrac2 and the birth date is not required. When searching with Client ID, all other entered information is ignored.

Adding a New Client

1. Click **enter new client** under the Clients section of the menu panel.



- The Smart Search screen will display. Enter the Client First Name, Last Name, Birth Date, Gender and Street Address.

Client Search

Smart Search ▼

Immtrac2 ID#

* First Name Mother's First Name

* Last Name Mother's Maiden Name

Middle Name Phone - -

* Birth Date * Street Address

* Gender Other Address

PO Box

Zip -

City

- Select the Find button and all possible client matches will display under the Smart Search Criteria. Make sure and review this information to prevent adding a duplicate client before continuing.

Client Search

Smart Search ▼

Immtrac2 ID#

* First Name Mother's First Name

* Last Name Mother's Maiden Name

Middle Name Phone - -

* Birth Date * Street Address

* Gender Other Address

PO Box

Zip -

City

Click on the ImmTrac2 Id to access the client file. **Possible Matches: 0**

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
No clients were found for the requested search criteria.														

- If the client doesn't appear under the possible matches, you must select one of the three consent options to continue.
 - I have a signed consent and would like to add client
 - I would like to request a consent form

c. I am not adding a client, but need to report doses administered for inventory reconciliation

Commented [HD13]: Need to update screen shot below after FDD 13103 Registry Only –remove inventory is coded. The Third bullet will be removed.

If your client does not appear on your search result Client List, select the appropriate option below. You may also use the "Modify Search" button, above, to change your search criteria or "New Search" to search for another client.

- I have a signed consent and would like to add the client. *
- I would like to request a consent form.
- I am not adding a client, but need to report doses administered for inventory reconciliation.

OK

5. Selecting 'I have a signed consent and would like to add the client', will continue to add the client. Add Mother's Maiden Name and First Name and select the Continue Add button.

Personal Information		Continue Add
* Last Name	Client	Cancel
* First Name	Test	
Middle Name		
Suffix		
* Birth Date	01/01/2000	
* Mother's Maiden Last Name	Smith	
* Mother's First Name	Sue	
Client Type	ImmTrac2 Client	
* Gender	FEMALE	
SSN		
Medicaid ID		
Birth Order		
Birth Country	UNITED STATES	
Birth State		
Birth County		
Client Identifier	Disaster Client	

6. The client summary screen will display.

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 to proceed with addition of this client's information.

Add Client Summary	
Last Name	Client
First Name	Test
Middle Name	
Suffix	
Date of Birth	01/01/2000
Sex	F
Race	

Client Address Information	
Address	12345 Test Street
City	
State	TX
Zip	
Country	
Country	US
Phone	
OK to Contact	YES

Confidential Client Information	
SSN	
Medicaid Number	

Edit Client Info
Continue
Cancel

7. Select Edit Client Info button to edit client. If information is correct select Continue.
8. The consent verification screen will display.

Consent Verification	
<i>You must have written consent to include this client's information in ImmTrac2.</i>	
Verify Consent For:	Verify Cancel
<input checked="" type="radio"/> ImmTrac2 Child (under age 18)	
<input type="checkbox"/> With Minor Family Member of a First Responder	
<input type="checkbox"/> With consent to retain disaster information beyond maximum time	
OR	<i>During a disaster or emergency event, all residents in the affected area who receive disaster-related vaccinations, antivirals, and/or medications will participate in ImmTrac2 regardless of age or consent status. If you are ONLY adding a disaster-related client, ADD the client by selecting one of the options below:</i>
Disaster Only Client:	
<input type="radio"/> With consent to retain disaster information beyond maximum time	
<input type="radio"/> Without consent to retain disaster information beyond maximum time	
Copyright © 1999 - 2014 State of Wisconsin. All rights reserved.	

9. Verify the correct consent information is selected and click the Verify button to proceed.

Consent Verification Confirmation

ImmTrac2 Customer Support (800) 348-9158

A record for the following client has been successfully added:

Client ID: 6966912
Name: TEST CLIENT
DOB: 01/01/2000

The following ImmTrac2 user has verified: 6966912 consent form ImmTrac2 Participation on 09/12/2014

Org Name: IR Physicians
Org Address: 100 MAIN , MAIN, 11111
Org Phone: (333)333-3333
User ID: 6709
TXIS ID: 2

Provider site should retain the signed consent form(s) in the client's medical record. Please DO NOT fax consent form(s) to ImmTrac2.

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10. Select Go to Client to edit client information

View Client

Personal Information

* Last Name CLIENT * Gender FEMALE

* First Name TEST SSN - - -

Middle Name Medicaid ID

Suffix Birth Order (for multiple births)

* Birth Date 01/01/2000 Birth Country UNITED STATES

* Mother's Maiden Last (On File) Birth State

* Mother's First Name SUE Birth County

Client Type IC - ImmTrac Child Client Identifier

ImmTrac2 Client Yes Disaster Client No

Last Updated by IR Physicians on 09/12/2014 by dhamann

Created by IR Physicians on 09/12/2014 by dhamann

- Consent Information ▼
- Client AKA (0) ▼
- Organization Information ▼
- Client Information ▼
- Address Information ▼
- Responsible Persons (0) ▼
- Client Comments (0) ▼
- Client Notes (0) ▼

Using Drop-Down Lists in ImmTrac2

When entering information on new clients or editing client information, you will use drop-down lists—fields that contain a list of options from which you may choose—rather than text fields for certain input data. The advantages of drop-down lists over text fields include:

- Ease of use. Allows users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliance. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily. With predefined drop-down lists, ImmTrac2 stays in HL7 compliance.
- Uniformity of entered data. By choosing information from a drop-down list, users do not risk entering conflicting information that could decrease the accuracy of ImmTrac2 reports.
- Confidentiality. By using standard drop-down lists, ImmTrac2 avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

Editing/Entering Client Information

The Update Client demographic page allows you to update or change specific, non-immunization information relating to any client in ImmTrac2. The Enter New Client page, accessed by clicking this option on the menu panel, allows you to input information for a new client. The Update Client and Enter New Client pages are divided into the following sections: Personal Information, Client AKA, Organization Information, Client Information, Address Information, Responsible Persons, Client Comments, and Client Notes. Except for required demographic information, all other information in these fields is optional. Each of these fields is explained in detail below.



Note: Organizations participating in a pandemic exercise or event will utilize the CRA Event Information section located directly beneath the Client Information section of the Demographic page. The CRA Event Information section will not be displayed when an organization is not participating in an exercise or event.



Personal Information Section

The Personal Information Section at the top of the Demographic and Enter New Client pages contains client-specific information used primarily to identify clients when conducting client searches. All fields shown in blue font

are required. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.

Personal Information		Edit Client
* Last Name	CLIENT	Return to Search
* First Name	TEST	
Middle Name		
Suffix		
* Birth Date	01/01/2000	
* Mother's Maiden Last Name <i>(On File)</i>		
* Mother's First Name	SUE	
Client Type	IC - ImmTrac Child	
ImmTrac2 Client	Yes	
* Gender	FEMALE	
SSN		
Medicaid ID		
Birth Order		<i>(for multiple births)</i>
Birth Country	UNITED STATES	
Birth State		
Birth County		
Client Identifier		
Disaster Client	No	

Last Updated by IR Physicians on 09/12/2014 by dhamann

History Table

Created by IR Physicians on 09/12/2014 by dhamann

- **Last Name:** required field
- **First name:** required field
- **Middle name:** optional field
- **Suffix:** optional field.
- **Birth Date:** required field
 - Complete the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field, clicking the appropriate date, and then clicking the OK button.
 - 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 in dispute. Contact the ImmTrac2 Help Desk to obtain the Vital Records phone number.
- **Mother's Maiden Last Name:** required field
 - Once entered, it will be kept confidential and the field will display *(On File)*.
- **Mother's First Name:** required field



Note: It is critical that the information in the Mother's Maiden Last Name and Mother's First Name fields is accurate. Do not use a fake name, foster mother, or type "unknown" in the fields.



- **Gender:** required field
- **SSN:** optional field

- Once entered, the Social Security Number will be kept confidential and the field will display *(On File)*.
- **Medicaid ID:** optional field
- **Birth Order:** optional field
 - This identifies the birth order of the client and should only be used for multiple births (e.g., twins, triplets).
- **Birth Country:** defaults to United States
 - Use the drop-down list to select a different country of birth, if applicable.
- **Birth State:** optional field
 - Use the drop-down list to select a state of birth, if applicable.
- **Birth County: optional field**
 - Use the drop-down list to select a county of birth, if applicable.
- **Client Identifier: displays** organization's primary client identifier (See the Organization Information section for adding/removing client identifiers.)

Client Consent Section

This section displays the First Responder attribute and Disaster Information retention (DIR) attribute values that can be viewed. Authorized users can update these values via Edit Consent Information link.

The screenshot shows a section titled "Consent Information" with a small upward-pointing triangle icon. Below the title is a blue link "[back to top]". There are two dropdown menus: "First Responder Attribute" with the value "N - Not a First Responder" and "DIR Attribute" with the value "N - DIR Consent Not Granted". Both dropdowns have a downward-pointing arrow. In the bottom right corner of the section, there is a link "View Consent History".

Client AKA Section

The Client AKA section gives other names that the client may be known as. A client can have several different AKAs.

1. Click the **Client AKA** heading to expand the information in that section.

Client AKA (0) ▲

[\[back to top\]](#)

Client AKA Listing

Remove AKA	* Last Name	* First Name	Middle Name
No AKAs have been added for this client			
Add New AKA			
	* Last Name <input type="text"/>	* First Name <input type="text"/>	Middle Name <input type="text"/>
			<input type="button" value="Add AKA"/>

- Last Name: required field when entering AKA information
- First Name: required field when entering AKA information
- Middle Name: optional field



Note: You must click the save button at the top of the screen to finalize any changes to the client record.



Organization Information Section

The Organization Information section shows organization-specific information about the client.

1. Click the **Organization Information** heading to expand the information in that section.

Organization Information ▲

[\[back to top\]](#)

Status: ACTIVE ▼ Allow Reminder and Recall Contact? Yes ▼

Provider- PCP ▼ Last Notice

* Tracking Schedule: ACIP ▼

Client Identifiers

Remove Identifier	Client Identifier	Primary
No Client Identifiers have been added for this patient.		
	<input type="text"/>	<input type="button" value="Add Client Identifier"/>

- Status:** Click ACTIVE from the drop-down list if you want this client to be associated with your organization, meaning he or she is receiving services from you. When you specify a client as INACTIVE, you make him or her inactive for your organization only.

ACTIVE	Client associated with your organization
INACTIVE-LOST TO	Client has not responded to follow up

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 client
INACTIVE-OTHER	
INACTIVE-PERMANENTLY (DECEASED)	Client is deceased.
INACTIVE-UNKNOWN	An individual made known to an via 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 via an electronic interface. (AIRA Definition)

- b. **Provider-(PCP):** Fill in the client's primary care physician (PCP) or health care organization from the drop-down list, if provided. This information is used only for reporting and must be set up by your organization's Super User. For instructions on how to set up the Provider (PCP) field, refer to the Managing Clinicians section in Chapter 8.
- c. **Tracking Schedule:** This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects recall and reminder notices and Comprehensive Clinic Assessment Software Application (CoCASA).
- d. **Allow Reminder and Recall Contact?:** By choosing Yes from the drop-down list you are allowing reminder/recall notices to be sent to this client when you run the reminder/recall report. If the client's parent chooses not to have, reminder/recall notices sent choose No from the drop-down list to exclude the client from the report.
- e. **Client Identifiers:** A client may have numerous client identifiers associated with him or her; each identifier is organization dependent. To enter a client identifier, type it in and click the Add Client Identifier button. Multiple client identifiers can be saved and a primary client identifier can be set by selecting the Primary option button.

Deleting an Existing Record

To delete an existing client identifier:

1. Click the client identifier you would like to remove by checking the appropriate box on the left.
2. Click the **Remove Identifier** button.
3. Click the **Save** button at the top of the page.

Generation of Reminder and Recall Notices

When running the reminder/recall report, letters are generated for every client when the following conditions are met:

- Client's status is not set to an INACTIVE status or INACTIVE-PERMANENTLY (DECEASED) on the Organization Information tab
- Allow Reminder and Recall Contact? Indicator on the Organization Information tab is set to Yes.
- Client has sufficient address information listed in the Address Information section



Note: Once a status of INACTIVE-PERMANENTLY (DECEASED) has been entered in the Status field, the field can no longer be edited by the organization. To change a status of INACTIVE-PERMANENTLY (DECEASED) contact the ImmTrac2 Help Desk.



Client Information Section

The Client Information section gives additional information about the client.

1. Click the **Client Information** heading to expand the information in that section.

- a. **Race:** Click the client's race by selecting the appropriate boxes. Multiple races may be selected.

- b. **Ethnicity:** Click the client's ethnic background from the drop-down list provided.
- c. **School:** Fill in the client's school from the drop-down list, if provided. This information is used only for reporting and must be set up by the organization's ImmTrac2 Super User. For instructions on how to set up the School field, refer to the Managing Schools section in Chapter 8.
- d. **Mother's HBsAg:** This is the client's mother's HBsAG Status. Select the mother's HBsAG status using the Mother's HBsAg pick list.
- e. **Occupation:** Click 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 targeted.
- f. **Language Spoken:** Click the primary language spoken by the Client; this determines the language of the Reminder/Recall letters. English and Spanish are the only options.

Address Information Section

The Address Information section allows you to identify the current address of the client and view previous addresses.

1. Click the **Address Information** heading to expand the information in that section.

Address Information ▲

[\[back to top\]](#)

[View Client Address History](#)

Last Updated 09/12/2014

No Viable Address

Start Date

Street Address

Other Address

P.O. Box

Zip +4

City State

County

Phone Number - -

Extension

E-Mail

- a. **No Viable Address:** Mark this checkbox if information was sent to the client and the information was returned as not deliverable.
- b. **Start Date:** Fill in the start date of the address using the MM/DD/YYYY format, or use the pop-up calendar by clicking

the calendar icon to the right of the field. Click the button to enter the Start Date. This is the Start Date of the client's New Address

- c. **Street Address:** Street Address of the client.
 - d. **Other Address:** Additional address information - a suite number or apartment number could be entered here.
 - e. **P.O. Box:** Post office box of the client
 - f. **Zip:** Zip code of the client
 - g. **+4:** Extended Zip code numbers of the client if available
 - h. **City:** City (or town) of the client's address
 - i. **State:** State
 - j. **County:** County
 - k. **Phone Number:** Phone Number
 - l. **Extension:** Phone extension if applicable
 - m. **Email:** Client's email address
2. Clicking **View Client Address History** will present a window with the client's address history, if available.

Responsible Persons Section

The Responsible Persons section allows you to identify client emergency contact information. The Reminder/Recall reports feature can also utilize the Responsible Persons information. The only required fields under this section are the Last Name, First Name, and Relationship fields.

- Click the **Responsible Persons** heading to expand the information in that section.

Responsible Persons (0) ▲

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Responsible Person listing

	Name	* Relationship	Primary
<i>No Responsible Persons have been added for this client</i>			

Details for Responsible Person:
Click 'Apply Changes' after applying updates

* Last Name <input type="text"/>	Street Address <input type="text"/>	<input type="button" value="Apply Changes"/>
* First Name <input type="text"/>	Other Address <input type="text"/>	
Middle Name <input type="text"/>	P.O. Box <input type="text"/>	
* Relationship <input type="text" value="v"/>	City <input type="text"/>	
Phone Number <input type="text"/> - <input type="text"/> - <input type="text"/>	State <input type="text" value="v"/>	
Extension <input type="text"/>	Zip <input type="text"/> +4 <input type="text"/>	
E-Mail <input type="text"/>		

To edit an existing responsible person:

1. Click the **Review** radio button next to the name of the person you wish to edit.
2. Click the **Review** button.
3. Change or add information for the fields listed.
4. Click the **Apply Changes** button.
5. Click the **Save** button at the top of the screen.
6. To enter a new responsible person, click the **Add New** button, and then enter information into the following fields:
 - a. **Last Name:** required field
 - b. **First Name:** required field
 - c. **Middle Name:** optional
 - d. **Relationship:** required field
 - e. **Phone Number:** responsible person's telephone number, including the area code
 - f. **Extension:** responsible person's extension to the above telephone number, if any
 - g. **Email:** responsible person's Email address
 - h. **Street Address:** responsible person's street address
 - i. **Other Address:** responsible person's additional address information - an apartment number could be entered here
 - j. **P.O. Box:** responsible person's post office box, or mailing address, if different from the street address.
 - k. **City:** city or town.
 - l. **State:** state
 - m. **ZIP:** ZIP code
 - n. **+4:** +4 code in this field if known.
7. To enter a new responsible person and save the information you entered in the Responsible Person Listing, or to view the next responsible person's record, click the **Save** button.
8. To clear existing information and enter a new responsible person, click the **Add New** button.

Deleting an Existing Responsible Person Listing

1. Select the **Remove** check box next to the record you wish to delete on the Responsible Person Listing table.
2. Click the **Remove** button.
3. Click the **Save** button at the top of the screen.

Client Comments Section

The Client Comments section allows you to enter immunization-related comments, such as contraindication information for a client. The client comments list is derived from a pre-selected CDC-standardized list and is displayed in drop-down list form.

Although the Start Date is not a required field, a start date must be entered with a contraindication comment 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 recommended.

The client comments are visible at the top of the Immunization History and Edit Immunization pages and the Client Immunization Records. When using the Print button on the Immunization History page, the comments are displayed on separate lines in the Comments box.

1. Click the **Client Comments** heading to expand the information in that section.

Client Comments (0) ▲

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Client Comment listing

Start Date	End Date	Client Comment
No Comments have been added for this client		

Enter New Client Comment

* Client Comment

Start Date End Date

2. Click the appropriate comment/contraindication from the Client Comment drop-down list.
3. Enter the date to which the comment refers in the Start Date field. Complete the field using the MM/DD/YYYY format or use the pop-up calendar. Click the **OK** button.
4. If applicable, enter the date to which the comment ends in the End Date field. Complete the field using the MM/DD/YYYY format, or use the pop-up calendar. Click the **OK** button.
5. To enter the comment into the Client Comments Listing, click the **Add Comment** button.
6. Click the **Save** button at the top of the page.

Immunity Comments

Immunity comments are linked to vaccine group recommendations. If a client has an immunity comment and a Start Date is specified, a recommendation for that vaccine group will not display on the client's record.

Client Refusal of Vaccine Comments

ImmTrac2 users should enter refusal comments with appropriate Start Dates 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 Forecaster.

Deleting an Existing Comment

1. Select the **Remove** check box next to the comment you wish to delete on the Client Comment Listing table.
2. Click the **Remove** button.
3. Click the **Save** button.

Client Notes Section

The Client Notes section allows you to enter notes for a client that may be useful to other clinicians.

1. Click the **Client Notes** heading to expand the information in that section.

Client Notes (0) ▲

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[Create New Note](#)

Please do not include confidential information in the client notes. Client Notes can be viewed by any provider organization with access to the registry.

Enter Text of Note:

Historical Notes [printer-friendly version](#)

Created by	Create Date	Note
No Notes have been added for this client		

2. Enter Text of Note: Enter text up to 4,000 characters in the text box.
3. Click the **Save** button at the top of the page.

