# Table of Contents

Chapter 1 Introduction ................................................................................................. 10
   What Are Immunization Information Systems ............................................. 11
   Why We Need Immunization Information Systems .................................. 11
   The ImmTrac2 Immunization Information System .................................. 12

Chapter 2 System Requirements ............................................................................... 13
   Internet Access ................................................................................................. 14
   Hardware Requirements ............................................................................... 14
   Software Requirements ............................................................................... 14

Chapter 3 Accessing ImmTrac2 .............................................................................. 15
   Opening ImmTrac2 ....................................................................................... 16
   Post Login ................................................................................................. 18
   Exiting ImmTrac2 .................................................................................... 18
   ImmTrac2 Security .................................................................................... 18

Chapter 4 Optimizing ImmTrac2 ......................................................................... 20
   Optimizing Browser Performance .......................................................... 21
      Deleting Temporary Internet Files (Internet Explorer) ...................... 21
      Operating in Full-Screen Mode (Internet Explorer) ......................... 22
   Running Reports with Adobe Acrobat Reader® ...................................... 22
      Running Acrobat Reader® Files ........................................................ 22
      Problems Running Reports in Acrobat® ........................................... 22
      File Transfer Protocol (FTP) Server Access ..................................... 23
   Efficient Screen Navigation ................................................................. 23
      Keyboard Shortcuts in ImmTrac2 ....................................................... 23
      Mouse Shortcuts in ImmTrac2 ......................................................... 25

Chapter 5 Home Page ............................................................................................... 27
   Menu Bar ................................................................................................. 28
   Menu Panel .............................................................................................. 29
      Menu Selections ............................................................................... 29
   Announcements ......................................................................................... 29
   Release Notes .......................................................................................... 30
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Information</td>
<td>201</td>
</tr>
<tr>
<td>Tracking Schedule</td>
<td>201</td>
</tr>
<tr>
<td>School Record</td>
<td>202</td>
</tr>
<tr>
<td>Print Confidential</td>
<td>202</td>
</tr>
<tr>
<td>Cancel</td>
<td>202</td>
</tr>
<tr>
<td>Adding Students to a Report List</td>
<td>202</td>
</tr>
<tr>
<td>Student Immunization Record</td>
<td>202</td>
</tr>
<tr>
<td>Vaccines Recommended</td>
<td>203</td>
</tr>
<tr>
<td>Printing an Immunization Record or Certificate of Immunization Status (CIS) Form</td>
<td>205</td>
</tr>
<tr>
<td>Manage List Screen</td>
<td>205</td>
</tr>
<tr>
<td>Creating a New Student List</td>
<td>206</td>
</tr>
<tr>
<td>Removing a List</td>
<td>207</td>
</tr>
<tr>
<td>Opening the Reports/Client List Screen</td>
<td>207</td>
</tr>
<tr>
<td>Reports/Client List Screen</td>
<td>207</td>
</tr>
<tr>
<td>Reports Available for Schools</td>
<td>208</td>
</tr>
<tr>
<td>Select Tracking Schedule</td>
<td>208</td>
</tr>
<tr>
<td>Generating the Student List Report</td>
<td>208</td>
</tr>
<tr>
<td>Generating the Student Immunization History List Report</td>
<td>208</td>
</tr>
<tr>
<td>Generating the Immunizations Due List Report</td>
<td>209</td>
</tr>
<tr>
<td>Selecting Vaccine Groups</td>
<td>209</td>
</tr>
<tr>
<td>Selecting Target Date Range</td>
<td>210</td>
</tr>
<tr>
<td>Client List</td>
<td>211</td>
</tr>
<tr>
<td>Check School Report Screen</td>
<td>212</td>
</tr>
<tr>
<td>School Report Job Status</td>
<td>213</td>
</tr>
<tr>
<td>School Report Status</td>
<td>213</td>
</tr>
<tr>
<td>Appendix 1</td>
<td>214</td>
</tr>
<tr>
<td>Online Help</td>
<td>215</td>
</tr>
<tr>
<td>Screen-Specific Help</td>
<td>215</td>
</tr>
<tr>
<td>General Help</td>
<td>215</td>
</tr>
<tr>
<td>Contents of General Help</td>
<td>215</td>
</tr>
<tr>
<td>Viewing/Searching the General Help Index</td>
<td>216</td>
</tr>
<tr>
<td>ImmTrac2 Help Desk</td>
<td>216</td>
</tr>
</tbody>
</table>
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.

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.

For more information on how to submit data to or receive data from ImmTrac2, contact the ImmTrac2 Help Desk at 1-800-xxx-xxxx.
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.
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.
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.
5. The content that displays upon logging into ImmTrac2 is determined by your individual user rights.

6. 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.
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.

**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.

![Internet Options dialog box]

- **Settings**:
  - **Security**
    - Just go to the most likely site
    - Check for publisher’s certificate revocation
    - Check for server certificate revocation (requires restart)
    - Check for signatures on downloaded programs
    - Do not save encrypted pages to disk
    - Empty Temporary Internet Files folder when browser is closed
    - Enable Integrated Windows Authentication (requires restart)
    - Enable PinyinAssistant
    - Use SSL 2.0
    - Use SSL 3.0
    - Use TLS 1.0
    - Warn about invalid site certificates
    - Warn if changing between secure and not secure mode
    - Warn if forms submission is being redirected
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.

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.

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

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.

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

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:
   - “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.
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.

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.
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.
6. To edit current access, check the Select box for the access to be edited. Click the Select button.
7. Update the user’s role and/or status for the selected access and click the Update button.
8. Once a user’s access is updated, “Update in progress, press Save to keep” will appear within the Modify Access page.
9. 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:

1. Click the Manage Access/Account tab at the top of the ImmTrac2 home page.
2. Click Edit Organization under the Manage Access section of the menu panel.
3. 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.
4. Enter updates to organization information.
5. 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.

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:

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.
4. 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.

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.
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.

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

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

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.

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.

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.

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

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

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

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

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

4. Fill in the Last Name field and any other fields you wish to complete.

5. 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.

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

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

8. 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:

1. 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.

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

### 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.
3. At the Clinician Search screen, enter the first and/or last name of the clinician and click the Find button.

4. 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.

5. At the Edit Clinician Information page, click the Delete button

6. A box will open asking if you want to delete this clinician. Click the OK button.

7. ImmTrac2 will return you to the Manage Clinicians page.

Listing All Clinicians

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians page, click the **Clinician List** button.

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

4. Click the **Close** button to return to the Manage Clinicians page.
Chapter 9
Managing Inventory

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:

   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.
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.
Table 1: Reasons for adding or subtracting inventory

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

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.
3. 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.

4. 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](image)

5. 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:

1. 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](image)

**Trade Name**

1. Under **Update Low-Level Alerts by Vaccine Group**, click the underlined vaccine group to display the trade names.

2. 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.

