Welcome to this webinar designed especially for schools. I’m Paul Spock in the ImmTrac group at DSHS and I’ll present the first part of the webinar for ImmTrac2 view-only users. The second part will be on back-to-school vaccine requirements that Julie will be talking about. Our combined presentation should last about an hour, followed by a question and answer session.
Our agenda for ImmTrac2 today is that we’ll cover:
• How to view a client (student) record and immunizations,
• How to use the “Official Immunization Record” button on the client record
• How to use the “Reports” button on the client record, and
• How to print reports from a list of students

I’ll be using the words client and student interchangeably in this webinar. They are students in the school and clients to the provider.
Some webinar details are that:

1. All of you are muted to prevent background noise,

2. Your attendee control panel has a grab tab. You may click on the orange arrow to expand and collapse the panel. You may ask questions throughout the presentation and during question times by typing into the GoToWebinar “questions” box,

3. We will try to answer as many questions today as possible.

4. All screenshots are from the viewpoint of a “View Only” user in ImmTrac2.
The first section we’re about to do will show you how to View a Client Record and Immunizations.
To access client immunization records, View Only Non-Provider users will see a menu panel option called “view client imm report” on the left menu panel.

The “view client imm report” is designed to run reports on ONE client.

Selecting this option displays the Client Search screen where you have a choice of using the Quick Search, the Basic Search, or the Smart Search to find a client.

If your search results in multiple possible matches, a list of possible matches will be displayed for you to choose from.

If the search results in only one match, the client record will be displayed immediately.

We’ll go over the three types of searches briefly now.
Of the three search methods, the Quick Search is the fastest!
The basic search requires a first name, last name, and birth date. The first and last names don’t have to be filled in completely but it’s a good idea to enter the information that you’re sure of. The date field can use question marks as a wild card if you don’t know the client’s birthday. Of course, if you do know the full first and last names, and have a full birth date, use those. Partial information will widen the search.
The smart search is the most complete search. It uses an algorithm, like doing a Google search, so that if your information is close but not completely right, it may still find the client. The first name, last name, birth date, gender, and street address are required. If you don’t know the street address you can put in the numbers 1, 2, 3. If you know the mother’s first name or maiden name, enter those as they can help find the client.
After the search, you’ll see that the Client Immunization Record for view-only users displays three sections:

- The client information at the top,
- The record of immunizations received by the client below that, and
- At the bottom are the vaccines recommended by the selected tracking schedule.

From this screen, a user can print out an immunization record or run select reports.
The first section displays basic identifying information from the client’s demographic record:

- From the Client Information section you can print an Official Immunization Record and other reports.
- Personal information such as date of birth and gender are displayed.
- You can select an immunization tracking schedule that includes the standard ACIP schedule and school schedules. This schedule will affect the record you see if you click on the Official Immunization Record above it.
- The Advisory Committee on Immunization Practices (ACIP) is a group of medical and public health experts that develop recommendations on use of vaccines for adults and children in the United States. More information about the ACIP can be found on the Centers for Disease Control website.
- Client ID, Provider, and school selections are also displayed.
- Note that Client Comments are displayed in RED. If a Provider has entered an allergy, condition, reaction, or refusal, those are displayed in the Comments area for ALL USERS of the system. Some comments can affect the vaccine recommendations. Refusals will be displayed in the comments of this section but will not be displayed when you print an Official Immunization Record.
The second section displays the client’s **Immunization Record** of vaccines the client received. The rows represent each vaccine group covered by administered doses. Combination vaccines will list separate vaccines in the combo.

The hyperlinks in the **Date Administered** column will open a pop-up window of the **Explanation of Dose Status** which describes the appropriate client ages for the administration of shots.

The **Owned?** column displays information on which provider “owns” or administered the vaccine. If the word NO is displayed, the organization did not administer the vaccine. If the row in the Owned column is blank, then the organization did administer the vaccine and owns the immunization. In this example, the second HepB immunization is “owned” and the word “No” does not appear in the Owned column.

