



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.

**ImmTrac2 Schools Training –  
Our Agenda**

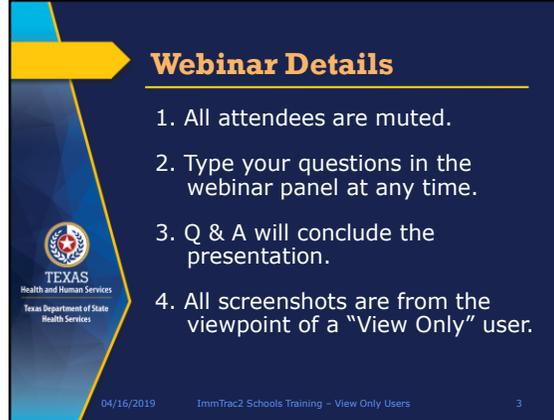
- View a client (student) record and immunizations
- How to use the “Official Immunization Record” button on the client record
- How to use the “Reports” button on the client record
- How to print reports from a list of students

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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.

A dark blue slide with a yellow arrow pointing right at the top left. The title "Webinar Details" is in orange. A list of four points is in white. On the left, there is a logo for Texas Health and Human Services, Texas Department of State Health Services. At the bottom, there is a date "04/16/2019", a title "ImmTrac2 Schools Training - View Only Users", and a page number "3".

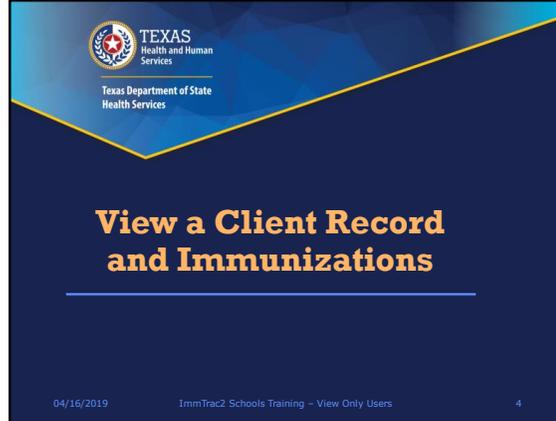
**Webinar Details**

1. All attendees are muted.
2. Type your questions in the webinar panel at any time.
3. Q & A will conclude the presentation.
4. All screenshots are from the viewpoint of a "View Only" user.

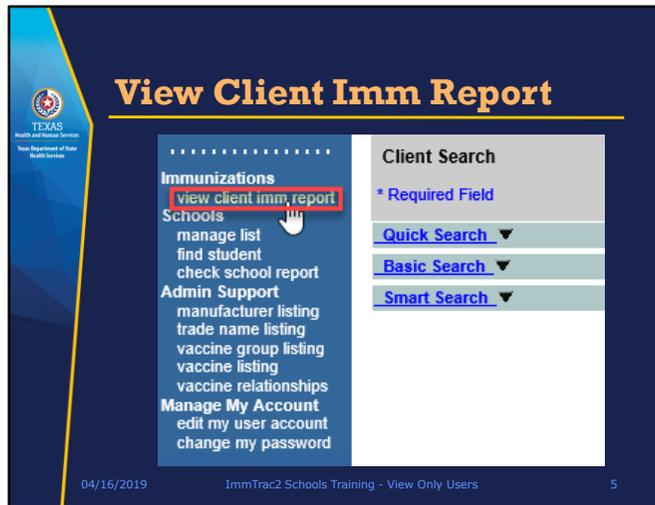
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Some webinar details are that:

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.

TEXAS  
Health and Human Services  
Texas Department of State Health Services

## Quick Search

- Fastest Search

Client Search

\* Required Field

Quick Search ▾

Search by ImmTrac2 ID

\* ImmTrac2 ID  Find Clear

Search by Client Identifier

\* Client ID

Search by SSN# and DOB

\* SSN#  -  -  \* Birth Date

Search by Medicaid ID

\* Medicaid ID

Basic Search ▾

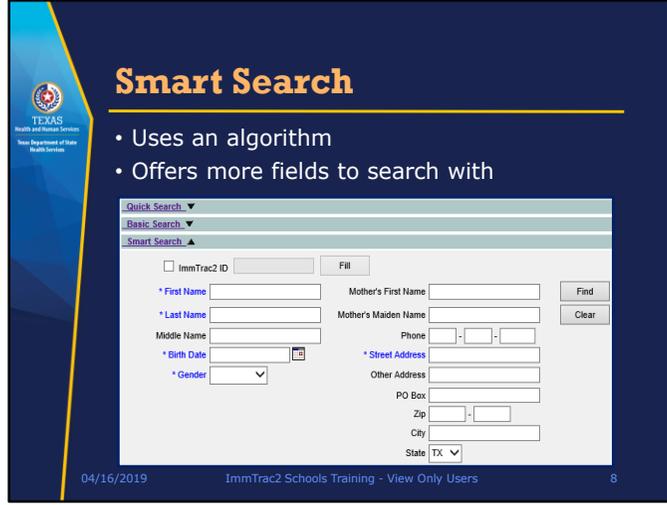
Smart Search ▾

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Of the three search methods, the Quick Search is the fastest!

The screenshot displays the 'Basic Search' section of the ImmTrac2 Schools Training application. At the top left is the Texas Health and Human Services logo. The title 'Basic Search' is prominently displayed in orange. Below the title, two bullet points state: 'Can use the wild card in date field' and 'Can use partial names'. The search interface includes a 'Client Search' header, a '\* Required Field' indicator, and three search options: 'Quick Search', 'Basic Search' (which is selected), and 'Smart Search'. The 'Basic Search' form contains the following fields: '\* First Name' (text input), 'Gender' (dropdown menu), 'Children Only' (checkbox), '\* Last Name' (text input), '\* Birth Date' (calendar icon and text input), and a 'Find' button. A 'Clear' button is located below the 'Find' button. The footer of the slide shows the date '04/16/2019', the text 'ImmTrac2 Schools Training - View Only Users', and the page number '7'.

