



TEXAS
Health and Human
Services

Texas Department of State
Health Services

ImmTrac2

Texas Immunization Registry



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ImmTrac2 Clients

Welcome



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Webinar Details

- All attendees are muted.
- Type your questions in the webinar panel at any time.
- Q & A will conclude the presentation.

Resources



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- User Manual
- Customer Support: 1-800-348-9158
- Fax: 512-776-7790
- Email: ImmTrac2@dshs.texas.gov
- Online Help
- Videos
- Webinars (Live and Pre-recorded)



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System Requirements

Reliable Internet access:

- High-speed connection preferred

Minimum hardware requirements:

- Pentium 1GHz CPU
- 512 MB RAM / 500 MB free disk space
- Screen display of 1024 x 768 resolution and 256 colors

Minimum Software Requirements



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- Microsoft[®] Internet Explorer version 11.0
- Windows[®] 7, 8, or 10
- Acrobat Reader[®] 6.0 or higher

Clients



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Clients – Purpose



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Manage and enter demographic data of ImmTrac2 clients who have selected to participate in the statewide immunization registry.

Allows users to:

- Search and view client records
- Manage client records
- Update client consent information

Objectives



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In this module we will learn how to :

- Manage Clients
 - Search and view client records
 - Edit client records
- Enter New Clients
- Edit Consent Information

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Clients

- manage client
- enter new client
- edit consent information

Immunizations

- manage immunizations

Schools

- manage list
- find student
- check school report

Manage Clients



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Client Search



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Manage Clients gives users the ability to perform the following tasks:

- View a client record using 3 different search options.
 - Access the client's demographic information.
 - Access the client's immunization record.
- Edit a client's record.
- View historical updates to the record.

Client Search Options

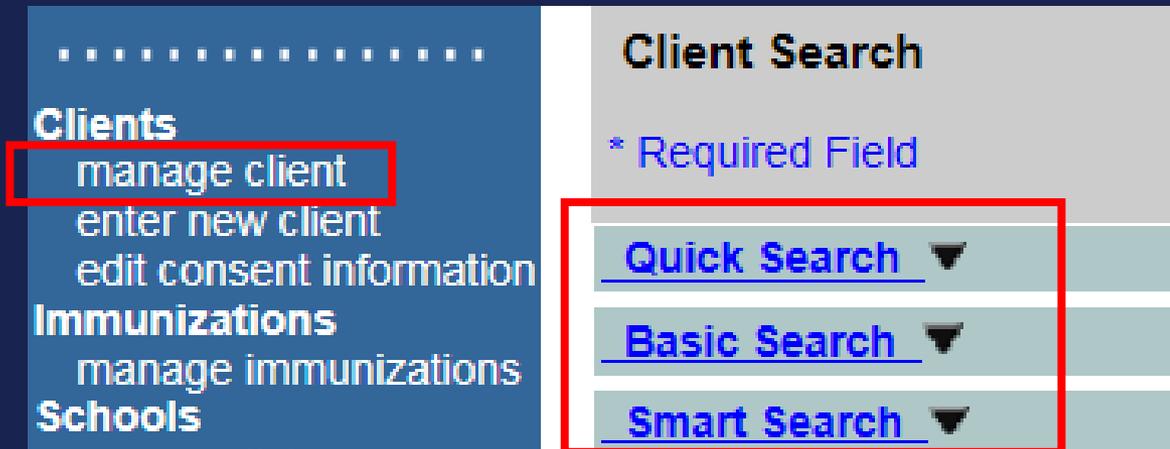


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- Client records are available to all users.
- Client searches are statewide.
- There are 3 available client search options:
 - Quick Search
 - Basic Search
 - Smart Search



Quick Search



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- It's quick!
- Allows users to search one of four ways:
 - ImmTrac2 ID
 - Client ID
 - Social Security Number and Birth Date
 - Medicaid ID
- Quick Search information must be exact; no "wild carding".