HISTORY denotes if the immunization was entered into ImmTrac2 by an organization that didn’t administer the immunization, in which case the word “Yes” will display in the History Column. If a row is blank in the History column, then that immunization is not historical and was entered as a current immunization by the organization giving the shot.
The third section displays the client’s **Vaccines Recommended by the Selected Tracking Schedule**. This is a dynamic display of the vaccines due based on the client’s record of doses already received and the timing of when those doses were administered. The Selected Tracking Schedule is the schedule defined in the Client’s demographic record, which is accessible only by Full-Access Providers.

Most Clients will have the ACIP schedule selected because it is the default option.

The hyperlinks for each vaccine group will open a pop-up window of the **Explanation of Dose Status**. The window displays a chart showing where the next recommended dose falls within the series and interval recommendations.
Using the Official Immunization Record button on one client is our next topic.
First, search for a student, or client, and then in the Client Information section, click the Official Immunization Record button.
A pop-up message displays, confirming that you have consent of the individual, parent, or guardian. Click OK to proceed.
The record displays in a new browser tab. You can right click on the screen to see print options.
The schedule selected can make a difference in the immunizations listed. Here I’ve selected the ACIP schedule at the bottom.
Using the ACIP schedule in this example of the Official Immunization Record, the Hib shot is “not valid” because the client’s age exceeded the maximum date range for Hib, and the HPV shot is listed as “1 of 2”.
For that same client, we now select the Texas 7th to 9th grade 2018 to 2019 schedule.
Under the 7th to 9th grade student schedule on the Official Immunization Record, the Hib shot no longer states “Not Valid” and the HPV series no longer states “1 of 2” because it is not required on the school schedule. The ACIP schedule is more strict than the Texas school schedules.
How to use the Reports button is our next topic.
First, search for a student, or client, and then in the Client Information section, click the Reports button.
Reports Available

- Official Immunization Record
- Immunizations Needed
- Recall Letter

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
<th>Additional Information</th>
<th>Tracking Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Immunization Record</td>
<td>Displays official immunization history contained in the registry</td>
<td>Home</td>
<td>ACIP</td>
</tr>
<tr>
<td>Immunizations Needed</td>
<td>Displays demographic, contact information, immunization history, as well as immunizations needed</td>
<td>None</td>
<td>ACIP</td>
</tr>
<tr>
<td>Recall Letter</td>
<td>Displays a portable Recall letter for the client with a list of missed due immunizations</td>
<td>Home</td>
<td>ACIP</td>
</tr>
</tbody>
</table>

From here you can print the Official Immunization Record, Immunizations Needed, or a Recall Letter for **ONE CLIENT**.

Note again that multiple schedules are available, including the ACIP and school schedules, for the Official Immunization Record and the Immunizations Needed reports.

Let’s look at these three reports, starting with the Official Immunization Record.
If you clicked on the Official Immunization Report link, a message pops up reminding you that you need to have the consent of the individual to print his or her record.
After clicking okay, the Official Immunization Record is displayed.
If you clicked on the Immunizations Needed link, that report is displayed, showing the immunizations already received, AND below, the immunizations that are due.
If you clicked on the Recall Letter link, that letter is displayed in both English and Spanish.
The last section that we’ll talk about is how to print reports from a list of students involving multiple clients.
School Lists (1 of 2)

“Schools” let you organize students into groups (lists) to print reports for all students on a list.

The Schools options on the menu panel allows users (for example schools and child care facilities) to organize their students into groups for reporting immunization information on all students on the list.
The functions available for schools allow users to:

• Create, edit, or delete school lists.
• Search for students to add or remove them from a list.
• Access pre-configured School List Reports.
• And you can also choose to assess students by the ACIP schedule or by a Texas school compliance vaccine schedule.

School Lists were designed mainly for the convenience of View Only – Non Provider users.
To create reports from school lists,

1. First, click on **Manage List** to create a new student list or access an existing one. At this point the list is empty and has no students in it.
2. Next, click **Find Student**, to search for & add students to the list.
3. Then, click **Manage List** again to run reports on all the students on the list.
4. Finally, you can click **Check School Report** to view reports you’ve already run.