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 screenshot shows a web application interface for a search function. At the top left is the Texas Health and Human Services logo. The main heading is "Smart Search". Below the heading are two bullet points: "• Uses an algorithm" and "• Offers more fields to search with". The interface includes three search tabs: "Quick Search", "Basic Search", and "Smart Search". The "Smart Search" tab is active, showing a form with the following fields: "ImmTrac2 ID" (checkbox), "First Name" (required), "Last Name" (required), "Middle Name", "Birth Date" (required), "Gender" (dropdown), "Mother's First Name", "Mother's Maiden Name", "Phone", "Street Address" (required), "Other Address", "PO Box", "Zip", "City", and "State TX" (dropdown). There are "Find" and "Clear" buttons on the right side of the form.

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.

**Client Immunization Record**

Client Information: KORONA PAVAN L, DOB: 01/01/2010, Gender: F, Tracking Schedule: ACIP, Client ID: [REDACTED]

Immunization Record (Tracking Schedule: ACIP):

Vaccine Group	Date Administered	Age at Administration	Source	Vaccine (Trade Name)	Doses	Doses Due	Reaction/Notes	Discontinue
HepB	03/01/2010	9V 2M	1 of 2	HepA, NCS (HepA, NCS)	1	2	Full	
HepB	01/01/2010	0 days	1 of 3	HepB, NCS (HepB, NCS)	1	3	Full	
HepB	01/02/2010	1D	2 of 3	HepB, NCS (HepB, NCS)	2	3	Full	
HepB	01/02/2010	2ND	2 of 3	HepB, NCS (HepB, NCS)	2	3	Full	
Hb	01/01/2010	1M 1M2	2 of 3	HepB, NCS (HepB, NCS)	2	3	Full	Yes
Hb	03/01/2010	1M2	1 of 2	HepA, NCS (HepA, NCS)	1	2	Full	Yes
HPV	03/01/2010	9V 2M	1 of 2	HPV, NCS (HPV, NCS)	1	2	Full	Yes
MMR	01/01/2011	1M2	1 of 2	MMR (MMR II)	1	2	Full	Yes
MMR	01/01/2012	2Y	2 of 2	MMR (MMR II)	2	2	Full	Yes
Polio	03/01/2010	7Y 2M	1 of 3	Polio (Polio II)	1	3	Full	Yes
Polio	03/01/2010	2M	1 of 3	Polio (Polio II)	1	3	Full	Yes
Polio	04/01/2010	3M	2 of 3	Polio (Polio II)	2	3	Full	Yes
Polio	04/01/2010	9V 2M	3 of 3	Polio (Polio II)	3	3	Full	Yes
Td/Hep	03/01/2011	7Y 2M	1 of 4	Td (Tdap, NCS)	1	4	Full	Yes
Td/Hep	10/02/2012	7Y 2M	2 of 4	Td (Tdap, NCS)	2	4	Full	Yes

Vaccines Recommended by Selected Tracking Schedule:

Vaccine Group	Vaccine	Next Due Date	Recommended Date	Past Due Date
DTaP	DTaP, NCS	08/21/2010	08/21/2010	10/21/2010
HepA	HepA, NCS	08/21/2010	08/21/2010	10/21/2010
HepB	HepB, NCS	08/21/2010	08/21/2010	10/21/2010
HPV	HPV, NCS	08/21/2010	08/21/2010	10/21/2010
MMR	MMR, NCS	08/21/2010	08/21/2010	10/21/2010
Polio	Polio, NCS	08/21/2010	08/21/2010	10/21/2010
Td	Td, NCS	08/21/2010	08/21/2010	10/21/2010
Tdap	Tdap, NCS	08/21/2010	08/21/2010	10/21/2010
MMR	MMR, NCS	08/21/2010	08/21/2010	10/21/2010

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.

## Section 1: Client Info

- Report options
- Personal information
- Tracking schedule and Client ID
- Provider & School selections (optional)
- Comments

Client Information		Official Immunization Record	Reports	Cancel
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
KEISHA PURPLE	01/01/2010	F	ACIP	
Provider (PCP)	Not on file		TX 10-12 2018-2019	
School	Not on file		TX 7th-8th 2017-2018	
			TX 7th-9th 2018-2019	
			TX 9-12 2017-2018	
			TX Child Care Reqs	
			TX K-6 2017-2018	
			TX K-6 2018-2019	
Comments	01/01/2012 - Allergy to POLYMYXIN B 02/01/2019 - Refusal of Td/Tdap 03/21/2019 - History of varicella (chicken pox)			
Current Age: 9 years, 3 months, 25 days				

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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.

## Section 2: Immunization Record

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

Vaccine Group	Date Admin	Age At Immunization	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
HepB	<a href="#">01/05/2019</a>	19Y	1 of 3	DTaP-HepB-IPV [Pediarix ®]	Full	No			
	<a href="#">02/06/2019</a>	19Y 1M	2 of 3	HepB, NOS [HepB ®]	Full				
MMR	<a href="#">01/05/2019</a>	19Y	1 of 2	MMR [MMR II ®]	Full	No		Yes	
Polio	<a href="#">01/05/2019</a>	19Y	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			
Td/Tdap	<a href="#">01/05/2019</a>	19Y	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			

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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.

## Section 3: 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="#">DTaP/aP</a>	DTaP, NOS		Maximum Age Exceeded	
<a href="#">HepA</a>	HepA, NOS	09/21/2019	09/21/2019	10/21/2019
<a href="#">HepB</a>	HepB, NOS		Complete	
<a href="#">Hib</a>	Hib, NOS		Maximum Age Exceeded	
<a href="#">HPV</a>	HPV, NOS	08/01/2019	09/01/2019	04/01/2020
<a href="#">Influenza seasonl</a>	Flu, NOS	01/01/2019	01/01/2019	01/01/2019
<a href="#">Meningo</a>	MCV4, NOS	01/01/2020	01/01/2021	01/01/2023
<a href="#">MMR</a>	MMR		Complete	
<a href="#">Poli</a>	Poli, NOS		Complete	
<a href="#">TdT/dTap</a>	Td (adult), NOS	04/02/2018	04/02/2018	11/02/2018
<a href="#">Varicella</a>	Varicella		Contraindicated	

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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.



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services

## Using the Official Immunization Record Button on One Client

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Using the Official Immunization Record button on one client is our next topic.

## Official Immunization Record (1 of 3)

From the client's record, click the Official Immunization Record button.