3. Click the **Save** button.
**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 page]

**Table 2: Transaction Types**

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receipt of Inventory (REC)</td>
<td>Vaccines were added as new inventory.</td>
</tr>
<tr>
<td>Immunization Given (Immunize)</td>
<td>Vaccines were subtracted from inventory because of immunizations given.</td>
</tr>
<tr>
<td>Immunization Deleted (Delete)</td>
<td>Vaccines were added to inventory because they were deleted from a client's record.</td>
</tr>
<tr>
<td>Doses Transferred (TRA)</td>
<td>Vaccines were subtracted due to transfer to another site.</td>
</tr>
<tr>
<td>Borrowed In (BORROWEDIN)</td>
<td>Doses of vaccine added to inventory to pay back vaccine that was given to a client with a mismatch</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Borrowed Out (BORROWEDOUT)</td>
<td>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</td>
</tr>
<tr>
<td>Borrowed Imm Given (Borrowed)</td>
<td>Vaccines were subtracted from inventory because of immunizations given to a client with a mismatched funding program.</td>
</tr>
<tr>
<td>Spoilage Reported by Provider (3)</td>
<td>Vaccines were subtracted due to vaccines spoiling prior to expiration.</td>
</tr>
<tr>
<td>Expiration Reported by Provider (4)</td>
<td>Vaccines were subtracted due to vaccines expiring.</td>
</tr>
<tr>
<td>Lost or damaged in transit to Provider (5)</td>
<td>Vaccines were subtracted due to broken vials or faulty injections that occurred while being shipped.</td>
</tr>
<tr>
<td>Failure to store properly upon receipt by Provider (6)</td>
<td>Vaccines were subtracted due to improper storage.</td>
</tr>
<tr>
<td>Refrigeration failure reported by Provider (7)</td>
<td>Vaccines were subtracted due to improper refrigeration.</td>
</tr>
<tr>
<td>Lost or unaccounted for in Provider inventory (11)</td>
<td>Vaccines were subtracted due to lost inventory.</td>
</tr>
<tr>
<td>Other - not usable, reported by Provider (12)</td>
<td>Vaccines were subtracted due to other reasons not specified above.</td>
</tr>
<tr>
<td>Doses Recalled (RECALL)</td>
<td>Vaccines were subtracted due to recall.</td>
</tr>
<tr>
<td>Doses Administered (ADMIN)</td>
<td>Vaccines were subtracted due to giving dose(s) to a client—used for manual adjustment of inventory for reconciliation.</td>
</tr>
<tr>
<td>Doses Returned (RET)</td>
<td>Vaccines were added to inventory after being returned from another site.</td>
</tr>
<tr>
<td>Error Correction (ERR)</td>
<td>Vaccines added or subtracted due to error correction.</td>
</tr>
<tr>
<td>Doses Reconstituted (RECON)</td>
<td>Number of doses that were subtracted from an unreconstituted lot to form a new reconstituted lot</td>
</tr>
<tr>
<td>Transfer out Expired Inventory (TRAEXP)</td>
<td>Number of doses that were subtracted from an expired lot when a transfer of expired doses is created</td>
</tr>
<tr>
<td>Lot Deleted (LOTDELETE)</td>
<td>Number of doses that were subtracted from a lot when a vaccine lot was deleted</td>
</tr>
</tbody>
</table>
Table 3: Vaccine Transactions

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

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

Table 4: Transaction Totals

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

<table>
<thead>
<tr>
<th>Trans Code</th>
<th>Abbreviated code that identifies the transaction type.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans Description</td>
<td>Full transaction type.</td>
</tr>
<tr>
<td>Trans Count</td>
<td>Number of times a particular transaction type was performed within the dates you specified.</td>
</tr>
<tr>
<td>Trans Value</td>
<td>Quantity of doses added or subtracted by transaction type.</td>
</tr>
</tbody>
</table>

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.

**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.
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.
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.

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.
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 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:

<table>
<thead>
<tr>
<th>Client Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Search</td>
</tr>
<tr>
<td>Basic Search</td>
</tr>
<tr>
<td>Smart Search</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Client Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Search</td>
</tr>
<tr>
<td>Search by ImmTrac2 ID</td>
</tr>
<tr>
<td>* ImmTrac2 ID</td>
</tr>
<tr>
<td>Search by SSN and DOB</td>
</tr>
<tr>
<td>* SSN: - - - - -</td>
</tr>
<tr>
<td>Search by Medicaid ID</td>
</tr>
<tr>
<td>* Medicaid ID</td>
</tr>
</tbody>
</table>

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

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

3. 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.

4. If the client doesn’t appear under the possible matches, you must select one of the three consent options to continue.
   a. I have a signed consent and would like to add client
   b. I would like to request a consent form
c. I am not adding a client, but need to report doses administered for inventory reconciliation.

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.

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

8. The consent verification screen will display.

9. Verify the correct consent information is selected and click the Verify button to proceed.
10. Select Go to Client to edit client information

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.

- **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.

**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.
a. Last Name: required field when entering AKA information  
b. First Name: required field when entering AKA information  
c. 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.

   **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.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVE</td>
<td>Client associated with your organization</td>
</tr>
<tr>
<td>INACTIVE-LOST TO</td>
<td>Client has not responded to follow up</td>
</tr>
<tr>
<td>FOLLOW UP</td>
<td>contact</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>INACTIVE-MOGE</td>
<td>Moved or gone elsewhere</td>
</tr>
<tr>
<td>INACTIVE-MOOSA</td>
<td>Moved out of service area</td>
</tr>
<tr>
<td>INACTIVE-ONE TIME ONLY</td>
<td>Received an immunization once but is not a regular client</td>
</tr>
<tr>
<td>INACTIVE-OTHER</td>
<td>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)</td>
</tr>
<tr>
<td>INACTIVE-PERMANENTLY (DECEASED)</td>
<td>Client is deceased.</td>
</tr>
<tr>
<td>INACTIVE-UNKNOWN</td>
<td>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)</td>
</tr>
</tbody>
</table>

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.

   **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 Section](image)

   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) ▲**

**Responsible Person listing**

Add New

No Responsible Persons have been added for this client

**Details for Responsible Person:**

Click ‘Apply Changes’ after applying updates

*Last Name* | Street Address | *Relationship* | Primary
---|---|---|---
*First Name* | Other Address | P.O. Box | City
Middle Name | | | |
*Relationship* | | | |
Phone Number | | State | Zip
Extension | | |
Email | | |

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.

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](image)

   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.
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.
- 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.

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.

