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# *ImmTrac2*

## Texas Immunization Registry

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# ImmTrac2 - Immunizations

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# Welcome



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# Webinar Details

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



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# Resources

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- DSHS website: [www.immunizetexas.com](http://www.immunizetexas.com)
  - Click ImmTrac Registry & go to [ImmTrac2 webpage](#)
- Health Service Regions & Local Health Depts.
  - Staff are trained to provide support
- ImmTrac Customer Support
  - Email: [ImmTrac2@dshs.texas.gov](mailto:ImmTrac2@dshs.texas.gov)
  - Phone: 1-800-348-9158



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# Help Resources



**User Manual**

**Customer Support: 1-800-348-9158**



**Fax: 512-776-7790**

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



**Online Help**

**Webinars (Live and Pre-recorded)**



**Self-guided video training**



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# Purpose

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To provide a thorough introduction to managing immunizations in ImmTrac2, including:

- Understanding user roles
- Logging in & navigating functional areas
- Viewing client immunization records
- Managing client immunization records



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# User Roles (1 of 6)

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- Five user access levels in ImmTrac2:
  - View Only Non-Providers
  - Full Access Providers
  - Provider Supervisor
  - Modified Access Sub-state
  - Full Access State



# User Roles (2 of 6)

Role	Tasks	Types of Users
<b>View Only Non-Providers</b>	<ul style="list-style-type: none"><li>• Search &amp; view clients</li><li>• View &amp; print immunization records</li><li>• Create student lists &amp; print student reports</li><li>• Manage own user account &amp; reset password</li></ul>	Administrative staff at schools and child care facilities.
<b>Full Access Providers</b>	Same as View Only Non-Providers, plus: <ul style="list-style-type: none"><li>• Add &amp; edit client information</li><li>• Add, edit &amp; delete immunizations</li><li>• Generate specific reports</li></ul>	Texas health care providers licensed to administer vaccines, and their staff.
<b>Provider Supervisor</b>	Same as Full Access Providers, plus: <ul style="list-style-type: none"><li>• Manage users at their organization</li></ul>	A designated individual in the organization. ( <b>training required</b> )



# User Roles (3 of 6)

Role	Tasks	Types of Users
<b>Modified Access Sub-State</b>	Same as Provider Supervisor, plus: <ul style="list-style-type: none"><li>• Access to reports and organization information for their responsible area</li></ul>	Designated users at Texas Health Service Regions and Local Health Departments.
<b>Full Access State</b>	Highest user role to: <ul style="list-style-type: none"><li>• Access clients, immunizations, organizations, clinicians, reports, registrations, renewals &amp; vaccine program enrollment</li><li>• Add, modify &amp; delete information across the system.</li></ul>	Texas Department of State Health Services (DSHS) central office staff.



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# User Roles (4 of 6)

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## View Only Non-Providers can:

- View client (student) immunization records
- View vaccines recommended by selected tracking schedule
- Print official immunization records
- Print reports of immunizations due
- Create & manage lists of students to print batch reports (See help resources for more information.)



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# User Roles (5 of 6)

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## Full Access Providers can:

- View client immunization records
- View vaccines recommended by selected tracking schedule
- Print official immunization records
- Print reports of immunizations due
- Create & manage lists of students to print batch reports (See help resources for more information.)



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# User Roles (6 of 6)

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Full Access Providers can *also*:

- Edit & delete “owned” client immunization records
- Enter immunization records for administered shots or historical shots
- Enter & manage client information, such as client comments



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# Logging In (1 of 3)

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- Users are assigned ONE user account.
- The user account can access one or many provider locations, or Organizations.
- Users must have three codes to log in:
  - Org Code
  - Username
  - Password

# Logging In (2 of 3)



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# Logging In (3 of 3)

- The Confidentiality Statement displays.
- Click the "I Agree" button to access ImmTrac2.

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### Confidentiality Statement

g Region  
elcome  
CoTrainer

I understand and agree that information entered into and contained in ImmTrac2 is confidential. I agree that I will use the information in ImmTrac2 only for the purpose for which it is intended. I acknowledge that the unauthorized disclosure of personal, identifiable information is strictly prohibited.

Immunization records may only be released to:

- the individual or the individual's legally authorized representative
- a public health district
- a local health department
- a physician to the individual
- a school or child care facility in which the individual is enrolled
- a state agency having legal custody of the individual

I verify that I am an authorized ImmTrac2 user.