Client Information					Official Immunization Record	Reports	Cancel
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID			
KEISHA PURPLE	01/01/2010	F	ACIP				
Provider (PCP)	Not on file						
School	Not on file						
Comments	01/01/2012 - Allergy to POLYMYXIN B 02/01/2019 - Refusal of Td/Tdap 03/21/2019 - History of varicella (chicken pox)						
Current Age: 9 years, 3 months, 15 days							

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First, search for a student, or client, and then in the Client Information section, click the Official Immunization Record button.

**Official Immunization Record (2 of 3)**

A pop-up message displays, confirming that you have consent of the individual, parent, or guardian. Click OK to proceed.

Message from webpage

 By printing the immunization record, you acknowledge that you have consent from the individual, parent, or guardian to print the Official Immunization Record for this client.

OK

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A pop-up message displays, confirming that you have consent of the individual, parent, or guardian. Click OK to proceed.

**Official Immunization Record (3 of 3)**

The record displays in a new browser tab. You can right click on the screen to see print options.

TEXAS DEPARTMENT OF STATE HEALTH SERVICES  
 Official Immunization and Disaster-Related Information Record

ImunTrac ID: 219113360      Gender: F  
 Client Name (L. F. M): PURPLE, KEISHA      DOB: 01/01/2008  
 Client Type: ImmunTrac Child (IC)      Client Age: 14 years, 3 months, 28 days  
 Schedule: ACIP      Report Date: 04/28/2018

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday. Learn more at [www.immtrac.com](http://www.immtrac.com).

Any combination vaccines (e.g. DTaP-HepB-IPV, HepB-Hib) administered are listed within each appropriate vaccine family.

IMMUNIZATION HISTORY					
Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Manufacturer	Lot #
HepA	03/21/2019	1 of 2	HepA, NOS [HepA, NOS]		ABC123
HepB	01/01/2010	1 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	DEF123
	01/02/2010	Not Valid	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	ABC123
	01/09/2010	2 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	XYZ456
	07/15/2010	3 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	
Hib	03/01/2011	Not Valid	Hib, NOS	LNK-UNKNOWN	
HPV	03/01/2019	1 of 2	HPV, NOS [HPV, NOS]		
MMR	03/01/2011	1 of 2	MMR [MMR II]	MSD-Merck & Co., Inc.	DEFG123

The record displays in a new browser tab. You can right click on the screen to see print options.

### Example: Selecting the ACIP Schedule (1 of 2)



Official Immunization Record
Reports
Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
KEISHA PURPLE	01/01/2005	F	ACIP	
Provider (PCP)	Not on file			
School	Not on file			
Comments	01/01/2012 ~ Allergy to POLYMYXIN B 02/01/2019 ~ Refusal of Td/Tdap 03/21/2019 ~ History of varicella (chicken pox)			
<b>Current Age: 14 years, 3 months, 28 days</b>				
Immunization Record			Tracking Schedule   ACIP   <span style="float: right;">v</span>	

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The schedule selected can make a difference in the immunizations listed. Here I've selected the ACIP schedule at the bottom.

## Example: Selecting the ACIP Schedule (2 of 2)



**TEXAS**  
Health and Human Services  
Texas Department of State Health Services

ImmTrac ID: 219113360      Gender: F  
 Client Name (L, F, M): PURPLE, KEISHA      DOB: 01/01/2005  
 Client Type: ImmTrac Child (C)      Client Age: 14 years, 3 months, 28 days  
 Schedule: **ACIP**      Report Date: 04/29/2019

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday. Learn more at [www.immtrac.com](http://www.immtrac.com)

Any combination vaccines (e.g. DTaP-HaB-IPV, HaB-Hib) administered are listed within each appropriate vaccine family.

IMMUNIZATION HISTORY					
Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Manufacturer	Lot #
HaPa	03/21/2019	1 of 2	HaPa, NOS [HaPa, NOS]		ABC123
HaB	01/01/2010	1 of 3	HaB, NOS [HaB]	MSD-Merck & Co., Inc.	DEF123
	01/02/2010	Not Valid	HaB, NOS [HaB]	MSD-Merck & Co., Inc.	ABC123
	01/29/2010	2 of 3	HaB, NOS [HaB]	MSD-Merck & Co., Inc.	XYZ456
	07/15/2010	3 of 3	HaB, NOS [HaB]	MSD-Merck & Co., Inc.	
	03/01/2011	Not Valid	Hib, NOS	UNK-UNKNOWN	
HPV	03/01/2019	1 of 2	HPV, NOS [HPV, NOS]		
MMR	03/01/2011	1 of 2	MMR [MMR I]	MSD-Merck & Co., Inc.	DEF0123
	01/01/2012	2 of 2	MMR [MMR II]		

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”.

### Example: Selecting the 7<sup>th</sup> – 9<sup>th</sup> Grade Schedule (1 of 2)



Official Immunization Record
Reports
Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
KEISHA PURPLE	01/01/2005	F	ACIP	
Provider (PCP)	Not on file			
School	Not on file			
Comments	01/01/2012 - Allergy to POLYMYXIN B 02/01/2019 - Refusal of Td/Tdap 03/21/2019 - History of varicella (chicken pox)			
Current Age: 14 years, 3 months, 28 days				
Immunization Record			Tracking Schedule   TX 7th-9th 2018-2019	▼

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For that same client, we now select the Texas 7<sup>th</sup> to 9<sup>th</sup> grade 2018 to 2019 schedule.

### Example: Selecting the 7<sup>th</sup> – 9<sup>th</sup> Grade Schedule (2 of 2)



**TEXAS**  
Health and Human Services  
Health Department of Texas  
Health Services

ImmTrac ID: 219113360	Gender: F
Client Name (L, F, M): PURPLE, KESHA	DOB: 01/01/2005
Client Type: ImmTrac Child (IC)	Client Age: 14 years, 3 months, 28 days
Schedule: TX 7th-9th 2018-2019	Report Date: 04/29/2019

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday. Learn more at [www.immtrac.com](http://www.immtrac.com)

Any combination vaccines (e.g. DTap+HepB-IPV, HepB-Hib) administered are listed within each appropriate vaccine family.