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Date Admin</th>
<th>Series</th>
<th>Vaccine [Trade Name]</th>
<th>Dose</th>
<th>Owned?</th>
<th>Reaction</th>
<th>Hist?</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTPaP</td>
<td>03/02/2008</td>
<td>1 of 5</td>
<td>DTaP, NOS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HepB</td>
<td>01/02/2008</td>
<td>1 of 3</td>
<td>HepB, NOS [HepB @]</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>03/02/2008</td>
<td>2 of 3</td>
<td>HepB, NOS [HepB @]</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotavirus</td>
<td>03/02/2008</td>
<td>1 of 3</td>
<td>Rotavirus, NOS</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Td/ItaP</td>
<td>03/02/2008</td>
<td></td>
<td>DTaP, NOS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Select</th>
<th>Vaccine Group</th>
<th>Vaccine</th>
<th>Earliest Date</th>
<th>Recommended Date</th>
<th>Past Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DTaP</td>
<td>DTaP, NOS</td>
<td>03/30/2008</td>
<td>05/02/2008</td>
<td>06/02/2008</td>
</tr>
<tr>
<td></td>
<td>MenA</td>
<td>MenA, NOS</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>08/02/2009</td>
</tr>
<tr>
<td></td>
<td>HepB</td>
<td>HepB, NOS</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hib</td>
<td>Hib, NOS</td>
<td>04/02/2009</td>
<td>04/02/2009</td>
<td>04/02/2009</td>
</tr>
<tr>
<td></td>
<td>Influenza-season</td>
<td>Influenza, NOS</td>
<td>07/02/2008</td>
<td>08/01/2010</td>
<td>08/02/2009</td>
</tr>
<tr>
<td></td>
<td>MMR</td>
<td>MMR</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>08/02/2009</td>
</tr>
<tr>
<td></td>
<td>Pneumococcal</td>
<td>PCV7</td>
<td>01/02/2010</td>
<td>01/02/2010</td>
<td>01/02/2010</td>
</tr>
<tr>
<td></td>
<td>Polio</td>
<td>Polio, NOS</td>
<td>02/13/2008</td>
<td>03/02/2008</td>
<td>04/02/2008</td>
</tr>
<tr>
<td></td>
<td>Rotavirus</td>
<td>Rotavirus, NOS</td>
<td>Maximum Age Exceeded</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>VeroVax</td>
<td>VeroVax</td>
<td>01/02/2009</td>
<td>01/02/2009</td>
<td>05/02/2009</td>
</tr>
</tbody>
</table>

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.

- 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.

  o 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.
  o 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.
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.
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.
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.
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**:

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**:
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:

<table>
<thead>
<tr>
<th>Job Name</th>
<th>User Name</th>
<th>Exchange Data Date</th>
<th>Process Start Date</th>
<th>Process End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>MyNewList</td>
<td>Aura Leigh Barrett</td>
<td>05/13/2004</td>
<td>05/13/2004</td>
<td>05/13/2004</td>
<td>COMPLETE</td>
</tr>
<tr>
<td>MyNewListError</td>
<td>Aura Leigh Barrett</td>
<td>05/13/2004</td>
<td>05/13/2004</td>
<td>05/13/2004</td>
<td>ERROR</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Column</th>
<th>Data type</th>
<th>Required</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Identifier</td>
<td>Char(32)</td>
<td>Y</td>
<td>Supplied by sender, used to uniquely identify a client.</td>
</tr>
<tr>
<td>First Name</td>
<td>Char(50)</td>
<td>Y</td>
<td>If Client does not have a first name,&quot;NO FIRST NAME&quot; must be entered in this field.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Char(50)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>Char(50)</td>
<td>Y</td>
<td>JR, III, etc.</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>Char(10)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth Date</td>
<td>Date(8)</td>
<td>Y</td>
<td>MMDDYYYY</td>
</tr>
<tr>
<td>Mothers First Name</td>
<td>Char(50)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mothers Maiden Last Name</td>
<td>Char(50)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Char(1)</td>
<td></td>
<td>Use the IR code set for Gender.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Char(55)</td>
<td></td>
<td>Residential address of responsible person.</td>
</tr>
<tr>
<td>Column</td>
<td>Data type</td>
<td>Required</td>
<td>Notes</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------</td>
<td>----------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mailing Address Line</td>
<td>Char(55)</td>
<td></td>
<td>Mailing address of responsible person. Use if mailing address is different from street address.</td>
</tr>
<tr>
<td>Other Address Line</td>
<td>Char(55)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Char(52)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Char(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip</td>
<td>Char(9)</td>
<td></td>
<td>If +4 zip is used, the first 5 characters and second 4 characters are concatenated into a single value, without separators.</td>
</tr>
</tbody>
</table>

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

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
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:

![Manage Roster List](image)

The Roster Lists you have created are displayed:

<table>
<thead>
<tr>
<th>Manage List</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>* New List Name</td>
<td>Save</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Client List</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Name</td>
</tr>
<tr>
<td>Test Roster List</td>
</tr>
</tbody>
</table>

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

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 #.

- 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®.
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®.
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.

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:

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, 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.

<table>
<thead>
<tr>
<th>Items to filter on</th>
<th>Client Factors</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Indian or Alaska Native</td>
<td>Whether the client is an American Indian or Alaska Native</td>
</tr>
<tr>
<td>Area Code</td>
<td>Area Code in which the client resides</td>
</tr>
<tr>
<td>Asian</td>
<td>Whether the client is Asian</td>
</tr>
<tr>
<td>Birth County</td>
<td>County of birth</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Date of birth</td>
</tr>
<tr>
<td>Black or African-American</td>
<td>Whether the client is Black or African-American</td>
</tr>
<tr>
<td>City</td>
<td>Current city in which the client resides</td>
</tr>
<tr>
<td>Comment</td>
<td>Any comments associated with the client record</td>
</tr>
<tr>
<td>Consent Indicator</td>
<td></td>
</tr>
<tr>
<td>County of Residence</td>
<td>Current county in which the client resides</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>Ethnicity of client</td>
</tr>
<tr>
<td>Gender</td>
<td>Gender of client</td>
</tr>
<tr>
<td>Has 2 or more immunizations</td>
<td>Whether the client has two or more immunizations</td>
</tr>
<tr>
<td>Language preferences</td>
<td>Language preferred by the client</td>
</tr>
<tr>
<td>Mother’s HBsAg Status</td>
<td></td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>Whether the client is Native Hawaiian or an Other Pacific Islander</td>
</tr>
<tr>
<td>Other Race</td>
<td>Whether the client is of a race not specified by the system, leading them to choose Other</td>
</tr>
<tr>
<td>-----------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Client ID</td>
<td>The Client ID within ImmTrac2</td>
</tr>
<tr>
<td>Phone number</td>
<td>Current phone number</td>
</tr>
<tr>
<td>Primary Address Indicator</td>
<td>Whether the client has a primary address on file in ImmTrac2</td>
</tr>
<tr>
<td>Primary Care physician</td>
<td>Client’s primary care physician</td>
</tr>
<tr>
<td>Relationship to client</td>
<td>The Responsible Person’s relationship to the client</td>
</tr>
<tr>
<td>School</td>
<td>Current school the client attends</td>
</tr>
<tr>
<td>State</td>
<td>Current state of residence</td>
</tr>
<tr>
<td>White</td>
<td>Whether the client is White/Caucasian</td>
</tr>
<tr>
<td>Zip code</td>
<td>Zip Code in which the client current resides</td>
</tr>
</tbody>
</table>

