



**TEXAS**  
Health and Human  
Services

Texas Department of State  
Health Services

*Texas Immunization Registry*

# ImmTrac2 Quick Guide: How to Resolve Questionable Matches



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## Purpose

This document is intended to provide background and step-by-step instructions to providers or organizations who report manually in ImmTrac2 on how to resolve questionable matches.

### What is a Questionable Match?

A questionable match is a registry client record that has been flagged or identified as a potential match to another registry client record, (i.e., more than one record could exist for the patient).

When questionable matches exist, it prevents patient and immunization data reported by organizations to be updated accurately since the system cannot determine which registry client record the data should be saved to.

It is important for providers and organizations to work with the registry to identify and resolve questionable matches to ensure:

- Patient record completeness, and
- Data quality resolution.

### Need Help?

Review the content in this quick guide and if you still require assistance, please contact our Customer Support at:

Phone: 800-348-9158, Option 1

Email: [ImmTrac2@dshs.texas.gov](mailto:ImmTrac2@dshs.texas.gov)

## Identify Questionable Matches

While performing routine tasks in ImmTrac2, you may encounter ImmTrac2 Client Record(s) that appear to be like your patient. You need to research the ImmTrac2 Client Record(s) found to determine if they are that of your patient (i.e., patient has more than one record) or if the record is for a unique patient (i.e., not your patient).

1. Log into ImmTrac2.
2. On the left-sided menu, select **manage client** under Clients. Refer to Figure 1: ImmTrac2 Left-Sided Menu, **manage client**.

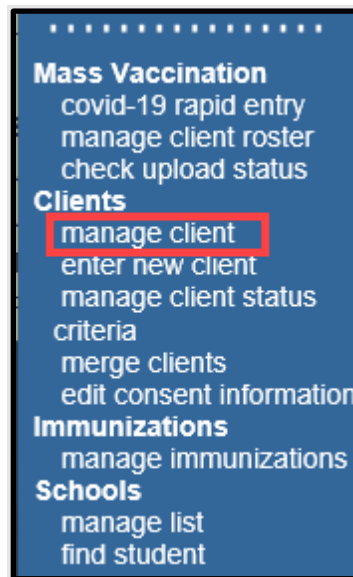
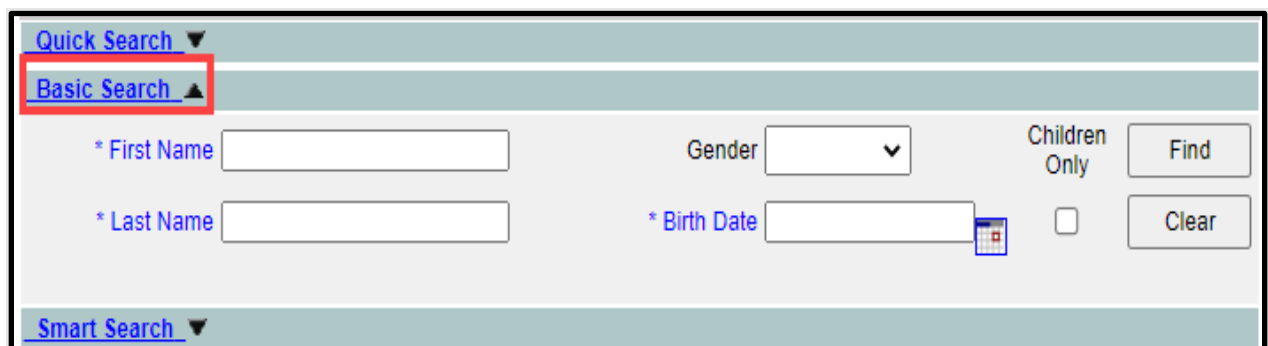


Figure 1: ImmTrac2 Left-Sided Menu, Manage Client

3. The three search options appear. Select the **Basic Search** option. Refer to Figure 2: Search Options – Basic Search.



The image shows a search interface with the following elements:

- Search options: Quick Search (dropdown), **Basic Search** (highlighted with a red box), Smart Search (dropdown).
- Form fields:
  - \* First Name (text input)
  - \* Last Name (text input)
  - \* Birth Date (text input with a calendar icon)
  - Gender (dropdown menu)
  - Children Only (checkbox)
- Buttons: Find, Clear

Figure 2: Search Options – Basic Search

4. Enter in the patient's **First Name**, **Last Name** and **Birth Date**. Select the **Find** button. This will likely return a one for one match, meaning only one ImmTrac2 Record will appear in your search or ImmTrac2 will automatically open the one record identified for your patient.

- If you want to identify if other records exist for your patient with similar demographics, modify your search criteria to include a Birth Date with a wild card value. A wild card value requires you to enter in all question marks in the Birth Date field for a wider search. Refer to Figure 3: Wild Card Value. Ex: ??/??/????