IMMUNIZATION HISTORY					
Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Manufacturer	Lot #
DTaP/IP	03/21/2017	1 of 3	Tdap (Boostrix)	SKB-GSKSmithKline	
	10/02/2017	2 of 3	Td (adult), NOS		
HepA	03/21/2019	1 of 2	HepA, NOS (HepA, NOS)		ABC123
	01/01/2019	1 of 3	HepB, NOS (HepB)	MSD-Merck & Co., Inc.	DEF123
HepB	01/02/2010	2 of 3	HepB, NOS (HepB)	MSD-Merck & Co., Inc.	ABC123
	01/28/2010	Not Valid	HepB, NOS (HepB)	MSD-Merck & Co., Inc.	XY2456
	07/15/2010	3 of 3	HepB, NOS (HepB)	MSD-Merck & Co., Inc.	
Hib	09/01/2011		Hib, NOS	UNK-UNKNOWN	
IPV	03/01/2019	1 of 2	HPV, NOS (HPV, NOS)		
MMR	03/01/2011	1 of 2	MMR, NOS (M)	MSD-Merck & Co., Inc.	DEE1122

Under the 7<sup>th</sup> to 9<sup>th</sup> 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.



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services

## Using the Reports Button for One Client

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How to use the Reports button is our next topic.

**Reports Button**

From the client's record, click Reports.

Client Information

Official Immunization Record **Reports** Cancel

Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Client ID
KEISHA PURPLE	01/01/2010	F	ACIP	

Provider (PCP) Not on file

School Not on file

Comments 01/01/2012 ~ Allergy to POLYMYXIN B  
02/01/2019 ~ Refusal of Td/Tdap  
03/21/2019 ~ History of varicella (chicken pox)

Current Age: 9 years, 3 months, 15 days

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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

Reports Available for this Client Cancel

Report	Description	Additional Information	Tracking Schedule
<a href="#">Official Immunization Record</a>	Displays official immunization history contained in the registry.	None	ACIP
<a href="#">Immunizations Needed</a>	Displays demographics, contact information, immunization history, as well as immunizations needed.	None	ACIP
<a href="#">Recall Letter</a>	Displays a printable Recall Letter for the client, with a list of their past due immunizations.	None	ACIP TX 10-12 2018-2019 TX 7th-9th 2017-2018 TX 7th-9th 2018-2019 TX 8-12 2017-2018 TX Child Care Rees TX K-6 2017-2018 TX K-8 2018-2019

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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.

## Official Immunization Record



**TEXAS**  
Department of State  
Health Services

**TEXAS DEPARTMENT OF STATE HEALTH SERVICES**  
Official Immunization and Disaster-Related Information Record



**TEXAS**  
Department of State  
Health Services

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Invoice ID: 318113360  
 Client Name (L, F, M): PLURIN, D, KESSHA  
 Client Type: Immunization Client (IC)  
 Submitter: ACPH

Gender: F  
 DOB: 01/01/2010  
 Client Age: 0 years, 3 months, 15 days  
 Report Date: 04/16/2013

NOTICE: By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday. Learn more at [www.dhs.gov/040303](http://www.dhs.gov/040303)

Any combination vaccines (e.g. DTaP-IPV/OPV, Hib/IPV) administered are listed within each appropriate vaccine entry.

IMMUNIZATION HISTORY					
Vaccine Name	Date Admin	Dose	Vaccine (Trade Name)	Manufacturer	Lot #
HibA	03/01/2010	1 of 3	HibA, NGS (Prevnar, NGS)	ABC123	
HibB	01/01/2010	1 of 3	HibB, NGS (Prevnar, NGS)	MED-MARK & Co., Inc.	DEF123
HibC	01/02/2010	Not Valid	HibC, NGS (Prevnar, NGS)	MED-MARK & Co., Inc.	ABC123
	01/03/2010	2 of 3	HibC, NGS (Prevnar, NGS)	MED-MARK & Co., Inc.	XYZ987
	07/16/2010	3 of 3	HibC, NGS (Prevnar, NGS)	MED-MARK & Co., Inc.	
MM	03/01/2011	1 of 2	MM, NGS	LEO-PHARMACEUTICAL	
IPV	03/01/2010	1 of 2	IPV, NGS (IPV, NGS)		
MM	03/01/2011	1 of 2	MM, NGS (IPV, NGS)	MED-MARK & Co., Inc.	DEF123
MM	01/01/2012	2 of 2	MM, NGS (IPV, NGS)		
Polio	03/01/2010	1 of 3	Polio (Polio)	GRU-Geac Laboratories	
Polio	03/01/2010	1 of 3	Polio (Polio)	GRU-Geac Laboratories Inc.	ABC
Polio	04/01/2010	2 of 3	Polio (Polio)	GRU-Geac Laboratories Inc.	LOT NO
Polio	04/03/2010	3 of 3	Polio (Polio)	GRU-Geac Laboratories Inc.	ABC123
Tdap	03/21/2011	1 of 1	Tdap (Boostrix)	GRU-Geac Laboratories	
Tdap	04/02/2011	2 of 1	Tdap (Boostrix)		

Client Comments:  
History of vaccine (check box)  
Always in POLYMYXIN B

Start Date: 01/01/2010  
End Date: 01/01/2013

04/16/2013

After clicking okay, the Official Immunization Record is displayed.

**Immunizations Needed**

18 April 2019 ImmunTrac2, the Texas Immunization Registry Page 1  
Immunization Record

Client ID: Race: Tracking Schedule: ACIP  
 Client Name: E. E. M. FURFLE, KESLIE Ethnicity:  
 Birth Date: 01/01/2010 Gender: F

Age: 9 years, 3 months, 15 days

Client Comments: Start Date: End Date:  
 History of vaccine (broken pass) 03/11/2018  
 Allergy to PGL/VMY/MYB 01/01/2012

Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Status
HepA	08/21/2019	1 of 2	HepA, NCS	Full
HepB	01/01/2010	1 of 3	HepB, NCS	Full
HepB	01/02/2010	Not Yrns	HepB, NCS	Full
HepB	01/06/2010	2 of 3	HepB, NCS	Full
HepB	07/19/2010	3 of 3	HepB, NCS	Full
IPV	03/01/2011	1 of 2	IPV, NCS	Full
IPV	03/01/2012	1 of 2	IPV, NCS	Full
MMR	01/01/2012	1 of 2	MMR	Full
MMR	01/01/2012	2 of 2	MMR	Full
Polio	03/01/2010	1 of 3	Polio-Inject	Full
Polio	04/01/2010	2 of 3	Polio-Inject	Full
Polio	04/04/2010	3 of 3	Polio-Inject	Full
Td/Type	03/01/2017	1 of 4	Td	Full
Td/Type	10/02/2017	2 of 4	Td (adult), NCS	Full

Vaccine	Date Needed
HepA	08/01/2019
IPV	06/01/2018
Influenza season	01/01/2019
MMR	01/01/2021
Td/Type	04/02/2018

If you clicked on the Immunizations Needed link, that report is displayed, showing the immunizations already received, AND below, the immunizations that are due.