### Immunization Factors

<table>
<thead>
<tr>
<th>Administering clinician</th>
<th>Clinician who administered the immunization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic site</td>
<td>Clinic site at which the immunization was administered</td>
</tr>
<tr>
<td>Display Inadvertent Vaccine Group</td>
<td></td>
</tr>
<tr>
<td>From Inventory</td>
<td>Whether the immunization was from inventory in ImmTrac2</td>
</tr>
<tr>
<td>Trade Name</td>
<td>Vaccine’s trade name</td>
</tr>
<tr>
<td>Vaccination date</td>
<td>Date on which the immunization was administered</td>
</tr>
<tr>
<td>Vaccine</td>
<td>Vaccine administered</td>
</tr>
<tr>
<td>Vaccine Eligibility</td>
<td>Whether the immunization was Vaccines for Children (VFC) eligible</td>
</tr>
<tr>
<td>Vaccine Lot Other Inv</td>
<td>Group in which the vaccine is labeled</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Vaccine Group</td>
<td>Group in which the vaccine is labeled</td>
</tr>
<tr>
<td>Vaccine Lot</td>
<td>The log from which the vaccine was aliquoted</td>
</tr>
<tr>
<td>Valid immunization</td>
<td>Whether the immunization is valid</td>
</tr>
</tbody>
</table>

**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.

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.
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.
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.

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.

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.

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.
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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Records Analyzed</th>
<th>Inactive</th>
<th>Records Meeting Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>36-72 Months of Age</td>
<td>50</td>
<td>0</td>
<td>50</td>
</tr>
<tr>
<td>24-35 Months of Age</td>
<td>51</td>
<td>0</td>
<td>51</td>
</tr>
<tr>
<td>12-23 Months of Age</td>
<td>54</td>
<td>0</td>
<td>54</td>
</tr>
<tr>
<td>&lt;12 Months of Age</td>
<td>46</td>
<td>0</td>
<td>46</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>201</strong></td>
<td>0</td>
<td><strong>201</strong></td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Age (months)</th>
<th>Up-to-Date</th>
<th>Late @ Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(UTD)</td>
<td></td>
</tr>
<tr>
<td>36-72 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>72</td>
<td>92.0%</td>
<td>82.0%</td>
</tr>
<tr>
<td>24</td>
<td>88.0%</td>
<td>82.0%</td>
</tr>
<tr>
<td>12</td>
<td>92.0%</td>
<td>90.0%</td>
</tr>
<tr>
<td>7</td>
<td>92.0%</td>
<td>88.0%</td>
</tr>
<tr>
<td>24-35 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>97.0%</td>
<td>90.0%</td>
</tr>
<tr>
<td>12</td>
<td>78.0%</td>
<td>94.0%</td>
</tr>
<tr>
<td>7</td>
<td>76.0%</td>
<td>94.0%</td>
</tr>
<tr>
<td>12-23 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>90.0%</td>
<td>84.0%</td>
</tr>
<tr>
<td>7</td>
<td>66.0%</td>
<td>84.0%</td>
</tr>
<tr>
<td>&lt;12 Months of Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>89.0%</td>
<td>86.0%</td>
</tr>
</tbody>
</table>

1) UTD by 7 months equals 3 DTaP, 3 HepB, 3 HIB, 3 Polio
2) UTD by 12 months equals 5 DTaP, 3 HepB, 3 HIB, 3 Polio
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella
4) UTD by 36 months equals 3 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

<table>
<thead>
<tr>
<th>UTD Age</th>
<th>DTaP</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Prevnar</th>
<th>Varicella</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>5 Months</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td></td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>9 Months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td></td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>13 Months</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td></td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>16 Months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>19 Months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>21 Months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>24 Months</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>72 Months</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>1</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>UTD Age</th>
<th>DTaP</th>
<th>Hep B</th>
<th>Hib</th>
<th>MMR</th>
<th>Polio</th>
<th>Prevnar</th>
<th>Varicella</th>
<th>Total Meeting Age Criteria</th>
<th>% Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Month</td>
<td>183</td>
<td>104</td>
<td>107</td>
<td></td>
<td>175</td>
<td>40</td>
<td></td>
<td>201</td>
<td>17.4%</td>
</tr>
<tr>
<td>5 Months</td>
<td>180</td>
<td>102</td>
<td>100</td>
<td></td>
<td>175</td>
<td>42</td>
<td></td>
<td>201</td>
<td>17.8%</td>
</tr>
<tr>
<td>9 Months</td>
<td>178</td>
<td>104</td>
<td>100</td>
<td></td>
<td>161</td>
<td>42</td>
<td></td>
<td>201</td>
<td>19.4%</td>
</tr>
<tr>
<td>13 Months</td>
<td>179</td>
<td>104</td>
<td>100</td>
<td></td>
<td>181</td>
<td>42</td>
<td></td>
<td>201</td>
<td>19.0%</td>
</tr>
<tr>
<td>16 Months</td>
<td>125</td>
<td>143</td>
<td>148</td>
<td></td>
<td>141</td>
<td>42</td>
<td></td>
<td>155</td>
<td>28.2%</td>
</tr>
<tr>
<td>19 Months</td>
<td>163</td>
<td>105</td>
<td>127</td>
<td>118</td>
<td>97</td>
<td>19</td>
<td>115</td>
<td>149</td>
<td>.%</td>
</tr>
<tr>
<td>21 Months</td>
<td>163</td>
<td>117</td>
<td>115</td>
<td>121</td>
<td>101</td>
<td>25</td>
<td>113</td>
<td>148</td>
<td>.%</td>
</tr>
<tr>
<td>24 Months</td>
<td>107</td>
<td>123</td>
<td>137</td>
<td>151</td>
<td>655</td>
<td>58</td>
<td>130</td>
<td>147</td>
<td>4.1%</td>
</tr>
<tr>
<td>72 Months</td>
<td>45</td>
<td>45</td>
<td>45</td>
<td>45</td>
<td>45</td>
<td>45</td>
<td>45</td>
<td>56</td>
<td>.%</td>
</tr>
</tbody>
</table>

Forms and Reports ImmTrac2 146
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     | 10.5% |
| 1 Vaccine Needed            | 2     | 40.0% |
| 2 Vaccines Needed           | 2     | 40.0% |
| 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