Let’s take a look at these steps.
First, let’s create a list of students! Click “manage list” from the menu bar on the left side of the screen.
Enter a New List Name, and click Save.

Note that the list is not functional until students have been added to it. The list starts out with a student count of zero (0). There’s no limit to the number of lists that can be created. Lists are shared and viewable by all users in your organization.
List names cannot be duplicated. If they are, a message dialog box will display stating that the Report List Name is already in use, and to please choose a different name.
If you want to change the name of a School List, click the Edit button on the row of the List Name you want to change. One use for this might be when students advance in grades.
Then enter the new List Name and click Save.
If you want to delete a School List, click the Delete button on the row of the List Name you want to delete.
A message will ask you if you’re sure you want to delete the list. To continue with deleting the list, click the OK button.
Now that we have a Student List, we need to add students to it. Click “Find Student” in the menu on the left to look up a student, or client.

The three search options will display and you can search for a client.
When the client record is displayed, use the drop down box to pick a Report List, then click on “Add this Student to a Report List”. You can add the student to one or more lists, by selecting and adding one at a time.
Now that we have a student list, and we have students in the list, hopefully more than one, we’re ready to print reports from the student list.

Click “Manage List” again to access reports and student details.
Click the list of students that you want to run reports from.
Print Reports (2 of 5)

The report options display.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Immunization</td>
<td>Displays the official immunization history for each student in the list sorted alphabetically by last name.</td>
</tr>
<tr>
<td>Immunizations Due</td>
<td>Displays the name, date of birth, and immunization information for immunizations due for each student in the list sorted alphabetically by last name.</td>
</tr>
<tr>
<td>Student List</td>
<td>Produces a basic report displaying the student's ImmTrac2 ID, Name, and Date of Birth for each student.</td>
</tr>
</tbody>
</table>

There are three report options to run and the report will pertain to all the students on the list you’ve selected.

When we earlier clicked on “View client Imm” report, that was for one student and the report that we could print was an Official Immunization Record, Immunizations Needed, or a Recall Letter.

When we clicked now on “Manage List”, that involves printing reports for multiple students from a list we created.

The reports we can generate now are:
- The **Student List** link produces a basic report that displays the ImmTrac2 ID, Name, and Date of Birth for each student.
- The **Official Immunization History List** allows you to produce the Official Immunization History for each student in a batch report.
- The **Immunizations Due** report produces a listing of all immunizations and what shots are due or past due for each student.
Select ACIP or the appropriate Texas school vaccine schedule.

Note the Tracking Schedule option below the report names. With the Tracking Schedule option, you can select which tracking schedule you want to use when you run any of the three reports. From the drop-down box for Tracking Schedule, you can select the standard ACIP tracking schedule, or any of several school tracking schedules used in Texas.

Select the appropriate schedule for evaluating students BEFORE you run your report.
Below the Tracking Schedule is the list of students and a delete box on each row. If you want to delete a student from the list, click the Delete box on the row for that student, then click the Delete button.
Finally, click one of the three report links to run a report.

Let’s take a look at the output of the three report options.
The Student List displays the ImmTrac2 ID, Last Name, First Name, and Birth Date for each student.
When you click the link for the Official Immunization History List, you will see a list of the times you’ve run the History List. If the status on the topmost list is less than 100 percent, click the refresh button to check the progress of creating the report. When the status is 100 percent complete, click the Report Name and the immunization report for each of the students on the list will be displayed.
Here’s a sample of the Official Immunization Report.
If you clicked the “Immunizations Due” report, you are given options to select which vaccines to check on and the target date range for when those vaccines might have been due.

For Vaccine Groups you can choose to “Use All Vaccine Groups”, or to “Use Vaccine Groups Selected” and then select vaccines by clicking on a vaccine and then clicking the Add button, or double-clicking on the vaccine you wish to add to the list.

If you do not select a target date range, the current date will be used.

After selecting a group of vaccines and a target date range, click the “Generate” button.
The report job status appears next, displaying a list of the school reports you have run. You can click the “Refresh” button in the upper right corner to see the current status of the report you are running. When the status is “Ready”, click the name of the report to see it.
This is an example of the Immunizations Due report, which will be generated for each student on your report list. It gives the name of the student, the date of birth, a list of vaccines due, and the dates vaccines were given.

