

Script for ImmTrac2 Online Disaster Reporting

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Part 1 - Adding Disaster Consents and Clients

Welcome to ImmTrac2, Disasters Part One, Adding Disaster Consents and Clients.

What is a disaster?

First, let's define what a disaster is. Disasters have:

- A definite beginning and ending date determined by a governmental authority,
- A specified geographic area such as a county or state,
- Specific AIMs (antivirals, immunizations, and/or medications) associated with the disaster, and
- Optionally, may have priority groups. Some disasters require priority groups but not all do.

Priority groups can protect those at risk, such as:

- those essential to the pandemic response,
- those who care for the ill,
- those who maintain national security and community services,
- children and pregnant women, and
- workers at greater risk of infection.

According to Section 161.00705 of the Texas Health and Safety Code,

- Any antiviral, immunization, or medication, an AIM,
- administered in response to a declared disaster or emergency must be entered into the Texas Immunization Registry (ImmTrac2).

According to Section 100.7(b) of the Texas Administrative Code,

- A health care provider who administers an antiviral, immunization, or medication, an AIM, during a publicly declared disaster shall provide the data elements to the department (DSHS) within 30 days of that medical treatment, in a format and manner prescribed by the department.

Report COVID-19 immunizations within 24 hours after administration!

- This is a requirement by the Centers for Disease Control and Prevention, the CDC. This requirement is especially important for clients who are deceased before their client records are closed permanently by Vital Statistics.

Reporting Requirements

- Everyone who receives an AIM during a declared disaster will have their AIM reported to the registry, regardless of whether they signed a consent or not.

The next section is about consents and client types.

Disaster Information Retention Consents are also known as Disaster Consents.

- All disaster AIMs must be recorded in the registry, with or without a disaster consent, BUT...
- Disaster Consents allow the registry to keep a client's disaster AIMs longer than 5 years. If a disaster client has not signed a disaster consent within 5 years after the end of the disaster, their disaster AIM is deleted.
- **Disaster consents only affect disaster AIMs.**

Standard Consents

- Standard consents, which are ImmTrac Child (IC) or ImmTrac Adult (IA) consents, allow the registry to keep standard non-disaster immunizations only.
- **Standard consents only affect standard immunizations.**

ImmTrac Child is Client Type "IC". For this client type:

- The client is under 18 years of age,
- A parent or guardian signed a minor consent for the child,
- The registry can keep standard non-disaster immunizations until 18, and
- A standard consent does not have any effect on keeping disaster AIMs in the registry.

ImmTrac Adult is Client Type "IA". For this client type:

- The client is 18 years of age or older,
- An adult consent was signed by them or a guardian in some cases,
- The registry can keep standard non-disaster immunizations for life; If signed before age 26, any childhood immunizations are kept, and
- An Adult Consent does not have any effect on keeping disaster AIMs in the registry.

The Disaster Unconsented client type is type DU.

- There is no age limit to client type DU,
- No consent was signed by the client,
- This type of client must have been in a disaster and received an AIM to be in the registry,
- Since a standard consent was not signed, they cannot keep any standard non-disaster immunizations in the registry, and
- Disaster AIMs are kept for 5 years in the registry. If a disaster consent is not signed within that time, their disaster AIMs are deleted at the end of 5 years.

If you enter a Disaster Unconsented client and do not add a disaster immunization for that client that day, the client record will be deleted that night!

The Disaster Consented client type is DC.

- For this client type there is no age limit,
- A Disaster Information Retention Consent form was signed by the client, or if under 18 signed by a parent or guardian,
- They did not sign a standard IC or IA consent,
- Because they did not sign a standard consent the registry cannot keep their standard non-disaster immunizations in the registry, but
- Since they signed a disaster consent the registry can keep their disaster AIMs for life.

To review, there are four client types.

- The parent or guardian of the ImmTrac Child signed a Minor Consent and the registry can keep standard immunizations for that child until the age of 18, or longer if the child signs an adult consent after reaching 18.
- An ImmTrac Adult signed an Adult Consent at the age of 18 or older, and the registry can keep standard immunizations for that adult for life.
- A Disaster Unconsented client didn't sign anything and the registry can keep that client's disaster AIMs for only 5 years unless a disaster consent is signed.
- A Disaster Consented client signed a Disaster Consent and the registry can keep that client's disaster AIMs for life.

The next section provides an example with Andrea's story.

At birth, Andrea's parents signed an ImmTrac Child, an IC, consent for her.

- What does an ImmTrac Child consent mean?
- Immunizations the registry receives for Andrea will be kept until Andrea reaches 18 or the consent is withdrawn.

At 18, Andrea signed an ImmTrac Adult, an IA, consent:

- What does an ImmTrac Adult consent mean?
- Since Andrea signed an ImmTrac Adult consent before 26, her childhood immunizations are kept by the registry, in addition to any adult immunizations she gets.
- The registry will keep Andrea's immunization records for life unless she sends a signed withdrawal form to the registry.

At 30, Andrea was in a disaster area, got an AIM, and signed a Disaster Consent.

- Since Andrea signed a disaster consent, her disaster immunizations will be kept longer than 5 years after the end of the disaster.

Can Andrea have both a Disaster Consent and a Non-Disaster Consent?

- Yes! Andrea already had an ImmTrac Adult (an IA) consent so the registry stores her non-disaster immunizations.
- Andrea also received a disaster immunization and signed a Disaster Consent (DC) so the registry can keep her disaster immunizations longer than 5 years beyond the end of the disaster.