<table>
<thead>
<tr>
<th>Late Start Rates</th>
<th>100.0%</th>
<th>36-72 mo. age group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning &gt; 3 mo. age</td>
<td>21.0%</td>
<td>24-35 mo. age group</td>
</tr>
<tr>
<td></td>
<td>98.0%</td>
<td>12-23 mo. age group</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Drop Off Rates</th>
<th>24 month status</th>
<th>24 month status</th>
</tr>
</thead>
<tbody>
<tr>
<td>60-72</td>
<td>.0%</td>
<td>24 month status</td>
</tr>
<tr>
<td>48-59</td>
<td>.0%</td>
<td>24 month status</td>
</tr>
<tr>
<td>36-47</td>
<td>.0%</td>
<td>24 month status</td>
</tr>
<tr>
<td>24-35 mo. age</td>
<td>.0%</td>
<td>24 month status</td>
</tr>
<tr>
<td>12-23 mo. age</td>
<td>5.6%</td>
<td>12 month status</td>
</tr>
</tbody>
</table>

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                                      | 11  | 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

<table>
<thead>
<tr>
<th>Age Group on Evaluation Date</th>
<th>Total Patients in Age Group</th>
<th>Patients Not up to Date</th>
<th>Missed Opportunity on Last Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Count</td>
<td>Percent</td>
</tr>
<tr>
<td>~&lt;12 months</td>
<td>6</td>
<td>5</td>
<td>83.3%</td>
</tr>
<tr>
<td>7 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12-23 months</td>
<td>20</td>
<td>16</td>
<td>80.0%</td>
</tr>
<tr>
<td>12 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24-35 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>36-52 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>52 months</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24 month benchmark</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 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 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.

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.
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.

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.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
<th>Clients</th>
</tr>
</thead>
</table>

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 Table](image)

**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:

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

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:

   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.

<table>
<thead>
<tr>
<th>Immunizations Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP, NOS</td>
</tr>
<tr>
<td>HepA, NOS</td>
</tr>
<tr>
<td>HepB, NOS</td>
</tr>
<tr>
<td>Hib, NOS</td>
</tr>
<tr>
<td>MMR</td>
</tr>
<tr>
<td>PCV13</td>
</tr>
<tr>
<td>Polio, NOS</td>
</tr>
<tr>
<td>Varicella</td>
</tr>
</tbody>
</table>
Mailing Labels

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

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.

---

**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.
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.

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:

1. Click Manage Custom Letter under Reports on the menu panel.

2. Click the New Custom Letter hyperlink.

3. At the Create New Custom Letter screen, enter the following:
   a. 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.
   b. Include Client Address:
      i. Check the box to include the client’s address at the top of the letter.
   c. To include a name with the client address, choose from the drop down list one of the following:
      i. (no name) - default
      ii. Client name
      iii. 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.**
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.
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 name to return to the list of requests.
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.

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:
7. 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.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>V01</th>
<th>V02</th>
<th>V03</th>
<th>V04</th>
<th>V05</th>
<th>TXA01</th>
<th>TXA02</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smallpox</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>HPV</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Plague</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>10</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>17</td>
</tr>
</tbody>
</table>

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.
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.

### Description

<table>
<thead>
<tr>
<th>Row</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1</td>
<td>Clients who were under 1 year of age at the time a dose was administered</td>
</tr>
<tr>
<td>1-6</td>
<td>Clients who were 1 through 6 years of age at the time a dose was administered</td>
</tr>
<tr>
<td>7-18</td>
<td>Clients who were 7 through 18 years of age at the time a dose was administered</td>
</tr>
<tr>
<td>19+</td>
<td>Clients who were 19 years of age or older at the time a dose was administered</td>
</tr>
</tbody>
</table>

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](image)

   - **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 drop downs provided.**
   - **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.**
   - **Select Included Reports: Check the boxes indicating which report types are requested – Memo, Summary, and/or Detail.**
   - **Click Generate. The reports drop into a processing queue:**

   ![Forms and Reports ImmTrac2](image)
6. 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

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

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 $0.00.
### Sample Summary Billing Report

**Billable Vaccination Summary**

Quarter: 01/01/2011 - 12/31/2011

<table>
<thead>
<tr>
<th>Vaccine/Brand</th>
<th>Doses Billed</th>
<th>Price Per Vaccination</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>HPV, NOS, HPV, NOS</td>
<td>1.0</td>
<td>$150.00</td>
<td>$150.00</td>
</tr>
<tr>
<td>HPV, NOS, HPV, NOS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>$150.00</td>
</tr>
</tbody>
</table>

**Forms and Reports** ImmTrac2 172

### Sample Detail Billing Report

**Billable Vaccination Detail Listing**

Quarter: 10/01/2011 - 12/31/2011

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>Brand</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>HPV, NOS</td>
<td>HPV, NOS</td>
<td>$150.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State ID</th>
<th>Vaccination Date</th>
<th>Client Name</th>
<th>Date of Birth</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>7177825</td>
<td>10/11/2011</td>
<td>KITTRIDGE, LILLITH JANE</td>
<td>08/10/1998</td>
<td>$150.00</td>
</tr>
</tbody>
</table>

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.

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”.

6. Click Generate Report to generate the report. The report will be displayed in a new window.
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]

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

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

   ![Header]

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

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Qtr 1</th>
<th>Qtr 2</th>
<th>Qtr 3</th>
<th>Qtr 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>9</td>
<td>4</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 45</td>
</tr>
<tr>
<td>2013</td>
<td>2</td>
<td>0</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 8</td>
</tr>
<tr>
<td>2012</td>
<td>2</td>
<td>0</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 9</td>
</tr>
<tr>
<td>2011</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 5</td>
</tr>
<tr>
<td>2010</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 5</td>
</tr>
<tr>
<td>2009</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>Unduplicated Annual Count:</strong> 5</td>
</tr>
</tbody>
</table>
4. The fourth section displays by quarter the number of client searches performed by the specified organization:

<table>
<thead>
<tr>
<th>Year</th>
<th>Qtr 1</th>
<th>Qtr 2</th>
<th>Qtr 3</th>
<th>Qtr 4</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>273</td>
<td>372</td>
<td>4,309</td>
<td></td>
<td>4,954</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Pau Test</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>ViewOnlyNonProvw</td>
<td>5</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>joel linn</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Marianne Swift</td>
<td>322</td>
<td>322</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>644</td>
</tr>
<tr>
<td>Paulina Baca</td>
<td>324</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>324</td>
</tr>
<tr>
<td>jordan braun</td>
<td>11</td>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>22</td>
</tr>
<tr>
<td>bob jones</td>
<td>42</td>
<td>42</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>84</td>
</tr>
<tr>
<td>Kimodorizzi</td>
<td>84</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>84</td>
</tr>
</tbody>
</table>

**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:
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.

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:
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.