Quick Search ▲

Search by ImmTrac2 ID

* ImmTrac2 ID

Search by Client ID

* Client ID ← Client ID is organization specific.

Search by SSN# and DOB

* SSN# - - * Birth Date

Search by Medicaid ID

* Medicaid ID

Basic Search



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- Requires the least specific information.
 - First Name / Last Name
 - Birth Date
 - All other fields are optional
- Data can be partial with a minimum of two characters.
 - Must be accurate
- Allows for a "Wild Card" option (??/??/????) in the date field.

The screenshot shows a web form titled "Basic Search" with a red box around the title. The form contains the following fields and controls:

- * First Name:
- * Last Name:
- Gender:
- * Birth Date:
- Children Only:
- Find:
- Clear:

Smart Search



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- Requires the most specific information to narrow results.
 - First Name
 - Last Name
 - Birth Date
 - Gender
 - Street Address
 - All other fields are optional (Birth Date must be exact with no “wild carding”)

A screenshot of the 'Smart Search' form in the ImmTrac2 Clients application. The form is titled 'Smart Search' with a small upward-pointing triangle icon. It contains several input fields and buttons. At the top left, there is a checkbox labeled 'ImmTrac2 ID' next to an empty text box and a 'Fill' button. Below this, the form is organized into two columns. The left column contains: '* First Name' (text box), '* Last Name' (text box), 'Middle Name' (text box), '* Birth Date' (text box with a calendar icon), and '* Gender' (dropdown menu). The right column contains: 'Mother's First Name' (text box), 'Mother's Maiden Name' (text box), 'Phone' (text box with hyphens), '* Street Address' (text box), 'Other Address' (text box), 'PO Box' (text box), and 'Zip' (text box with hyphens). On the far right, there are two buttons: 'Find' and 'Clear'.

Search Results



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There are 4 different search result outcomes:

- No results – no clients found
- One Exact Match – the client record will display immediately
- Threshold limits – too many clients were found to list all **Please refine your search, only the first 50 matches were returned.**
- Multiple results (shown below) – more than one client is found
 - Columns to help find your client : Mother's Maiden Last Name / Client's Social Security Number

Click on the ImmTrac2 Id to access the client file.

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
6970636	IC	FARMER	DONNA			F	06/06/2010	MARY	KITTER	123 DECKER	AUSTIN			
6970639	IC	FARMER	DONNA			M	06/06/2010	MARY	KITTER	123 DECKER LN.	ROUND ROCK		1234	

Possible Matches: 4

View Client - Personal Information



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- Personal information is displayed at top of screen.
- Last Updated date, Created by, and History Table button are also displayed.

Update Client

Personal Information

* Last Name	GREEN	* Gender	FEMALE
* First Name	TERRY	SSN	- -
Middle Name		Medicaid ID	
Suffix		Birth Order	(for multiple births)
* Birth Date	10/06/2016	Birth Country	UNITED STATES
* Mother's Maiden Last (On File)		Birth State	
* Mother's First Name	MARY	Birth County	
Client Type	IC - ImmTrac Child	Client Identifier	
ImmTrac2 Client	Yes	ImmTrac2 ID	208105848
		Disaster Client	No

Save

History/Recommend

Edit Consent

Reports

Cancel

Delete Client

Last Updated by Training on 11/28/2016 by la4458st ←

Created by Training on 11/17/2016 by te8435tr ←

History Table →

Client Types



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- Type IC = Client Child, under age 18
- Type IA = ImmTrac Adult, age 18 and over
- Type FR = First Responder, age 18 and over
- Type FM = Adult Family Member of a First Responder, age 18 and over
- Type DC = Disaster Consent Client, any age
- Type DU = Disaster Unconsented Client, any age

View Client - Demographic Tabs



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- The View Client screen consists of multiple demographic tabs.
- Many tabs are optional.
- The Organization tab is **specific** to each organization.