I agree not to share any information that is accessible through ImmTrac2 without proper authorization.

I acknowledge that unauthorized discussion or release of the information from ImmTrac2 will expose me to civil and criminal liability under the provisions of Texas Government Code §552.352, Texas Health and Safety Code §591.022; Title 5, United States Code §552a(1); and Title 42, code of Federal Regulations, Part 2.

I agree at the end of each ImmTrac2 session, I will log out of the ImmTrac2 application and close my Internet browser.

By agreeing, I certify I have read, understood and agreed to the above statements.

I Do Not Agree      I Agree 

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# Application View



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After Login:

- Users assigned to only ONE organization will land on the Application page.

The screenshot displays the ImmTrac2 application interface. At the top, there is a navigation bar with tabs for 'home', 'registration/renewal', 'manage access/account', 'forms', 'related links', 'logout', and 'contact us'. Below the navigation bar, the user's current session information is shown: 'organization Training Clinic • user Delia CoTrainer • role Full Access Providers no/DE'. The main content area is divided into sections: 'announcements' and 'release notes'. The 'announcements' section contains a message dated 03/04/2014 with a 'NEW' tag, titled 'New Procedure Starting March 17'. The 'release notes' section contains a message dated 11/18/2015 with a 'NEW' tag, titled 'Release Version 2.2.0 V2 Code Release'. On the left side of the interface, there is a sidebar menu with the following options: 'Clients' (manage client, enter new client, edit consent information), 'Immunizations' (manage immunizations), 'Schools' (manage list, find student, check school report), and 'Reports'.



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# Manage Access Portal View

- Users assigned to more than one organization will land on the Portal view.
- Select an organization's "ImmTrac2" button to navigate to the Application view.

Testing Region

Welcome  
Matty Smith

Logout

Applications  
Switch Organizations

Manage My Account  
Edit My User Account  
Change My Password

HOME FORMS REGISTRATION RELATED LINKS

organization Training • user Matty Smith • role Full Access Providers no/DE

ImmTrac2 | Manage Access | IR Physicians

ImmTrac2 | Manage Access | Training

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# Application View (1 of 2)

To navigate back to the Portal, click the “manage access/account” tab in the menu bar.

The screenshot displays the ImmTrac2 application interface. At the top, a navigation menu bar contains several tabs: 'home', 'registration/renewal', 'manage access/account' (highlighted with a red box), 'forms', 'related links', 'logout', and 'contact us'. Below the menu bar, the user's current session information is shown: 'organization Training Clinic • user Delia CoTrainer • role Full Access Providers no/DE'. The main content area is divided into sections: 'announcements' with a 'NEW' tag and a date '03/04/2014' followed by a link 'New Procedure Starting March 17'; and 'release notes:' with a 'NEW' tag and a date '11/18/2015' followed by a link 'Release Version 2.2.0 V2 Code Release'. On the left side, there is a sidebar menu with categories: 'Training Region 3.0.1', 'Clients' (with sub-items: manage client, enter new client, edit consent information), 'Immunizations' (with sub-item: manage immunizations), 'Schools' (with sub-items: manage list, find student, check school report), and 'Reports'.

# Application View (2 of 2)



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The screenshot shows the application interface with several key components highlighted by red boxes and arrows:

- Navigation Bar:** A horizontal bar at the top containing links for home, registration/renewal, manage access/account, forms, related links, logout, and contact us.
- User Information:** A yellow bar below the navigation bar showing the user's role as 'Full Access Providers no/DE'.
- Menu Bar:** A box labeled 'Menu Bar' with an arrow pointing to the 'related links' link in the navigation bar.
- Menu Panel:** A box labeled 'Menu Panel' with an arrow pointing to the left-hand sidebar menu.

The sidebar menu includes the following sections:

- Training Region 3.0.1**
- 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
  - vaccine listing
  - vaccine relationships
- Manage My Account**
  - edit my user account
  - change my password

The main content area displays 'announcements' and 'release notes' with dates and links to new procedures and code releases.



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# ImmTrac2 - Immunizations

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## View Only Non-Providers



# Menu Panel Options

To look up a Client's Immunizations, click "view client imm report".