Notes cannot be removed by users. To remove a note, contact the ImmTrac2 Help Desk.

Saving Client Information

There are several ways to save information on the Demographic/Enter New Client pages:

Save: When clicked, the Save button at the top of the page will save all information fields within each section: Personal Information, Client AKA, Organization Information, Client Information, Address Information, Responsible Persons, Client Comments, and Clients Notes. Once the client data is saved the message

“Client record successfully saved” will appear at the top of the Personal Information header.

History/Recommend: As with the Save button, the **History/Recommend** button will save all information fields. Once the information is saved the client’s Immunization History page will display.

Reports: As with the Save button, the **Reports** button will save all information fields. Once the information is saved, the Reports Available for this Client page will display, so that a report may be generated for the client. Refer to the Reports and Forms, chapter 12, for more information on reports.

Cancel: When clicked, the **Cancel** button clears all entered information and **does not save to ImmTrac2**. The Find Client or Enter New Client page is displayed.

De-duplication of Client Records

After you enter a new client and click one of the buttons that will save the data, ImmTrac2 initiates a process that ensures that the client information you entered does not duplicate a client that already exists.

If, after attempting to save a new client, you receive a message box titled “Potential Match List”, ImmTrac2 has determined that the client you are attempting to save may already exist in the database. A table below the message box will contain one or more names of potential matches. Click View Details for each last name to display his or her information. ImmTrac2 will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your client’s record. Review Address, Responsible Persons, and any other information you have to identify matching data.

Potential Match List

1 additional matches have been found.

Create New Client

Cancel

The system has determined that the client record you are adding already exists in ImmTrac2. The Potential Match List below shows clients listed on the Client Search Results along with those not previously listed but may be a match after client-information changes. Select View Details to view the client's information. Select View Details to open the client's existing record in a View Only format. If you do not find the matching client, proceed by clicking Add New Client. If one of the clients listed is the one you are looking for, click Cancel – this change must be entered using the Edit Client Consent option available to DSHD staff with the appropriate User Role permission.

	ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Suffix	Sex	Birth Date	Mother's Maiden Name	Address	City	County	Guardian Last Name
View Details	6966912	IC	CLIENT	TEST			F	01/01/2000	SMITH	12345 TEST STREET			

If you determine that the potential match clients listed above do not match the client for whom you are searching proceed by clicking the Add New Client button below. The Cancel button will return you to the previous screen.

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If you do not find a match for your client after reviewing all the related names, click the Create New Client button. A confirmation box will appear; click the OK button. Be aware that if you do override the listed matches and create a duplicate record for a client, it will be difficult to manage the client's immunization and personal information; the registry will lose its accuracy and efficiency. If you identify possible duplicate client records, you should call the ImmTrac2 Help Desk immediately.

Countermeasure and Response Administration Module (CRA)



Note: In the event of a public health emergency, ImmTrac2 may be used to track the administration of vaccine. In some instances, specific groups may be identified as being at higher risk than the general population and targeted as priority groups to receive the vaccination first.



CRA Event Information Section

If your organization is selected for an event, the CRA Event Information section will be displayed below the Client Information section of the Demographic page. The CRA Event Information section is used to collect Public Health data during a pandemic response event or preparedness exercise. During an ongoing event, the CRA Event Information section will be displayed on the Edit/Enter New Client page. Based on candidate screening, select the appropriate priority group category for each client.

CRA Event Information (2) ▲

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Event Description	Begin Date	End Date
Influenza By Age Group	01/01/2010	
Age Group:	Age will be calculated at the time of Vaccination and included in aggregate reporting.	
Influenza By Priority Group	09/30/2010	12/31/2010
Priority Group:		
<input type="text" value="Pick a Priority Group"/>		

- Effective Events are displayed.
- 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.



Chapter 11

Managing Immunizations

In this chapter:

- Viewing Client Immunization Information
- Entering Immunizations
- Editing Immunizations
- Countermeasure and Response Administration (CRA)

ImmTrac2 allows you to view and manage historical immunization information and add new immunizations for a client. ImmTrac2 also recommends immunizations based on the ACIP tracking schedule.

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

1. Click **Manage Client** under the Clients section of the menu panel. This will display the Client Search page. For information on finding clients, refer to Chapter 10, Managing Clients. Once a client is retrieved, click the History/Recommend button to display the client's Immunization Record page.

Or

2. Click **Manage Immunizations** under the Immunizations section of the menu panel. This will bring up the Client Search page. For information on finding clients, refer to Chapter 10, Managing Clients. Once a client is retrieved, the client's Immunization Record page displays.

Viewing Client Immunization Information

The Immunization Record page holds a large amount of information on each client in ImmTrac2. The page has three sections: Client Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule.

Client Information






The Client Information section at the top of the Immunization Record page displays information on the client, such as name, DOB, gender, Tracking Schedule, Client ID, address, phone, and a scrollable list of comments. Use this information to verify that the client indicated is the client for whom you were searching. To edit this information, Click the Edit Client button and refer to the Editing/Entering Client Information section in Chapter 10, Managing Clients.

Client Information				
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
MY CLIENT	01/01/2008	F	ACIP	
Address/Phone		55 RED ROAD, TX		
Comments				

Between the Client Information section and the Immunization Record section, the client's exact age is shown in a solid blue field. The age also displays on the printable version of this page.

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 ordered by Date Administered.

Immunization Record							
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist? Edit
DTP/aP	03/02/2008	1 of 5	DTaP, NOS				Yes 
HepB	01/02/2008	1 of 3	HepB, NOS [HepB ®]				Yes 
	03/02/2008	2 of 3	HepB, NOS [HepB ®]				Yes 
Rotavirus	03/02/2008	1 of 3	Rotavirus, NOS				Yes 
Td/Tdap	03/02/2008		DTaP, NOS				Yes 

Vaccine Group: The vaccine group name

Date Administered: The date the client was given the vaccine. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click this date.

Series: denotes the sequence number within the immunization series. A vaccine may show as invalid because the client was not old enough to receive it or not enough time has elapsed between doses. "Partial Dose" will display if the shot is flagged as a partial dosage.

Trade Name: the manufacturer's trade name of the vaccine

Dose: indicates whether full, half or multiple doses were administered to the client. If the Dose field is blank, assume that the default "full" dose was administered.


Owned?: If the value in the owned column is blank, the immunization data is owned by your organization. This is a result of either manual data entry of this information or having sent it via data exchange. This only indicates the organization submitting the data; it has nothing to do with the organization that administered the shot to the client.

"If the value in the Owned?" column is "No", the immunization data is not owned by your organization.

This indicates that your organization did not enter the shot information into ImmTrac2. Click “No” to display who owns the shot information.

Reaction: If this column indicates “Yes” and appears in red, this means a reaction to a vaccine was recorded. To view the client’s reaction, Click the “Yes” link in the Reaction column or Click the notepad icon in the “Edit” column.

Hist?: If this column indicates “Yes”, this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into ImmTrac2).

Edit: When you click the notepad icon  in this column, you will be able to edit some fields for the recorded immunization using the Edit Immunization page, as long as the immunization is owned by your organization or is historical. You will also be able to see more details about the immunization, including vaccine lot number and VFC status (if applicable). Click the Edit button to enter a reaction to the immunization or mark it as a subpotent dose. Details on editing immunizations are covered in more detail later in this chapter.



Note: Owned vs. Not Owned Immunizations

A single provider does not own any of the clients within ImmTrac2, but an organization does own the immunization data it enters into the system. If the Owned column on the Immunization Record table shows a “No” for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

Any provider may edit a historical immunization, but “new” or non-historical shots may only be edited by the organization that administered the vaccine and entered the data in ImmTrac2. The exception is that any user can enter a reaction to any immunization or mark it as a subpotent dose.



Validation of Combination Vaccines

ImmTrac2 validates each vaccine group component separately when recording combination vaccines. For example, if Comvax, which is a combination of Hib and Hep B was administered, and only one component is valid, that component will be treated as if it were a single vaccine and validated. The other component will be displayed as “Not Valid”. The component that is not valid will not be counted in series.

Vaccines Recommended by Selected Tracking Schedule

This table, known as the Forecaster, lists all vaccines recommended by the ACIP tracking schedule associated with the client. Immunizations are listed alphabetically.


Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
<input type="checkbox"/>	DTP/aP	DTaP, NOS	03/30/2008	05/02/2008	06/02/2008
<input type="checkbox"/>	HepA	HepA, NOS	01/02/2009	01/02/2009	08/02/2009
	HepB	HepB, NOS	Complete		
<input type="checkbox"/>	Hib	Hib, NOS	04/02/2009	04/02/2009	04/02/2009
<input type="checkbox"/>	Influenza-seasnI	Influenza, NOS	07/02/2008	08/01/2010	08/02/2008
<input type="checkbox"/>	MMR	MMR	01/02/2009	01/02/2009	05/02/2009
<input type="checkbox"/>	PneumoConjugate	PCV7	01/02/2010	01/02/2010	01/02/2010
<input type="checkbox"/>	Polio	Polio, NOS	02/13/2008	03/02/2008	04/02/2008
	Rotavirus	Rotavirus, NOS	Maximum Age Exceeded		
<input type="checkbox"/>	Varicella	Varicella	01/02/2009	01/02/2009	05/02/2009

- Select:** allows users to manually check inclusion in the Vaccines Recommended section. When the Add Selected button is clicked, the Enter New Immunizations page will open with the check-marked selections displayed.
- Vaccine Group:** lists the vaccine group name. To view the tracking schedule information for the selected immunization, click the vaccine group name.
- Vaccine:** lists the vaccine name
- Earliest Date:** the earliest date that the client may 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.

Immunization Color Coding

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. For a detailed listing of

color definitions, click the online help icon  on the Immunization Record page. The colors applied to the dates within the columns are defined as follows:

Green: Color that will fill the background for the Vaccine Group and Date columns when a dose in that family is recommended or past due.

Gray: Vaccine statuses that will show gray color: Complete, Contraindicated, Maximum Age Exceeded, Immunity, and Medical Exemption.

Other Features on the Immunization Record Page

The Immunization Record page contains links to other ImmTrac2 functions:

- Edit Client:** Clicking this button will return you to the Demographic page for the client
- Reports:** Clicking this button will bring you to the Reports Available for This Client page. You may generate Client-specific reports. Refer to Forms and Reports in Chapter 12 of this manual for more information.
- Print Record:** Clicking this button will display the client's immunization information without the top or side ImmTrac2 menus. To print this page, Click the printer icon on your browser's tool bar or click File, Print and click OK. Click the browser's Back button to return to the Client Immunization Information page.
- Print Confidential Record:** Clicking on this button will display the client's immunization information without top or side ImmTrac2 menus and without confidential client information. To print this window, Click the printer icon on your browser or click File, Print, and Click

OK. Click your browser's Back button to return to the Client Immunization Information page.

Entering Immunizations

To add new immunizations:

1. To enter immunizations using the **Add Selected** button in the bottom right hand corner of the page, click the boxes of the appropriate immunizations under the Vaccines Recommended section and click the Add Selected button.
2. To enter immunizations without using the Add Selected button, click the **Add New Imms** button to display the Enter New Immunization page.
3. To add immunizations from ImmTrac2 Inventory, click the check box **From ImmTrac2 Inventory**. This will deduct the immunization from your vaccine inventory.

Enter New Immunization

From ImmTrac2 Inventory

Date Administered

Administered By

Remove Immunization	* Trade Name	Lot #	* Vaccine Eligibility	Administered By
<input checked="" type="checkbox"/>	MMR			


Body Site Route Dose

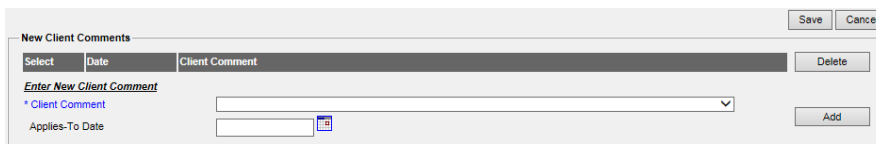
Save Cancel

- Click a date for the Date Administered field using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. drop-down
- You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Full Access State User of ImmTrac2 for your organization. Refer to “Managing Clinicians” (Chapter 8).
- Remove box: click when removing an immunization.
- Immunization: click from the drop-down list. This will uncheck the Remove box.
- Trade Name-Lot #-Funding Source Exp Date: click or enter the appropriate Trade-Name-Lot #-Funding Source Exp Date. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.)

- **Vaccine Eligibility:** click the appropriate vaccine eligibility for this client's immunization. The vaccine eligibility drop-down list will display according to organization type.
- **Body Site:** click the appropriate body site for the immunization.
- **Route:** click the appropriate route for the immunization.
- **Dose:** click the appropriate dose for the immunization. The dose will default to Full.

Repeat these steps for each new immunization you are entering.

- **New Client Comments:** If necessary, select the appropriate comment from the drop-down list. Add an "Applies-To Date" by using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon  to the right of the field. Click the Add button to add client comment to the record. For more information on Client Comments, see *Managing Clients, Chapter 10*.
- Click the Save button to save your immunization entry.



To Add Historical Immunizations:

1. Click the **Add Historical Imms** button to display the Enter Historical Immunizations page.
2. Enter Doses 1 – 5 for immunizations being historically recorded by using the MM/DD/YYYY format. For those immunizations not being recorded, leave the box blank.

Enter Historical Immunizations					
Immunization	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
DTP/aP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HepA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HepB	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Hib	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
HPV	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Influenza-seasn1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Influenza-H1N1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Meningo	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MMR	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PneumoConjugate	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PneumoPoly 23	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Polio	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Rotavirus	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Td/Tdap	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Varicella	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Zoster	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/> (Select additional types of immunizations.) <input type="button" value="Add Details"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>					

3. Click the **Enter Details** button to enter the Trade Name, Lot Number, Provider Org, and Source of Immunization.
4. Click the **Save** button to save your immunization entry.



Note: At the bottom of the Immunization Details Entry page, default VIS dates will be displayed for each new immunization entered.



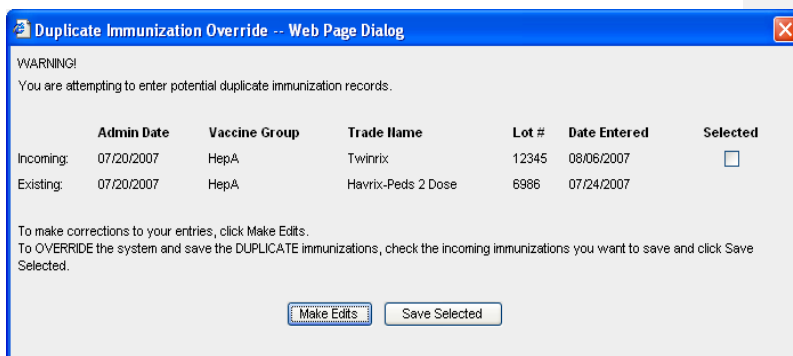
Duplicate Immunizations

ImmTrac2 does not allow duplicate immunizations to be entered for a client. If you attempt to enter an immunization for a client given within two days before or after an existing immunization with the same trade name, you will receive the message, "Possible duplicate immunizations exist. Modify or delete your entries." ImmTrac2 will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunizations override warning:

- In the Duplicate Immunization Override warning dialog box, review all immunizations to determine whether there are any duplicates.

- If the immunization(s) you entered need to be removed or edited, click “Make Edits”. At the Enter New Immunization or Enter Historical Immunizations page, make changes or remove immunizations as needed. Click the **OK** button.



- If an Immunization listed in the warning dialog box is not a duplicate, select the checkbox next to the immunization to enter it as a separate vaccine event and click the Save Selected button.



Note: The following scenarios explain how ImmTrac2 overrides duplicate immunization records:

- If there is a historical immunization on file and the same, immunization is entered as administered from ImmTrac2 inventory or data exchange, no warning message will appear; instead, it processes the new immunization and removes the historical immunization.
- If there is a historical immunization on file and a matching historical immunization is entered, a warning message will appear. The user then has the choice to cancel the new immunization or save it anyway (adding a duplicate immunization). The user would need to explicitly delete the historical immunization to remove the duplicate records.



Applying a Prerequisite Override to a Client's Immunization


A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a client reaches a certain age. A prerequisite override is not automatically applied to an individual client's immunization record. To apply a prerequisite override to an immunization:

1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the Editing Owned Immunization from the Inventory section of this chapter.
3. In the field marked Disregard Primary Series, click Yes. This field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the client is greater than or equal to the override age) meet those of the prerequisite override.
4. Click **Save**.

Editing Immunizations

Editing or Deleting Historical Immunizations

To edit or delete a historical immunization:

1. On the Immunization Record table, select the historical vaccine record you wish to edit by clicking the vaccine's notepad icon  in the "Edit" column.

Edit Historical Immunization

Vaccine Group: DTP/aP - Td/Tdap Save

Vaccine Display Name: DTaP, NOS Cancel

Trade Name: Unknown Delete

Vaccine Lot Number:

Subpotent Dose:

Date Provided: 03/02/2008

Provider Org Name:

Source of Immunization: Source Unspecified ▼

Disregard Primary Series:

VIS Date for DTP/aP: Unknown

VIS Date for Td/Tdap: Unknown

Entered by Site: Unknown

Input Source of Record: Created through User Interface

Reactions to Immunization

Anaphylactic reaction


Hypotonic-hyporesponsive collapse within 48 hours of immunization

2. On the Edit Historical Immunization page, you may edit information for the Vaccine Lot Number, Subpotent Dose, Date Provided, Provider Organization Name, Source of Immunization fields; you may also select the box for Disregard Primary Series.
3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. To delete the historical immunization, click the **Delete** button.
5. Click the **Save** button.

Editing Owned Immunizations

An immunization that is not historical is one that was given out of an organization's inventory or submitted via electronic data exchange as administered. You will not be able to edit non-historical immunizations that are owned by another organization.

To edit an immunization record that is an owned immunization, administered by your organization:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking the vaccine's notepad icon  in the Edit column.

Edit Immunization

Vaccine Group: HepB Save

Vaccine Display Name: HepB-Adult Cancel

Trade Name: Engerix-B Adult Delete


Vaccine Lot Number: lot_38.1.4.1

Funding Source: State

Dose Size: 0.5 ml

Dosage From Inventory: Full

Subpotent Dose:

Date Provided: 01/08/2013 

Vaccine Eligibility: M - Medicaid, OHP ▼

Ordering Authority: ▼

Administered By: Test Clinician ▼

Body Site: left thigh ▼

Administered Route: intramuscular ▼

Source of Immunization: New Immunization Administered

Disregard Primary Series:


VIS Date for HepB: 07/18/2007 ▼

Entered by: City ID Physicians

2. To indicate a partial dosage, check the **Subpotent Dose** checkbox. For example, check this box if a partial dosage was administered because the needle broke or was removed too soon.
3. Update information in the Date Provided, Vaccine Eligibility, Ordering Authority, Administered By, Body Site and/or Administered Route fields on the Edit Immunization page.
4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, click an alternate date from the drop-down list.
5. To record a reaction to the immunization, check the box next to the applicable reaction.
6. Click the **Save** button.

Deleting Owned Immunizations

Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notebook icon  in the Edit column.
2. At the Edit Immunization page, click the **Delete** button.
3. Click the **OK** button in the confirmation box.

Countermeasure and Response Administration (CRA)

In the event of a public health emergency, ImmTrac2 may be used to track the administration of vaccine. 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.