A screenshot of the ImmTrac2 software interface. At the top, there are two tabs: 'ImmTrac2 Client' (selected) and 'Disaster Client'. Below the tabs, the text reads 'Last Updated by Training on 06/30/2016 by st2728su' and 'Created by Training Organization on 03/08/2016 by st2728su'. A 'History Table' button is located to the right. Below this information is a list of demographic tabs, each with a downward arrow: 'Consent Information', 'Client AKA (2)', 'Organization Information', 'Client Information', 'Address Information', 'Responsible Persons (1)', 'Client Comments (2)', and 'Client Notes (4)'. The tabs are displayed in a light blue/grey color with white text.

Click the Down Arrows to Open Accordion Tabs



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Consent Information	▼	←
Client AKA (1)	▼	←
Organization Information	▼	
Client Information	▼	
Address Information	▼	
Responsible Persons (1)	▼	
Client Comments (2)	▼	
Client Notes (0)	▼	

Edit Client Record – 3 Steps



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1. Click the “Edit Client” button.
2. Make changes to the client record.
3. Click the “Save” button at the top of the screen.

Step 1: Click Edit Client Button



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- To update the client record, click the Edit Client button.

View Client

Personal Information

 **Edit Client**

Return to Search

* Last Name	PURPLE	* Gender	MALE
* First Name	PAUL	SSN	- -
Middle Name		Medicaid ID	
Suffix		Birth Order	(for multiple births)
* Birth Date	12/01/2016	Birth Country	UNITED STATES
* Mother's Maiden Last (On File)		Birth State	
* Mother's First Name	MARY	Birth County	
Client Type	IC - ImmTrac Child	Client Identifier	paul1234
ImmTrac2 Client	Yes	ImmTrac2 ID	208110830
		Disaster Client	No

Step 2: Edit Fields of Client Record



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- Editable fields will be white.
- Required fields have asterisks and blue text.

Update Client

Personal Information

* Last Name	<input type="text" value="PURPLE"/>	* Gender	<input type="text" value="MALE"/>
* First Name	<input type="text" value="PAUL"/>	SSN	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Middle Name	<input type="text"/>	Medicaid ID	<input type="text"/>
Suffix	<input type="text"/>	Birth Order	<input type="text"/> (for multiple births)
* Birth Date	<input type="text" value="12/01/2016"/>	Birth Country	<input type="text" value="UNITED STATES"/>
* Mother's Maiden Last (On File)	<input type="text"/>	Birth State	<input type="text"/>
* Mother's First Name	<input type="text" value="MARY"/>	Birth County	<input type="text"/>
Client Type	<input type="text" value="IC - ImmTrac Child"/>	Client Identifier	paul1234
ImmTrac2 Client	Yes	ImmTrac2 ID	208110830
		Disaster Client	No

Save
History/Recommend
Edit Consent
Reports
Cancel

Step 3: Click Save to Save Changes



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- You must click Save to apply changes.
- Click the History / Recommend button to view the client's immunizations.

Update Client

Personal Information

* Last Name	<input type="text" value="PURPLE"/>	* Gender	<input type="text" value="MALE"/>
* First Name	<input type="text" value="PAUL"/>	SSN	<input type="text" value=""/> - <input type="text" value=""/> - <input type="text" value=""/>
Middle Name	<input type="text"/>	Medicaid ID	<input type="text"/>
Suffix	<input type="text"/>	Birth Order	<input type="text"/> (for multiple births)
* Birth Date	<input type="text" value="12/01/2016"/>	Birth Country	<input type="text" value="UNITED STATES"/>
* Mother's Maiden Last (On File)	<input type="text"/>	Birth State	<input type="text"/>
* Mother's First Name	<input type="text" value="MARY"/>	Birth County	<input type="text"/>
Client Type	<input type="text" value="IC - ImmTrac Child"/>	Client Identifier	<input type="text" value="paul1234"/>
ImmTrac2 Client	<input type="text" value="Yes"/>	ImmTrac2 ID	<input type="text" value="208110830"/>
		Disaster Client	<input type="text" value="No"/>

Save

History/Recommend

Edit Consent

Reports

Cancel

Enter New Clients



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Enter New Client – Client Search



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- A Smart Search is required to search for an existing client.
 - This reduces the possibility of a duplicate client.
- If a client is found, update their records as needed.
- If no matches are found, continue to add the client.

