



Script for the Spring 2024 School Nurse Webinar

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(no audio)

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Welcome to the Spring 2024 School Nurse Webinar. Today's presentation will be followed by a questions and answers session.

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Let's review a few webinar reminders:

- All participants are automatically muted by webinar administrators,
- Please type your questions using the Question-and-Answer feature, and
- This webinar is being recorded for learning purposes.

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Today's agenda will cover the following topics for ImmTrac2:

- Renew ImmTrac2 Access
- Nurses as Full Access Providers
- Consents
- Official Immunization Record and Schedules
- Using the Reports button
- Create School Lists
 - Print reports from a school list.
- Questions and Answers

I'll be using the words client and student interchangeably in this webinar. They are students in the school and clients to the provider.

All screenshots are from the viewpoint of a "View Only" user in ImmTrac2.

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Renew ImmTrac2 Access

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ImmTrac2 Access needs to be renewed annually.

Remember to:

- Login to ImmTrac2 the day before leaving for summer or winter breaks.
- Renew your access for the organizational site you are currently working at and not a previous site.

You will receive several reminders 90, 60, 30, 15, and 10 days prior to your access expiring.

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This next slide pertains to IAMOnline

Okta error message: If users are getting an error when clicking on the “Activate Account” button in the e-mail they received:

- Please ask your IT folks to whitelist “noreply@okta.com” on your organization infrastructure. Email server security setups that review links from [no reply@okta.com](mailto:noreply@okta.com) could be triggering the ‘Activate Account’ token within the email message, which will make it invalid when the user clicks on it.

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Nurses as Full Access Providers

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Let’s review different types of ImmTrac2 user roles:

View Only Non-Provider

- View and print Immunization records.
- Create and print school report lists.
- Manage account or reset password.
- Submit registrations and renewals.



Full Access Provider

You will have all the View Only Non-Provider roles that I just mentioned, and you can also:

- Add and edit client information.
- Add, edit, and delete immunizations.

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- “To update to a Full Access Provider, email your nurse’s license number to ImmTrac2@dshs.texas.gov. Include ‘Attn: Review for Full Access’ in the subject line.”
- The ImmTrac2 Customer Service Support Team will confirm your license number is active and change user to Full Access Provider in ImmTrac2.

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Let’s review some differences between standard and disaster consents.

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- Disaster consent – Disaster immunizations are sent to Immtrac2 regardless of whether there is a consent on file for that client. Without a disaster consent, we can only retain those immunizations for 5 years after the disaster has ended.
- Once a disaster is declared over, clients and their disaster immunizations will not be visible to providers nor other ImmTrac2 users without a disaster consent on file.
- Disaster consents can be signed at any time, you don’t have to be in a disaster.

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What happens when a minor becomes an adult?

- Once the client turns 18, they become a pending adult. As a pending adult (PA), they must sign an adult standard consent by the age of 26 to retain their childhood immunizations for life.



- If the adult standard consent is not signed by the age of 26, their childhood records are purged from ImmTrac2.
- In addition, when a client turns 18, their standard immunizations records will be inaccessible to providers until the client signs an adult standard consent and it is added to their record.
- Best practice is to have clients sign both standard and disaster consents.

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- Minor Standard consent – When a Parent or legal custodian signs to keep their child’s childhood immunizations in Immtrac2,
- Adult Standard consent – When a client or legal custodian signs an adult consent; Immtrac2 stores their standard immunizations for life.
- Disaster consent –When the client signs a disaster consent; ImmTrac2 stores disaster immunizations longer than 5 years beyond the end of the disaster. They will be stored for life.
- Consents can be signed at any time.

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Next, we will review the steps for printing the Official Immunization Record.

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First search for a student, or client. In the client information section, click the “Print Official Immunization Record” button.

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A pop-up displays, confirming that you have consent of the individual, parent, or guardian to print the Official record. Click “OK” to proceed.

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The record will display in a new browser tab. You can right click the screen or click the printer icon to see print options.

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The tracking schedule selected can make a difference in the immunizations listed and printed. Here the ACIP schedule is selected.

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Here the Texas 7th to 9th grade 2018 to 2019 schedule is selected.

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This slide shows the immunization history under the 7th to 9th grade student schedule on the Official Immunization Record. The ACIP schedule is more strict than the Texas school schedules.

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Using the reports button is another way of printing the Official Immunization record.

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Let's walk through those steps:

First, search for a student, or client in the Client Information section, then click the "Reports" button.

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

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

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When you click 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. Click "OK."

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After clicking OK, the Official Immunization Record is displayed.



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

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If you clicked on the “Recall Letter” you can send a customizable reminder letter to clients due or past due for immunizations.

Benefits:

- Save up to three personalized letters for reminders and recalls,
- Choose to include client’s immunization history or recommended vaccinations,
- Choose how to word the letters to clients, and
- Choose to display in English or Spanish.

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Next, we will create school lists.

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The Schools’ options on the menu panel allows users (for example schools and childcare facilities) to organize their students into groups for reporting immunization information on all students on the list.

Users can:

- Create, edit, or delete school lists.
- Find students to add or remove them from a list.
- Access pre-configured School List Reports.
- Check students' compliance with Texas vaccine requirements for K-12 schools.

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There are 4 steps to create and run reports from school lists:

- 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.
- Next, click “Find Student”, to search for & add students to the list.
- Then, click “Manage List” again to run reports for all the students on the list.
- Finally, you can click “Check School Report” to view reports you have already run.

Let’s take a closer look at each step.

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Let’s create a list of students. Click “manage list” from the menu bar on the left side of the screen.

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- Next, enter a New List Name and click “Save”.
- Your list is not functional until students have been added to it.

The list starts out with a student count of zero (0).

Lists are shared and viewable by all users in your organization.

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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 choose a different list name.

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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. You may want to use this when students advance in grades.

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Enter the new name for the school list name and click “Save”.



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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. Then search for the student’s name using one of the search options.

The three search options you can choose to search for a student or client are Quick, Basic, and Smart.

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When the client record is displayed, use the dropdown 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 student at a time.

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To print the reports from a list, click “manage list” again to access reports and student details.

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Now select the list you want to print from.

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Choose the report option from the list.

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Select ACIP or the appropriate Texas School vaccine schedule.

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You can also delete a student by clicking the box next to the student you want to delete. Then click the “delete” button.

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Click on one of the three report links to run a report. Let’s look at each report option.

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

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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 at the top of the 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.

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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.

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Next, the immunization due report job status appears, displaying a list of the school reports you have run. You can click the “Refresh” button in the upper right corner to see the status of the report you are running. When the status is Ready, click the “name of the report” to see it.

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This is an example of the immunizations due list, 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 that we did for one student earlier, but both have the dates that immunizations given were due and dates that immunizations were given.

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You can click “check school report” on the left-side menu panel to access completed reports.

Click the “status” hyperlink to see the status of reports that are running or to see reports you’ve previously run.

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In summary, the View Client Immunization 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.

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Here are some resources:

You can email us at ImmTrac2@dshs.texas.gov if you need assistance with access, site registrations or renewals, ImmTrac2 user changes, registry trainings, or publications.

ImmTracMU@dshs.texas.gov

If you need assistance with Data exchange questions, interoperability promotion, and data quality reports.

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That concludes the presentation portion for today. Please enter your questions in the question box.

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Thank you!