The CRA Event Information section is used to collect public health data during a pandemic event or preparedness exercise (such as the response event to a pandemic influenza outbreak.). If your organization is selected for an event, then the CRA Event Information section will be displayed on the Record Immunizations page. Based on candidate screening, click the appropriate priority group category for each client.

Client Information

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
FRED FLINTSTONE	07/29/1950	M	ACIP	

Address/Phone: 1212 ROCK ROAD, TX

Comments:

Current Age: 64 years, 1 month, 17 days

Client Notes (0) [view or update notes](#)

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?
Influenza-H1N1	09/17/2012		Influenza-H1N1-09 [H1N1 CSL @]	Full	No		
Zoster	08/29/2010	1 of 1	Zoster		No		Yes

CRA Event Information (1)

Event Description	Begin Date	End Date
ssss	01/23/2014	10/29/2014

Priority Group:

Age Group: Age will be calculated at the time of Vaccination and included in aggregate reporting.

Enter New Immunization

From ImmTrac2 Inventory

Date Administered:

Administered By:

Remove	Immunization	* Trade Name	Lot #	* Vaccine Eligibility	Administered By
<input checked="" type="checkbox"/>	MMR				

Body Site:

Route:

Dose:



Chapter 12

Immunization Roster

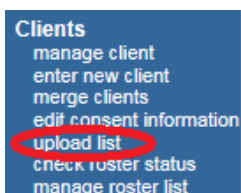
In this chapter:

- Upload List
- Check Roster Status
- Manage Roster List

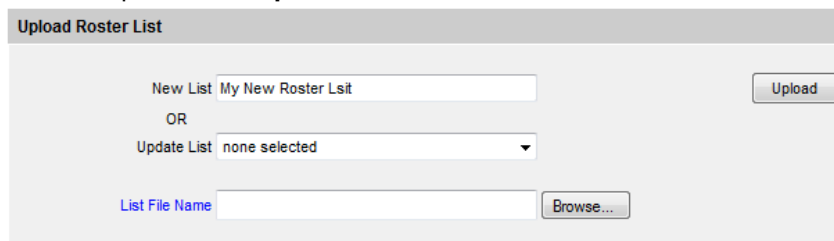
Upload List

ImmTrac2 provides the ability to create a list of clients by uploading a flat file of clients (or by entering clients one-by-one to an existing list); in order to enter immunizations from mass events using a roster format.

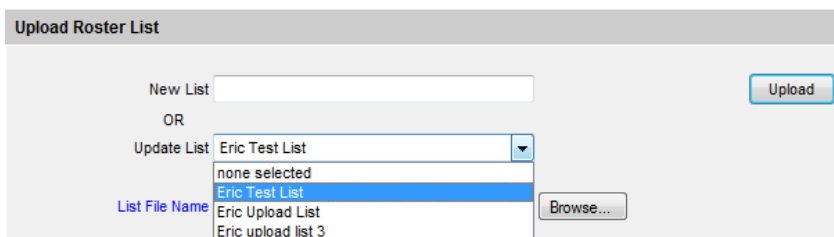
To upload a roster list, select **Upload List** from Clients section of the blue menu panel on the left side of the screen:



Enter a name for your Roster List and Browse to select the file/location from which to upload, click **Upload**:

A screenshot of the "Upload Roster List" form. It has a title bar "Upload Roster List". Below it, there is a "New List" text input field containing "My New Roster List" and an "Upload" button. Below that is "OR" and an "Update List" dropdown menu with "none selected". At the bottom, there is a "List File Name" text input field and a "Browse..." button.

Alternately, if you want to add to an existing Roster List, click on the dropdown under Update List, select the desired List Name, Browse to select the file/location, and click **Upload**:

A screenshot of the "Upload Roster List" form. The "New List" field is empty. The "Update List" dropdown menu is open, showing a list of options: "none selected", "Eric Test List", "Eric Upload List", and "Eric upload list 3". The "Eric Test List" option is highlighted. The "List File Name" field and "Browse..." button are also visible.

The upload List results screen will display:

Upload List Result

The following files were uploaded:

- c:\mynewlistinputfile.txt

Job Name which is "MyNewList" has been presented for processing.

Click **Check Status** and the upload list status screen will display:

Upload List Status

Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
MyNewList	Aura Leigh Borrett	05/13/2004 13:51:11	05/13/2004 13:32:58	05/13/2004 13:32:58	COMPLETE
MyNewListError	Aura Leigh Borrett	05/13/2004 13:21:10	05/13/2004 13:02:58	05/13/2004 13:02:58	ERROR

From this screen you can click Refresh to determine how the job is progressing. When it is “complete”, clicking on the hyperlink will take you to the Upload Status Screen if no errors were encountered in processing. (You may also continue to work elsewhere in the system while waiting for the job to finish, and come back to check on the job using the **Check Roster Status** menu link on the side blue panel).

ImmTrac2 anticipates the Roster List being uploaded to be a flat file, in the following format:

Column	Data type	Required	Notes
Record Identifier	Char(32)	Y	Supplied by sender, used to uniquely identify a client.
First Name	Char(50)	Y	If Client does not have a first name, " NO FIRST NAME " must be entered in this field.
Middle Name	Char(50)		
Last Name	Char(50)	Y	
Name Suffix	Char(10)		JR, III, etc.
Birth Date	Date(8)	Y	MMDDYYYY
Mothers First Name	Char(50)		
Mothers Maiden Last Name	Char(50)		
Gender	Char(1)		Use the IR code set for Gender .
Street Address	Char(55)		Residential address of responsible person.

Column	Data type	Required	Notes
Mailing Address Line	Char(55)		Mailing address of responsible person. Use if mailing address is different from street address.
Other Address Line	Char(55)		
City	Char(52)		
State	Char(2)		
Zip	Char(9)		If +4 zip is used, the first 5 characters and second 4 characters are concatenated into a single value, without separators.

1. Character fields need to be left justified and blank-filled, number fields right justified and blank-filled, and date fields in format MMDDYYYY with leading zeroes. If information is unable to be supplied any information for a specified field, the entire field needs be filled with blanks (spaces).
2. The file needs to be generated using the ASCII character set. Records will be fixed length and need to be terminated with a carriage return/line feed.

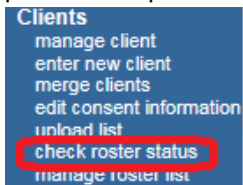
Example

Records need to be **blank** filled. In the following example, blanks are represented with the '*' character for illustrative purposes.

```
*****12345LAUREN*****
*****KAY*****SMITH*****
*****05141995GAIL*****
*****CARPENTER*****
*****F125*EAST*STREET*****
*****
*****FULTON*****
*****OR535291234
```

Check Roster Status

After uploading a roster List, you can check on the progress of the job by clicking on **Check Roster List** from the Clients section of the blue menu panel. The upload status screen displays:



Upload List Status					
Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
Eric Test List	Heather Worachek	03/30/2012 06:56:18	03/30/2012 06:56:18	03/30/2012 06:56:22	COMPLETE

Refresh

When the job is complete, click on the hyperlink to view the response and Download Files:

Download Files for: Eric Test List

[Roster List Response \(3KB \)](#)
[Roster List of Names With No Match \(1KB \)](#)
[Roster List Rejected \(1KB \)](#)
[Roster List of Names With Multiple Matches \(1KB \)](#)

Refresh

Cancel

Download Log for: Eric Test List

File	User Name	Download Date
No Download Logged		

Summary Information for: Eric Test List

Description	Patient
Total Patients Processed	6
Added	1
Multiple Match	1
No Match	3
Rejected	1

- There are 1-4 files that will be available for download:
- 1) a response file for summarizing information on the clients that were added, multiple match, no match, and/or rejected;
 - 2) a roster list file if any clients encountered multiple matches;
 - 3) a roster list file if any clients found no matches; and/or
 - 4) a roster list file if any clients were rejected for other reasons.

Example of a Response file

```
//////////////////////////////////////
// SUMMARY //
//////////////////////////////////////
```

```
*****
** JOB INFORMATION **
*****
```

```
Job ID: 126909
Job Start Date: Fri Mar 30 06:56:18 PDT 2012
Job End Date: Fri Mar 30 06:56:22 PDT 2012
```

DESCRIPTION	PATIENTS
Total ROSTER Patients Processed	6
Added	1
Multitple Match	1
No Match	3
Rejected	1

```
//////////////////////////////////////
// DETAIL //
//////////////////////////////////////
```

```
*****
** PATIENTS THAT HAVE MULTIPLE MATCHES **
*****
```

[33330] Patient PATIENT, TEST Born 01012010
 The incoming client matches more than one existing candidate. Existing candidate patient IDs include 7139771,7138611,7138575,7138574

CL	Matching Patient 7139771=PATIENT, TEST null	2010-01-01	Mother=null[N/A]
CL	Matching Patient 7138611=PATIENT, TEST null	2010-01-01	Mother=null[N/A]
CL	Matching Patient 7138575=PATIENT, TEST TOTALREPORT	2010-01-01	Mother=null[N/A]
CL	Matching Patient 7138574=PATIENT, TEST null	2010-01-01	Mother=null[N/A]
CL	Matching Patient 7138051=PATIENT, TEST null	2010-01-01	Mother=null[N/A]
CL	Matching Patient 7108771=PATIENT, TEST null	2010-01-01	Mother=null[N/A]

```
*****
** PATIENTS THAT DID NOT HAVE A MATCH **
*****
```

```
[33332] Patient SMITH, LAUREN KAY Born 05141995
Client did not match
```

```
[33332] Patient SMITH, SALLY SUE Born 05141995
Client did not match
```

```
[33332] Patient SMITH, 54321 SUE Born 05141995
Client did not match
```

```
*****
** PATIENTS THAT WERE REJECTED **
*****
```

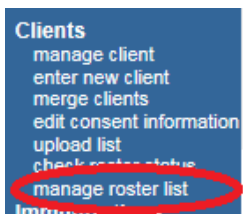
```
[33332] Patient SMITH, 54321 SUE Born 05142222
Record rejected. A valid birth date between Jan 1, 1890 and today must be entered.
```

If multiple match, no match, or rejections occur you may click on the specific Roster List hyperlink to see a list of which list clients met this criterion:

- Multiple match means ImmTrac2 found more than one client in the registry that matches your list criteria; you will need to add the client into the list by hand, using Manage Roster List and selecting the specific client you wish to add.
- If no match was found, 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.
- Rejections for other reasons require you to correct the data in your upload file in order for the system to accept it (examples: invalid or missing birth date)

Manage Roster List

To manage your roster list(s), click on the blue hyperlink **Manage Roster List** under the Clients menu on the left side of the screen:



The Roster Lists you have created are displayed:

Manage List			
* New List Name	<input type="text"/>	<input type="button" value="Save"/>	
Client List			
List Name	Last Updated Date	Client Count	Delete
Test Roster List	10/08/2014	0	<input type="button" value="Delete"/>

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You may create a new Roster List, or access an existing List by clicking on the corresponding hyperlink. The **Immunization Roster** displays:

Immunization Roster

Roster Event Information ▲

Event:

Search and Add Client to Roster ▲

Search to Add Client to Roster

(Exact Birth Date is mandatory when searching by client.)

Last Name Mother's First Name

First Name Phone --

Middle Name

* Birth Date

Search By Client Id

* Client Id

Search By ImmTrac2 ID

* ImmTrac2 ID

Search Results

Last Name	First Name	Middle Name	Birth Date	Gender	Possible Matches:

Roster Immunization Information ▲

Immunization Defaults

From ImmTrac2 Inventory * Date Administered

Administered By

Not From ImmTrac2 Inventory

Remove	Immunization	* Trade Name	Lot#	* Vaccine Eligibility	Administered By
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Body Site <input type="text"/>		Route <input type="text"/>		Dose <input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Body Site <input type="text"/>		Route <input type="text"/>		Dose <input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Body Site <input type="text"/>		Route <input type="text"/>		Dose <input type="text"/>

Client Roster(0) ▲

Client Roster

1 to 0 of 0 << < > >>

Select	Last Name	First Name	Middle Name	Birth Date	Status

The collapsible **Event Information** dropdown section will only display if the organization is associated with a CRA Event.

The **Search and Add Client to Roster** section allows you to find a client in the ImmTrac2 System, and add them to your Roster List. In order to search you need the birth date and one other criteria. Then click on **Find**.

When you click on **Find**, Run Match is invoked: if it finds a single match, that client is displayed and is automatically populated into the Client Roster on the lower part of the screen. If it finds multiple matches, they are displayed in the **Search Results** section and you may select a client to add to the list: The Add Client button is displayed.

Search and Add Client to Roster ▲

Search to Add Client to Roster
(Exact Birth Date is mandatory when searching by client.)

Last Name Mother's First Name

First Name Phone - -

Middle Name

* Birth Date

Find
Clear

Search By Client Id
* Client Id

Search By ImmTrac2 ID
* ImmTrac2 ID

Search Results

Possible Matches: 1

Last Name	First Name	Middle Name	Birth Date	Gender
CLIENT	MY		01/01/2008	F

Clicking on the **Plus sign** will select and add that client to the Client Roster displayed on the lower part of the screen.

Clicking on the **Last name hyperlink** will take you to the Update Client screen in ImmTrac2. From ImmTrac2, click the Cancel button on the Update Client screen to return to the Immunization Roster screen.

View Client

Personal Information

* Last Name * Gender ▼

* First Name SSN - -

Middle Name Medicaid ID

Suffix ▼ Birth Order (for multiple births)

* Birth Date Birth Country ▼

* Mother's Maiden Last (On File) Birth State ▼

* Mother's First Name Birth County ▼

Client Type ▼ Client Identifier

ImmTrac2 Client Yes Disaster Client No

Edit Client
Return to Search

Last Updated by IR Physicians on 06/24/2015 by dhamann History Table

Created by IR Physicians on 06/24/2015 by dhamann

Consent Information ▼

Client AKA (0) ▼

Organization Information ▼

Client Information ▼

CRA Event Information (2) ▼

Address Information ▼

Responsible Persons (0) ▼

Client Comments (0) ▼

Client Notes (0) ▼

To record multiple immunizations on the same date:

- Indicate if you are administering from existing **ImmTrac2 inventory** by clicking on the check box provided. Then enter the **Date Administered** (calendar icon is available) and **Administered By** dropdown fields.
- Click on the **Immunization** and **Trade Name** dropdowns, enter the **Lot #** and select the **Eligibility code** from the dropdown list. Click on the appropriate **Administered By, Body Site, Route and Dose** dropdown fields.
- Click on the **Select** box for each client receiving the immunization. When all clients have been selected, click on the **Immunize Selected** action box.

Roster Immunization Information ▲

Immunization Defaults

From ImmTrac2 Inventory * Date Administered 01/02/2008
Administered By

Not From ImmTrac2 Inventory

Remove	Immunization	* Trade Name	Lot#	* Vaccine Eligibility	Administered By
<input type="checkbox"/>	DTP/aP			V01-Private Pay/Insur	
	Body Site		Route	Dose	Full
<input checked="" type="checkbox"/>					
	Body Site		Route	Dose	Full
<input checked="" type="checkbox"/>					
	Body Site		Route	Dose	Full

Client Roster(1) ▲

Client Roster

Immunize Selected Remove Selected Clear Roster Status 1 to 1 of 1 << >>

Select	Last Name	First Name	Middle Name	Birth Date	Status
<input checked="" type="checkbox"/>	CLIENT	MY		01/01/2008	Immunized

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ImmTrac2 will record the Immunization for each client selected, and/or will indicate if there is an error status associated with the client when recording the immunization in ImmTrac2 (example: client already has the immunization and you are entering a duplicate). The Status column is also updated.

If administered from ImmTrac2 inventory, the quantity on hand for the corresponding lot # will be decremented for the immunizations given. If there are too many clients for the lot # you entered, an error will indicate such. You can only select the number of clients from the roster list for the quantity

available from this lot #. Then you can enter a new lot # and select which clients received an immunization from the next selected lot #.

Patient Roster(8) ▲

Patient Roster

Immunize Selected Remove Selected Clear Roster Status 1 to 8 of 8 << < > >>

Select	Last Name	First Name	Middle Name	Birth Date	Status
<input type="checkbox"/>	CHAKABHARTI	BRITTANY	LIZ	09/02/2000	Immunized
<input type="checkbox"/>	FF	BOB		01/01/2008	
<input type="checkbox"/>	PATIENT	BABY B		01/01/2010	Immunized
<input type="checkbox"/>	PATIENT	BADEMAIL		01/01/2010	Immunized
<input type="checkbox"/>	PATIENT	BOB		01/01/2010	Immunized

- If you need to remove a client from your Roster List, click on the Select button and then click the **Remove Selected** action Box.
- To clear the Roster Status, simply click on **Clear Roster Status**.
- Note that at any time you may click on the **last name hyperlink**, and it will take you to the Update Client screen in ImmTrac2. Click the Clear button to get back to the Manage Roster List.



Chapter 13

Forms and Reports

In this chapter:

- Forms Tab
- Client Level Reports
- Certificate of Immunization Status (CIS) Report
- Immunization History Report
- Immunizations Needed Report
- Vaccine Administration Record
- Ad Hoc Reports
- Assessment Report
- Benchmark Report
- Doses Administered
- Group Clients
- Reminder/Recall
- Vaccine Eligibility
- Billing Report
- Provider Report
- Vaccine Accountability Report

Forms Tab

The Forms tab at the top of the ImmTrac2 web page gives users access to several ImmTrac2 related forms. You can also access this tab prior to logging into ImmTrac2.

To access forms, click the **Forms** tab in the top menu bar.



Client Level Reports

For all clients in ImmTrac2, you may generate the following reports from the Client Reports Screen:

- Vaccine Administration Record – Pediatric
- Vaccine Administration Record – Adult
- Immunization History Report
- Immunizations Needed

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the client's immunization history. This report will typically be used as an official school record. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Client section, click **Immunization History Report**, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

15 September 2014

ImmTrac2, the Texas Immunization Registry

IR Physicians

Immunization History Report

Patient ID:	Tracking	ACIP
Patient Name:	PEBBLES FLINTSTONE	
Birth Date:	06/01/2014	Gender: Female
Age:	3 months, 14 days	

Vaccine	Date	Series	Vaccine [Trade	Dose	Mfg	Lot #	Bod Rt.	Bod St.	Provider of	React
DTP/aP	07/14/201	1 of 5	DTaP [Acel-Imune ®]	Full					IR Physicians	
HepB	06/01/201	1 of 3	HepB-Peds [H-B-Vax ®]	Full					IR Physicians	
	06/30/201	2 of 3	HepB-Peds [Engerix-B Peds ®]	Full					IR Physicians	
Hib	07/14/201	1 of 4	Hib-PRP-T [ActHib ®]	Full					IR Physicians	

Reaction Descriptions: No Records Found.