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Clients
manage client
enter new client
edit consent information

Immunizations
manage immunizations

Schools
manage list
find student
check school report

Reports
generate report

Client Search

* Required Field

Smart Search ▼

ImmTrac2 ID

* First Name Mother's First Name

* Last Name Mother's Maiden Name

Middle Name Phone

Enter New Client – Consent Forms



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- If you have a signed consent form, select the “Add a client” radio button and click Submit to continue.
- Or, if no signed consent form, select the “Request a Consent Form” option and click Submit to request a form.

Click on the ImmTrac2 Id to access the client file.

Possible Matches: 0

ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Client's Suffix	Sex	Client's Birth Date	Mother's First Name	Mother's Maiden Name	Client's Street Address	Client's City	Client's County	Client's SSN	Client's Medicaid ID
-------------	-------------	--------------------	---------------------	----------------------	-----------------	-----	---------------------	---------------------	----------------------	-------------------------	---------------	-----------------	--------------	----------------------

No clients were found for the requested search criteria.

Modify Search

New Search

Cancel

If your client does not appear on your search result Client List. Add the client by responding to the consent-related question below.

Do you have one of the following signed consent forms for your client?

Yes Add a client

No Request a Consent Form

* If you have also obtained consent to retain disaster-related information beyond the minimum retention period, you will have the opportunity to affirm this consent at the same time you affirm consent for ImmTrac2 participation.

Enter New Client – Print Consent Form



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- If you chose to print a consent form, you have a choice of English or Spanish, and a child consent form or a Disaster Information Retention (DIR) consent form.

Print Consent Documentation

Select the consent forms (one at a time) you would like to request, then click the Display Form button to print the consent form you have requested. Note that each time a form selection is made the non-selected radio button choices will grey out.

English **Spanish**

 ImmTrac2 Child Consent Form

ImmTrac2 Clients may also consent to have their disaster information retained beyond the mandatory 5-year retention period by signing a Disaster Information Retention Consent Form.

English **Spanish**

 Disaster Information Retention Consent Form

[Click here to obtain a blank copy of the ImmTrac2 Consent forms.](#)

Enter New Client – Disaster-Related Consent



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- You can also add a disaster-related client, with or without a signed disaster-related consent form.
- Then, click the Submit button.

DISASTER-RELATED INFORMATION

During a disaster or emergency event, all residents in the affected area who receive disaster-related vaccinations, antivirals, and/or medications will participate in ImmTrac2 regardless of age or consent status. **If you are ONLY adding a disaster-related client, ADD the client by selecting one of the options below:**

ADD CLIENT WITH Signed Disaster-Related Consent
 WITHOUT Signed Disaster-Related Consent

Submit

Enter New Client – Required Info



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- Client info is populated based on search info.
- Enter the additional required information.
- Enter demographics information.
- Click the Continue Add button.

Personal Information

* Last Name: ORANGE

* First Name: PAUL

Middle Name: []

Suffix: []

* Birth Date: 01/01/2014

* Mother's Maiden Last: Orange

* Mother's First Name: Mary

Client Type: []

Client Identifier: []

ImmTrac2 ID: []

Disaster Client: No

* Gender: MALE

SSN: [] - [] - []

Medicaid ID: []

Birth Order: [] (for multiple births)

Birth Country: UNITED STATES

Birth State: []

Birth County: []

Continue Add

Cancel

Enter New Client – Client Summary



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- Review client info for accuracy.
- Click the Continue button to add the client.