**Recall Letter**

**COMMUNITY HEALTH CENTER**  
 Same address as above  
 and a phone number

April 16, 2019

Parent or Guardian of / Padre, Madre o Tutor de:  
 KEISHA PURDIE,  
 825 BROADWAY  
 LUBBOCK, TX 79401

Our records indicate that Keisha Purdie may soon be due for the vaccines noted on this letter.

If you have recently taken your child to a health care provider for vaccines, please call the provider to ensure your child's immunization records are updated.

If your child has not received the doses indicated below, please call your provider to arrange an appointment for your child.

Nuestros registros indican que posiblemente a Keisha Purdie pronto le toquen las vacunas que se anotan en esta carta.

Si recientemente usted llevó a su niño(a) con quien le proporciona atención de salud para recibir las vacunas, sírvase llamar a quien lo atiende para asegurarse que sean actualizadas los registros de inmunización de su niño(a).

Si su niño(a) no ha recibido las dosis que abajo se indican, sírvase llamar a quien lo atiende para hacer los arreglos necesarios y hacerse una cita a su niño(a).

Vaccines Due / Vacunas Recomenadas	Date(s) Recommended / Fecha en la que se Recomienda
HepA	09/12/2019
MMV	04/01/2019
Influenza-season	01/01/2019
Meningo	01/01/2021
Td/Tdap	04/03/2018
Varicella	01/26/2012

04/16 Thank You.

If you clicked on the Recall Letter link, that letter is displayed in both English and Spanish.



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services

## **Print Reports from a List of Students (multiple clients)**

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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.

- Immunizations
  - view client imm report
- Schools**
  - manage list
  - find student
  - check school report.
- Admin Support
  - manufacturer listing
  - trade name listing
  - vaccine group listing
  - vaccine listing
  - vaccine relationships
- Manage My Account
  - edit my user account
  - change my password

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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.



## School Lists (2 of 2)

You can:

- Create, edit, or delete school lists
- Find students, to add or remove them from a list
- Access pre-configured School List Reports
- Assess students by a Texas school compliance vaccine schedule

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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.

## Creating Reports from School Lists

1. Click Manage List to create a new student list

2. Click Find Student to add students to the list

3. Click Manage List again to run reports from the list

4. Click School Report to view reports you've run.

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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.

**1. Let's Create a List!**

Immunizations  
view client imm report  
Schools  
**manage list** ←  
find student  
check school report  
Admin Support  
manufacturer listing  
trade name listing  
vaccine group listing  
vaccine listing  
vaccine relationships  
Manage My Account  
edit my user account  
change my password

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First, let's create a list of students! Click "manage list" from the menu bar on the left side of the screen.

**TEXAS**  
Health and Human Services  
Texas Department of State Health Services

## Create a School List

Enter a New List Name and Click Save.  
Your list isn't functional until you add students, or clients, to it.

The list has been created successfully.

Manage List

New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
2017-2018 7th graders	07/07/2017	0	Delete	Edit
2017 Kinder Registration	05/04/2017	1	Delete	Edit
Master List	03/22/2017	9	Delete	Edit

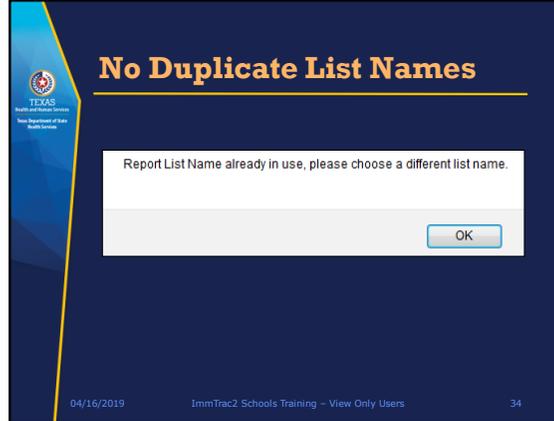
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Enter a New List Name, and click Save.

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.

## Change the Name of a School List (1 of 2)

- Click the Edit button on the row of the School List you want to rename.

Manage List

\* New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
<a href="#">Yaupon Elementary</a>	04/15/2019	2	Delete	Edit

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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.

## Change the Name of a School List (2 of 2)

- Enter the new name for the school list and click Save.

Edit List Name

Current List Name    Yaupon Elementary

\* New List Name    Yaupon Elementary 2020     x   

04/16/2019    ImmTrac2 Schools Training - View Only Users    36

Then enter the new List Name and click Save.

 **Delete a School List (1 of 2)**

Click the Delete button.

Manage List

\* New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
<a href="#">Yaupon Elementary</a>	04/15/2019	2	Delete	Edit

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If you want to delete a School List, click the Delete button on the row of the List Name you want to delete.

**Delete a School List (2 of 2)**

You are asked if you're sure you want to delete the list. Click the OK button to delete the list.

Message from webpage

Are you sure you want to delete this list?

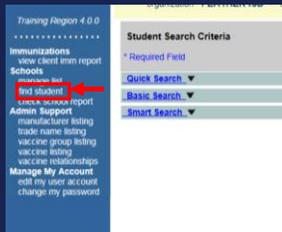
OK Cancel

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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.

## 2. Let's Add Students to the List!

Click "Find Student" to look up a student or client, then do a search for the student.



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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.

**Find Student**

On the client record, add the student to the list.