<table>
<thead>
<tr>
<th>Patient ID</th>
<th>Date of Birth</th>
<th>Vaccine</th>
<th>Date Administered</th>
<th>Date Entered</th>
<th>Days between administration and entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>698759</td>
<td>01/01/2015</td>
<td>HepA-HepB</td>
<td>01/16/2015</td>
<td>01/16/2015</td>
<td>0</td>
</tr>
<tr>
<td>6987598</td>
<td>01/01/2015</td>
<td>HepB-HepB</td>
<td>01/10/2015</td>
<td>01/10/2015</td>
<td>0</td>
</tr>
<tr>
<td>6987592</td>
<td>01/01/2015</td>
<td>Tetap</td>
<td>01/10/2015</td>
<td>01/10/2015</td>
<td>0</td>
</tr>
<tr>
<td>6987592</td>
<td>01/01/2015</td>
<td>DTap</td>
<td>01/10/2015</td>
<td>01/10/2015</td>
<td>0</td>
</tr>
<tr>
<td>6987592</td>
<td>01/01/2015</td>
<td>DTap</td>
<td>01/10/2015</td>
<td>01/10/2015</td>
<td>0</td>
</tr>
<tr>
<td>6987592</td>
<td>01/01/2015</td>
<td>DTap</td>
<td>01/10/2015</td>
<td>01/10/2015</td>
<td>0</td>
</tr>
</tbody>
</table>
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.
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.

Vaccine Accountability – Summary Report

1. The Summary Report contains accountability data grouped by Vaccine Group, with all lot numbers combined.
Understanding Vaccine Accountability Report

Columns and Calculations:

<table>
<thead>
<tr>
<th></th>
<th>+ Starting Inventory</th>
<th>+ Doses Received</th>
<th>- Doses Reported</th>
<th>- Doses Expired</th>
<th>- Doses Spoiled</th>
<th>- Doses Wasted</th>
<th>- Doses Transferred Out</th>
<th>+ Ending Inventory</th>
<th>Accounted for Doses</th>
<th>Accounted for %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>CODE</th>
<th>+/-</th>
<th>DESCRIPTION</th>
<th>SOURCE OF TRANSACTION</th>
<th>SOURCE TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>B</td>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>Add inventory is saved, Order/transfer Received</td>
<td>automated</td>
</tr>
<tr>
<td>C</td>
<td>RET</td>
<td>Doses Returned</td>
<td>Rejected transfer that is restocked in inventory</td>
<td>automated</td>
</tr>
<tr>
<td>D</td>
<td>RET</td>
<td>Doses Returned</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>E</td>
<td>TRA</td>
<td>- transfers out of inventory</td>
<td>Orders from or transfers from inventory</td>
<td>automated</td>
</tr>
<tr>
<td>F</td>
<td>TRA</td>
<td>Doses Transferred</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>G</td>
<td>Immunize</td>
<td>Immunizations Given</td>
<td>Imm is added to client’s record</td>
<td>automated</td>
</tr>
<tr>
<td>H</td>
<td>Delete</td>
<td>+ Immunizations Deleted</td>
<td>Imm is deleted from client record</td>
<td>automated</td>
</tr>
<tr>
<td>I</td>
<td>ERR</td>
<td>+ or - Error Correction</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>J</td>
<td>RECALL</td>
<td>- Doses Recalled</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>K</td>
<td>ADMIN</td>
<td>- Doses Administered</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>M</td>
<td>3</td>
<td>- Spoilage reported by Provider</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>N</td>
<td>4</td>
<td>- Expiration reported by Provider</td>
<td>Counts auto-generated when reports run</td>
<td>automated</td>
</tr>
<tr>
<td>O</td>
<td>5</td>
<td>- Lost/damaged in transit to Provider</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>P</td>
<td>6</td>
<td>- Failure to Store properly.........</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>Q</td>
<td>7</td>
<td>- Refrigeration failure.........</td>
<td>Edit Inventory reason pick list</td>
<td>manual</td>
</tr>
<tr>
<td>R</td>
<td>11</td>
<td>-</td>
<td>Lost or Unaccounted for</td>
<td>Edit Inventory reason pick list</td>
</tr>
<tr>
<td>S</td>
<td>12</td>
<td>-</td>
<td>Other - Not usable, per Provider</td>
<td>Edit Inventory reason pick list</td>
</tr>
<tr>
<td>T</td>
<td>BORROWEDIN</td>
<td>+</td>
<td>Borrowed In</td>
<td>Edit Inventory reason pick list</td>
</tr>
<tr>
<td>U</td>
<td>BORROWEDOUT</td>
<td>-</td>
<td>Borrowed Out</td>
<td>Edit Inventory reason pick list</td>
</tr>
<tr>
<td>V</td>
<td>TRAEXP</td>
<td>n/a</td>
<td>Transfer out Expired Inventory</td>
<td>Transfer of Expired Inventory (i.e., back to mfg)</td>
</tr>
<tr>
<td>W</td>
<td>BORROWED</td>
<td>-</td>
<td>Borrowed Imm Given</td>
<td>Borrowed Imm is added to client record</td>
</tr>
<tr>
<td>X</td>
<td>LOTDELETE</td>
<td>-</td>
<td>Lot Deleted</td>
<td>Edit Inventory Delete button</td>
</tr>
</tbody>
</table>

**Inventory Transactions within Vaccine Accountability Report columns**

<table>
<thead>
<tr>
<th>+ Starting Inventory</th>
<th>+ Doses Received</th>
<th>- Doses Reported</th>
<th>- Doses Expired</th>
<th>- Doses Spoiled</th>
<th>- Doses Wasted</th>
<th>- Doses Transferred Out</th>
<th>+ Ending Inventory</th>
<th>Accounted for Doses</th>
<th>Accounted for %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
</tr>
<tr>
<td>ending inventory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>from</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>prior report run</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A, B, C, D, T and I</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G*, W*, (H*)</td>
<td>N, V</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>J, S, and I when</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>positive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>N, V</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M, P, Q</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E, F, O, U, X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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


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 alertis@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.

**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.

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.](image)

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.

<table>
<thead>
<tr>
<th>Job Name</th>
<th>User Name</th>
<th>Exchange Data Date</th>
<th>Process Start Date</th>
<th>Process End Date</th>
<th>Status</th>
</tr>
</thead>
</table>

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:

<table>
<thead>
<tr>
<th>organization</th>
<th>IR Physicians • user Chris Mattson • role ImmTrac2 Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download Files for: Job 10/19/2012 11:37:19</td>
<td></td>
</tr>
<tr>
<td>HL7 251 Response (1KB)</td>
<td></td>
</tr>
<tr>
<td>Inbound HL7 251 File (1KB)</td>
<td></td>
</tr>
<tr>
<td>Download Log for: Job 10/19/2012 11:37:19</td>
<td></td>
</tr>
<tr>
<td>File</td>
<td>User Name</td>
</tr>
<tr>
<td>HL7 251 Response</td>
<td>Chris Mattson</td>
</tr>
<tr>
<td>Summary Information for: Job 10/19/2012 11:37:19</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Client</td>
</tr>
<tr>
<td>Processed</td>
<td>1</td>
</tr>
<tr>
<td>Accepted</td>
<td>0</td>
</tr>
<tr>
<td>New</td>
<td>0</td>
</tr>
<tr>
<td>Updated</td>
<td>0</td>
</tr>
<tr>
<td>Deleted</td>
<td>-</td>
</tr>
<tr>
<td>Already in ImmTrac2</td>
<td>0</td>
</tr>
<tr>
<td>Rejected</td>
<td>1</td>
</tr>
<tr>
<td>Pending</td>
<td>0</td>
</tr>
<tr>
<td>Unprocessed (client rejected)</td>
<td>-</td>
</tr>
<tr>
<td>Inventory Updated</td>
<td>0</td>
</tr>
<tr>
<td>Inventory Not Updated</td>
<td>0</td>
</tr>
</tbody>
</table>

- 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 for 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:

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.