Client Summary

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

Add Client Summary	
Last Name	ORANGE
First Name	PAUL
Middle Name	
Suffix	
Date of Birth	01/01/2014
Sex	M
Race	

Client Address Information	
Address	103 Maple Street
City	Austin
State	TX
Zip	78758
County	TRAVIS
Country	US
Phone	
OK to Contact	YES

Confidential Client Information	
SSN	
Medicaid Number	

Edit Client Info

Continue

Cancel

Enter New Client – Consent Verification



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- The Consent Verification screen will display.
- Consent options are based on the client's Date of Birth.
- Select the appropriate consent and click Affirm.

Consent Verification

Affirm Consent For:  Affirm
Cancel

ImmTrac2 Child (under age 18) *(Signed Minor Consent form on file)*

Minor Family Member of a First Responder *(Signed Minor Consent form on file)*

With consent to retain disaster information beyond minimum time *(Signed Disaster Information Retention Consent form on file)*

OR During a disaster or emergency event, all residents in the affected area who receive disaster-related vaccinations, antivirals, and/or medications will participate in ImmTrac2 regardless of age or consent status. If you are ONLY adding a disaster-related client, ADD the client by selecting one of the options below:

Affirm Disaster-Only Client:

With consent to retain disaster information beyond minimum retention period *(Signed Disaster Information Retention Consent form on file)*

Without consent to retain disaster information beyond minimum retention period *(No consent forms on file)*

Enter New Client – Consent Confirmation



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- The Consent Verification Confirmation screen will display.
- Click the appropriate button to continue.

Consent Affirmation Confirmation

ImmTrac2 Customer Support (800) 348-9158

A record for the following client has been successfully added:

Client ID:	208111388	<input type="button" value="Go To Client"/>
Name:	PAUL ORANGE	<input type="button" value="Add Next"/>
DOB:	01/01/2014	<input type="button" value="Cancel"/>

The following ImmTrac2 user has been verified: 208111388 consent form ImmTrac2 Participation on 03/14/2017

Org Name:	Training
Org Address:	123 MULBERRY LANE, AUSTIN, 78749
Org Phone:	(555)555-5555
User ID:	308033
TXIIS ID:	1111009000

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

- ← View/Edit Client
- ← Add New Client
- ← Home Page

Enter New Client – Overrides



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- Users can override a potential match.
 - Review existing client information for a possible match before overriding.
- Overrides will be marked as potential duplicates and be reported to the state.

Potential Match List

1 additional matches have been found.

The system has determined that the client record you are creating matches with those not previously listed but may be a match. Clicking Create New Client will create a new client with the appropriate User Role permission. If one of the clients listed above is the client you are searching for, this change must instead be entered using the appropriate User Role permission.

Message from webpage

Are you sure you would like to **OVERRIDE** the System Match?

ImmTrac2 ID	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Suffix	Sex	Birth Date	Mother's Maiden Name	Address	City	County	Guardian Last Name
208111388	IC	ORANGE	PAUL			M	01/01/2014	ORANGE	103 MAPLE STREET	AUSTIN		

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

Edit Consent Information



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Consent Options (1 of 2)



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- **Minor Consent:**
Parental/guardian consent required for clients under 18.
- **Adult Consent:**
Required for clients 18 years of age and older
- **Disaster Information Retention (DIR) Consent:** Allows disaster related information to be retained after the initial 5 years.

Consent Options (2 of 2)



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- **Withdrawal of Consent and Confirmation:**
Required if client wishes to be removed from registry.
- **First Responder/Family Member Consent:**
Allows ImmTrac2 to track First Responders and their family members.
 - Only required for adults.
 - Child family member of a First Responder does not require a consent form.

Print Consent Forms



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- Use the Forms tab to access and print consent forms.