The screenshot displays the ImmTrac2 web application interface. At the top, there is a navigation bar with links for "home", "registration/renewal", "manage access/account", "forms", "related links", and "logo". Below this, a yellow banner shows the user's current session: "organization Training Clinic • user Delilah CoTrainer • role View Only Non-P". The main content area is divided into two sections. On the left, a blue navigation menu is highlighted with a red box. The menu items are: "Immunizations" (with a sub-item "view client imm report" indicated by a red arrow), "Schools" (with sub-items "manage list", "find student", and "check school report"), "Admin Support" (with sub-items "manufacturer listing", "trade name listing", "vaccine group listing", "vaccine listing", and "vaccine relationships"), and "Manage My Account" (with sub-items "edit my user account" and "change my password"). On the right, the "Client Search" section is visible, featuring a "Required Field" label and three search options: "Quick Search", "Basic Search", and "Smart Search", each with a dropdown arrow.



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# Client Search

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- Perform a Client Search using one of the following:
  - Quick Search
  - Basic Search
  - Smart Search
- If an exact match is found, the client's immunization record will display.
- If multiple matches are found, select from the client list.



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# Client Immunizations (1 of 2)

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The screen has three sections:

- Client Information
- Immunization Record
- Vaccines Recommended by Selected Tracking Schedule

# Client Immunizations (2 of 2)



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Client Information

Official Immunization Record Reports Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
DEB ORANGE	01/01/2014	F	ACIP	TraiClinic-DORA2014
Provider (PCP)	Not on file			
School	Not on file			
Comments	03/01/2014 ~ Allergy to egg ingestion (anaphylactic)			
<b>Current Age: 3 years, 2 months, 19 days</b>				

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
DTP/aP	<a href="#">03/01/2014</a>	1 of 5	DTaP-HepB-IPV [Pediarix ®]	Full	No			
	<a href="#">06/01/2014</a>	2 of 5	DTaP-HepB-IPV [Pediarix ®]	Full	No			
HepB	<a href="#">01/01/2014</a>	1 of 4	HepB, NOS [HepB ®]		No		Yes	
	<a href="#">03/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			
Polio	<a href="#">06/01/2014</a>	3 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			
	<a href="#">03/01/2014</a>	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			
	<a href="#">06/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
<a href="#">DTP/aP</a>	DTaP, NOS	06/29/2014	08/01/2014	09/01/2014
<a href="#">HepA</a>	HepA, NOS	01/01/2015	01/01/2015	08/01/2015
<a href="#">HepB</a>	HepB, NOS	07/27/2014	07/27/2014	08/01/2015
<a href="#">Hib</a>	Hib, NOS	04/01/2015	04/01/2015	04/01/2015
<a href="#">Influenza-seasn</a>	Flu NOS	Contraindicated		
<a href="#">MMR</a>	MMR	01/01/2015	01/01/2015	05/01/2015
<a href="#">PneumoConjugate</a>	PCV13	02/12/2014	03/01/2014	04/01/2014
<a href="#">Polio</a>	Polio, NOS	06/29/2014	08/01/2014	08/01/2015
<a href="#">Varicella</a>	Varicella	01/01/2015	01/01/2015	05/01/2015



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# Client Information (1 of 2)

- Personal information, Tracking schedule (ACIP) & Client ID (organization defined)
- Provider & School selections (optional)
- Client Comments

Client Information					Official Immunization Record	Reports	Cancel
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID			
DEB ORANGE	01/01/2014	F	ACIP	TraiClinic-DOr2014			
Provider (PCP)	<i>Not on file</i>						
School	<i>Not on file</i>						
Comments	03/01/2014 ~ Allergy to egg ingestion (anaphylactic)						
<b>Current Age: 3 years, 2 months, 19 days</b>							



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# Client Information (2 of 2)

Click buttons to access:

- Official Immunization Record
- Reports
- Cancel (to return to previous screen)

Client Information				
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
DEB ORANGE	01/01/2014	F	ACIP	TraiClinic-DOr2014
Provider (PCP)	<i>Not on file</i>			
School	<i>Not on file</i>			
Comments	03/01/2014 ~ Allergy to egg ingestion (anaphylactic)			
<b>Current Age: 3 years, 2 months, 19 days</b>				

Buttons: Official Immunization Record, Reports, Cancel



# Immunization Record

- Displays a separate row for each vaccine group, whether combo or single vaccine.
- Hyperlinks to display Explanation of Dose Status and organization ownership.