This report is slightly different from the Immunizations Needed report we did for one student earlier, but both have dates that immunizations given were due and dates that immunizations were given.
You can click Check School Report in the left-side menu panel to access reports.

Click the Status hyperlink to see the status of reports that are running or to see reports you’ve previously run.
In summary, the View Client Imm Report link lets you print reports for one student at a time, giving you a choice of:

- The Official Immunization Record, or
- Immunizations Needed, which covers immunizations given and immunizations due, or
- A Recall Letter, which lists past due immunizations in English and Spanish.
The Manage List link lets you print reports for one or more students where you can select:
• A student list displaying the ImmTrac2 ID, Name, and Birthday, or
• Official Immunization Records, or
• Immunizations Due, which displays name, birthday, and immunizations due.
Thank you from the ImmTrac Group

ImmTrac2@dshs.texas.gov
(800) 348-9158

The next part of our webinar will be on back-to-school vaccine requirements, and at the end of this webinar we’ll answer questions.
Back-To-School Vaccine Requirements

School Compliance Team (DSHS Immunization Assessment, Compliance, & Evaluation Group)
On today’s webinar, a brief overview will be provided on the following topics:

- Vaccine requirements for students enrolled in K-12
- Provisional Enrollment
- Conscientious Exemptions
- Valid Vaccine Record
- Tracking Immunization Records
- Resources
- Records Retention

Examples will be used throughout the presentation
Finally, we will answer any questions at the end of the presentation
• The required vaccines and number of doses for individuals attending childcare facilities, Pre-K programs, elementary schools, and secondary schools.


• Texas Administrative Code Rule 97.63 goes into detail regarding the vaccines and number of doses for individuals enrolled in childcare facilities, Pre-K programs, elementary schools, and secondary schools.
• Even though TAC Rule 97.63 explains the requirements, it’s sometimes more convenient to have the information in chart form.
• Hep A is the only update to the school requirements for the 2019-2020 school year. During the 2018-2019 school year, 2 doses of hep A were required for students enrolled in K-9th grade. For the 2019-2020 school year, 2 doses of hep A will be required for students enrolled in K-10th grade.
• The 2019-2020 vaccine requirements are posted on the School & Childcare Facility Immunization Requirements website. If you are interested in printing the requirements or would like to access the requirements at a later date, the website can be accessed using the link located at the bottom of the slide.
State of Texas vaccine requirements are based on the number of doses. ACIP recommendations are based on interval of doses. Some vaccine doses are required to be received on or after a specific birthday. State of Texas vaccine requirements for individuals enrolled in childcare, Pre-K, primary, and secondary schools are based on the number of doses. The Advisory Committee on Immunization Practices or ACIP recommendations are based on interval of doses. Students would ideally receive the required vaccines at the ACIP recommended intervals, but that doesn’t always happen. If a student has received all of the required # of doses, the doses should count, and s/he should be allowed to enroll in school. There are some exceptions of course, as some vaccines are required to be received on or after a specific birthday. For example, if a student received the 2nd dose of Hep A four months after receiving the 1st dose, s/he would be in compliance because they received two doses of Hep A. Whereas, a child who received 5 doses of DTaP before their 4th birthday would be required to receive an additional dose in order to meet State of Texas minimum vaccine requirements.
Shayla is moving from Arkansas and her parents want to enroll her in 3rd grade at Smith Elementary School. When Nurse Bee was reviewing Shayla’s immunization record, she noticed that Shayla received the 2nd dose of MMR when she was 3½.

Nurse Bee isn’t sure if Shayla should be allowed to enroll since Shayla received the 2nd dose of MMR earlier than the ACIP recommendations.

Is Shayla allowed to enroll at Smith Elementary School?
Yes, Shayla should be allowed to enroll at Smith Elementary School.

Since Shayla received two doses of MMR, she meets the State of Texas Minimum Vaccine Requirements.
Tyrus needs to enroll in Jones elementary as a 5th grade student. He received both doses of varicella two weeks apart when he was two years old.