Patient Comments: No Records Found.	Start Date:	End Date:
--	-------------	-----------

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Client Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the client. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

1. From a client's Manage Client screen or Manage Immunizations screen, click **Reports**.
2. At the Reports Available for this Client section, click **Immunizations Needed**, which is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

Patient ID:	Race:	Tracking Schedule: ACIP
Patient Name (L, F, M): PEBBLES FLINTSTONE	Ethnicity: null	
Birth Date: 06/01/2014	Gender: F	
Age: 3 months, 14 days		

Patient Comments:	From Date:	To Date:
--------------------------	-------------------	-----------------

Immunization Record				
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
DTP/aP	07/14/2014	1 of 5	DTaP	Full
HepB	06/01/2014	1 of 3	HepB-Peds	Full
HepB	06/30/2014	2 of 3	HepB-Peds	Full
Hib	07/14/2014	1 of 4	Hib-PRP-T	Full

Immunizations Due Record	
Vaccine	Date Needed
DTP/aP	10/01/2014
HepA	06/01/2015
HepB	12/01/2014
Hib	10/01/2014
Influenza-seasnl	12/01/2014
MMR	06/01/2015
PneumoConjugate	08/01/2014
Polio	08/01/2014
Varicella	06/01/2015

- To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
- To return to the Client Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Vaccine Administration Record – Pediatric

The Vaccine Administration Record – Pediatric displays English and Spanish versions of the pediatric VAR form approved by the Texas Immunization Program. The forms are not populated with client or immunization data by ImmTrac2. To generate the form, follow these steps:

- From a client's Manage Client screen or Manage Immunizations screen, click the **Reports** button.
- At the Reports Available for this Client Section, choose the language you would like to print under the Additional Information column for the Vaccine Administration Record – Pediatric row.

3. Click **Vaccine Administration Record - Pediatric**, which is a hyperlink underlined and in blue text. The report will be generated in a new browser window.
4. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
5. To print the form, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To return to the Client Reports screen, close the browser window that contains the VAR.

Vaccine Administration Record – Adult

The Vaccine Administration Record – Adult displays English and Spanish versions of the adult VAR form approved by the Texas Immunization Program. The forms are not populated with client or immunization data by ImmTrac2.

To generate the form, follow the steps above for Vaccine Administration Record – Pediatric.

Ad Hoc Reports

The Ad Hoc reports function in ImmTrac2 allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected clients, the other type produces counts, either of clients or of immunizations. The table below defines terms used in Ad Hoc reports.

Items to filter on	Client Factors	
	American Indian or Alaska Native	Whether the client is an American Indian or Alaska Native
	Area Code	Area Code in which the
	Asian	Whether the client is Asian
	Birth County	County of birth
	Birth Date	Date of birth
	Black or African-American	Whether the client is Black or African-American
	City	Current city in which the client resides
	Comment	Any comments associated with the client record
	Consent Indicator	
	County of Residence	Current county in which the client resides
	Ethnicity	Ethnicity of client
	Gender	Gender of client
	Has 2 or more immunizations	Whether the client has two or more immunizations
	Language preferences	Language preferred by the client
	Mother's HBsAg Status	
	Native Hawaiian or Other Pacific Islander	Whether the client is Native Hawaiian or an Other Pacific Islander

	Other Race	Whether the client is of a race not specified by the system, leading them to choose Other
	Client ID	The Client ID within ImmTrac2
	Phone number	Current phone number
	Primary Address Indicator	Whether the client has a primary address on file in ImmTrac2
	Primary Care physician	Client's primary care physician
	Relationship to client	The Responsible Person's relationship to the client
	School	Current school the client attends
	State	Current state of residence
	White	Whether the client is White/Caucasian
	Zip code	Zip Code in which the client current resides
	Immunization Factors	
	Administering clinician	Clinician who administered the immunization
	Clinic site	Clinic site at which the immunization was administered
	Display Inadvertent Vaccine Group	
	From Inventory	Whether the immunization was from inventory in ImmTrac2
	Trade Name	Vaccine's trade name
	Vaccination date	Date on which the immunization was administered
	Vaccine	Vaccine administered
	Vaccine Eligibility	Whether the immunization was Vaccines for Children (VFC) eligible

	Vaccine Lot Other Inv	
	Vaccine Group	Group in which the vaccine is labeled
	Vaccine Lot	The log from which the vaccine was aliquoted
	Valid immunization	Whether the immunization is valid
Comparison	BEFORE	Used for dates
	EQUALS	Same in comparison
	NOT EQUAL TO	Not the same in comparison
	AFTER	Used for dates
	BETWEEN	Used for dates
	IS	Exact equivalent
	IS NOT	Not the equivalent
Selected Filters	Edit	Edit an applied filter
	Remove	Remove an applied filter
	And/Or	Changes the operator between 'And' and 'Or' depending upon which is initially selected. Requires at least two filters to be applied.
	Group	Groups filtered sections together in the report
	Ungroup	Removes grouped filtered sections



Notes: Clients whose information is added or changed on the day the report is run will not appear in the results until the following day.

Ad Hoc reports run against all clients associated with your organization. To disassociate a client from your organization you must change their status in the organization information section of the client's record.



Ad Hoc List Reports

To produce a list of information about selected clients:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Client Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.

Create a Customized List Report

What items would you like to display on the report?

Patient

- American Indian or Alaska Native
- Asian
- Birth County
- Birth date
- Black or African-American
- Consent Indicator
- County of Residence
- First name

Buttons: Add >, < Remove, < Remove All

How would you like the report to be sorted?

Item to sort on: (not sorted) Order: First-to-Last Last-to-First

A report takes longer to run if you want it to be sorted.

How would you like to filter the data?

Item to filter on: (no filters)

Comparison: [dropdown]

Value to compare to: [dropdown] [input] [grid icon]

and: [dropdown] [input] [grid icon] [Add/Save Edit]

Selected Filters

[Empty box]

Buttons: Edit, Remove, And/Or, Group, UnGroup


Buttons: Generate, Cancel


3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.

How would you like to filter the data?

Item to filter on (no filters) ▼

Comparison ▼

Value to compare to ▼ 

and ▼ 

Selected Filters

4. Under Item to filter on, select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Filters in ImmTrac2 are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make; for example, Between. =
6. Under Value to compare to, either choose a value from the drop down list in the left field and/or enter a date in the right field.
7. Under And, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.

How would you like to filter the data?

Item to filter on: Birth date

Comparison: BETWEEN

Value to compare to: 07/21/2006

and: 07/21/2011

Add/Save Edit

Selected Filters

Birth date BETWEEN 07/21/2006 AND 07/21/2011

Edit

Remove

And/Or

Group

UnGroup

Generate Cancel

9. When finished adding filter items:
 - a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button. Alternatively, can also be switched to AND by following the same process.
 - b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
 - c. Highlight a grouped statement and click the **UnGroup** button to ungroup it. This removes the filters from being grouped together in the report.
 - d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
 - e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Count Report

To produce a count of selected clients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.

2. Select whether Clients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.

3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.

4. Under Item to filter on select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.
6. Under Value to compare to, either choose a value from the drop down list in the left field or enter a beginning date in the right field.
7. Under and, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click on **Add/Save**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
 - a. Group them together by highlighting two filter statements and click Group.
 - b. Change AND to OR by highlighting 'AND' and clicking the **And/Or** button. OR can also be switched to AND by following the same process.
 - c. Highlight a grouped statement and click on **Ungroup** to ungroup it.

- d. Highlight a statement and click on **Remove** to remove it from the selected filters.
 - e. Highlight a statement and click on **Edit** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on **Add/Save**
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status				
Report Type	Started	Completed	Status	Row Count
LIST	09/15/2014 12:32 PM	09/15/2014 12:32 PM	DONE	158

2. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.
4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.



Note: 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.



Assessment Reports

The Assessment Report feature in ImmTrac2 provides an analysis of an organization’s immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing client records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

1. Click **Assessment Report** under the Reports section of the menu panel.

Assessment Report

Select Client Population

All Clients residing in County

All Clients residing in County and all clients associated with IR Physicians

All Clients associated with IR Physicians

Clients Associated with Selected Site

Select Age or Birth Date Range

Less than or equal to 72 months old

Birth date range Earliest Birth date: Latest Birth date:

Age range Youngest Age: Oldest Age:

Options for Benchmarking

Standard Assessment

Assess Clients with Sufficient Refusal History as Covered

Select Evaluation Date

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2. Select the client population to be assessed by clicking one of the following:
3. All Clients Associated with <Organization Name>: Choose this option to view immunization data on all clients associated with your organization.
4. Select the age, birth date range, or age range of the clients by choosing one of the following:
 - a. Less than 72 months old: Choose this option to return all clients who are 72 months or younger.
 - b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
 - c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for clients older than 72 months.
 - d. Select either the Standard Assessment or the Assess Clients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second

option will return an assessment report that counts clients with sufficient refusal comments as being up-to-date.

- e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.

Assessment Report

Select Client Population

All Clients residing in County



All Clients residing in County and all clients associated with IR Physicians

All Clients associated with IR Physicians

Clients Associated with Selected Site IR PHYSICIANS

Select Age or Birth Date Range

Less than or equal to 72 months old

Birth date range Earliest Birth date:  Latest Birth date: 


Age range Youngest Age: Days Oldest Age: Years

Options for Benchmarking

Standard Assessment

Assess Clients with Sufficient Refusal History as Covered

Select Evaluation Date



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5. Click **Generate**.
6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of clients assessed.

Assessment Report Status Refresh

Assessment of Patients With At Least One Missing Age Specific Benchmark Cancel

3 Months Generate

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %
(Missed Opps Patients) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %

Records Meeting Criteria

Age Range - Evaluation Date	Number of Patients in Age Range	Started	Status
< 12 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
12 - 23 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
24 - 35 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
36 - 72 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
All Age Ranges - 07/07/2011	0	07/21/2011 10:41 AM	2 %

7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.
8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:
9. Select an age from the drop down list provided and click on Generate (to the right of the age drop down list). Create an assessment report listing clients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the client's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A client will show on the report if they missed at least one age-specific benchmark.
10. Click the underlined job name.
11. The report listing clients by benchmark age will have a job name of: (Benchmark Client Listing) <Organization Name> - <Benchmark Age>.
12. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.
13. A report listing all clients who have missed a vaccination opportunity will have a job name of: (Missed Opps Clients)<Organization Name>-<Date>.
14. Click an underlined age range to view a listing of clients returned that fall 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.

15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.
16. Click **OK** in the Print Dialog box
17. To return to the Assessment Report Status screen, click the Back button in the browser.



Note: Clients with Refusals

If the option to Assess Clients with Sufficient Refusal History as Covered is selected when the assessment report is run, clients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.



Understanding the Assessment Report

The following is a brief overview of the data that is returned on each table within the assessment report.

Table 1

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	50	0	50
24 - 35 Months of Age	51	0	51
12 -23 Months of Age	54	0	54
<12 Months of Age	46	0	46
Total	201	0	201

Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected clients within the age group that are included in this report. This is determined by the age range chosen when generating the report.

Inactive: This column displays the count of selected 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: This column displays the count of selected clients within the age group who are Active in your organization.

Table 2

Immunization Status		
Age(months)	Up-to-Date ¹⁻⁴ (UTD)	Late ¹⁻⁴
36 - 72 Months of Age		
72	82.0%	82.0%
24	88.0%	88.0%
12	92.0%	98.0%
7	92.0%	98.0%
24 - 35 Months of Age		
24	80.4%	90.2%
12	78.4%	94.1%
7	76.5%	94.1%
12 - 23 Months of Age		
12	90.7%	92.6%
7	83.3%	92.6%
< 12 Months of Age		
7	89.1%	89.1%

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.
 Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

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 page. 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, rather than on the assessment date.

Table 3

Age Specific Immunizations 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	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

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a client should have by the age listed at the left to be determined UP-TO-DATE. This chart is used to create the Assessment of Clients Meeting Age-Specific Benchmarks table.

Table 4

Assessment of Patients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	183	184	187		178	40		201	17.4%
5 Months	180	182	180		175	42		201	17.9%
7 Months	175	184	189		181	42		201	19.4%
9 Months	179	184	190		181	42		201	19.4%
12 Months	136	143	148		141	42		155	25.2%
16 Months	103	93	137	118	97	19	116	149	.7%
19 Months	103	95	137	121	101	25	119	149	.7%
21 Months	127	123	137	131	105	39	128	147	4.1%
24 Months	89	90	92	95	95	42	94	101	40.6%
72 Months	46	45	47	44	45	0	49	50	.0%

- UP-TO-DATE 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:** 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.

Table 5

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	5	10.9%
1 Vaccine Needed	2	40.0%
2 Vaccines Needed	3	60.0%
3 Vaccines Needed	0	.0%
4 Vaccines Needed	0	.0%

The report breaks down the children who could have been brought up to date into three tables, ≤ 12 months, 24-36 months, and 60-72 months. This is an example of ≤ 12 months.

- 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 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 additional vaccinations to be up-to-date.

Table 6

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age ¹	100.0%	36-72 mo. age group
		21.6%	24-35 mo. age group
		98.1%	12-23 mo. age group
Drop Off Rates	60-72	.0%	24 month status
	48-59	.0%	24 month status
	36-47		24 month status
	24-35 mo. age	.0%	24 month status
	12-23 mo. age	5.6%	12 month status

Late Start Rates: A client who did not receive one full dose of DTaP by 90 days of age is considered to have gotten 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.

Table 7

Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number ⁴	Per Cent ⁵
Patients Missing Birth Dose Of Hep	14	7.0%

The Hep B chart gives the number and percentage of clients who did not receive a birth dose of the Hep B 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.

Table 8

Missed Opportunity Assessment

Age Group on Evaluation Date	Total Patients in Age Group	Patients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
<12 months 7 month benchmark	6	5	83.3%	1	16.7%
12-23 months 12 month benchmark	20	16	80.0%	14	70.0%
24-35 months 24 month benchmark					
36-72 months 24 month benchmark					

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.

The missed opportunities report lists all your 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.



Note: Missed Opportunities Assessment

Keep in mind, since ImmTrac2 is used for reporting immunization records, it 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 will not include any clients that were treated at your organization for any other reason except vaccination purposes.



Benchmark Reports

Benchmark Report

Select Client Population

Clients Associated with Selected Site [Dropdown]
 All Clients residing in County
 All Clients residing in County and all clients associated with IR Physicians
 All Clients associated with IR Physicians

Clients who did NOT meet the benchmark
 Clients who DID meet the benchmark
 All Clients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

Less than or equal to 72 months old
 Birth date range Earliest Birth date: [Text] [Calendar] Latest Birth date: [Text] [Calendar]
 Age range Youngest Age: [Text] [Days] [Dropdown] Oldest Age: [Text] [Days] [Dropdown]

Options for Benchmarking

Standard Assessment
 Assess Clients with Sufficient Refusal History as Covered

Select Evaluation Date

[Text: 09/15/2014] [Calendar]

Select Benchmark

Age	Age Specific Immunization Benchmarks						
	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

[Clear Selection]

Benchmark reports allow 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 viewed in ImmTrac2, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.
2. Select the client population to be assessed by clicking on one of the following:

- a. Clients Associated with Selected Site: immunization data on all clients associated with the site selected from the drop down list at the right. Clients Associated with <Organization Name> OR Clients Residing in < County Name>: immunization data on clients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in ImmTrac2.)
- b. All Clients Associated with <Organization Name>: immunization data on all clients associated with your organization.
3. Click one of the following to specify the clients to return on the report:
 - a. Clients who did NOT meet the benchmark: a list of clients who did not meet the benchmark(s) defined in the table.
 - b. Clients who DID meet the benchmark: a list of clients who met the benchmark(s) defined in the table.
 - c. All clients, regardless of whether they met the benchmark or not: a list of all clients meeting the criteria defined in the table.
4. Select the age, birth date range, or age range of the clients by choosing one of the following. You may only enter up to age six years.
 - a. Less than or equal to 72 months old: all clients who are 72 months old or younger.
 - b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
 - c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.
5. Select either the Standard Assessment or the Assess Clients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts clients with sufficient refusal comments as being up-to-date.



Note: Refusals of Vaccine

In order for client refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Client Comments tab. Refer to the Managing Clients Chapter 10 of this manual for more information.



6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. 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.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.

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		

10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.
11. Click the **Generate** button.
12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, ImmTrac2 will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
 13. Click the **Export as Text** link to display the report in text file format.
 14. Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
 15. Click the **Display as a PDF** link to display the report in Adobe® Reader.

ImmTrac2, the Texas Immunization Registry
 Report generated on 09/15/2014
 Report generated by Denise Hamann
 IR Physicians - IRPH - Z90090

Filter conditions used for this report:
 Clients Associated with Provider: IR Physicians
 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: 08/15/2014
 Benchmark age @ 12 months
 Selected benchmarks: DTaP (3), HepB (2), Hib (2), Polio (2), Pneumo (2)
 Total clients: 60; 0 clients (0%) met all benchmark criteria, 60 clients did not
 Number of rows in this report: 60

No.	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	DTaP (3)	HepB (2)	Hib (2)	Polio (2)	Pneumo (2)
1	BILBO	BAGGINS	01/01/2010				OR		N	N	N	N	N
2	ARNOLD	BLOSSER	02/02/2010		717 WEST 1ST AVE		TX		N	N	N	N	N
3	JAN	BRIGGINS	02/02/2010		8785 HICKORY LANE		TX		N	N	N	N	N
4	AUISE	DARROLL	10/10/2013		33 CLEARVIEW DR		TX		N	N	N	N	N
5	BABY	CLIENT	07/10/2013				OR		Y	N	N	N	N
6	BOB	CLIENT	06/12/2014				OR		N	N	N	N	N
7	JEFFREY	CLIENT	01/01/2014				OR		N	N	N	N	N
8	JOEL	CLIENT	10/01/2013				OR		N	N	N	N	N
9	LEAH	CLIENT	03/01/2014				OR		N	N	N	N	N
10	MARGARET	CLIENT	05/04/2011				OR		N	N	N	N	N
11	MATCH	CLIENT	01/01/2010		MAIN		TX		N	N	N	N	N
12	RACHEL	CLIENT	09/03/2010		12 HICKORY LANE		TX		N	N	N	N	N
13	THOMAS	CLIENT	03/01/2013				OR		N	N	N	N	N
14	CHILD/ASTERONLY	CONSIDENT	04/06/2013		684 POPLAR STREET		TX		N	N	N	N	N
15	CHILD/WITHBOTH	CONSIDENTS	02/23/2013		12 LOOKOUT BLUFF ROAD		TX		N	N	N	N	N



Note: The size of your file is not limited when you choose to export the Benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message “file not loaded completely” will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.

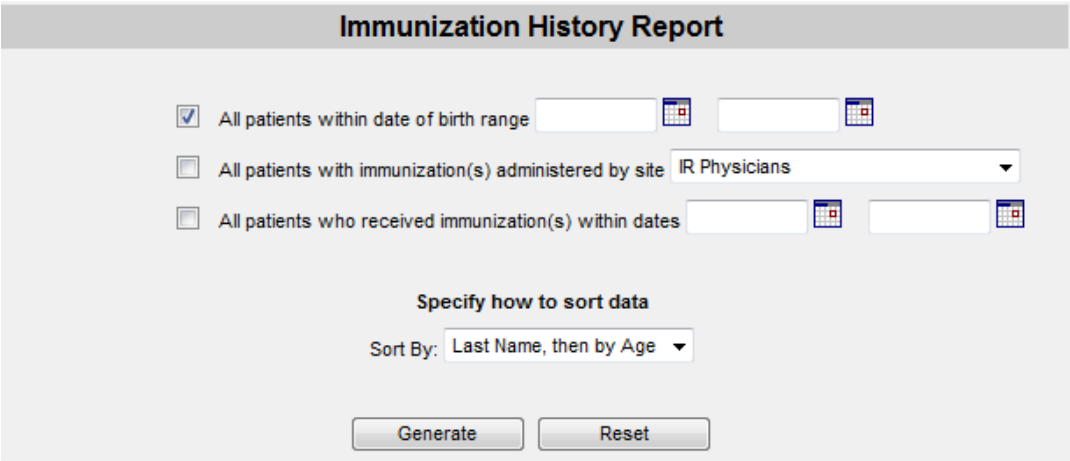


The Benchmark Report shows a list of all clients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many clients met the specified criteria. It lists clients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each client’s demographic information indicates whether the client met the criteria for that vaccine and benchmark age.