Student Information    ImmTrac2 ID 219113740    Official Immunization Record    Cancel

Student Name (First - MI - Last)    DOB    Gender    Tracking Schedule  
KARL GREEN    01/01/2004    M    ACIP

Current Age: 15 years, 3 months, 14 days

Reports

Add this Student to a Report List    Please Pick a Report List  
Laupon Elementary

Current Report Lists

Immunization Record

04/16/2019    ImmTrac2 Schools Training - View Only Users    40

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.

### 3. Let's Print Some Reports from a List!

Click Manage List again to access reports and student details.



Immunizations  
view client imm report  
Schools  
manage list  
add student  
check school report  
Admin Support  
manufacturer listing  
trade name listing  
vaccine group listing  
vaccine listing  
vaccine relationships  
Manage My Account  
edit my user account  
change my password

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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.

**Print Reports (1 of 5)**

Select the list you want to print from.

home | registration/renewal | manage access/account | forms | related links | logout | contact us

organization: COMMUNITY HEALTH CENTER OF LUBBOCK PEDIATRIC CLINIC - user: PAUL SPOCK - role: View Only Non-Providers no/DE

Manage List

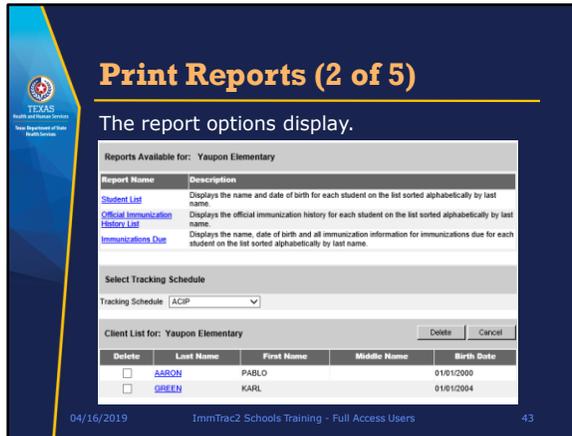
\* New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
Yaupon Elementary	04/15/2019	1	Delete	Edit

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Click the list of students that you want to run reports from.



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.

**Print Reports (3 of 5)**

Select ACIP or the appropriate Texas school vaccine schedule.

Reports Available for: Yauson Elementary

Report Name	Description
<a href="#">Student List</a>	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
<a href="#">Official Immunization History List</a>	Displays the official immunization history for each student on the list sorted alphabetically by last name.
<a href="#">Immunizations Due</a>	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: **ACIP**

Client List for:

Delete	First Name	Middle Name	Birth Date
<input type="checkbox"/>	ADAMS	FRANCO	01/01/2000
<input type="checkbox"/>	GREEN	KARL	01/01/2004

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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.

## Print Reports (4 of 5) Delete Student from List

Click the box of the student you want to delete from the list, then click Delete button.

Reports Available for: Yauson Elementary

Report Name	Description
<a href="#">Student List</a>	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
<a href="#">Official Immunizations History List</a>	Displays the official immunization history for each student on the list sorted alphabetically by last name.
<a href="#">Immunizations Due</a>	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: ACIP

Client List for: Yauson Elementary

Delete	Last Name	First Name	Middle Name	Birth Date
<input checked="" type="checkbox"/>	AARON	PABLO		01/01/2000
<input type="checkbox"/>	GREEN	KARL		01/01/2004

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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.

**Print Reports (5 of 5)**

Click a report link to run a report.

Reports Available for: Yaupon Elementary

Report Name	Description
<a href="#">Student List</a>	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
<a href="#">Official Immunization History List</a>	Displays the official immunization history for each student on the list sorted alphabetically by last name.
<a href="#">Immunizations Due</a>	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule:

Client List for: Yaupon Elementary

Delete	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	AGGON	PAELO		01/01/2000
<input type="checkbox"/>	GRINCH	KARL		01/01/2004

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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.

**Student List**

ImmTrac2, the Texas Immunization Registry  
Student Listing

Report run on: 04/17/2019

ImmTrac2 ID	Last Name	First Name	Middle Name	Birth Date
219112820	AARON	PABLO		01/01/2000
219113740	GREEN	KARL		01/01/2004

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The Student List displays the ImmTrac2 ID, Last Name, First Name, and Birth Date for each student.

## Official Immunization History List



Official Immunization Report Job Status

Refresh Cancel

Report Name	Started	Completed	Status	Students
<a href="#">Yauco Elementary</a>	2019-04-25 16:36:29.0	2019-04-25 16:36:30.0	100%	2
<a href="#">Yauco Elementary</a>	2019-04-25 16:34:56.0	2019-04-25 16:34:57.0	100%	2
<a href="#">Yauco Elementary</a>	2019-04-25 07:25:39.0	2019-04-25 07:25:41.0	100%	2
<a href="#">Yauco Elementary</a>	2019-04-17 10:20:36.0	2019-04-17 10:20:36.0	100%	2
<a href="#">Yauco Elementary</a>	2019-04-17 10:20:12.0	2019-04-17 10:20:14.0	100%	2

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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.

## Official Immunization Reports (for all on the list)



**TEXAS DEPARTMENT OF STATE HEALTH SERVICES**  
 Official Immunization and Disaster-Related Information Record



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ImmTrac ID: 219112620	Gender: M	
Client Name (L, F, M): AARON, PABLO	DOB: 01/01/2000	
Client Type: ImmTrac Adm (SA)	Client Age: 19 years, 3 months, 16 days	
Schedule: ACP	Report Date: 04/17/2019	

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 28th birthday. Learn more at [www.immtrac.com](http://www.immtrac.com)

Any combination vaccines (e.g. DTaP-HepB-IPV, HepB-HB) administered are listed within each appropriate vaccine family.

IMMUNIZATION HISTORY						
Vaccine Group	Date Admin.	Series	Vaccine (Trade Name)	Manufacturer	Lot #	
HepB	01/05/2019	1 of 3	DTaP-HepB-IPV (Pediatrix)	SKB-GlaxoSmithKline	TEST123	
MMR	01/05/2019	1 of 2	MMR (MMR II)			
Polio	01/05/2019	1 of 4	DTaP-HepB-IPV (Pediatrix)	SKB-GlaxoSmithKline	TEST123	
Td/Tdap	01/05/2019	1 of 4	DTaP-HepB-IPV (Pediatrix)	SKB-GlaxoSmithKline	TEST123	

Client Crossmatch: Allergy to latex (anaphylactic)	Start Date: 03/01/2019	End Date:
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Here's a sample of the Official Immunization Report.