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.

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

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Record Identifier</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Last Name</th>
<th>Birth Date</th>
</tr>
</thead>
</table>

Data Exchange ImmTrac2 195
## 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

<table>
<thead>
<tr>
<th>File</th>
<th>User Name</th>
<th>Download Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outbound Demographic File</td>
<td>Chris Mattson</td>
<td>08/07/2012 11:31:38</td>
</tr>
<tr>
<td>Outbound Immunization File</td>
<td>Chris Mattson</td>
<td>08/07/2012 11:31:47</td>
</tr>
</tbody>
</table>

### Summary Information for: 9.ii.a-OR-HMO_Query

<table>
<thead>
<tr>
<th>Description</th>
<th>Client</th>
<th>Immunization</th>
<th>Comment</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Summary Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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

---

**Data Exchange** ImmTrac2 196
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:

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

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

- **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

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.

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
  o Displays the trade name of the vaccination received.
• Dose
  o 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:

<table>
<thead>
<tr>
<th>Vaccine Group</th>
<th>Displays the vaccine group name.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine</td>
<td>Displays the specific vaccine name.</td>
</tr>
<tr>
<td>Earliest Date</td>
<td>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.</td>
</tr>
<tr>
<td>Recommended Date</td>
<td>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.</td>
</tr>
<tr>
<td>Past Due Date</td>
<td>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.</td>
</tr>
</tbody>
</table>
Note:
The Earliest Date, Recommended Date, and Past Due Date are the same if a school or children’s facility grade level tracking schedule is selected. Students are incomplete for that vaccine starting on this date. The Earliest Date is the recommended date for the student to receive the vaccine.

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

**Green:** fills the background when the current date is on or after the recommended or past due date.

**Grey:** fills the background when a vaccine cannot be given because that immunization series is complete, contraindicated, maximum age exceeded, or the client has immunity or medical exemption.

**Maximum Age Exceeded:** reflects whether a student has exceeded the maximum age to receive a specific vaccine. For example, if a student has already reached the age of five and has not completed the Hib series, then the recommendation for Hib at the bottom of the student immunization history will show Maximum Age Exceeded.

**Maximum Doses Met or Exceeded for Vaccine Group:** indicates that the maximum number of doses recommended have been administered for the specified vaccine series according to the tracking schedule.

**Complete:** indicates that an immunization series has been completed according to the tracking schedule.

**Immunity Recorded for Vaccine Group:** indicates history of disease or vaccine history. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.

**Contraindicated:** indicates history of disease, or the vaccine should not be given for medical reasons. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.
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
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)
Reports Available for Schools

This section can generate three student reports within the selected list:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student List</td>
<td>Displays the name and date of birth for each student on the list sorted alphabetically by last name.</td>
</tr>
<tr>
<td>Student Immunization History List</td>
<td>Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.</td>
</tr>
<tr>
<td>Immunization Due</td>
<td>Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.</td>
</tr>
</tbody>
</table>

Select Tracking Schedule

Choose the appropriate tracking schedule from the drop down menu. This function allows users to set the tracking schedule for each report in order to evaluate all of the records of all the students listed based on the school law requirements for their grade level to identify those students who are incomplete.

Generating the Student List Report

1. Click the Student List link.
2. The Student List report will open in a PDF document.
3. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Student Immunization History List Report
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 though 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.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Displays the student’s last name and provides a link back to the Student Immunization History screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Displays the student’s first name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Displays the student’s middle name.</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Displays the student’s birth date.</td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
<th>Students</th>
<th>Target From</th>
<th>Target To</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/29/2014 03:55 AM</td>
<td>06/29/2014 03:55 AM</td>
<td>100%</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/15/2014 01:05 PM</td>
<td>06/15/2014 01:05 PM</td>
<td>100%</td>
<td>1</td>
<td>09/15/2014</td>
<td>09/15/2014</td>
</tr>
</tbody>
</table>

### School Report Status

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Requested</th>
<th>Started</th>
<th>Completed</th>
<th>Status</th>
</tr>
</thead>
</table>
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: alertis@state.or.us
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.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Web Page/Section</th>
<th>Characters Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter New Client/Personal Information, Manage Client/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Enter New Client/Personal Information, Manage Client/ Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter New Client/Personal Information, Manage Client/ Personal Information</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.</td>
</tr>
<tr>
<td>Mother's First Name</td>
<td>Enter New Client/Personal Information, Manage Client/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Mother's Maiden Last Name</td>
<td>Enter New Client/Personal Information, Manage Client/ Personal Information</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party First Name</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Responsible Party Middle Name</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, apostrophes, and periods.</td>
</tr>
<tr>
<td>Responsible Party Last Name</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes.</td>
</tr>
<tr>
<td>Street Address</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>Other Address</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>PO Box</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>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.</td>
</tr>
<tr>
<td>E-mail Address</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Must contain &quot;@&quot; symbol and period. Do not save quotes.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only numeric characters and dashes. Do not save quotes.</td>
</tr>
<tr>
<td>City</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only alpha characters, dashes, and apostrophes. Do not save quotes.</td>
</tr>
<tr>
<td>Zip</td>
<td>Enter New Client/Responsible Person(s), Manage Client/ Responsible Person(s)</td>
<td>Allow only numeric characters. Do not save quotes.</td>
</tr>
</tbody>
</table>
### Disallowed Address Entries

<table>
<thead>
<tr>
<th>Disallowed Address Entries</th>
</tr>
</thead>
<tbody>
<tr>
<td>DO NOT USE</td>
</tr>
<tr>
<td>UNKNOWN</td>
</tr>
<tr>
<td>GENERAL DELIVERY</td>
</tr>
<tr>
<td>DECEASED</td>
</tr>
<tr>
<td>ADDRESS</td>
</tr>
<tr>
<td>FAMILY PLANNING</td>
</tr>
<tr>
<td>PLANN PARENTHOOD</td>
</tr>
</tbody>
</table>

### Disallowed First Name Entries

The following chart lists first name entries that will not be validated in ImmTrac2.

