

# Navigating ImmTrac2

## Welcome to the Immatrac2 Training Video: Navigating ImmTrac2

### Training Objectives:

The objectives of this video are to demonstrate how to navigate the Application view and the Portal view of ImmTrac2.

### Navigating ImmTrac2

After logging into ImmTrac2, users who have access to only one organization land in the **Application** view on the **Home** screen.

The Application view is primarily used for immunization based tasks such as managing client records, updating and printing immunization records, and generating reports are performed.

If a user has access to multiple organizations they will land in the Portal view where the organizations they have access to will display.

The **Portal** view is used to switch between organizations and where users manage their ImmTrac2 account information.

Let's begin in the Application view. At the top of the screen is the Application menu bar.

The Application menu bar contains the following tabs: **Home, Registration/Renewal, Manage Access/Account, Forms, Related Links, Logout, Contact Us**, and the **Online Help** icon (the light bulb).

Under the menu bar is the user information section. This section displays the organization the user has accessed, the user's name, and the user's role.

### Home

The Application **Home** screen displays **Announcements** and **Release Notes** related to ImmTrac2.

Click an Announcement or a Release Note hyperlink to view the details. After reading the details click the **Return to Home** link.

### Registration/Renewal

The Registration/Renewal tab is used to manage an organizations registration or renewals.

Use the **Renew for existing Organizations** link to submit a renewal form for an existing ImmTrac2 Organization.

The **Register a new Organization** link allows user to submit a registration for a **NEW** Organization to ImmTrac2.

The **Access saved/in progress Registration or Renewal** link, allows user to access previously saved registration or renewal to continue working on the form.

The **Access previously approved Registration or Renewal** is used to access previously approved Registrations or Renewals.

The **Registration of Intent** link is used to access the Registration of Intent Application to pursue electronic data exchange and immunization reporting with ImmTrac2.

For additional details on how to use these features, please review the **ImmTrac2 User Manual** and/or the **Provider Online Enrollment Manual**.

## Manage Access/Account

The **Manage Access/Account** tab is used to switch between to the Application and the Portal view. Clicking it redirects the user to the Portal view on the **Switch Organization** screen.

On the **Switch Organization** screen, the organizations the user has access to are listed in alphabetical order.

Clicking on the **ImmTrac2** button will navigate users to the Application Home screen for the selected organization. Clicking the **Manage Access** button, will navigate users to the Switch Organization screen for the selected organization.

Let's click the **ImmTrac2** button to return back to the Application view in the Training organization.

## Forms

The **Forms** tab is where you can find blank consent forms in both English and Spanish.

## Related Links

The **Related Links** tab provides links to external website that are relevant to ImmTrac2 or immunizations, and the User Manuals.

The Related Links section includes the follows: About ImmTrac, ImmTrac is a Lifetime Registry, About the Texas Vaccines for Children Program, Meaningful Use Information, and Vaccine Education Online.

The User Manual section includes the **ImmTrac2 User Manual** and the **Provider Online Enrollment manual**.

Clicking any of the links opens the website or manual in a separate browser window.

## Logout

Clicking the **Logout tab** logs the user out of ImmTrac2.

## Contact Us

The **Contact Us** screen will provide the email, phone and fax number for the ImmTrac2 Customer Support Team.

## Online Help (Light Bulb)

The **Online Help** icon, or the light bulb, is accessible on every screen. Clicking the icon opens the help page in a separate window browser. The help page provides details about the selected screen in ImmTrac2. This is an example of the help page that open for the Contact Us tab.

We'll talk more about the Online Help later in the video. Close the browser window to return to ImmTrac2.

## Navigating the Application Menu Panel

Now that we have navigated the menu bar, let's review the menu panel. The menu panel is where you see the options that allow you to perform tasks in ImmTrac2.

The options available in the menu panel are dependent upon the user role. This is the menu panel for a Full Access Provider user.

The menu panel of a Full Access Provider consist of the following sections: Clients, Immunizations, Schools, Reports, Maintenance, Admin Support, and Manage My Account.

### Clients

The **Client** section is used to manage client records. This includes viewing and editing client records, entering new client records, and editing client consent.