**Immunizations Due (1 of 3)**

**School Immunization Due List Request**

Select the Vaccine Group To Report on ...

Use All Vaccine Groups  
 Use Vaccine Groups Selected

Adeno  
Amantadine

Add Remove

Enter the Date Criteria ...

Target Date Range

NOTE: If Target Date is blank, today's date will be used.

From To

Generate Cancel

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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.

**Immunizations Due (2 of 3)**

Immunization Due Report Job Status

Started	Completed	Status	Students	Target From	Target To
04/17/2019 10:35 AM	04/17/2019 10:35 AM	100 %	2	04/17/2019	04/17/2019

School Report Status

Name	Type	Requested	Started	Completed	Status
<a href="#">Due Report 04-17-2019 10:35:39</a>	Imm. Due	04/17/2019 10:35 AM	04/17/2019 10:35 AM	04/17/2019 10:35 AM	Ready
<a href="#">Due Report 04-15-2019 12:29:37</a>	Imm. Due	04/15/2019 12:29 PM	04/15/2019 12:29 PM	04/15/2019 12:29 PM	Ready

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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.

## Immunizations Due (3 of 3)


 Report from on: 04/17/2019  
 Student Name: G. F. M.  
 PABLO AARON - 01/01/2000 Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTaP/IP	Max Age Exceeded	
HepB	02/02/2019	11/01/2019
HPV	01/01/2011	
Influenza-seasonal	07/01/2018	
Meningo	01/01/2018	
MMR	03/05/2019	11/01/2019
Polio	03/05/2019	11/01/2019
Td/Tdap	02/05/2019	11/01/2019

KARL GREEN - 01/01/2004 Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
HepA	01/01/2005	
HepB	01/01/2004	
HPV	01/01/2018	
Influenza-seasonal	07/01/2018	
Meningo	01/01/2015	
MMR	01/01/2005	
Polio	03/01/2004	
Td/Tdap	01/01/2011	
Varicella	01/01/2017	

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.

**4. Check School Report Shows Completed Reports**

Click Check School Reports to access the reports you've run.

The screenshot shows a software interface with a dark blue background. On the left is a vertical menu with several options: 'Immunizations', 'Schools', 'Admin Support', and 'Vaccine'. The 'check school report' option is highlighted in red. The main content area is titled 'Check School Report Status' and contains a table with two columns: 'Report Name' and 'Description'. There are two rows of data in the table, each with a 'Status' hyperlink in the right margin. The first row is for 'Official Immunization History List' and the second is for 'Immunizations Due'. The 'Status' links are highlighted in red.

Report Name	Description	Output
Official Immunization History List	Displays the official immunization history for each student on the list sorted alphabetically by last name.	<a href="#">Status</a>
Immunizations Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.	<a href="#">Status</a>

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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.



## Summary (Part 1 of 2)

- View Client Imm Report – One Student
  - Official Immunization Record
  - Immunizations Needed (Imms given & due)
  - Recall Letter (lists past due immunizations in English and Spanish)

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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.



## Summary (Part 2 of 2)

- Manage List – One or More Students
  - Student List – (ImmTrac2 ID, Name, Birthday)
  - Official Immunization Records
  - Immunizations Due – Name, Birthday, and Immunizations Due

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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.



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.



Texas Department of State  
Health Services

# Back-To-School Vaccine Requirements

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**School Compliance Team  
(DHS Immunization  
Assessment, Compliance, &  
Evaluation Group)**

## Topics



- Vaccine Requirements
- Doses vs Intervals
- Provisional Enrollment
- Conscientious Exemptions
- Valid Vaccine Record
- Tracking Immunization Records
- Resources
- Records Retention

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 immunization record
- Tracking immunization records
- Available resources that will make your lives easier
- Records Retention

Examples will be used throughout the presentation

Finally, we will answer any questions at the end of the presentation

## TAC Rule §97.63



- The required vaccines and number of doses for individuals attending childcare facilities, Pre-K programs, elementary schools, and secondary schools.
- [https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pg=1&p\\_tac=&ti=25&pt=1&ch=97&rl=63](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=25&pt=1&ch=97&rl=63)

- 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.

# Texas Minimum State Vaccine Requirements

**TEXAS**  
Health and Human Services  
Texas Department of State Health Services

**2019 - 2020 Texas Minimum State Vaccine Requirements for Students Grades K - 12**

This chart summarizes the vaccine requirements (compared to the Texas Administrative Code (TAC), Title 25, Health Services, §27.61-97.7). This document is not intended as a substitute for the TAC, which has full provisions and details. The Department of State Health Services (DSHS) is granted authority to set immunization requirements by the Texas Education Code, Chapter 26.

**IMMUNIZATION REQUIREMENTS**

A student shall show acceptable evidence of vaccination prior to entry, attendance, or transfer to a public or private elementary or secondary school in Texas.