Immunization Record								
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
DTP/aP	<a href="#">03/01/2014</a>	1 of 5	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			
	<a href="#">06/01/2014</a>	2 of 5	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			
HepB	<a href="#">01/01/2014</a>	1 of 4	HepB, NOS [HepB ®]		<a href="#">No</a>		Yes	
	<a href="#">03/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			
	<a href="#">06/01/2014</a>	3 of 4	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			
Polio	<a href="#">03/01/2014</a>	1 of 4	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			
	<a href="#">06/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediatrix ®]	Full	<a href="#">No</a>			



# Vaccines Recommended

- A dynamic display based on the client's immunization record.
- Hyperlinks to display explanation of series recommendations.

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
<a href="#">DTP/aP</a>	DTaP, NOS	06/29/2014	08/01/2014	09/01/2014
<a href="#">HepA</a>	HepA, NOS	01/01/2015	01/01/2015	08/01/2015
<a href="#">HepB</a>	HepB, NOS	07/27/2014	07/27/2014	08/01/2015
<a href="#">Hib</a>	Hib, NOS	04/01/2015	04/01/2015	04/01/2015
<a href="#">Influenza-seasonl</a>	Flu NOS	Contraindicated		
<a href="#">MMR</a>	MMR	01/01/2015	01/01/2015	05/01/2015
<a href="#">PneumoConjugate</a>	PCV13	02/12/2014	03/01/2014	04/01/2014
<a href="#">Polio</a>	Polio, NOS	06/29/2014	08/01/2014	08/01/2015
<a href="#">Varicella</a>	Varicella	01/01/2015	01/01/2015	05/01/2015



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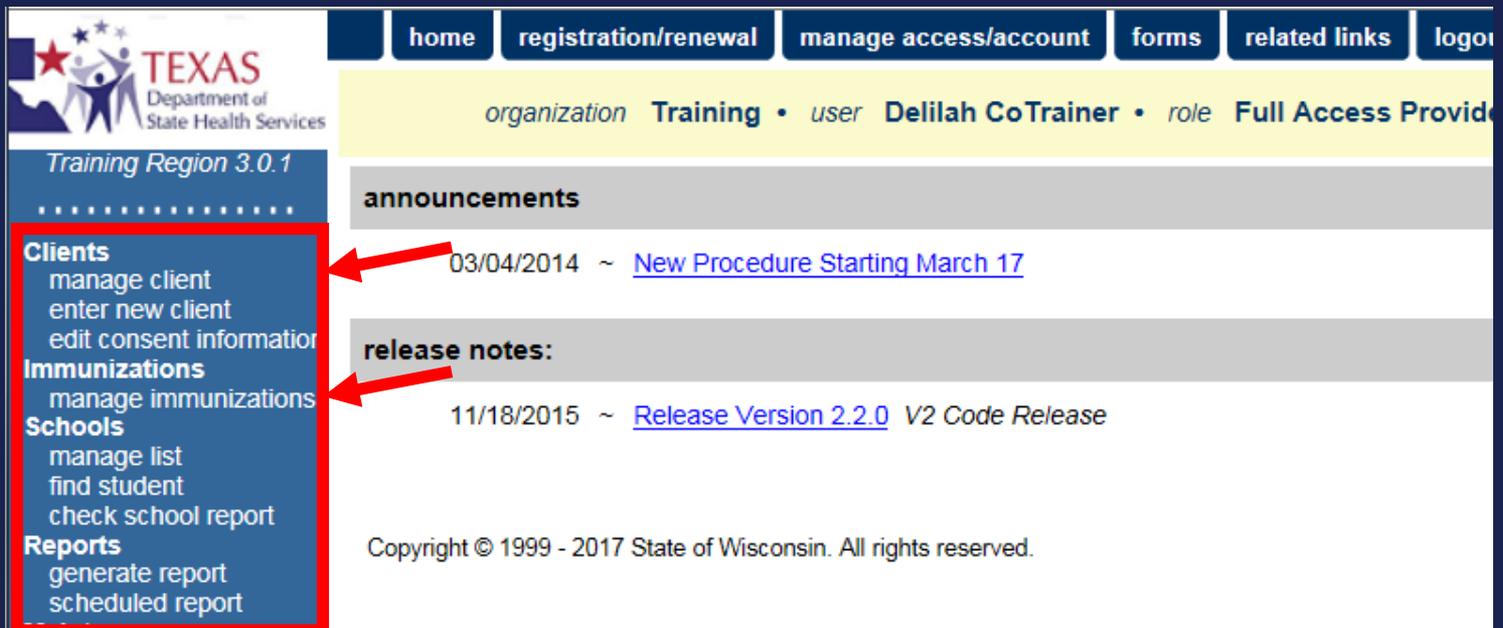
# ImmTrac2 - Immunizations