### Immunizations

The **Immunizations** section allows users to view, edit, and add immunization, and print immunization records.

### Schools

The **Schools** section of the menu panel include the following menu options: Manage Lists, Find Students, and Check School Reports.

Together, these options allow users to create lists of students or clients, and then generate pre-defined immunization reports again those lists.

### Reports

The **Reports** section is available to all users except the View Only – Non Provider users. This section offers reports that can be configured by the user, or pre-defined scheduled reports.

The **Reports** section offers report that can be configured by the user, or pre-defined scheduled reports to all user except the View Only – Non Provider users.

The **Generate Report** option offers reports that can be configured by the user in different ways to meet the needs of their organization.

For more details on the available reports, review the ImmTrac2 User Manual and the report videos.

The **Scheduled Reports** option appears in the user's menu panel for all user except the View Only – Non Provider users.

These reports are pre-defined and auto generated, but are only available to Modified Access Sub State and Full Access State users. For all other users, this screen will be blank as in this example.

### Maintenance

The **Maintenance** section is used to manage clinicians and schools contact associated to your organization, and is available to all user except the View Only – Non Provider users.

## Admin Support

The **Admin Support** section of the menu panel provides multiple immunization reference documents that are available to all users.

## Manage My Account

The **Manage My Account** section can be utilized by all users to edit their user information and change their ImmTrac2 password at any time.

When you select a **Manage My Account** option, users are redirected to the selected screen in the Portal view. Let's click the **Edit My User Account** option.

## Navigating the Portal Menu Bar

Now we are in the Portal view on the **Edit User** screen. Notice the same **Manage My Account** menu options are available.

Let's review the Portal menu bar which consist of the Home, Forms, Registration, Related Links, and the Online Help icon.

### Home

The **Home** tab displays the Hot Topics and quick access to the links displayed in the Related Links tab.

Hot Topics are messages related to ImmTrac2.

If more than one Hot Topic is available, each topic can be viewed by clicking the topic hyperlink or hovering the mouse over the HT-2.

### Forms

The **Forms** tab is where you can find blank consent forms in both English and Spanish. This is the same screen that was available in the Application view.

### Registration

The **Registration** tab can be utilized to find information on how to **Request Access** for new users, and a link to **Register** a new organization.

### Related Links

The Related Links screen provides a links to external website that are relevant to ImmTrac2 or immunizations, and link to the User Manuals. This is the same screen that is available in the Application view.

### Online Help

As previously mentioned, clicking the help icon provides details about the selected screen in ImmTrac2.

## Navigating the Portal Menu Panel

Now let's review the Portal menu panel.

Similar to the Application view, the available options in the menu panel are dependent upon the user's role. For a Full Access Provider user, and a View Only - Non Provider user, the Application and the Manage My Account sections are the only option in the menu panel.

## Switch Organization

As previously discussed, the Switch Organizations screen will list all the organizations the user has access to and is used to navigate to the Application or Portal view for the selected organization.

Clicking on the **ImmTrac2** button will navigate users to the Application Home screen for the selected organization.

Clicking the **Manage Access** button, will navigate users to the Switch Organization screen for the selected organization.

## Log out

To log out, click the **Logout** link at the top of the menu panel.

## Online Help

Now that we have reviewed the menu bar and menu panel for both the Application and Portal views, let's take a closer look at the **Online Help**.

Let's open the **Edit My User Account** screen. Then select the **Online Help** icon.

The Online Help opens for the Edit My User Account screen.

**NOTE:** *If the Online Help browser window was previously opened and not closed, the Edit My User Account help page will open in the same window. Users may need to navigate to the browser window that was already opened.*

Every help page begin with the Purpose section that describes the purpose of the screen. This section and provides bookmark links that quickly jump the user to the different topic discussed in the help page.

If the help page doesn't provide enough details, please review the User Manual for more information.

That concludes the video for Navigating ImmTrac2.

Thank you for listening to this video.

For more detailed information regarding any of these topics, see the Online **ImmTrac2** User Manual.

Please review the other ImmTrac2 videos at [www.immtrac.com](http://www.immtrac.com) at your convenience.