Group Clients Report

The purpose of Group clients is to run either the Immunization History Report for a group of selected clients. To run one of these reports, complete the following steps:

1. Click **Group Clients** under the Reports section of the menu panel.



The screenshot shows a web form titled "Immunization History Report". It contains three filter options, each with a checkbox and a date range input field with a calendar icon:

- All patients within date of birth range [] []
- All patients with immunization(s) administered by site [IR Physicians]
- All patients who received immunization(s) within dates [] []

Below these is a section titled "Specify how to sort data" with a "Sort By:" label and a dropdown menu set to "Last Name, then by Age". At the bottom are "Generate" and "Reset" buttons.

2. To run a report for clients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for clients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for clients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.



Note: You may combine any of the criteria in the above steps. The system only selects clients who fulfill all the criteria you specify.



5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.

7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) The system starts to generate the report and takes you to the Group Client Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Client Reports Request Status screen becomes a hyperlink. Click the hyperlink.

Group Client Reports Request Status				Refresh
Report Name	Started	Completed	Status	Clients
Immunization History Report	2014-09-15 12:59:18.0	2014-09-15 12:59:57.0	100%	225

9. The system displays the report output in PDF.

Reminder/Recall

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and client listings.



Note: Generation of reminder and recall notices

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

- The 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.



Reminder Request Status screen

Depending upon the number of clients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.



Note: Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in ImmTrac2 while the report is generating and may return to

the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of ImmTrac2 and return to the status screen by clicking on the Check Reminder Status link after logging in again.

Summary Screen

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of clients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Reminder Request Criteria		
Step	Criteria Evaluated at this Step	Clients
1	Clients associated with <i>IR Physicians</i> .	225
2	Clients immunized by <i>IR Physicians</i> .	214
3	Clients that are active within <i>IR Physicians</i> and allow Reminder & Recall Contact . Additional criteria includes: • Birthdate range is not specified; • School is not specified; • Provider is not specified.	207
4	Clients that have a Valid Address . Additional criteria includes: • City is not specified; • Zip Code is not specified.	21
5	Clients that meet the following criteria regarding vaccination status: • Clients that are Due Now for one or more vaccinations as of 09/15/2014 ; • Use the following vaccine groups: Influenza-season1 ; • Use tracking schedule associated with each client.	1
Total Number of Clients Eligible for Reminder		1

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Preview Clients that will display on the Reminder Recall Report.	Preview Clients
Increment last notice date for all clients eligible for this reminder .	Increment Eligible
Increment last notice date for all clients immunized by <i>IR Physicians</i> .	Increment Immunized
Return to the previous screen.	Cancel

1. Clicking **Preview Clients** will provide a list of clients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each client’s demographic record.

2. Clicking **Increment Eligible** will 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.
3. Increment last notice date for all clients immunized by your organization.
4. Click **Cancel** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each client returned on your query. The letter allows room at the top for your 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:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>

- a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
 - b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
 - c. The telephone number is presented in the closing for each of the letters generated in your report.
2. Click **Reminder Letter**, which is a hyperlink.
 3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.

- a. You have the option of moving to other portions of ImmTrac2 or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
 - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each client returned on your 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 these steps:

- Under the Additional Input column or the Letter section of the table, you have the option of entering the following information:
 - If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
 - You may include a maximum of 400 characters in the Free Text field. Any information entered in this text box will be presented as the closing for each of the cards generated in your report.
 - The telephone number is presented in the closing for each of the cards generated in your report.

Dear Parent of Violet Georgia Dallman,

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

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

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
--------------------------------	-----------------------	----------------------------------

1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of ImmTrac2 or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
 - a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
 - b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

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. To generate a Client Query Listing:

1. Click the **Client Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
 - a. You have the option of moving to other portions of ImmTrac2 or using other functions of your computer while you are waiting for your report to process. To return to check the progress of

your request, click on Check Reminder Status under Reports on the menu panel.

- b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Provider Location

Organization Name

Personal Information

* Last Name	<input type="text"/>	* Gender	Unknown	<input type="button" value="Save"/>
* First Name	<input type="text"/>	SSN	<input type="text"/> - <input type="text"/> - <input type="text"/>	<input type="button" value="Add Next"/>
Middle Name	<input type="text"/>	Medicaid ID	<input type="text"/>	<input type="button" value="Add New Imm"/>
Suffix	<input type="text"/>	Patient ID	<input type="text"/>	<input type="button" value="Add Historical Imm"/>
* Birth Date	<input type="text"/>			<input type="button" value="Cancel"/>
* Mother's Maiden Last	<input type="text"/>			
* Mother's First Name	<input type="text"/>			
Street Address	<input type="text"/>			
Other Address	<input type="text"/>			
City	<input type="text"/>			
State	OR	Zip	<input type="text"/> +4 <input type="text"/>	
County	<input type="text"/>			
Phone Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			

Extract Client Data

The Extract Client Data displays client demographic information, immunization history, and recommendations for those clients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every client that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.

- Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

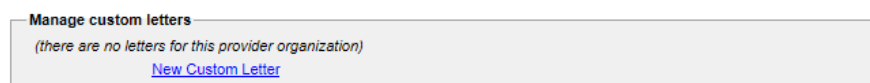
Reminder Request Status					
Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

Creating Custom Letters

In addition to the standard letter, ImmTrac2 allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

- Click **Manage Custom Letter** under Reports on the menu panel.



- Click the **New Custom Letter** hyperlink.
- At the Create New Custom Letter screen, enter the following:
 - Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
 - Include Client Address:
 - Check the box to include the client's address at the top of the letter.
 - To include a name with the client address, choose from the drop down list one of the following:
 - (no name) - default
 - Client name
 - To the parent/guardian of client name

- b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.
 - i. If name is chosen, the name of the client will show up after the salutation.
 - ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <client name>

4. Paragraph 1:

- a. In the field marked First Part, enter desired text.
- b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.
- c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, client name or no name).
- d. In the field marked Second Part, continue to enter the rest of the text.
- e. Immunization History: Check the box to include the client's immunization history in the letter.

- f. The maximum amount of allowed characters in this field is 4,000.

5. Paragraph 2: You may enter more text in this field.

- a. Immunization recommendations: Check this box to include the immunization forecast for the client in the letter.
- b. The maximum amount of allowed characters in this field is 4,000.

6. Paragraph 3: You may enter text in this field.

- a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.

- b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
- c. The maximum amount of allowed characters in this field is 4,000.

Top Margin
 Number of blank lines at the top of the letter: 3 ▼

Patient Address
 Include patient address

Salutation
 Enter a salutation for the letter:
 Include a name at the end of the salutation: (no name) ▼

Paragraph 1
 First Part

 Include a name between the first and second parts of this paragraph: (no name) ▼
 Second Part

Immunization History
 Include immunization history

Paragraph 2

Immunization Recommendations
 Include immunization recommendations

Paragraph 3

Closing
 Enter a closing for the letter:
 Include provider organization name in the closing
 Include provider organization phone number in the closing

Name and save the custom letter
 Name the custom letter



Note: Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.



Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each client returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

Patient Query Listing	A list of patients based on the report criteria.	Report Name	<input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name	<input type="text"/>
Long Test Nov 18 2010	Custom Letter.	Report Name	<input type="text"/>
Long Test Oct 29 2010	Custom Letter.	Report Name	<input type="text"/>

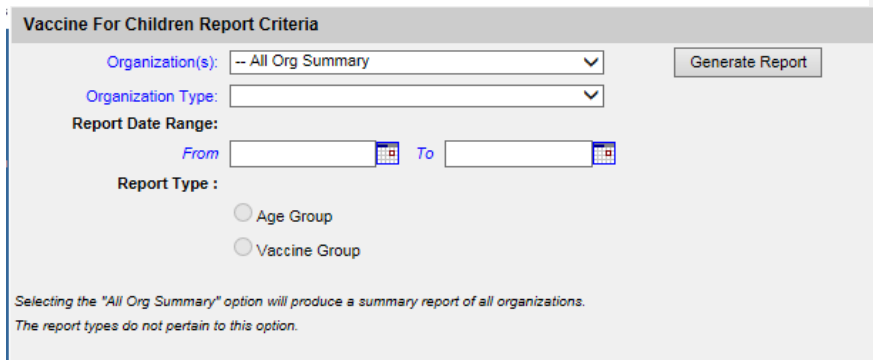
3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
 - a. You have the option of moving to other portions of ImmTrac2 or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
 - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request

hyperlink (top table) to return to the Reminder Request Process Summary screen.

Vaccine Eligibility

The Vaccines for Children (VFC) Report details the number of clients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.



Vaccine For Children Report Criteria

Organization(s): -- All Org Summary

Organization Type:

Report Date Range:

From To

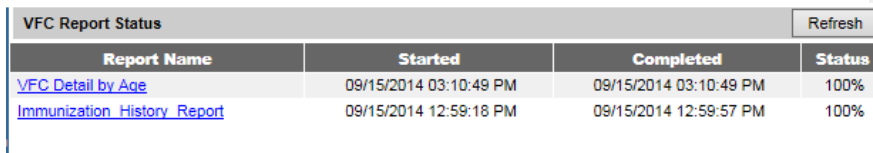
Report Type :

Age Group

Vaccine Group

Selecting the "All Org Summary" option will produce a summary report of all organizations.
The report types do not pertain to this option.

2. Select your organization name from the drop-down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. You have two choices:
 - a. 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.
 - b. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the **Generate Report** button. The reports drop into a processing queue:



VFC Report Status			<input type="button" value="Refresh"/>
Report Name	Started	Completed	Status
VFC Detail by Age	09/15/2014 03:10:49 PM	09/15/2014 03:10:49 PM	100%
Immunization History Report	09/15/2014 12:59:18 PM	09/15/2014 12:59:57 PM	100%

- Click Refresh until the statuses are 100%; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

Understanding the Vaccine Eligibility Report by Vaccine Group

The following section explains the rows and columns within the Vaccine Eligibility Report by Vaccine Group. The report only displays vaccines administered by your organization.

Texas Vaccines for Children
For Dates Between 09/01/2012 and 09/15/2014

Report run on: 09/15/2014 3:20
Organization: Jordan1 - Z13411

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
Smallpox	2	2	1	0	0	1	0	6
HPV	5	0	0	0	0	0	0	5
Plague	3	2	0	1	0	0	0	6
Total	10	4	1	1	0	1	0	17

The key at the top of the report provides a listing of each vaccine eligibility code and its description. This report may show codes that are not available to your clinic. Codes are specific to whether your clinic is public or private and whether you have a federal designation. No provider will be able to use all codes listed.

Understanding the Vaccine Eligibility Report by Age Group

The following section explains the rows and columns within the Vaccine Eligibility report by Age Group. The report only displays clients who have received vaccines administered by your organization.

Texas Vaccines For Children
For Dates Between 01/01/2012 and 09/15/2014

Report run on: 09/15/2014 3:13

Page 1

IR Physicians - Z90090

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	4	2	0	0	0	0	0	6
1-6	3	9	12	1	0	2	0	27
7-18	2	7	4	0	0	1	0	14
19+	0	1	1	0	0	0	0	2
Total	9	19	17	1	0	3	0	49

The key at the top of the report provides a listing of each vaccine eligibility code and its description.

The rows on the report break down the count of distinct clients given immunizations by age in years. For example, client who receives a vaccination when he or she is 6 years and 11 months old will be included in the 1-6 age group.

Row	Description
< 1	Clients who were under 1 year of age at the time a dose was administered
1-6	Clients who were 1 through 6 years of age at the time a dose was administered
7-18	Clients who were 7 through 18 years of age at the time a dose was administered
19+	Clients who were 19 years of age or older at the time a dose was administered

Each column on the report counts the number of distinct clients who have received immunizations associated with a vaccine eligibility category within the specified date range. For example, a single client who received 3 Medicaid doses would contribute only +1 to the total column.

Billing Report

Selecting the Billing Report will allow you to create a report where you can preview your quarterly billable report and check to ensure that your coding is correct before the final bill is prepared by VFC staff. The report displays those immunizations administered during the specified time period which have been coded with an eligibility code of “B-billable/not eligible”, indicating that the dose is reimbursable either by an insurance company or by the client. To generate a billing report:

1. Select **Billing Report Request** from the side Reports menu and you will be presented with the following selection screen:

Billing Report Request

Select Report Time Period

Quarter Quarter 1 Year 2014

Begin Month Year End Month Year

Select Billing Organization

All Organization Statewide

All Organization Statewide Rollup

All Organization Statewide Rollup and Individual Breakout

Use Single Organization: FDD13029 Include Satellite Organizations

Enter Memo Presentation Information...

VFC Manager: Hamann Admin. Specialist: Smith

Select Included Reports

Include Memo

Include Summary

Include Detail

2. Select the quarter and year you wish to generate the billing report for, or alternately, enter the begin month and year and end month and year from the dropdowns provided.
3. Select the billing organization by clicking on the drop down menu and selecting your organization. If you have satellite organizations and would like their information included in your report, check the appropriate box. If you would like to create a copy of the billing memo, enter the names of the VFC Manager and the Administrative Specialist to be included on the generated memo.
4. Select Included Reports: Check the boxes indicating which report types are requested – Memo, Summary, and/or Detail.
5. Click **Generate**. The reports drop into a processing queue:

Billing Reports Status					
Report Name	Started	Completed	Status	Period	Organization
SUMMARY	2014-09-16 10:07:39.0	2014-09-16 10:07:42.0	100%	Quarter 1 2014	All
MEMO	2014-09-16 10:07:15.0	2014-09-16 10:07:16.0	100%	Quarter 1 2014	All
DETAIL	2014-09-16 10:06:13.0	2014-09-16 10:06:14.0	100%	Quarter 1 2014	All

- Click Refresh until the statuses are Complete; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

Sample Memo Billing Report

Commented [HD14]: Memo should not show Oregon. Inventory report was hidden need to check when added back in V3/

PUBLIC HEALTH DIVISION
Oregon Immunization Program
John A. Kitzhaber, MD, Governor

Oregon Health Authority
800 NE Oregon St, Suite 370
Portland, OR 97232
Voice - 971-673-0300
FAX - 971-673-0278
TTY 971-673-0372
www.healthoregon.org/imm

MEMORANDUM

To: FDD13029 - VFC PIN: 324234

From: Hamann, VFC Manager
Smith, Office Specialist

Date: September 16, 2014

Subject: Billable Vaccines

According to our records, you administered a total of 0 doses of billable vaccine during the Jan 01, 2014 to Mar 31, 2014 time period for a total of \$.00.

Sample Summary Billing Report

04/16/2012			
Billable Vaccination Summary			
Quarter: 10/01/2011-12/31/2011			
Organization: AMJEN PRIVATE VFC FQHC UI			
VFC PIN: A0500			
Satellite:			
Vaccine/Brand	Doses Billed	Price Per Vaccination	Total Amount
HPV, NOS-HPV, NOS	1.0	\$ 150.00	\$ 150.00
HPV, NOS-HPV, NOS Totals			\$ 150.00
AMJEN PRIVATE VFC FQHC UI			\$ 150.00
Agency Totals:			\$ 150.00

Sample Detail Billing Report

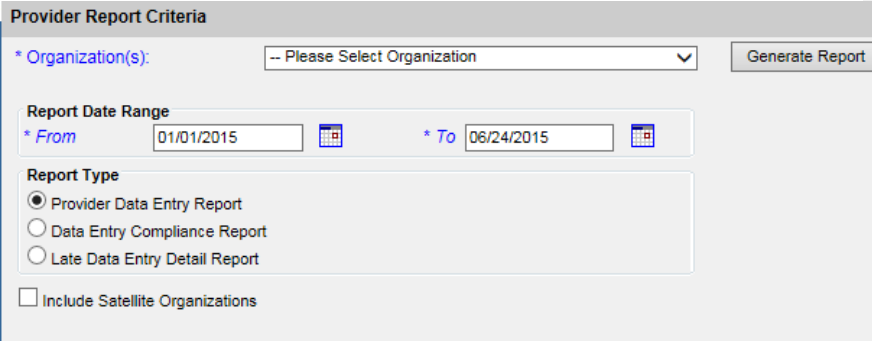
Billable Vaccination Detail Listing			
Quarter: 10/01/2011 - 12/31/2011			
Organization: AMJEN PRIVATE VFC FQHC UI			
Organization VFC PIN: A0500			
Satellite: N/A			
Satellite VFC PIN: N/A			
Vaccine: HPV, NOS		Brand: HPV, NOS	Price: \$ 150.00
State ID	Vaccination Date	Client Name	Date of Birth
7177625	10/11/2011	KITTRIDGE, LILLITH JANE	08/10/1998
Total HPV, NOS Vaccinations: 1.0			Cost: \$ 150.00
Total HPV, NOS Vaccinations: 1.0			Cost: \$ 150.00
Total HPV, NOS Vaccinations: 1.0			Cost: \$ 150.00
Total AMJEN PRIVATE VFC FQHC UI Vaccinations: 1.0			Cost: \$ 150.00
Agency Total Vaccinations: 1.0			Cost: \$ 150.00

After reviewing the reports, if you find clients with doses that need to be recorded, you can edit the vaccine eligibility code through the user interface by bringing up the client's immunization record and editing the appropriate dose. If you submit immunization information through an electronic interface, you still need to update immunization eligibility codes through the user interface.

Provider Report

Provider reports are available to designated user roles only. If you feel as though you need access to one of the following reports please contact the ImmTrac2 Help Desk. Selecting the Provider Report will allow you to further specify up to 4 different Provider level reports, which provide information about aggregate transactions entered into ImmTrac2 for specified time periods. These reports can be generated for specific organizations, or for organizations including their satellites. To generate a Provider Report:

1. Click **Provider Report** under the Reports section of the menu panel.



The screenshot shows the 'Provider Report Criteria' form. It includes a dropdown menu for 'Organization(s)' with the text '-- Please Select Organization' and a 'Generate Report' button. Below this is a 'Report Date Range' section with 'From' and 'To' date fields. The 'From' field contains '01/01/2015' and the 'To' field contains '06/24/2015'. There are calendar icons next to both date fields. Underneath is a 'Report Type' section with three radio button options: 'Provider Data Entry Report' (selected), 'Data Entry Compliance Report', and 'Late Data Entry Detail Report'. At the bottom, there is a checkbox labeled 'Include Satellite Organizations' which is currently unchecked.

2. Select the organization name from the drop-down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format. (The default is provided is the first day of the current year, as in a year-to-date report. However you can change the From date by entering a different date or selecting it from the calendar icon).
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format. (The default is provided as the current date, however you can change the To date by entering a different date or selecting it from the calendar icon).
5. Indicate if you want to also include transactions from your satellite organizations by clicking on the checkbox "Include Satellite

Organizations”. If you wish to report only on the selected organization, leave this checkbox blank.