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Texas Immunization Registry

HOME **FORMS** REGISTRATION RELATED LINKS

organization Texas DSHS • user Larry Strassner • role Full Access State

Forms and Documents

 **Get ADOBE® READER®**

ImmTrac2 reports are best viewed with Adobe Reader 6.0 or later. Earlier versions of Adobe may work, but there may be formatting differences. If you do not have a qualifying version, click the Adobe image to the left to download the current version of Adobe Reader. In addition, you will find helpful guidelines at the Adobe Support Site for configuring Adobe Reader to work with your browser. Troubleshooting guidelines for popular browsers may be found by clicking [here](#).

Consent Forms - English

- [ImmTrac2 Consent Form - Adult](#)
- [ImmTrac2 Consent Form - Minor](#)
- [ImmTrac2 Consent Form - Disaster Information Retention](#)
- [Withdrawal of Consent and Confirmation](#)
- [First Responder/Family Member Consent](#)

Consent Forms - Spanish

- [ImmTrac2 Consent Form - Adult](#)

Reminder of Client Types



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- Type IC = Client Child, under age 18
- Type IA = ImmTrac Adult, age 18 and over
- Type FR = First Responder, age 18 and over
- Type FM = Adult Family Member of a First Responder, age 18 and over
- Type DC = Disaster Consent Client, any age
- Type DU = Disaster Unconsented Client, any age

Client Type in Personal Information Tab



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- The Client Type is found in the Personal Information section of the client record.

Personal Information

* Last Name	PURPLE
* First Name	PAUL
Middle Name	
Suffix	
* Birth Date	01/01/2014
* Mother's Maiden Last Last	(On File)
* Mother's First Name	MARY
Client Type	IC - ImmTrac Child

Editing Consent Information



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- Can be performed by any user (*except view-only*).
- A Smart Search is required to search for the client.
- On the View Client screen, click Select Client button.

Clients
manage client
enter new client
edit consent information

Immunizations
manage immunizations

Schools
manage list
find student
check school report

Reports
generate report
scheduled report

Maintenance
manage clinicians
manage schools

Admin Support
manufacturer listing
trade name listing
vaccine group listing

View Client

Personal Information

* Last Name: PURPLE

* First Name: PAUL

Middle Name:

Suffix:

* Birth Date: 01/01/2014

* Mother's Maiden Last (On File):

* Gender: MALE

SSN: - -

Medicaid ID:

Birth Order: (for multiple births)

Birth Country: UNITED STATES

Birth State:

Select Client

Return to Search

Select New Consent Option



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- Consent options (attributes) will display depending on the client type
- Click Display Form to view a pre-populated consent.
- Select the appropriate consent option, and click Update Client.
- Once updated the client type and/or the consent attributes will change.

Edit Consent Information - Add a Form

Client: PURPLE, PAUL DOB: 01/01/2014

Client Type:	IC
FR Attribute:	N
DIR Attribute:	N

The following form is available to be added to this client:

- Option #1: Add Consent Form(s) for this client
 - Minor Child of a First Responder (No additional consent form required)
 - Disaster Information Retention Consent Form

[Click here to obtain a blank copy of the ImmTrac2 Consent forms.](#)

Display Form

Update Client

Edit Client

Cancel

Consent Attributes



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First Responder attributes:

F = First Responder

A = Adult family member of a First Responder

M = Minor family member of a First Responder

N = Not a First Responder

Disaster Information Retention (DIR) attributes:

Y = Yes, DIR consent is granted

N = No, DIR consent is not granted

Edit Consent Information - Add a Form

Client: PURPLE, PAUL DOB: 01/01/2014

Client Type:	IC
FR Attribute:	N
DIR Attribute:	N

The following form is available to be added to this client:

Option #1: Add Consent Form(s) for this client

- Minor Child of a First Responder (No additional consent form required)
- Disaster Information Retention Consent Form

[Click here to obtain a blank copy of the ImmTrac2 Consent forms.](#)

Display Form
Update Client
Edit Client
Cancel

Demo



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Questions



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