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## Full Access Providers

# Menu Panel Options

- Access to Client demographics
- Fast path to Client immunizations



home registration/renewal manage access/account forms related links login

organization Training • user Delilah CoTrainer • role Full Access Provider

Training Region 3.0.1

**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

03/04/2014 ~ [New Procedure Starting March 17](#)

**release notes:**

11/18/2015 ~ [Release Version 2.2.0 V2 Code Release](#)

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# Client Search

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- Perform a Client Search using one of the following:
  - Quick Search
  - Basic Search
  - Smart Search
- If an exact match is found, the client's immunization record will display.
- If multiple matches are found, select from the client list.



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# Client Immunizations (1 of 2)

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The screen has four sections:

- Client Information
- Client Notes & Navigation Bar
- Immunization Record
- Vaccines Recommended by Selected Tracking Schedule

# Client Immunizations (2 of 2)



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Client Information  ImmTrac2 ID 208110668

Client Name (First - MI - Last) DOB Gender Tracking Schedule Client ID  
 DEB ORANGE 01/01/2014 F ACIP

Address/Phone 123 JJ PICKLE, AUSTIN, TX 78758

Comments 03/01/2014 ~ Allergy to egg ingestion (anaphylactic)

**Current Age: 3 years, 2 months, 20 days**

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

Add New Imms Add Historical Imms Edit Client Reports Print Official Immunization Record

Immunization Record 

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
DTP/aP	<a href="#">03/01/2014</a>	1 of 5	DTaP-HepB-IPV [Pediarix ®]	Full					
	<a href="#">06/01/2014</a>	2 of 5	DTaP-HepB-IPV [Pediarix ®]	Full	No				
HepB	<a href="#">01/01/2014</a>	1 of 4	HepB, NOS [HepB ®]		No		Yes		
	<a href="#">03/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full					
Polio	<a href="#">06/01/2014</a>	3 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No				
	<a href="#">03/01/2014</a>	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full					
	<a href="#">06/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No				

Vaccines Recommended by Selected Tracking Schedule 

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Select <input type="checkbox"/>	<a href="#">DTP/aP</a>	DTaP, NOS	06/29/2014	08/01/2014	09/01/2014
Select <input type="checkbox"/>	<a href="#">HepA</a>	HepA, NOS	01/01/2015	01/01/2015	08/01/2015
Select <input type="checkbox"/>	<a href="#">HepB</a>	HepB, NOS	07/27/2014	07/27/2014	08/01/2015



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# Client Information

- Personal information, Tracking schedule (ACIP) & Client ID (organization defined)
- Address/Phone
- Client Comments

Client Information				ImmTrac2 ID 208110668
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
DEB ORANGE	01/01/2014	F	ACIP	TraiClinic-DOra2014
Address/Phone	123 JJ PICKLE, AUSTIN, TX 78758			
Comments	03/01/2014 ~ Allergy to egg ingestion (anaphylactic)			
<b>Current Age: 3 years, 2 months, 20 days</b>				

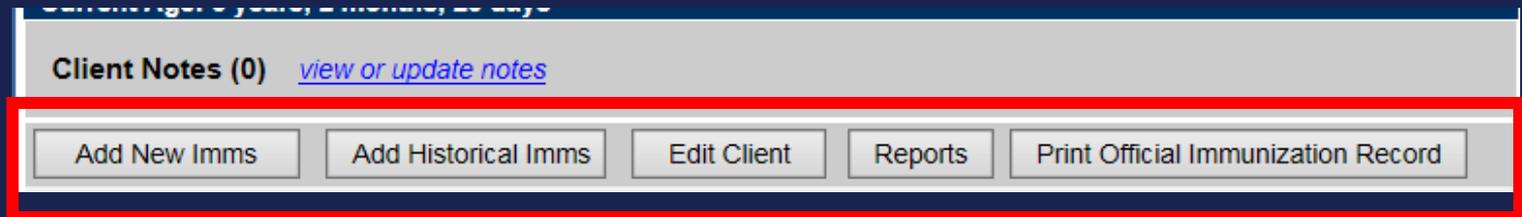


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# Client Notes & Navigation Bar