Quick Search ▾

Basic Search ▲

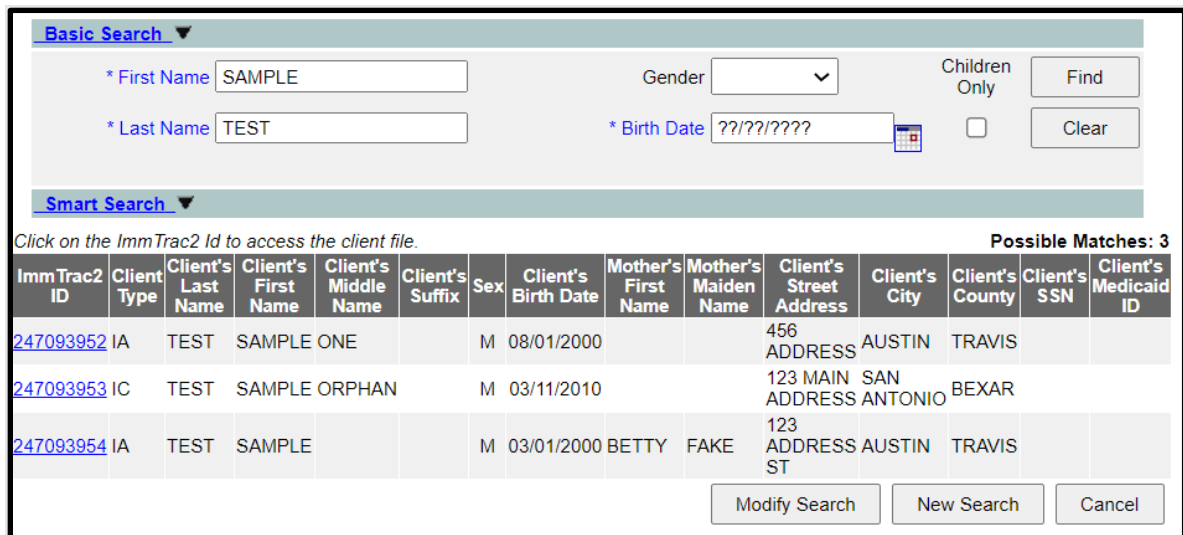
\* First Name  Gender  Children Only  Find

\* Last Name  \* Birth Date   Clear

Smart Search ▾

Figure 3: Wild Card Value

- Select the **Find** button. Up to 50 records matching the entered demographics can be returned in the search results.
- Identify from the list of registry records populated in the search results, if any could be potential questionable matches to your patient. Refer to Figure 4: Wild Card Search Results.



Basic Search ▾

\* First Name  Gender  Children Only  Find

\* Last Name  \* Birth Date   Clear

Smart Search ▾

Click on the ImmTrac2 Id to access the client file.

Possible Matches: 3

ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Client's Suffix	Sex	Client's Birth Date	Mother's First Name	Mother's Maiden Name	Client's Street Address	Client's City	Client's County	Client's SSN	Client's Medicaid ID
<a href="#">247093952</a>	IA	TEST	SAMPLE ONE			M	08/01/2000			456 ADDRESS	AUSTIN	TRAVIS		
<a href="#">247093953</a>	IC	TEST	SAMPLE ORPHAN			M	03/11/2010			123 MAIN ADDRESS	SAN ANTONIO	BEXAR		
<a href="#">247093954</a>	IA	TEST	SAMPLE			M	03/01/2000	BETTY	FAKE	123 ADDRESS ST	AUSTIN	TRAVIS		

Modify Search    New Search    Cancel

Figure 4: Wild Card Search Results

8. Select the **ImmTrac2 ID hyperlink** for the registry clients you deem to be potential questionable matches to your patient. Refer to Figure 5: ImmTrac2 ID Selected.

*Click on the ImmTrac2 Id to access the client file.*

**Possible Matches: 3**

ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Client's Suffix	Sex	Client's Birth Date	Mother's First Name	Mother's Maiden Name	Client's Street Address	Client's City	Client's County	Client's SSN	Client's Medicaid ID
<a href="#">247093952</a>	IA	TEST	SAMPLE ONE			M	08/01/2000			456 ADDRESS	AUSTIN	TRAVIS		
<a href="#">247093953</a>	IC	TEST	SAMPLE ORPHAN			M	03/11/2010			123 MAIN SAN ADDRESS	ANTONIO	BEXAR		
<a href="#">247093954</a>	IA	TEST	SAMPLE			M	03/01/2000	BETTY	FAKE	123 ADDRESS ST	AUSTIN	TRAVIS		