<table>
<thead>
<tr>
<th>Disallowed First Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADOPT</td>
</tr>
<tr>
<td>ADOPTIVE</td>
</tr>
<tr>
<td>AF BABY</td>
</tr>
<tr>
<td>BB</td>
</tr>
<tr>
<td>BABY</td>
</tr>
<tr>
<td>BABY B</td>
</tr>
<tr>
<td>BABY BOY</td>
</tr>
<tr>
<td>BABY G</td>
</tr>
<tr>
<td>BABY GIRL</td>
</tr>
<tr>
<td>BABYB</td>
</tr>
<tr>
<td>BABYBOY</td>
</tr>
<tr>
<td>BABYGIRL</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>BG</td>
</tr>
<tr>
<td>BOY</td>
</tr>
<tr>
<td>BOY I</td>
</tr>
<tr>
<td>BOY II</td>
</tr>
<tr>
<td>CHILD</td>
</tr>
<tr>
<td>CSS</td>
</tr>
<tr>
<td>FEMALE</td>
</tr>
<tr>
<td>FIRE DEPT</td>
</tr>
<tr>
<td>GIRL</td>
</tr>
<tr>
<td>GIRL I</td>
</tr>
<tr>
<td>GIRL II</td>
</tr>
</tbody>
</table>

**Disallowed Last Name Entries**

The following chart lists last name entries that will not be validated in ImmTrac2.

<table>
<thead>
<tr>
<th>Disallowed Last Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADOPT</td>
</tr>
<tr>
<td>ADOPTIVE</td>
</tr>
<tr>
<td>A BABY</td>
</tr>
<tr>
<td>A F BABY</td>
</tr>
<tr>
<td>AF</td>
</tr>
<tr>
<td>AF BABY</td>
</tr>
<tr>
<td>AF BABY BO</td>
</tr>
<tr>
<td>AF BABY GI</td>
</tr>
<tr>
<td>AFBABY</td>
</tr>
<tr>
<td>B C S</td>
</tr>
<tr>
<td>B S C</td>
</tr>
<tr>
<td>BABY</td>
</tr>
<tr>
<td>BABY BOY</td>
</tr>
</tbody>
</table>

Appendix 2 ImmTrac2 221
<table>
<thead>
<tr>
<th>BABYBOY</th>
<th>GIRL</th>
<th>RBABY</th>
</tr>
</thead>
<tbody>
<tr>
<td>BABY GIRL</td>
<td>GSST</td>
<td>SBA</td>
</tr>
<tr>
<td>BABYGIRL</td>
<td>H BABY BOY</td>
<td>SBABY</td>
</tr>
<tr>
<td>BCS</td>
<td>I</td>
<td>SCI</td>
</tr>
<tr>
<td>BCSW</td>
<td>INFANT</td>
<td>SB</td>
</tr>
<tr>
<td>BOY</td>
<td>INFANT BOY</td>
<td>SC</td>
</tr>
<tr>
<td>BRT</td>
<td>INFANT FEM</td>
<td>SIGNATURE</td>
</tr>
<tr>
<td>BSC</td>
<td>INFANT GIRL</td>
<td>SMRT</td>
</tr>
<tr>
<td>CAC</td>
<td>INFANTBOY</td>
<td>SRB</td>
</tr>
<tr>
<td>CS</td>
<td>INFANTGIRL</td>
<td>SRFC</td>
</tr>
<tr>
<td>C S S</td>
<td>INFANTMALE</td>
<td>SRP</td>
</tr>
<tr>
<td>CAC</td>
<td>LSS</td>
<td>SS</td>
</tr>
<tr>
<td>CBS</td>
<td>LCFD</td>
<td>TAO</td>
</tr>
<tr>
<td>CCS</td>
<td>LCFS</td>
<td>UN</td>
</tr>
<tr>
<td>CFCFS</td>
<td>LCSF</td>
<td>UNK</td>
</tr>
<tr>
<td>CS</td>
<td>LNAME</td>
<td>UNKN</td>
</tr>
<tr>
<td>CSS</td>
<td>LS</td>
<td>UNKNOWN</td>
</tr>
</tbody>
</table>
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.
Index

C
Clinicians
adding ................................................ 56
deleting .............................................. 62
editing ................................................ 58
listing all ............................................. 63
merging ............................................. 60

D
Deduplications
client records ................................... 102
Disallowed
address entries ................................... iv
first name entries ............................... iv
last name entries ................................. v
Drop Down Lists ..................................... 90

H
Help
ImmTrac2 help desk ........................... iii
general ................................................. ii
screen-specific ..................................... ii

I
Immunizations
deleting owned ................................ 116
duplicate ........................................... 112
editing or deleting historical ........... 114
editing owned .................................. 115
entering ........................................... 110
immunization record ....................... 106
Reports
ad hoc .......................................... 137
assessment .................................. 144
prerequisite override ....................... 114
registry ............................................ ix
vaccines recommended ................... 108
Clients
personal information ......................... 91
Inventory
active / inactive ................................... 68
adding ................................................ 66
alerts ................................................. 71
printing ........................................... 73
updating .......................................... 69
viewing ........................................... 67
viewing transactions ....................... 73
Inventory t
transfers
creating ........................................... 81
Inventory transfers
accepting or rejecting ....................... 82
shipping and restocking ................... 84

P
Clients
address information ......................... 96
aka section ........................................ 92
client notes ....................................... 100
cra event information ..................... 103
saving ............................................. 101
editing ............................................. 90
entering ........................................... 90
finding ........................................... 87, 200
organization information ................. 93
client comments ............................... 99
responsible persons ........................ 97
Physicians
adding ................................................ 49
deleting ............................................. 53
editing ............................................. 51
listing all ............................................ 56

R
Reminder Recall ................................. 157
custom letters .................................. 164
extract client data ............................ 163
mailing labels ................................. 162
client query listing ......................... 162
reminder card .................................. 161
reminder letters ............................... 159
Reports
ad hoc count .................................. 142
ad hoc list ........................................ 139
benchmark ....................................... 153
billing ............................................... 171
certificate of immunization status (cis) ....................................................131
data entry compliance ................. 179
immunization history .................. 133
immunizations needed .................. 134
late data entry detail .................... 179
group clients ................................. 156
provider data entry ....................... 178
provider participation ................... 176
transaction summary .................... 84
vaccine accountability................... 180
vaccine administration record-adult ....................................................136
vaccine administration record- pediatric ........................................... 135
vaccine eligibility by age group ......170
vaccine eligibility by vaccine group .. 169
Roster Lists
managing ......................................... 124
uploading ................................. 119

S
Schools
adding ............................................ 44
deleting ................................. 47
editing ......................................... 45
listing all .................................... 48

T
Tab
forms ................................. 131

V
Vaccines
ordering ........................................ 80
viewing orders ............................... 78
Validation
client entry data ................................ ii