Does Tyrus need an additional dose?
No, Tyrus does not need an additional dose of varicella in order to be in compliance with State of Texas Minimum Vaccine Requirements because he received the right number of doses.

It is recommended that Tyrus should receive another dose of varicella vaccine since the two doses were given too close together.

• Although it is recommended for children to receive the 2nd dose of varicella between four and six years of age, Tyrus does not need an additional dose in order to be in compliance with Texas State Minimum Vaccine Requirements.
There are five reasons a student would qualify for provisional enrollment. A student would qualify for provisional enrollment if he or she is transferring from one Texas public or private school to another Texas school. Please remember students moving from out-of-state must either be up-to-date, have a valid vaccine exemption, or be in-progress for receiving the required vaccines.

- Students who are identified as homeless according to the federal McKinney-Vento Act, 42 U.S.C. §11302. If you aren’t sure if the student qualifies as homeless, please reach out to your McKinney-Vento liaison.
- Active duty dependents are students who are dependents of active duty service members and are waiting on the transfer of their immunization records.
- Students who are in foster care and are waiting on the transfer of their immunization record.
- Finally, students who are in-progress of receiving the required vaccines. For these provisionally enrolled student, the school nurse or school staff are required to review the student’s immunization record every 30 days to ensure they are on track to receiving subsequent doses as fast as medically feasible.
- It’s 30 calendar days, not 30 school days.
- If a student qualifies for provisional enrollment, they have 30 days from the date of enrollment to either produce a valid up-to-date shot record or a valid vaccine exemption. If there isn’t a valid shot record or vaccine exemption after 30 days, the student is not allowed to be enrolled in school.

<table>
<thead>
<tr>
<th>Students Who Qualify</th>
<th>Initial # of Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Texas Transfer Student</td>
<td>• 30 days</td>
</tr>
<tr>
<td>• Homeless Student</td>
<td></td>
</tr>
<tr>
<td>• Active Duty Dependents</td>
<td></td>
</tr>
<tr>
<td>• Children in Foster Care</td>
<td></td>
</tr>
<tr>
<td>• Students In-Progress</td>
<td></td>
</tr>
</tbody>
</table>
• Students provisionally enrolled are required to receive subsequent doses of vaccine as fast as medically feasible.
• If a student is provisionally enrolled, s/he would need to follow the ACIP Catch-Up Schedule.
• Based on feedback, we created a K-12 Provisional Enrollment Vaccine Dosing Schedule. The tool is intended to help take the guess work out of when the subsequent vaccine should be given in a series.
• The spacing of doses on the provisional enrollment dosing schedule only applies to doses received after the student’s provisional enrollment begins.
• We have also been asked to create a provisional enrollment dosing schedule for children enrolled in Pre-K and childcare, but one is not available at this time.
Liam and his family are moving from Florida to Texas and he will be enrolled in 8th grade. Due to the differences in state vaccine requirements, Liam has not received two doses of Hep A or one dose of meningococcal.

Would Liam qualify for provisional enrollment since he will be transferring middle schools?
Liam's immunization record is delinquent by State of Texas standards.

If Liam receives one dose of Hep A and the required dose of MCV4, Liam is able to provisionally enroll in 8th grade because he has started all vaccine series.

- The answer could be no or yes. If a student moves from out of state and does not meet State of Texas vaccine requirements or is willing to receive the missing vaccines, s/he is only allowed to enroll if they have a valid medical or conscientious vaccine exemption.
- If a student moves to Texas and starts receiving required doses of the missing vaccine(s), s/he would be eligible for provisional enrollment.
- In this example, Liam should receive the 2nd dose of Hep A 6 months after he receives the 1st dose since 6 months is as fast as medically feasible for receiving the subsequent dose of Hep A.
• TAC Rule, Subchapter B, §97.62:
https://texreg.sos.state.tx.us/public/readtac$ext.TacP

• DSHS School Exemptions FAQs:
https://www.dshs.texas.gov/immunize/school/exemption-faq.aspx

• Conscientious exemptions include exemptions for
religious & personal beliefs.
• Some students may have a conscientious exemption
on file for some vaccines, but not all vaccines.
• If the exemption is not for all vaccines, a valid shot
record must also be included with the student’s file.