6. Choose a type of Provider Report to run. You have four choices:
 - a. Provider Participation Report
 - b. Provider Data Entry Report
 - c. Data Entry Compliance Report
 - d. Late Data Entry Detail Report
7. Click the **Generate Report** button.
8. The report request drops into a processing queue, in order to update the % complete click on the refresh button, when status indicates “ready” you can click on the underlined hyperlink to view the report.

Provider Report Status						
Name	Started	Completed	Status	Organization	From Date	To Date
Provider Data Entry Report	06/24/2015 01:47 PM	06/24/2015 01:47 PM	Ready	IR Physicians	01/01/2015	06/24/2015

9. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
10. Click the **OK** button in the Print dialog box. To return to the Provider Report Status screen, click the Back button on your browser.

Understanding the Provider Participation Report

Commented [HD15]: This report is inventory and hidden in V1. Check in V3.

1. There are 5 sections to the Provider participation report, first is the Header which displays information about the requesting organization:

IR Physicians - Participation Report		Report Generated:	09/16/2014
Street Address	100 MAIN MAIN, OR 11111	Org Code	IRPH
		VFC Pin	Z90090
		County	
Mailing Address		Source Type	Unknown/None
		Submission Type	
Phone	(333) 333-3333	Organization Type	Private Practice
		Last UI Submission	07/11/2012
		Last DX Submission	08/14/2012

2. The second section displays a graph of clients by age group (across the top), according to their vaccine eligibility code (displayed on each line); a count of clients who have received an immunization from this organization within the specified date period:

Patients Reported by Age Group: 01/01/2014 - 09/16/2014					
Vaccine Eligibility Code	<1 Yr	1-6 Yrs	7-18 Yrs	19+ Yrs	**Subtotal
V01-Private Pay/Insurance	3	2	2	0	7
V02-Medicaid	1	8	5	1	15
V03-No Insurance	0	9	2	0	11
V04-American Indian/Alaskan Native	0	1	0	0	1
V05-Underinsured, FQHC/RHC/Deputized					0
TXA01-CHIP	0	1	1	0	2
TXA02-Underinsured, Not					0
TXA03-Adult, 19 Year Old Finishing Series					0
TXA04-Adult, No Insurance	0	0	0	3	3
TXA05-Adult, Underinsured	0	0	0	3	3
TXA06-Adult, Private Pay/Insurance					0
History	0	0	1	0	1
Unknown Insurance Status	0	1	0	2	3
Totals:					**46
Unduplicated Count:					45

**Patients will be counted multiple times if they age from one age category to another during the chosen time period, so the subtotal may differ from the unduplicated count.

- The third section displays a quarterly breakdown of the distinct number of clients who received immunizations administered by the selected organization:

Quarterly Submission Breakdown of Patients				
Year	Qtr 1	Qtr 2	Qtr 3	Qtr 4
2014	9	4	36	
Unduplicated Annual Count:				45
2013	2	0	6	2
Unduplicated Annual Count:				8
2012	2	0	4	3
Unduplicated Annual Count:				9
2011	3	0	1	2
Unduplicated Annual Count:				5
2010	1	0	2	3
Unduplicated Annual Count:				5
2009	2	1	2	0
Unduplicated Annual Count:				5

4. The fourth section displays by quarter the number of client searches performed by the specified organization:

Quarterly Patient Searches for this Clinic:					
Year	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
2014	273	372	4,309		4,954

5. The fifth section displays the number of client searches, annually, for the selected organization, broken down by clinic user:

Annual Patient Searches By Clinic User:								
WebUser Name	Phone	2014	2013	2012	2011	2010	2009	Total
Pau Test		2						2
ViewOnlyNonProvw		5						5
joel linn		3						3
Marianne Swift		322						322
Paulina Baca		324						324
jordan braun		11						11
bob jones		42						42
Kim Odorizzi		84						84

Understanding the Provider Data Entry Report

The Provider Data Entry report displays a count of the various transactions entered into the system during the specified time period:

Provider Data Entry Report
 Organization: IR Physicians
 AL #: IRPH
 Report Date: 06/24/2015
 Date Range: 01/01/2015 To 06/24/2015

User Interface	
Transactions	Count
New Patients Entered	14
Overrides Created	0
Overrides Merged	7
Overrides Determined Unique	0
Overrides Pending	0

Data Exchange	
Transactions	Count
New Patients Entered	3
Pending Patients Created	0
Pending Patients Merged	0
Pending Patients Determined Unique	0
Pending Patients Review	0

Understanding the Data Entry Compliance Report

The Data Entry Compliance Report displays information about when the immunization was entered into the system versus the administration date (for the selected time period). It is grouped to highlight those immunizations that were entered past the standard 14 days after administration.

Data Entry Compliance Report
 Organization: IR Physicians
 AL #: IRPH
 Report Date: 06/16/2014

The Best-practice for timely data entry is within 14 days of the date of administration of the vaccine.

Last Eight Complete Quarters:															
Quarter	<= 1 Day		> 1 day - <= 7 days		>7 days - <= 14 days		Total Meeting 14-day submission guideline		>14 days - <= 30 days		>30 days		Total Past 14-day submission guideline		Total Entries
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count
Quarter 4 2012	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 1 2013	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 2 2013	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 3 2013	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 4 2013	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 1 2014	8	86.67%	0	0%	0	0%	8	86.67%	1	8.33%	3	25%	4	33.33%	12
Quarter 2 2014	1	16.67%	0	0%	0	0%	1	16.67%	1	16.67%	4	66.67%	5	83.33%	6
Quarter 3 2014	35	27.13%	6	4.65%	5	3.88%	46	35.66%	0	0%	70	54.26%	83	64.34%	128
Last Two Complete Years:															
Complete Year	<= 1 Day		> 1 day - <= 7 days		>7 days - <= 14 days		Total Meeting 14-day submission guideline		>14 days - <= 30 days		>30 days		Total Past 14-day submission guideline		Total Entries
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count
Quarter 4 2012 -	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 4 2013 -	44	29.93%	6	4.08%	5	3.4%	55	37.41%	2	1.36%	77	52.36%	92	62.59%	147

Understanding the Late Data Entry Detail Report

The Late Data Entry detail report gives additional information about the immunizations administered during the selected time period, and compares that to when they were entered into ImmTrac2. The report is group by clinician's name:

Late Data Entry Detail Report
 Organization: IR Physicians
 AL #: IRPH
 Report Date: 06/24/2015
 Date Range: 01/01/2015 to 06/24/2015

Data Entered By : Denise Hamann					
Patient ID	Date of Birth	Vaccine	Date Administered	Date Entered	Days between administration and
6967756	01/01/2015	Hib-PRP-T	01/02/2015	03/20/2015	77
6966679	07/29/1950	DTaP	03/02/2015	03/20/2015	18
6966679	07/29/1950	Flu trivalent injectable	01/30/2015	02/09/2015	10
6966679	07/29/1950	Flu trivalent injectable	03/23/2015	03/23/2015	0
Data Entered By : Aaron Wallisch					
Patient ID	Date of Birth	Vaccine	Date Administered	Date Entered	Days between administration and
1000	05/09/1997	Anthrax	05/15/2015	05/15/2015	0
Data Entered By : jordan braun					
Patient ID	Date of Birth	Vaccine	Date Administered	Date Entered	Days between administration and
6967716	01/01/2010	Botulism	02/17/2015	02/17/2015	0
6967716	01/01/2010	HepB-Hib	02/17/2015	02/17/2015	0
6967582	01/01/2015	HepB-Hib	01/26/2015	01/26/2015	0
6967582	01/01/2015	Botulism	01/26/2015	01/26/2015	0
6967582	01/01/2015	Vaccinia (smallpox)	01/26/2015	01/26/2015	0
6967582	01/01/2015	Tdap	01/26/2015	01/26/2015	0
6967582	01/01/2015	DTaP	01/26/2015	01/26/2015	0

Vaccine Accountability Report

Commented [HD16]: Inventory Report hidden.

The Vaccine Accountability Report provides information about inventory transactions entered into ImmTrac2 for selected quarterly time periods. The report is available to designated user roles only. If you feel as though you need access to the Accountability Report please contact the ImmTrac2 Help Desk. The Vaccine Accountability Report can be generated for a single organization, multiple organizations, or All VFC organizations (available to state-level user roles only). When the Vaccine Accountability Report is generated for a single organization, both a Summary report and a Detail report will be created. When the Vaccine Accountability Report is generated for multiple organizations or All VFC organizations, only a Summary report will be created. To generate a Vaccine Accountability Report:

1. Click **Accountability Report Request** under the Reports section of the menu panel.

Vaccine Accountability Report Request

Begin Date End Date

Select Accountability for Organization

VFC Clinics Statewide
 Select Individual Organization

Organization Name Selected Organizations

PIVOT HEALTH CLINIC
MCNARY HEIGHTS ELEMENTARY SCHOOL
WALGREENS PHARMACY 07119
EAST GRESHAM ELEMENTARY SCHOOL
KNOWLEDGE BEGINNINGS HILLSBORO

Add >
Add All >>
< Remove
<< Remove All

Select Type of Vaccine:

State Supplied Privately Purchased Both

If Individual Organization option is chosen and only one Org is selected, in addition to the Summary Report that shows Accountability by Vaccine Group, a Detail Report will be available that shows accountability by individual lot numbers, sorted by Vaccine Group.

Report Name:

Generate Cancel

2. Select the beginning quarter/year from the Begin Date drop down list. (The options provided appear as "Quarter [#], [YYYY]", for instance "Quarter 4, 2013". The translates the selected quarter to the **FIRST** date of that quarter, which is October 1, 2013.)
3. Select the ending quarter/year from the End Date drop down list. (The options provided appear as "Quarter [#], [YYYY]", for instance "Quarter 4, 2013". The translates the selected quarter to the **LAST** date of that quarter, which is December 31, 2013.)



Note: It is acceptable to select the same quarter option in the Begin Date and End Date drop down lists. For instance, if Quarter 4, 2013 is selected for both the Begin Date and End Date, the report period will be October 1 - December 31, 2013.

Quarter breakdown:

- Quarter 1: January 1 – March 31
- Quarter 2: April 1 – June 30
- Quarter 3: July 1 – September 30
- Quarter 4: October 1 – December 31



4. Select the organization options available to you (not all options are available to all user roles).
 - a. The “Select Individual Organization” option may be selected in order to run a Vaccine Accountability Report for one or more selected organizations.
 - i. Most user roles will see their assigned organization(s) displayed in the Organization Name list box and may select one or more organizations for the report.
 - ii. If you are assigned to one organization and are not a state-level user, your organization will automatically be selected for you.
 - iii. State-level users have all organizations with a VFC status of Active or Suspended displayed in the Organization Name list box and may select one or more organizations for the report.
 - b. For state-level user roles only, the “VFC Clinics Statewide” option may be selected in order to run a Vaccine Accountability Report for all clinics that have a VFC Status of Active or Suspended.
5. Choose the type of vaccine you would like to include in your Vaccine Accountability Report. Options include “State-Supplied”, “Privately Purchased”, or “Both.”
6. Enter the report name in the Report Name text box. Entering a report name is optional. If no report name is entered, ImmTrac2 will automatically assign a report name as shown below:
 - a. One organization Detail report: “[Organization Name]_Detail.xls”
 - b. One organization Summary report: “[Organization Name].xls”
 - c. Multiple Organization Summary report: “Multiple_Orgs.xls”
 - d. VFC Clinics Statewide Summary report: “Statewide.xls”
7. Click the **Generate** button.
8. The report request drops into a processing queue. In order to update the Status, click on the refresh button. When status indicates “100%” you can click on the underlined hyperlink(s) to view the report.

Accountability Report Status							Refresh	Cancel
Report Name	VFC PIN	Vaccine Type	Begin Date	End Date	Status	Summary Report	Detail Report	
Statewide	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	Statewide.xls		
Multiple Orgs	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	Multiple Orgs.xls		
IR Physicians	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	IR Physicians.xls	IR Physicians_Detail.xls	

9. The reports are in the '.xls' spreadsheet format, so you may be prompted to open or save the file. Choose from the options presented: Open, Save, or Cancel. The file will open in the program on your computer that is set to open '.xls' files, such as Microsoft Excel.
10. To print the report, click on the printer icon on the Microsoft Excel toolbar or other program that has opened the file.
11. Click the **Print** button in the Print dialog box.

Vaccine Accountability – Detail Report

1. The Detail Report contains accountability data grouped by Vaccine Group and Lot Number.

Oregon Immunization Program										Oregon Vaccines for Children	
Vaccine Accountability Report - REX'S TEST CLINIC-PUBLIC											
Org Code: RL1111						VFC PIN: R11111					
Report timeframe: Quarter 1, 2014 - Quarter 2, 2014				Report date: 04/27/2014				Funding Source: Both			
This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza vaccine.											
Detailed Accountability Data by Vaccine Group and Lot											
Vaccine Group	Lot Number	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
HepA	adult 1	50	0	0	0	0	0	0	30	30	60.00%
HepA	ALL	50	0	0	0	0	0	0	30	30	60.00%
HepA-HepB	dupe-test	0	13	0	0	0	0	0	13	13	100.00%
HepA-HepB	ALL	0	13	0	0	0	0	0	13	13	100.00%
HepB	123x1	50	0	-1	0	0	0	-9	39	49	98.00%
HepB	ALL	50	0	-1	0	0	0	-9	39	49	98.00%
HepB-Hib	Test6	0	7	0	0	0	0	0	7	7	100.00%
HepB-Hib	ALL	0	7	0	0	0	0	0	7	7	100.00%
Hib	Privatetest	87	0	0	0	-17	0	0	70	87	100.00%
Hib	ALL	87	0	0	0	-17	0	0	70	87	100.00%
Meningo	LOT1098120	4	0	-1	0	0	0	-3	0	4	100.00%
Meningo	LOT1287216	25	0	0	0	0	0	-5	20	25	100.00%
Meningo	ALL	29	0	-1	0	0	0	-8	20	29	100.00%
Polio	LOT1076110	28	0	-3	0	0	-20	0	2	25	89.29%
Polio	ALL	28	0	-3	0	0	-20	0	2	25	89.29%
Td/Tdap	123521	89	0	-1	0	0	0	0	79	80	89.89%

Vaccine Accountability – Summary Report

1. The Summary Report contains accountability data grouped by Vaccine Group, with all lot numbers combined.

Oregon Immunization Program												Oregon Vaccines for Children	
Vaccine Accountability Report - REX'S TEST CLINIC-PUBLIC													
Org Code: RL1111				VFC PIN: R11111									
Report timeframe: Quarter 1, 2014 - Quarter 2, 2014				Report date: 04/27/2014				Vaccine Funding Source: Both					
This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza vaccine.													
Accountability Data By Vaccine Group													
VFC PIN	Organization Name	County	Vaccine Group	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	DTP/aP	30	0	0	0	0	-15	0	15	30	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepA	50	0	0	0	0	0	0	30	30	60.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepA-HepB	0	13	0	0	0	0	0	13	13	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepB	50	0	-1	0	0	0	-9	39	49	98.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepB-Hib	0	7	0	0	0	0	0	7	7	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Hib	87	0	0	0	-17	0	0	70	87	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HPV	200	0	0	0	-100	0	0	100	200	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Meningo	29	0	-1	0	0	0	-8	20	29	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Polio	28	0	-3	0	0	-20	0	2	25	89.29%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Td/Tdap	89	20	-1	0	0	0	0	99	100	91.74%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Varicella	79	0	-1	0	-8	-10	0	49	68	86.08%
Total			ALL	642	40	-7	0	-125	-45	-17	444	638	93.55%

Understanding Vaccine Accountability Report

Columns and Calculations:

+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
1	2	3	4	5	6	7	8	9	10

The following inventory transactions are "counted" in each of the above categories of the Vaccine Accountability Report. See p. 70, *Table 1: Reasons for adding or subtracting inventory* for more details on these transaction types.

1. Inventory units on-hand at begin date of report (active non-expired)
2. Doses Received, transfers in, and '+' error correction
3. Immunizations Given less Immunizations Deleted (must be recorded in the with a valid eligibility code)
4. Expiration reported by Provider (automatic inventory transaction)
5. Spoilage reported by Provider, Failure to store properly on receipt by Provider, Refrigeration failure report by Provider

6. Other not usable by Provider, doses recalled, and '-' error correction
7. Doses Transferred Out
8. Inventory units on hand at end date of report (active, non-expired): per system
9. Accounted for Doses = $|(3+4+5+6+7)|+8$
10. Accounted for Doses / Total vaccine doses $|(3+4+5+6+7)|+8 / 1+2$
i.e., total accounted for transactions + ending inventory / total theoretical doses available
11. Unaccounted for includes sum of negative values for (-) doses administered transaction (doses that were manually subtracted, not deducted via inventory modification), (-) Lost or unaccounted for in Provider Inventory, (-) doses recorded in the without a valid eligibility code, and (+) doses deleted in the without a valid eligibility code for the org

Detailed List of Inventory Transactions

The code is what is displayed in the Show Transactions report in ImmTrac2.

	CODE	-/+	DESCRIPTION	SOURCE OF TRANSACTION	SOURCE TYPE
A	REC	+	Receipt of Inventory	Edit Inventory reason pick list	manual
B	REC	+	Receipt of Inventory	Add inventory is saved, Order/transfer Received	automated
C	RET	+	Doses Returned	Rejected transfer that is restocked in inventory	automated
D	RET	+	Doses Returned	Edit Inventory reason pick list	manual
E	TRA	-	transfers out of inventory	Orders from or transfers from inventory	automated
F	TRA	-	Doses Transferred	Edit Inventory reason pick list	manual
G	Immunize	-	Immunizations Given	Imm is added to client's record	automated
H	Delete	+	Immunizations Deleted	Imm is deleted from client record	automated
I	ERR	+ or -	Error Correction	Edit Inventory reason pick list	manual
J	RECALL	-	Doses Recalled	Edit Inventory reason pick list	manual
K	ADMIN	-	Doses Administered	Edit Inventory reason pick list	manual
M	3	-	Spoilage reported by Provider	Edit Inventory reason pick list	manual
N	4	-	Expiration reported by Provider	Counts auto-generated when reports run	automated
O	5	-	Lost/damaged in transit to Provider	Edit Inventory reason pick list	manual
P	6	-	Failure to Store properly.....	Edit Inventory reason pick list	manual
Q	7	-	Refrigeration failure.....	Edit Inventory reason pick list	manual

R	11	-	Lost or Unaccounted for	Edit Inventory reason pick list	manual
S	12	-	Other - Not useable, per Provider	Edit Inventory reason pick list	manual
T	BORROWEDIN	+	Borrowed In	Edit Inventory reason pick list	manual
U	BORROWEDOUT	-	Borrowed Out	Edit Inventory reason pick list	manual
V	TRAEXP	n/a	Transfer out Expired Inventory	Transfer of Expired Inventory (i.e., back to mfg)	automated
W	BORROWED	-	Borrowed Imm Given	Borrowed Imm is added to client record	automated
X	LOTDELETE	-	Lot Deleted	Edit Inventory Delete button	automated

Inventory Transactions within Vaccine Accountability Report columns

+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
1	2	3	4	5	6	7	8	9	10
ending inventory from prior report run	A, B, C, D, T and I when positive	G*,W*, (H*)	N, V	M, P, Q	J, S, and I when negative	E, F, O, U, X	active, non-expired QOH per system		

Note that some transaction types are treated differently based on whether they are accompanied by a valid vaccine eligibility code:

G*, W* = count if the immunization administered contains a vaccine eligibility code

H* = Delete transaction of an immunization administered that contains a vaccine eligibility code, which lowers the count of Doses Reported

Unaccounted for transactions: K, R, G**, W**, H**

G**, W** = unaccounted for if the immunization administered does not contain a vaccine eligibility code

H** = Delete transaction of an immunization administered that does not contain a vaccine eligibility code



Chapter 14

Data Exchange

In this chapter:

Introduction
Data Exchange through ImmTrac2
HMO Data Exchange

Introduction

Thank you for your interest in electronic data exchange with ImmTrac2. Getting immunization data into ImmTrac2 is important for your clinic and for the individuals you serve. ImmTrac2 is interested in finding the least burdensome method for your clinic to submit data to ImmTrac2.