*Figure 5: ImmTrac2 ID Selected*

9. Review the ImmTrac2 Client Record(s) of the potential questionable match to determine if the record is that of your patient or not. Review these specific areas of the ImmTrac2 Client Record:
  - a. Personal Information
  - b. Client Information
  - c. Address Information, including View Client Address History
  - d. Responsible Persons

**Personal Information**

Return to Search

<p>* First Name <input type="text" value="SAMPLE"/></p> <p>* Last Name <input type="text" value="TEST"/></p> <p>Middle Name <input type="text" value="ONE"/></p> <p>Suffix <input type="text"/></p> <p>* Birth Date <input type="text" value="08/01/2000"/> </p> <p>Mother's Maiden Last <input type="text"/></p> <p>Mother's First Name <input type="text"/></p> <p>Client Type <input type="text" value="IA - ImmTrac Adult"/></p> <p>ImmTrac2 Client Yes</p>	<p>* Gender <input type="text" value="MALE"/> <input type="button" value="v"/></p> <p>SSN <input type="text" value="-"/> - <input type="text" value="-"/> - <input type="text" value=""/></p> <p>Medicaid ID <input type="text"/></p> <p>Birth Order <input type="text"/> (for multiple births)</p> <p>Birth Country <input type="text" value="UNITED STATES"/> <input type="button" value="v"/></p> <p>Birth State <input type="text"/> <input type="button" value="v"/></p> <p>Birth County <input type="text"/> <input type="button" value="v"/></p> <p>Client Identifier 247093952</p> <p>ImmTrac2 ID 247093952</p> <p>Disaster Client No</p>	<input type="button" value="Edit Client"/> <input type="button" value="Immunizations"/> <input type="button" value="Edit Consent"/> <input type="button" value="Reports"/> <input type="button" value="Delete Client"/>
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Last Updated by Wellness Pointe 040263 on 05/12/2022 Job ID: 318449861 History Table

Created by Wellness Pointe 040263 on 05/12/2022 Job ID: 318449855

- Consent Information
- Client AKA (0)
- Organization Information
- Client Information
- CRA Event Information (1)
- Address Information
- Responsible Persons (0)
- Client Comments (0)
- Client Notes (0)

Figure 6: ImmTrac2 Client Record

10. Decide if any of the potential questionable match records are that of your patient or not.
  - a. If the questionable match ImmTrac2 Record identified is a unique record for a different patient than yours, follow the steps under the **Scenario 1: Patient is Not the Same As Questionable Match** section.
  - b. If the questionable match ImmTrac2 Record identified is a duplicate ImmTrac2 Record for your patient, follow the steps under the **Scenario 2: Patient Is the Same As Questionable Match** section.
  - c. If the questionable match ImmTrac2 Records identified are a combination of some duplicate records for your patient and some unique records for a different patient than yours, then follow the steps under the **Scenario 3: Questionable Match Mix** section.

### Scenario 1: Patient is Not the Same As Questionable Match

If the questionable match ImmTrac2 Record identified is a unique record for a different patient than yours, then you must:

1. Contact the registry's Customer Service Team to assist you with resolving the questionable match so your patient's registry records can be made unique and not associated to the other ImmTrac2 Client Record(s).
  - a. The assistance you will be requesting is for registry staff to "unpend" the questionable match identified from your patient.
  - b. It is possible that despite having similar demographics ImmTrac2 cannot unpend the records. There are no impacts if an unpend request cannot be processed as the records are considered unique in ImmTrac2.
2. Send the registry's Customer Service an email with your request:
  - a. Use [Email Template #1 - Unpend Request for Org Code \[Insert Org Code\]](#)
  - b. Email is sent to ImmTrac2@dshs.texas.gov.
  - c. Email subject line is "Unpend Request for Org Code [Insert Org Code]".
3. The registry's Customer Service Team will review and process the request accordingly.
  - a. If they have any additional questions, they will contact you for assistance.
  - b. If they cannot complete the request due to additional information or documentation needed, they will contact you with the next steps or additional documentation needed.
4. You've completed the resolution of the questionable match.

### **Email Template #1 - Unpend Request for Org Code [Insert Org Code]**

#### **Unpend Request**

I found ImmTrac2 Client(s) that have similar demographics as my patient and could be considered potential questionable matches.

I've determined that these records are not those of my patient. I am requesting for these ImmTrac2 Client ID(s) [insert ImmTrac2 Client IDs] to be unpended from my patient's ImmTrac2 Client ID [insert ImmTrac2 Client IDs], so not to be considered questionable matches. Please notify me when this request is completed.



**Example of Email Template #1****Unpend Request**

I found ImmTrac2 Client(s) that have similar demographics as my patient and could be considered potential questionable matches.

I've determined that these records are not those of my patient. I am requesting for these ImmTrac2 Client ID(s) 2234567991 to be unpended from my patient's ImmTrac2 Client ID 112587496, so not to be considered questionable matches. Please notify me when this request is completed.