• More Information regarding conscientious exemptions can be found in TAC Rule §97.62, as well as on
the DSHS School Exemptions FAQs page. TAC Rule §97.62 and the DSHS School Exemptions FAQs can
be accessed by using the links on the screen.

• Individuals cite various reasons why they do not want their children immunized, but unless there is a
medical contraindication that has been verified by a MD or DO, the parent would need to submit a
conscientious exemption request.

• Some parents/guardians may want their child to receive some vaccines, but not all vaccines. If this is
the case, the student will present a conscientious exemption affidavit with boxes checked for some
vaccines, but not for others.
The conscientious exemption affidavit is printed on special paper that is mailed from DSHS state headquarters in Austin. DSHS mails all affidavits via USPS and the recipient should receive the document 7-10 business days after the request has been processed. Requests are processed in the order received. If it is a busy time of year, a person may submit their exemption request on a Monday afternoon, but it may not get processed until Wednesday morning due to the number of requests that were received prior to the individual’s.

After the parent/guardian receives the conscientious exemption affidavit in the mail, s/he must get the document notarized by a notary public for the State of Texas. This document remains valid for two years after the date notarized.

There is no grace period which means once the exemption expires, the student should not be allowed to return to school until they have either started the vaccine series or has a valid conscientious exemption affidavit.
On April 15th, DSHS started using new paper for the conscientious exemption affidavits. A lot of the same features on the old paper remain the same on the new paper. These features include: Number in upper right corner in red ink, DSHS logo in upper left corner; State seal watermark; Color of paper is light blue, but slightly different tint; When copied, the copy will show the word “void”; Blank back page, but when held to the light the repeated words “Kan’t Kopy” appear. There are some differences between the types of paper, which include the weight and thickness. A school should accept a valid vaccine exemption that is printed on either the new or old affidavit paper. Since DSHS started using the new paper, an insert with information on the updated paper has been included with each vaccine exemption affidavit packet that is mailed. Information regarding the update has also been placed on DSHS Immunization Unit website.
Transferring Schools
Example

Mai Ling has a conscientious exemption on file at her current middle school. Mai Ling’s family will be moving from Waco to Houston.

When her mom went to withdraw Mai Ling from school, her mom intended on taking her daughter’s original conscientious exemption affidavit since it would still be valid for one more year.

The school registrar stated the original affidavit must remain at the school, but Mai Ling’s mom disagrees. Who is correct?
Transferring Schools
Example Answer

Mai Ling’s mom is correct. When a student withdraws from a school, the original conscientious exemption affidavit should be returned to the parent/guardian.

The school does not need to keep the original for record retention purposes.

- Per the Records Retention Schedule, affidavits of conscience-based exclusions should be retained for 2 years after the date notarized or date of withdrawal, whichever sooner.
Obtaining a Conscientious Exemption Affidavit Example

Shannon attends Washington High School, which is part of Dallas ISD. It is August 15th and school starts August 19th. Shannon’s father realizes her conscientious exemption affidavit has expired.

Which one is NOT an option for obtaining a conscientious exemption affidavit?
A. Drive to Austin and obtain in person
B. Submit a request via fax
C. Submit a request via online
D. Submit a request via mail
Obtaining a Conscientious Exemption Affidavit Example Answer

A. Drive to Austin and obtain the document in person.

Conscientious exemption affidavit requests are not processed in person, although the request form can be dropped off.

Conscientious exemption affidavit requests are processed year round.