The Texas ImmTrac2 Immunization Information System (ImmTrac2) has made available an interactive user interface on the World Wide Web for authorized users to enter, query, and update client immunization records. The Web interface makes ImmTrac2 information and functions available on desktops around the state. However, some immunization providers already store and process similar data in their own information systems and may wish to keep using those systems while also participating in the statewide. Others may have different needs and may decide they do not want to enter data into two diverse systems. For many clinics, electronic transfer is the preferred method to accomplish this goal.

This document explains how to exchange electronic data files with the.

Data Frequency

Timely data submission to ImmTrac2 benefits providers and the clients they serve by making complete immunization records accessible through the system as soon as possible. ImmTrac2 encourages weekly data submissions wherever possible for all providers. Public clinics are required to submit data within 14 days of administration. Real-time data submission is also possible via Health Level Seven (HL7) real-time messaging (see Data Formats Accepted below).

Data Formats Accepted:

Data is typically pulled from Electronic Health Record (EHR) systems or from Practice Management or billing systems. If you have both EHR and billing data systems, ImmTrac2 encourages you to send data from the EHR, as we have found these data 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 standard files
- Health Level Seven (HL7) Version 2.5.1 Real Time Transfer
- Health Level Seven (HL7) Version 2.4 standard files

- Health Level Seven (HL7) Version 2.4 Real Time Transfer
- Fixed format flat text files

ImmTrac2 accepts and transmits the Health Level Seven (HL7) Version 2.4 and Version 2.5.1 standards for batch data loads to submit client and immunization information to ImmTrac2. This document defines requirements for Health Level Seven (HL7) Version 2.4 and Version 2.5.1 standard files. Additionally, ImmTrac2 allows providers to submit client and immunization information and submit queries for this information via real-time messaging. For information regarding real-time messaging, please see the following document:

Data Exchange through ImmTrac2

The data exchange feature of ImmTrac2 allows the capability to exchange client, immunization and comment data files. Only ImmTrac2 state staff or other users with the role of E-Transfer Submission Only, MCO, Pharmacy Standard + E-transfer or Super User (Provider and LHD) will be able to perform data exchange.

Provider Organization Data Exchange

Prior to establishing data exchange, you must contact the ImmTrac2 staff at (1-800-xxx-xxx) or alertiis@state.or.us to arrange for testing either a Health Level 7 (HL7) or a Flat File that your organization will be sending. ImmTrac2 prefers to work with the organization's vendor or technical contact to test the file format first. Once that testing is complete, ImmTrac2 will run a test with each provider organization to ensure it is set up correctly in ImmTrac2 and able to upload data into the system.

Commented [HD17]: Check phone number and address.

Setting up your organization for Data Exchange

To set up your organization for Data Exchange you must call the ImmTrac2 Help Desk and provide them with the following information:

- your provider organization
- your vendor (EMR, Billing or Third Party)
- file format type (Health Level 7 (HL7), Flat File or Custom Flat File)

Creating a test file for Data Exchange

1. Contact ImmTrac2 Help Desk to receive the most up-to-date version of the file specifications for both HL7 and Flat File. You may also access Data Exchange Specifications through the Forms tab in ImmTrac2.

2. Send ImmTrac2 staff a test file of at least 5-10 client records. Include in this file a range of immunizations per client. ImmTrac2 will check the file and run it in test mode.
 - a. All combination vaccines and single vaccines should be tested.
 - b. Provide at least 3 records where all client information that you are allowing your clients to provide is entered (e.g., mother's maiden name, responsible person, client status, etc).
 - c. Let ImmTrac2 staff know if you are only collecting the required fields.
 - d. Review code tables carefully, paying attention to spelling and codes that are only valid during specific time periods.
3. Ensure that the data in the test file matches the data in the system.
4. Once the file format has been tested and found to be correct, the ImmTrac2 Help Desk will walk your data exchange representative through the steps for data upload and explain the response files that are created. This process can take a few cycles of loading and testing until formats are finalized for imports.



Note: Files have a size limit of 150 MB combined of the client, immunization, and comment files that can be uploaded via the user interface. If files are larger than 150 MB, they will need to be split into smaller files for loading.



Uploading a File for Data Exchange

The ImmTrac2 Help Desk ((1-800-xxx-xxxx)) will assist you with your first data exchange. This file will be sent into ImmTrac2 in test mode. Once your first file has been accepted in ImmTrac2, it will be reviewed by your organization and the ImmTrac2 Help Desk. If both parties agree that the Data Exchange was successful, then your organization will continue sending data into the ImmTrac2 application.

Commented [HD18]: Check phone number

To perform a data exchange:

1. Click **Exchange Data** under Data Exchange on the menu panel. Depending upon the type of file format and direction of data you will be using, one or more of the following fields will display:
 - a. *Job Name*: Fill in a name for the data exchange, if desired. If left blank, ImmTrac2 will use the current date for a job name.
 - b. *HL7 File Name*: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.

- c. *Client File Name*: This field is required if you have chosen "bidirectional" or "provider organization to ImmTrac2 " as a data direction, and your file format is Flat File or Custom Flat File. Click on Browse to select the appropriate Client File Name.
- d. *Immunization File Name*: This field is required if you have chosen "bidirectional" or "provider organization to ImmTrac2 " as a data direction, and your file format is Flat File or Custom Flat File. Click on Browse to select the appropriate Immunization File Name.
- e. *Comment File Name*: This optional field will appear if you exchange data via Flat File format and have chosen "bidirectional" or "provider organization to ImmTrac2 " as a data direction, or if you exchange data via Custom Flat File format. Click on Browse to select the appropriate Comment File Name.

2. Click the **Upload** button.



Note: Do not close the browser, click any other buttons, or navigate away from this page during the upload of the file. This can take several minutes. If the browser is closed or the screen refreshed before the file completes uploading, the source file will truncated and not all of the data will be loaded.



3. The Exchange Data Result screen will list the files that were uploaded using "bidirectional" or "provider organization to ImmTrac2" data directions and will confirm the job name you entered or provide the date as a job name.

Exchange Data Status		Past 7 Days	Realtime?	No	Refresh
Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
Job 07/07/2011 06:57:49	Cliff Gardner	07/07/2011 06:57:49	07/07/2011 06:57:49	07/07/2011 06:57:49	COMPLETE
Job 07/07/2011 06:57:31	Cliff Gardner	07/07/2011 06:57:31	07/07/2011 06:57:32	07/07/2011 06:57:33	COMPLETE

- 4. Click **Check Status**.
- 5. The Exchange Data Check Status screen will contain the job name, user name, exchange data date, process start and end date and status of the current job.
- 6. Click **Refresh** periodically to check the status of the job, it will not automatically update.
- 7. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear.
 - a. Complete: the job has completed processing

- b. Error: the job could not be processed because of formatting errors
 - c. Exception: the job could not be processed because of an internal system error
8. Click the job name hyperlink.
9. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:

organization IR Physicians • *user* Chris Mattson • *role* ImmTrac2 Developer

Download Files for: Job 10/19/2012 11:37:19

[HL7 251 Response](#) (1KB)

[Inbound HL7 251 File](#) (1KB)

Download Log for: Job 10/19/2012 11:37:19

File	User Name	Download Date
HL7 251 Response	Chris Mattson	10/19/2012 11:37:34

Summary Information for: Job 10/19/2012 11:37:19

Description	Client	Immunization	Comment	Event
Processed	1	0	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	0	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

- a. Download Files for: <Job Name>: This section contains all output files available for you to download including the Response Files and any "ImmTrac2 to provider organization" download files. Click on the download name hyperlink to download the file. Under the HL7 251 Response link, there is a link to the file that was uploaded into Data Exchange, Inbound HL7 251 File. Similar links appear for jobs using HL7 2.4, flat file and CSV file formats.
- b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s) including file name, user name, date, and time of the download(s).

- c. Summary Information for: <Job Name>: This section contains a summary of all the information pertinent to the exchanged data file received and processed.
10. Review the summary figures to ensure complete uploads. The response files can be searched for record rejections.
 11. Clients put into pending file are reviewed and merged (where a client already exists in the system). Once merging is complete, data are viewable in the.

If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed the original uploaded file(s) and information regarding the activity of the downloaded file(s).

Data Collected via Data Exchange

Submit as much data as possible of the listed elements in the flat file or HL7 specifications. This will ensure a complete immunization record. In addition to required fields defined in the specifications (add links here), supplying additional data fields allows for record merging, and allows for electronic vaccine eligibility coding, as well as performance measure and vaccine recall efforts.

Due to the large volume of records ImmTrac2 receives from various sources, additional 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 your data with other sources to obtain one complete immunization record. Records that are more complete benefit your clinic by providing you with the best possible client data. ImmTrac2 encourages sites to send as many 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.

HMO Data Exchange

All HMO/ MCOs will need to complete the same testing of their data file format as outlined above for provider organizations and EMRs. Prior to performing an HMO data exchange, your HMO will need to contact the ImmTrac2 Help Desk and arrange for your organization to be set up to perform data exchange.

You will need to provide the following information regarding the exchange:

- File format: HL7 or Flat File
- Type of transmission: test or actual production transfer

To perform an HMO Data Exchange:

1. Click Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
 - a. Job Name: Fill in a name for the data exchange, if desired. If left blank, ImmTrac2 will use the current date for a job name.
 - b. For Flat File Submissions:
 - c. Client File Name: This field is required if your file format is Flat File. Click on Browse to select the appropriate Client File Name.
 - d. Immunization File Name: This optional field will appear if you exchange data via Flat File format. HMO/MCOs are not required to send immunization data.
 - e. Comment File Name: This is an optional field that will appear if you exchange data via Flat File format.
 - f. For HL7 File Submissions:
 - g. File Name: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.
 - h. For HMO Query Files:
 - i. This field is required for users who are running an HMO query. Click on Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.



Note: The HMO/MCO must first submit client data into ImmTrac2 before a query will run successfully. Only clients that are shown to be affiliated with an HMO/MCO will be returned to the HMO via a data query.



Submit HMO Data Screen:

Exchange Data

Job Name

NOTE: If Job Name is blank, today's date will be used.

Query File Name

At this time we are only accepting files with total size less than 157,286,400 bytes (150.00 MB)

Comment File Name

At this time we are only accepting files with total size less than 157,286,400 bytes (150.00 MB)

2. Submit HMO Query Screen:
3. Click **Upload**.
4. The Exchange Data Result screen will display, and list the files that were uploaded and confirm the job name you entered or provide the date as a job name.

Exchange Data Result

The following HMO flat files were uploaded:

- LONG_HMO_CLIENT.txt

Job Name which is set as default string "Job 07/07/2011 07:13:09" has been presented for processing.

5. Click the **Check Status** button.
6. The Exchange Data Status screen will display, and contain the job name, user name, exchange data date, process start and end date, and status of the current job.

Exchange Data Status		Past 7 Days	Realtime?	No	<input type="button" value="Refresh"/>	
Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status	
Job 07/07/2011 07:11:24	Cliff Gardner	07/07/2011 07:11:24	07/07/2011 07:11:25	07/07/2011 07:11:25	COMPLETE	

7. Click **Refresh** periodically to check the status of the job.
8. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear:
 - a. Complete: has completed processing
 - b. Error: could not be processed because of formatting errors
 - c. Exception: could not be processed because of an internal system error
9. Click the job name hyperlink.

10. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:
 - a. Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "ImmTrac2 to provider organization" download files. Click on the download name hyperlink to download the file.
 - b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
 - c. Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.
11. For jobs created using the Submit HMO Query menu option, the following sections will display:
 - a. Download Files for: <Job Name>: Contains the Inbound Query File, Outbound Demographic File, Outbound Immunization File, and Exception File, if there was an error processing the Inbound Query File, all available for download by clicking on the file name hyperlink.
 - b. Download Log for: <Job Name>: Contains information regarding activity of the download files.
12. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed, the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Query Format
Record Type
Record Identifier
First Name
Middle Name
Last Name
Birth Date

HMO Query Result File Formats

organization **IR Physicians** • user **Chris Mattson** • role **ImmTrac2 Developer**

Download Files for: 9.ii.a-OR-HMO_Query

[Inbound Query File](#) (1KB)
[Outbound Demographic File](#) (1KB)
[Outbound Immunization File](#) (1KB)

Download Log for: 9.ii.a-OR-HMO_Query

File	User Name	Download Date
Outbound Demographic File	Chris Mattson	08/07/2012 11:31:38
Outbound Immunization File	Chris Mattson	08/07/2012 11:31:47

Summary Information for: 9.ii.a-OR-HMO_Query

Description	Client	Immunization	Comment	Event
No Summary Information				

Demographic

Chart Number
First Name
Middle Name
Last Name
Birth Date

Immunization

Chart Number
CPT
Vaccine Group
Administered Date
Filler

Exception

Chart Number
Record Type
Error Message



Chapter 15

School User

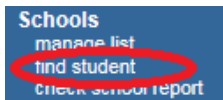
In this chapter:

- Finding Student
- Student Immunization Record
- Manage List
- Reports/Client List
- Check School Report

Finding Student Screen

The Find Student screen is used to search and locate any student existing in the ImmTrac2 application.

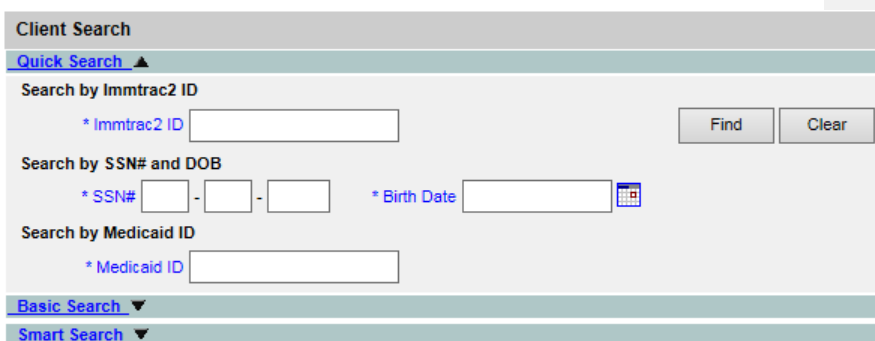
To search for a student in ImmTrac2. From the menu, under Schools, select find student.



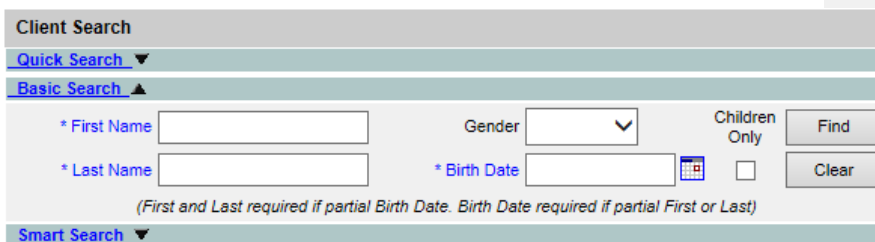
1. There are three client search options:

A screenshot of the "Client Search" dropdown menu. The menu is open, showing three options: "Quick Search", "Basic Search", and "Smart Search". Each option has a downward-pointing arrow.

2. The Quick Search option allows user to search by ImmTrac2 ID, SSN and Birth Date or Medicaid ID.

A screenshot of the "Quick Search" search form. The form is titled "Client Search" and has "Quick Search" selected. It contains three search sections: "Search by Immtrac2 ID" with a text input field and "Find" and "Clear" buttons; "Search by SSN# and DOB" with SSN# (three separate input fields) and Birth Date (input field with a calendar icon) fields; and "Search by Medicaid ID" with a text input field. Below the form are "Basic Search" and "Smart Search" options.

3. The Basic Search option allows the user to search by First Name, Last Name and Birth Date.

A screenshot of the "Basic Search" search form. The form is titled "Client Search" and has "Basic Search" selected. It contains search fields for "* First Name", "* Last Name", "Gender" (dropdown), "* Birth Date" (input field with a calendar icon), and a "Children Only" checkbox. There are "Find" and "Clear" buttons. A note at the bottom states: "(First and Last required if partial Birth Date. Birth Date required if partial First or Last)". Below the form are "Quick Search" and "Smart Search" options.

4. The Smart Search allows the user to search by First Name, Last Name, Birth Date, Gender and Street Address.

The screenshot shows the 'Client Search' interface with the 'Smart Search' tab selected. The form contains the following fields and controls:

- ImmTrac2 ID#
- * First Name Mother's First Name
- * Last Name Mother's Maiden Name
- Middle Name Phone - -
- * Birth Date * Street Address
- * Gender Other Address
- PO Box
- Zip -
- City

Search Results

Exact Student Match

An exact student match means ImmTrac2 returned only one student. When this occurs, the Student Immunization Record screen is displayed.

List of Possible Matches

A list of possible matches means the search returned more than one student match. All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by last name; first name, middle name, birth date, and gender are also included in the table for each student. Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The Student Immunization Record screen is then displayed containing the student immunization information.

No Match Found

Please try at least twice to be sure the student is not in the system. For example, you can search once using the date of birth and last name, and once using date of birth and first name. Parents may have immunization information but if the child was born in another state or received services from a provider who did not report to ImmTrac2, the information may not be in ImmTrac2. A blank CIS form is available from the forms list.

Threshold Limit

When searching in the database, if the number of students exceeds 75 matches, then no students will be listed. Instead, the following message will display:

"XX students were found. Please refine your search criteria to limit your student list." (XX is the total number of students found in the search.)

In the unlikely event you receive this message, clear your search criteria and try again with information that is more detailed.

Student Immunization Record Screen

The Student Immunization Record screen displays a student's immunization history and provides immunization recommendations. From this screen, you are able to select and add the student to a specific student list. This will allow you to run reports that include the student.