**Scenario 2: Patient Is the Same As Questionable Match**

If the questionable match ImmTrac2 Record identified is a duplicate ImmTrac2 Record for your patient, then you must:

1. Contact the registry's Customer Service Team to assist you with resolving the questionable match so your patient's multiple registry records can be combined into one registry record.
  - a. The assistance you will be requesting is for registry staff to "merge" the questionable matches identified.
  - b. When ImmTrac2 records are merged, a new ImmTrac2 Client ID is created for the patient and the original merged ImmTrac2 Client IDs are no longer used/accessible.
2. Send the registry's Customer Service an email with your request:
  - a. Use [Email Template #2 - Merge Request for Org Code \[Insert Org Code\]](#).
  - c. Email is sent to ImmTrac2@dshs.texas.gov.
  - d. Email subject line is "Merge Request for Org Code [Insert Org Code]".
3. The registry's Customer Service Team will review and process the request accordingly.
  - a. If they have any additional questions, they will contact you for assistance.
  - b. If they cannot complete the request due to additional information or documentation needed, they will contact you with the next steps or additional documentation needed.
4. You've completed the resolution of the questionable match.

**Email Template #2 - Merge Request for Org Code [Insert Org Code]****Merge Request**

I've determined that these records are duplicate records belonging to my patient.

I am requesting for ImmTrac2 Client ID(s) [insert ImmTrac2 Client IDs] to be merged with my patient's ImmTrac2 Client ID [insert ImmTrac2 Client ID], so only one registry record exists for my patient.

Please notify me when the merge is completed and provide the new ImmTrac2 Client ID for my patient.

**Example of Email Template #2****Merge Request**

I've determined that these records are duplicate records belonging to my patient.

I am requesting for ImmTrac2 Client ID(s) 021478523 to be merged with my patient's ImmTrac2 Client ID 124567418, so only one registry record exists for my patient.

Please notify me when the merge is completed and provide the new ImmTrac2 Client ID for my patient.

**Scenario 3: Questionable Match Mix**

If the questionable match ImmTrac2 Record identified are a combination of some of the records being duplicates for your patient and unique records for a different patient than yours, then you must:

1. Contact the registry's Customer Service Team to assist you with resolving the questionable match impacting your patient. The assistance you will be requesting is for registry staff to:
  - a. "Unpend" specific questionable match identified from your patient, and
  - b. "Merge" specific questionable matches identified, so your patient has only one ImmTrac2 Client Record.
2. Send the registry's Customer Service an email with your request:
  - a. Use [Email Template #3 – Unpend and Merge Request for Org Code \[Insert Org Code\]](#).
  - b. Email is sent to ImmTrac2@dshs.texas.gov.
  - c. Email subject line is "Unpend and Merge Request for Org Code [Insert Org Code]".

3. The registry's Customer Service Team will review and process the request accordingly.
  - a. If they have any additional questions, they will contact you for assistance.
  - b. If they cannot complete the request due to additional information or documentation needed, they will contact you with the next steps or additional documentation needed.
4. You've completed the resolution of the questionable matches.

**Email Template #3 - Unpend and Merge Request for Org Code [Insert Org Code]****Unpend Request**

I found ImmTrac2 Client(s) that have similar demographics as my patient and could be considered potential questionable matches.

I've determined that these records are not those of my patient. I am requesting for these ImmTrac2 Client ID(s) [insert ImmTrac2 Client IDs] to be unpended from my patient's ImmTrac2 Client ID [insert ImmTrac2 Client IDs], so not to be considered questionable matches.

**Merge Request**

Additionally, I've determined that these records are duplicate records belonging to my patient. I am requesting for ImmTrac2 Client ID(s) [insert ImmTrac2 Client IDs] to be merged with my patient's ImmTrac2 Client ID [insert ImmTrac2 Client ID], so only one registry record exists for my patient.

Please notify me when the unpend and merge are completed and provide the new ImmTrac2 Client ID for my patient.

**Example of Email Template #3****Unpend Request**

I found ImmTrac2 Client(s) that have similar demographics as my patient and could be considered potential questionable matches.

I've determined that these records do not belong to my patient. I am requesting for these ImmTrac2 Client ID(s) 2234567991 to be unpended from my patient's ImmTrac2 Client ID 112587496, so not to be considered questionable matches.

**Merge Request**

Additionally, I've determined that these records are duplicate records belonging to my patient. I am requesting for ImmTrac2 Client ID(s) 021478523 to be merged with my patient's ImmTrac2 Client ID 124567418, so only one registry record exists for my patient.

Please notify me when the unpend and merge are completed and provide the new ImmTrac2 Client ID for my patient.