• People do have the option to drive to the state health department and submit a request, but their request will not be processed in-person.
• We value vaccinations and education, but due to the limited size of our staff, we don’t process conscientious exemption requests in person.
• By law, students are required to either be up-to-date or have a valid vaccine exemption in order to attend school. If a student does not have an up-to-date vaccine record, is in the process of receiving the required vaccines, or have a valid vaccine exemption; s/he should not be allowed to attend the first day of school.
• We do process conscientious exemption requests daily all year long and we generally process requests within 3 business days of receiving the request. We know parents/guardians may wait until the last minute before school starts, but back-to-school is our busiest time of year. Additional staff is hired during the back-to-school season in order to help process conscientious exemption requests. Additionally, it may take 7-10 business days after the request has been processed for the parent/guardian to receive the affidavit in the mail.
Immunization records come in a variety of forms and as long as the record has been validated by a physician or public health personnel and the month, day, and year of when the vaccination was received is on the record; it’s valid.

- It does not matter if the same ink was used when indicating the date and vaccine type received.
- If the record has been printed off from an EHR, it must contain the clinic’s stamp & provider’s signature or stamp.
- Immunization records are also acceptable if they come from a local or state health authority.
- Records from ImmTrac2 are acceptable.
- Official records from school officials are also acceptable.
- If the immunization record is from another country and contains all of the required information; the record is valid.
Tracking Immunization Records

- ImmTrac2
  - School immunization tracking software
  - Change schedule from ACIP recommendations to State of Texas requirements
  - Student’s immunization records

School nurses wear many hats and it can be challenging making sure students are up-to-date and in compliance.

All schools have access to ImmTrac2 and some schools use school immunization tracking software to track their students’ immunization status.

ImmTrac2 is automatically set to the ACIP Recommendations and as a result, a student may appear as delinquent, when in reality s/he is up-to-date.

Immunization tracking software varies. If you or a school staff have a question about your tracking software, please contact the vendor. If you aren’t sure who to contact, check their website.

If the tracking software indicates the student is delinquent and you can’t figure out why, review the dates when the doses were received on the student’s immunization record. When reviewing the student’s record, compare it to the State of Texas Minimum Vaccine Requirements. The software may be indicating the student is delinquent if the student received a dose of a specific vaccine before a required birthday. If for example, the student received four doses of polio before their 4th birthday, the software would flag the student as not being up-to-date per State of Texas Minimum State Vaccine Requirements and the student should receive another dose of polio.
RN Fisher’s school immunization tracking software provides a report when immunizations are due. According to the school immunization tracking software, Shelby, a kindergartner, is due for a final dose of DTaP.

RN Fisher is confused because Shelby has received five doses of DTaP. What should RN Fisher do?
A. Check ImmTrac2
B. Review Shelby’s immunization record
C. A and B are correct
A & B are correct

ImmTrac2 is a great place to start.

• If you guessed C, that A (Check ImmTrac2) and B (Review Shelby’s immunization record) is the answer, you are correct.
• ImmTrac2 is a great place to start. If Shelby is not in ImmTrac2, RN Fisher should review Shelby’s immunization record.
• Even though Shelby received 5 doses of DTaP, all were received before age four.
• After RN Fisher notices that Shelby received all 5 doses of DTaP before age four, RN Fisher will need to notify the parent/guardian that Shelby needs an additional dose of DTaP in order to be in compliance.
A records retention schedule provides guidance on the length of time an entity is required to keep documents.

**Public School District Record Retention Schedule:**  
https://www.tsl.texas.gov/slrm/localretention#SD

**Part 5: Student Health Records**

- You may wonder why a slide pertaining to records retention is included in this presentation.
- A records retention schedule provides guidance on the length of time an entity is required to keep documents.
- Some school RNs have contacted the school compliance team and inquired how long they should keep certain documents.
- If you have questions regarding how long you should keep certain documents such as immunization records, health screening documentation, vaccine exemptions, the records retention guide will make your life easier.
- The guide can be accessed by clicking on the link and the records retention schedule for student health records is located in part 5.
Immunization Resources

- ACIP Catch-Up Schedule: 
  https://www.cdc.gov/vaccines/schedules/hcp/imz/catchup.html

- DSHS School & Childcare Immunization Website: 
  https://www.dshs.texas.gov/immunize/

- ImmTrac2: 
  https://immtrac.dshs.texas.gov/TXPRD/portalHeader.do

- Some helpful school immunization resources are listed on the slide.
Thank you from the Assessment, Compliance, & Evaluation Group

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