There are three main sections used in the Student Immunization Record screen:

- Student Information
- Immunization Record
- Vaccines Recommended

Student Information
School Record
Print Confidential
Cancel

Student Name (First - MI - Last)
DOB
Gender
Tracking Schedule

SCHOOL LIST PATIENT
08/01/1998
M
ACIP

Current Age: 15 years, 6 months, 5 days

Reports

[Add this Student to a Report List](#)
Please Pick a Report List

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction
DTP/aP	05/03/1999	1 of 5	DTaP-HepB-IPV [Pediatrix ®]		
HepA	09/03/1999	1 of 2	HepA-Ped 2 Dose [Havrix-Peds 2 Dose ®]		
HepB	05/03/1999	1 of 3	DTaP-HepB-IPV [Pediatrix ®]		
Hib	05/03/1999	1 of 2	Hib-PRP-T [Hiberix ®]		
Polio	05/03/1999	1 of 4	DTaP-HepB-IPV [Pediatrix ®]		

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS		Maximum Age Exceeded	
HepA	HepA, NOS	03/03/2000	03/03/2000	10/03/2000
HepB	HepB, NOS	05/31/1999	05/31/1999	07/03/1999
Hib	Hib, NOS		Maximum Age Exceeded	
HPV	HPV, Quadrivalent	08/01/2007	08/01/2007	08/01/2019
Influenza-seasonl	Flu NOS	08/01/2007	08/01/2013	08/01/2007
Meningo	Meningococcal, NOS	08/01/2009	08/01/2009	08/01/2011
MMR	MMR	08/01/1999	08/01/1999	12/01/1999
Polio	Polio-Inject	05/31/1999	05/31/1999	08/03/1999
Td/Tdap	Tdap	08/01/2005	08/01/2005	08/01/2005
Varicella	Varicella	08/01/2011	08/01/2011	08/01/2011

Student Information

The Student Immunization Record screen displays a student information header at the top of the page. This section includes student name, date of birth (DOB), gender, and selected tracking schedule. The information contained in this section can be used to confirm that you have located the correct student.

Tracking Schedule

Select the appropriate tracking schedule from the drop down menu. This function allows users to change the tracking schedule to evaluate the record according to school law requirements based on the grade of the student. If a grade level tracking schedule is selected, the Earliest Date, Recommended Date and Past Due Date will be the same and identify vaccines for which the student is incomplete according to school requirements. ACIP is the clinical schedule and is the default. The ACIP schedule should be used when printing out a record for the parent so they know when they can obtain immunizations for their child.

School Record

Clicking on the **School Record** button will allow users to print the official Certificate of Immunization Status (CIS) form.

Print Confidential

This button allows you to print the record showing on the screen. This record may be helpful for parents when scheduling immunizations for their child.

Cancel

This button cancels the screen and takes you back to the previous screen.

Adding Students to a Report List

To add a student to a list, you must have first created specific student report lists in the Manage Lists section of the application. See the Manage List Screen section of this chapter for details.

1. Click the “Please pick a Report List” drop-down menu and select your list from the available options.
2. Then click the “Add this Student to a Report List” hyperlink.
 - a. Students can be added to more than one list.

The screenshot shows a web form titled "Student Information". At the top right are three buttons: "School Record", "Print Confidential", and "Cancel". Below these are fields for "Student Name (First - MI - Last)", "DOB", "Gender", and "Tracking Schedule". The values are "SCHOOL LIST PATIENT", "08/01/1998", "M", and "ACIP" respectively. Below the fields is a blue bar indicating "Current Age: 15 years, 6 months, 5 days". Underneath is a "Reports" section with a blue hyperlink "Add this Student to a Report List". To the right of this link is a dropdown menu currently showing "GraduationYear2014". The dropdown menu is open, showing "Please Pick a Report List" and "GraduationYear2014" as options.

Student Immunization Record

The Immunization Record table lists all vaccinations the student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

- Vaccine Group
 - Lists the vaccine group name for each immunization received.
- Date Admin
 - Lists the date the student received the vaccine.
- Series
 - Denotes the sequence number within the immunization series and contains messages such as “Not Valid”, if the vaccine does not meet the requirements of the selected tracking schedule.

- Trade Name
 - Displays the trade name of the vaccination received.
- Dose
 - Indicates whether full, half, or multiple doses were administered to the student. A blank field is the default for a full dose.



Note:

Doses marked as Subpotent or Not Valid are counted for school/children’s facility immunization law compliance. The exceptions are MMR, Varicella, and Hepatitis A doses given before the first birthday. Texas accepts these dates for school attendance purposes because revaccination is a clinical decision.



The student's age appears in a solid blue field between the student information and reports sections.

Vaccines Recommended

Find the recommended vaccinations and corresponding dates for the student in the Vaccines Recommended by Selected Tracking Schedule table. The vaccine group list shows all vaccinations included in the tracking schedule assigned to this student. The table columns are defined as follows:

Vaccine Group	Displays the vaccine group name.
Vaccine	Displays the specific vaccine name.
Earliest Date	Displays the earliest date the student could receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Earliest Date will be when the student is incomplete for the vaccine according to Texas school law requirements.
Recommended Date	Displays the date that the student is recommended to receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Recommended Date will be when the student is incomplete for the vaccine according to Texas school law requirements.
Past Due Date	Displays the date that the student is past due for the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Past Due Date will be when the student is incomplete for the vaccine according to Texas school law requirements.



Note:

Religious exemptions are not recorded in ImmTrac2 and are not displayed.



Printing an Immunization Record or Certificate of Immunization Status (CIS) Form

To print out a record in the format of a Certificate of Immunization Status form for your school files:

1. Click the **School Record** button
2. Click **File** and then click **Print**

The CIS form is considered a verified record and does not require a signature unless the parent provides additional dates.

To print out the Student Immunization Record screen:

1. Click the **Print Confidential** button.
2. Click **File** and then click **Print**.

This page can be used to look at dates when students will be due for vaccines. Click the Back button on your browser to return to the student record.



Note:

If you are printing the Student Immunization Record for a parent, choose ACIP as the tracking schedule to show the clinically recommended dates and select Print Confidential.



Manage List Screen

The Manage List screen is used to create new and manage existing student lists to be used for generating reports. A maximum of thirteen lists can be created by each school.

There are two main sections used in the Manage List screen:

- Manage List
- Report List

Each school can only have 13 report lists.

Manage List

New List Name

Save

Report List

List Name	Last Updated Date	Student Count	Delete
GraduationYear2014	05/09/2011	1	Delete

Mange List	Creates new lists for your school or children's facility organization in ImmTrac2.
Report Lists	Displays a table of all lists added to ImmTrac2 by your school or children's facility in alphabetical order.
List Name	Displays the name given to the list by your school. If you click the name, you can view a detailed display of your students within the list.
Last Updated Date	Displays the date on which the list was last updated.
Student Count	Displays the number of students within the list. The count is determined by how many students are assigned to the list.
Delete	Displays a delete button for each list. If you click the delete button, the list will be deleted.



Note:

Once you delete a list, you cannot retrieve it. Deleting a list removes all students from the list.



Creating a New Student List

1. Click **Manage Lists** under the School Access menu group on the left side of the screen.
2. Enter a list name in the New List Name text field.
3. Click the **Save** button to add the list name.
4. The message will appear at the top, "The list has been created successfully". An example of a list name may be: Class of 2015. You will later add students to this list.



Note:

Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references such as kindergarten). Instead, use titles such as Class of 2020, Class of 2021, etc., using the year of high school graduation.



Removing a List

1. Click the **Delete** button to the right of the list.
2. When the Delete button is clicked, you will be given a prompt “Are you sure you want to delete this list?” Your option is either **OK** or Cancel.
3. Clicking **OK** will delete the list and remove it from the Manage List screen. Clicking on Cancel will cancel the delete and return you to the Manage List screen.

Opening the Reports/Client List Screen

1. Click a list name for the list you wish to view.
2. You will be taken to the Reports/Client List screen where you can view your student list. Further explanation can be found on the Reports/Client List Screen section, below.



Note:

You can only view details of a list that contains students. A list with zero count will not link to the Reports/Client List screen.



Reports/Client List Screen

The Reports/Client List screen is used to view students added to your school list and run reports for the students in the list. You can also view a student's immunization record and remove a student from your list.

There are three main sections used in the Reports/Client List screen:

- Reports Available: (List Name)
- Select Tracking Schedule
- Client List for: (List Name)

1. Click the **Student Immunization History List** link. You will be taken to the Check School Report screen where you can view the status of the report you are running.
2. Click **Refresh** periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
3. Once your report has finished generating, the report name will turn blue, and the report status will display “ready”. You can now click the link and view the report.
4. The report displays the immunization history and the recommended vaccines for each student on your list according to the Tracking Schedule selected on the Reports/Client List screen.
5. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Immunizations Due List Report

When requesting the Immunization Due report you will be taken to a screen where you can enter criteria used for the report. The criteria for this report are explained below.

Selecting Vaccine Groups

The majority of the time, you will Click Use All Vaccine Groups. The immunization due dates will be based on the tracking schedule you have selected for this report. If a student is past due for any of the vaccines in the tracking schedule (for example, if he/she is past due for any vaccines required for kindergarten and you have selected the Kindergarten tracking schedule), then he or she will be included in the report outcome, given all other report criteria are met. If no students are listed in the report, then all students on the list are complete or up-to-date for the selected date range.

Choosing vaccine groups allows you to focus on a specific vaccine(s) within the selected tracking schedule. If the student is past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report, given all other report criteria are met. For example, you can use this report if you want to see which students on the list are due for a specific vaccine or if there is an outbreak of disease and you need to identify students on your list that may be lacking that vaccine. This report could be used to produce a list of susceptible students at your school or children's facility if all of the students attending your school/facility have all of their immunization dates in ImmTrac2.

1. Within the Select the Vaccine Group(s) section, select either **Use All Vaccine Groups** or **Use Vaccine Groups Selected**.
 - a. If the Use Vaccine Groups Selected option is selected, choose the vaccine groups to be included.
2. Scroll through the vaccine group list and double-click the desired vaccine group name, or click the vaccine group name and then click the Add button.
 - a. All selected vaccine groups will appear in green in the box to the right.
3. To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click the selected vaccine group name and then click the Remove button.

When the report is generated, the only students that will appear on the list are those students who are due for the vaccine group(s) selected in the report criteria, but the report will show all vaccines included in the tracking schedule.

Selecting Target Date Range

When dates are specified, the report will only return those students that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.



Note:

The To date in the target date range may be set to the day your report is due to the local health department to identify students who will be due for a vaccine by this date.



4. Enter the Target Date Range in the From and To text boxes in the form MM/DD/YYYY, or Click the calendar icon to set the date.
 - a. The From date, To date, or both dates can be left unspecified:
 - i. 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.

- ii. 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.
 - iii. If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To fields.
5. Click **Generate**.
 - a. You will be taken to the Check School report screen where you can view the status of the report you are running.
6. Click **Refresh** periodically until the status displays 100%. You can also click "Check School Report" on the menu on the left side to see if the report is finished.
 - a. Once your report has finished generating, the report name will turn blue, and the report status will say "ready".
7. Click the link and view the report, which displays the Immunizations Due for each student on your list.
 - a. If you selected a future date, then all children on the list will require vaccines by the date selected, but Due will only be displayed for those vaccines that are past due or due now. You will have to manually evaluate the rest of the record to identify those vaccines that are due before the future date selected.
8. Compare to see if all of the student's immunizations are in the ImmTrac2 if you have information from another source.
 - a. Parents may have additional information if the child was born in another state or received services from a provider who did not report to ImmTrac2.
 - b. Additional dates can be written on the printed CIS form but will not be reflected in the Immunizations Due report for students.
 - c. The ImmTrac2 forecast does not consider any vaccines that the parent has selected as a religious exemption.



Note:

There are two places in the ImmTrac2 where you can select a tracking schedule. If you want to run a report for a group of students using a specific tracking schedule, such as Kindergarten, select the tracking schedule on the Reports/Client List screen. If you want to see the immunizations due for one student only, find the student and then select the tracking schedule on the Student Immunization Record screen.



Client List

This section is for viewing student immunization records and removing a student from your list. Information contained within the student list table is described below.

Delete	If you wish to remove a student from your list, place a checkmark in the box beside the student's name in the Delete column. Remove more than one student at a time by checking multiple students. Next, Click the Delete button. Once you have confirmed the delete, a message will display "The list has been updated successfully" and your student(s) will be removed.
Last Name	Displays the student's last name and provides a link back to the Student Immunization History screen.
First Name	Displays the student's first name.
Middle Name	Displays the student's middle name.
Birth Date	Displays the student's birth date.

Check School Report Screen

The Check School Report screen is used to display and/or determine the status of a report request. The screen is separated into two sections:

- School Report Job Status
- School Report Status

School Report Job Status						Refresh
Started	Completed	Status	Students	Target From	Target To	Cancel
09/20/2014 03:56 AM	09/20/2014 03:56 AM	100 %	3			
09/15/2014 01:08 PM	09/15/2014 01:08 PM	100 %	1	09/15/2014	09/15/2014	

School Report Status					
Name	Type	Requested	Started	Completed	Status
History Report 09-20-2014 03:56:50	Imm. History	09/20/2014 03:56 AM	09/20/2014 03:56 AM	09/20/2014 03:56 AM	Ready

School Report Job Status

This section displays the date and time a report was started and completed, the overall status in percentage, the number of students returned and the target date range if one was specified. Status will update by clicking the Refresh button. You can only have one job listed in this section. Once you run a new report, your previous job will be erased.

School Report Status

This section displays reports generated from the Reports/Client List screen. It contains the name of the report, the type of report, the date and time the report was requested, what time it started and the status. Your reports will be sorted by time generated, with the latest report at the top.

To get the latest update on all the requests listed in the table, click the **Refresh** button. This will show the most current status for each request from the ImmTrac2 database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get back to the School Report Status screen, Click the Check School Report link on the left menu panel.

As soon as the report name appears as a hyperlink and the Status displays Ready, it has completed processing and is ready for viewing. To view the report, Click the report name hyperlink. This process can take some time depending on the size of the report. The selected report will automatically display using the Adobe Acrobat Reader. If there is a problem viewing your report, please contact the ImmTrac2 Help Desk. At any time, click the **Cancel** button to return to the screen you were previously on.



Appendix 1

In the Appendix:

Online Help
ImmTrac2 Help Desk

Online Help



The ImmTrac2 online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in ImmTrac2 by pressing the yellow light bulb on the menu bar in the top right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

When on any screen where you would like help, click on the light bulb on the menu bar located at the top-right of the screen.

A box with screen-specific help information will display. This help box may have any or all of the following features:

- **Purpose:** describes what the screen is meant to do or what kind of information needs to be entered.
- **Information provided:** describes in detail the input and output fields that are found on the screen.
- **Functionality:** provides information about specific buttons on the screen and describes their function.
- **Results:** describes the outcome of a search, report, download, or other information entered into the database.
- **User tips:** has advice or further information on how to use this screen.

To view these features, you may either click the links under the Purpose section or scroll down the page. To close the help box, press the X button in the top right corner of the box.

General Help

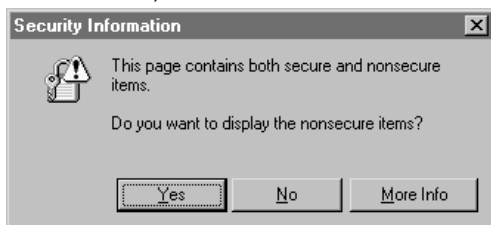
General help contains information on screens throughout ImmTrac2. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

Contents of General Help

To access the contents of general help follow these steps:

1. Click the light bulb on the menu bar.
2. Click **Help Contents** in the top left corner of the help box.

3. A box may open asking if you want to display both secure and non-secure items; click the **Yes** button.



4. The General Help screen now displays. On the left side of the page, view a list of topics, each with its own book-shaped icon.
5. Select a topic. A list of help items with question mark icons will display. You may also see further subtopics, each with its own book-shaped icon.
6. The help information you selected will display on the right side of the General Help screen.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
9. To collapse a topic, select it or click on the book icon next to it. You may toggle back and forth between opening and closing a topic by clicking on the book icon.
10. To close out of the help box, click the X in the top right corner of the box.

Viewing/Searching the General Help Index

To view or search the general help index follow these steps:

1. Follow Steps 1-3 under *Contents of General Help*.
2. Click the **Index** button on the top left side of the General Help screen.
3. To find an index topic, use the scroll bar to view index topics.
4. Click one of the help items to view the item.
5. The help information you selected will display on the right side of the General Help screen.
6. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
7. To close out of the help box, click the X in the top right corner of the box.

ImmTrac2 Help Desk

If you are experiencing difficulties or have questions regarding ImmTrac2, you may contact the ImmTrac2 Help Desk.

The ImmTrac2 Help Desk hours are 8:00 a.m. to 5:00 p.m. Monday through Friday.

- Help Desk telephone number: 800-xxx-xxxx
- Help Desk e-mail address: *alertiis@state.or.us*

Commented [HD19]: Confirm information



Appendix 2

In the Appendix:

Validation of Client Entry Data
Disallowed Address Entries
Disallowed First Names
Disallowed Last Names

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.

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. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Mother's First Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Mother's Maiden Last Name	Enter New Client/Personal Information, Manage Client/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Street Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
PO Box	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT
FAMILY PLANNING	FAMILY PLANNING SERVICES
PLANN PARENTHOO	PLANNED PARENTHOOD

Disallowed First Name Entries

The following chart lists first name entries that will not be validated in ImmTrac2.

Disallowed First Names			
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

BG	INFANT GIRL	PENDING	
BOY	INFANT GRL	PVN	
BOY I	INFANT M	SIGNATURE	
BOY II	INFANT MA	SLKDFSLKD	
CHILD	INFANT MAL	SRM	
CSS	INFANTBOY	THWJ	
FEMALE	INFANTGIR	TOMORROW'S CHILDREN	
FIRE DEPT	INFANTGIRL	TSWJ	
GIRL	INFANTMAL	TSWM	
GIRL I	INFANTMALE	TSWV	
GIRL II	LCFS	TXWM	

Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in ImmTrac2.

Disallowed Last Names			
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	

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. This "harmonized schedule" is the default schedule within NYSIIS.

Bookmark

A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

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.

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 client 19 years of age or older to permit future modification and edit of demographic and immunization information housed in the registry.

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.

Desktop

The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open the represented programs and files from the desktop screen.

Favorite

See Bookmark.

Grace period

The default period of time prior to and following an immunization. This time period is used to validate a client's immunization history; it does not affect immunization recommendations.

Historical Doses

Doses that the client received, but it is unclear which organization in the registry, if any, actually 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 who have access to a single organization. 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, in ImmTrac2. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

Immunization Information System

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.

Inventory Doses

Doses that are recorded in ImmTrac2 through the user interface which subtract from an inventory lot whose quantity is recorded and maintained in ImmTrac2. (See also Historical Doses and Other Owned Doses.)

Logout

Button on 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, change password, logout, 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 NYSIIS functions available to the user.

Ordering authority

A person with the capability of ordering an immunization for a client; a person with ordering authority is generally the client's pediatrician or primary care provider or, within public health organizations, the medical director.

Other Owned Doses

Doses that the organization knows it has administered, but not from any vaccine lots maintained in the ImmTrac2 inventory module. (See also Historical Doses and Inventory Doses.)

Client

Anyone who has an immunization recorded in ImmTrac2 by a provider organization.

Client Note

Some general, non-medical information regarding the client that is displayed to any user viewing the client's record.

PDF

Portable document file. A file format that allows you to view and print a document online in its original format with Adobe Reader.

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.

Reconstitution

The process of mixing a dry, powder form of a vaccine with a diluents to produce doses that may be administered to the client. This term applies to Smallpox vaccine.

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 or letter that informs a responsible person or client of immunizations that are due in the future.

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.

Shortcut

An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

Toolbar

Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back Forward, Stop, Refresh, and Home.

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.

Undeliverable Address

An indicator that the address currently on file for the client is incorrect.

User roles

ImmTrac2 users are categorized into hierarchical 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.

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