Vaccine Required (Indicate by name and function)	Minimum Number of Doses Required by Grade Level												Notes	
	Grades K-10				Grades 11-12									
	K	1	2	3	4	5	6	7	8	9	10	11	12	
Diphtheria/Tetanus/Whooping Cough (DTaP/DTaP/DTaP/DTaP/Tdap)	5 doses to 4 doses													<p><b>For K - 4<sup>th</sup> grade:</b> 5 doses of diphtheria-tetanus-whooping cough vaccine. 1 dose must have been received on or after the 4th birthday. However, 4 doses meet the requirement if the 4th dose was received on or after the 4th birthday. For students aged 7 years and older, 3 doses meet the requirement if 4 doses were received on or after the 4th birthday.</p> <p><b>For 5<sup>th</sup> grade:</b> 1 dose of Tdap is required if at least 3 years have passed since the last dose of tetanus-containing vaccine.*</p> <p><b>For 6<sup>th</sup> - 12<sup>th</sup> grade:</b> 1 dose of Tdap is required when 10 years have passed since the last dose of tetanus-containing vaccine.*</p> <p>*Tdap is acceptable in place of Tdap if a medical contraindication to diphtheria exists.</p>
Polio <sup>1</sup>	4 doses to 3 doses													<p><b>For K - 12<sup>th</sup> grade:</b> 4 doses of polio. 1 dose must be received on or after the 4<sup>th</sup> birthday. However, 3 doses meet the requirement if the 1<sup>st</sup> dose was received on or after the 4<sup>th</sup> birthday.</p>
Meningitis (Meningitis and Bivalent) <sup>1,2</sup> (MMV2)	2 doses													<p><b>For K - 12<sup>th</sup> grade:</b> 2 doses are required, with the 1<sup>st</sup> dose received on or after the 1<sup>st</sup> birthday. Students vaccinated prior to 2009 with 2 doses of meningitis and one dose each of Hib and meningitis meet this requirement.</p>
Hepatitis B <sup>1</sup>	3 doses													<p>For students aged 11 - 15 years, 2 doses meet the requirement of child hepatitis B vaccine (Recombivax)<sup>®</sup> was received. (Doseage: [10 mcg / 1.0 mL] and type of vaccine (Recombivax)<sup>®</sup> must be clearly documented. If Recombivax<sup>®</sup> was not the vaccine received, a 3-dose series is required.</p>
Varicella <sup>1,2</sup>	2 doses													<p><b>For K - 12<sup>th</sup> grade:</b> 2 doses are required with the 1<sup>st</sup> dose of received on or after the 1<sup>st</sup> birthday.</p>
Meningococcal (ACV) <sup>1</sup>	1 dose													<p><b>For 7<sup>th</sup> - 12<sup>th</sup> grade:</b> 1 dose of quadrivalent meningococcal conjugate vaccine is required on or after the student's 11<sup>th</sup> birthday. Notes: If a student received the vaccine at 10 years of age, this will satisfy the requirement.</p>
Hepatitis A <sup>1,2</sup>	2 doses													<p><b>For K - 12<sup>th</sup> grade:</b> 2 doses are required, with the 1<sup>st</sup> dose received on or after the 1<sup>st</sup> birthday.</p>

NOTE: Shaded area indicates that the vaccine is not required for the respective grade.  
<sup>1</sup> Notes on the back page, please refer to page 1.  
<sup>2</sup> Notes on the back page, please refer to page 1.

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<https://www.dshs.texas.gov/immunize/school/default.shtm>

- 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-9<sup>th</sup> grade. For the 2019-2020 school year, 2 doses of hep A will be required for students enrolled in K-10<sup>th</sup> 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.

## Doses vs. Intervals



- 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 2<sup>nd</sup> dose of Hep A four months after receiving the 1<sup>st</sup> 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 4<sup>th</sup> birthday would be required to receive an additional dose in order to meet State of Texas minimum vaccine requirements.

## Doses vs Intervals Example 1



Shayla is moving from Arkansas and her parents want to enroll her in 3<sup>rd</sup> grade at Smith Elementary School. When Nurse Bee was reviewing Shayla's immunization record, she noticed that Shayla received the 2<sup>nd</sup> dose of MMR when she was 3½ .

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

Is Shayla allowed to enroll at Smith Elementary School?

## Doses vs Intervals Example Answer



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.

## Doses vs. Intervals Example 2



Tyrus needs to enroll in Jones elementary as a 5<sup>th</sup> grade student. He received both doses of varicella two weeks apart when he was two years old.

Does Tyrus need an additional dose?

## Doses vs. Intervals Example 2 Answer



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 2<sup>nd</sup> 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.

## Provisional Enrollment



### Students Who Qualify

- Texas Transfer Student
- Homeless Student
- Active Duty Dependents
- Children in Foster Care
- Students In-Progress

### Initial # of Days

- 30 days

- 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.

## Provisional Enrollment & Catch-Up Schedule



- DSHS Provisional Enrollment Vaccine Dosing Schedule:  
<https://www.dshs.texas.gov/immunize/school/publications.aspx>
- ACIP Catch-Up Schedule:  
<https://www.cdc.gov/vaccines/schedules/hcp/imz/catchup.html>

- 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.

## Provisional Enrollment Transfer Student Example



Liam and his family are moving from Florida to Texas and he will be enrolled in 8<sup>th</sup> 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?

## Provisional Enrollment Transfer Student Example Answer



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 8<sup>th</sup> 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 2<sup>nd</sup> dose of Hep A 6 months after he receives the 1<sup>st</sup> dose since 6 months is as fast as medically feasible for receiving the subsequent dose of Hep A.

## Conscientious Exemptions



- TAC Rule, Subchapter B, §97.62:  
[https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pg=1&p\\_tac=&ti=25&pt=1&ch=97&rl=62](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=25&pt=1&ch=97&rl=62)
- 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.

## Conscientious Exemptions Cont.



- Request via fax, online, or mail
- Printed on special paper
- Sent via USPS
- Valid two years after notarized
- Must be notarized by a notary public for the State of Texas
- No grace period

- 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.

# Conscientious Exemption Affidavit Paper Update



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services



Difference	Old Affidavit Exemption Paper	New Affidavit Exemption Paper
Weight/thickness	<ul style="list-style-type: none"> <li>• Heavier, thicker paper</li> <li>• Feels more like an index card or cardstock</li> </ul>	<ul style="list-style-type: none"> <li>• Lighter, thinner paper</li> <li>• Feels more like computer paper</li> </ul>

- On April 15<sup>th</sup>, 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 15<sup>th</sup> and school starts August 19<sup>th</sup>. 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.

## Valid Vaccine Record



- Validated by a physician or public health personnel
- Month, day, and year of when vaccination was received
- Clinic contact information & the provider's signature/stamp if generated from an electronic health record
- Official immunization record from a state or local health authority (e.g. ImmTrac2)
- Official record from school officials, including a record from another state
- TAC Rule §97.68:  
[https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pg=1&p\\_tac=&ti=25&pt=1&ch=97&rl=68](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=25&pt=1&ch=97&rl=68)

- 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 4<sup>th</sup> 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.

## School Immunization Tracking Software Error Message Example



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

## School Immunization Tracking Software Error Message Example Answer



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.

## Records Retention



- 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/slr/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.



Texas Department of State  
Health Services

**Thank you from the Assessment,  
Compliance, & Evaluation Group**

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