- Hyperlink to display Client Notes (viewable by all Providers)
- Command button functions:
  - Enter immunization records
  - Display the client demographic record
  - Display client reports screen
  - Print Official Immunization Record





# Immunization Record

- Each vaccine group displays as separate row
- Hyperlinks to display Explanation of Dose Status and organization ownership
- Edit button for each row

Immunization Record									
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaste	Edit
DTP/aP	<a href="#">03/01/2014</a>	1 of 5	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				
	<a href="#">06/01/2014</a>	2 of 5	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				
HepB	<a href="#">01/01/2014</a>	1 of 4	HepB, NOS [HepB ®]		<a href="#">No</a>		Yes		
	<a href="#">03/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				
	<a href="#">06/01/2014</a>	3 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				
Polio	<a href="#">03/01/2014</a>	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				
	<a href="#">06/01/2014</a>	2 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	<a href="#">No</a>				



# Vaccines Recommended

- Dynamic display of vaccines due
- Selection option to enter new vaccines

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
Select <input type="checkbox"/>	<a href="#">DTP/aP</a>	DTaP, NOS	06/29/2014	08/01/2014	09/01/2014
Select <input type="checkbox"/>	<a href="#">HepA</a>	HepA, NOS	01/01/2015	01/01/2015	08/01/2015
Select <input type="checkbox"/>	<a href="#">HepB</a>	HepB, NOS	07/27/2014	07/27/2014	08/01/2015
Select <input type="checkbox"/>	<a href="#">Hib</a>	Hib, NOS	04/01/2015	04/01/2015	04/01/2015
	<a href="#">Influenza-seasn</a>	Flu NOS		<b>Contraindicated</b>	
Select <input type="checkbox"/>	<a href="#">MMR</a>	MMR	01/01/2015	01/01/2015	05/01/2015
Select <input type="checkbox"/>	<a href="#">PneumoConjugate</a>	PCV13	02/12/2014	03/01/2014	04/01/2014
Select <input type="checkbox"/>	<a href="#">Polio</a>	Polio, NOS	06/29/2014	08/01/2014	08/01/2015
Select <input type="checkbox"/>	<a href="#">Varicella</a>	Varicella	01/01/2015	01/01/2015	05/01/2015

Add Selected



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# Managing Immunizations

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Provider users can enter records three ways:

- "Add New Imms"
- "Add Historical Imms"
- "Add Selected" from Tracking Schedule



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# Enter New Immunization (1 of 4)

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This is the method to record vaccines administered by the provider organization.



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# Enter New Immunization (2 of 4)

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This is the method to record vaccines administered by the provider organization.

Required fields:

- Date Administered
- Trade Name
- Lot #
- Vaccine Eligibility
- Manufacturer



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## Enter New Immunization (3 of 4)

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Provider users can edit and delete the immunization records “owned” by their organization.



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# Enter New Immunization (4 of 4)

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Provider users can edit and delete the immunization records “owned” by their organization.

Additional fields:

- Immunization (Vaccine name)
- Administered By
- Body Site
- Route
- Dose



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# Enter Historical Imm. (1 of 3)

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This is the method to update the client's full immunization record.



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# Enter Historical Imm. (2 of 3)

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This is the method to update the client's full immunization record.

Historical immunizations are vaccines administered by other provider organizations.



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# Enter Historical Imm. (3 of 3)

---

This is the method to update the client's full immunization record.

Historical immunizations are vaccines administered by other provider organizations.

Any Provider user can edit and delete these records.



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# Enter Selected Immunization

---

This is a quick method to record vaccines administered by selecting the recommended vaccines.



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# Enter Selected Immunization

---

This is a quick method to record vaccines administered by selecting the recommended vaccines.

The selections are then displayed for adding the required information by date administered.



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# ImmTrac2 - Immunizations

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## System Demo

# Q & A

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# Help Resources



**User Manual**

**Customer Support: 1-800-348-9158**



**Fax: 512-776-7790**

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



**Online Help**

**Webinars (Live and Pre-recorded)**



**Self-guided video training**