Getting started.

Who enters the disaster dose?

- The organization that administered the AIM is responsible for reporting each dose to ImmTrac2.

For a browser,

- we recommend Google Chrome.

AIMs must be entered by the correct administering provider/facility.

- For subsites, log in using the organization code
- of your subsite provider/facility, not the org code of the parent site.

Be extra careful when you are logging in to use the correct org code. Some users have access to multiple org codes. Logging in with an incorrect org code can add patients and immunizations to the wrong organization and prevent the vaccine inventory from being correctly decremented in the Vaccine Allocation and Ordering System.

After logging in and before adding consents, clients, or immunizations, look at the menu bar at the top of the screen to check the name of the organization that you're logged into.

To select or create a client,

- From the menu panel click "enter new client" which will search to see if the client already exists in the Registry.

Search to see if the client already exists in the Registry by doing a Smart Search.

Required fields for a Smart Search include:

- First name,
- Last name,
- Birth date,
- Gender, and
- Street address.

Be extra careful to correctly enter the date of birth. An incorrect date of birth can make the difference between the client seen as a minor or adult, or you may not see a client that already exists in the database and create a duplicate. It's easy to make this mistake and transpose numbers.

If the client's address in ImmTrac2 does not match the provider's EMR records,

- Please update ImmTrac2 with the client's current address.
- Updates to your EMR are encouraged.

When adding a new client, please select the race and ethnicity of the client in the Client Information tab.

The next section describes how to enter consents.

If the disaster client is found, click on the ImmTrac2 ID on the left side to go to the client's record and add a consent to the existing record. If the client is not found, we can use the buttons on the bottom half of this screen to add a client record and a consent.

Next, we will discuss the four mutually exclusive buttons on the bottom half of the screen. You can only choose one of the four buttons.

If you have a standard ImmTrac2 consent such as an ImmTrac Child (IC) or ImmTrac Adult (IA) consent, click this button labelled "Add a client". If you also have a signed disaster-related consent from the client, you can add it later when you are confirming consents.

The button labelled "Request a Consent Form" that is highlighted allows you to request and print a consent form that is prepopulated with the client's information which you entered in the search screen earlier.

Use the button labelled "WITH Signed Disaster-Related Consent" if you are adding a disaster-related consent but not a standard consent.

Use the button labelled "WITHOUT Signed Disaster-Related Consent" if the client did not sign a disaster-related consent and does not have a standard consent either.

This is the end of ImmTrac2, Disasters Part 1, Adding Disaster Consents and Clients.

To learn more, consider viewing ImmTrac2, Disasters Part 2, The Tales of Five Disaster Clients.

- Thank you, from all of us at the Texas Immunization Registry.

ImmTrac2, Disasters Part 2, The Tales of Five Disaster Clients

Welcome to ImmTrac2, Disasters Part Two, The Tales of Five Disaster Clients.

Entering disaster consents.

In the first example,

- Arthur Adams was not found in the ImmTrac2 database,
- He did not sign a disaster consent, and
- This requires creating a client record with a Disaster Unconsented (DU) client type.

To begin, search for the client record by selecting the “enter new client” link.

Next do a Smart Search for the client, in this case Arthur Adams. Fill in at least the minimum fields and click find.

In this example, no clients were found for the requested search criteria.

The client was not found in the Registry database and since Arthur Adams did not sign a Disaster Consent, select the option “WITHOUT Signed Disaster-Related Consent”, and click Submit.

A pop-up message states that a disaster-related client may not be added to ImmTrac2 if the client has not received a disaster-related antiviral, immunization, or medication, an AIM.

What this message really should say is:

- If you enter a Disaster Unconsented (DU) client:
 - Continue to enter the AIM immediately after that.
 - If you enter the DU client but not an AIM for that client that same day, then at night that client will be deleted.

More on Disaster Clients and Consents:

- A Disaster Consent (DC) client can be added at any time, with or without an AIM.
- A Disaster Consent can also be added at any time for an IA or IC client, with or without an AIM.

The Personal Information tab for Arthur is displayed here. Because we had the Mother’s maiden last name, we included that.

On the Client Information tab, select the appropriate race and ethnicity.

The Address Information tab of the client's record is displayed here. In addition to the required fields, it's very helpful to include the client's phone number and e-mail address.

Click the "Continue Add" button to continue.

View the Client Summary for Arthur. If it looks incorrect, you can click the "Edit Client Info" button to go back. To proceed, click the "Continue" button.

View the Consent Affirmation for Arthur. On this screen you can change the type of consent. We are leaving it as a disaster unconsented client. Click the "Affirm" button to continue.

View the Consent Affirmation Confirmation for Arthur. At this point Arthur has a client record and a client ID established. To add an immunization click the "Go To Client" button.

On the View Client screen, click the "Edit Client" button.

Click the "Immunizations" button to view and enter immunizations.

On the Client Information screen, click "Add New Imms" to enter a new immunization. We'll cover entering immunizations later.

In the second example,

- Matt Moriarty was not found in the ImmTrac2 database,
- he DID sign a disaster consent, and
- this requires creating a client record with a Disaster Consented (DC) client type.

To begin, search for the client record by selecting the "enter new client" link.

Next do a Smart Search for Matt Moriarty and click Find.

In this example, no clients were found for the requested search criteria.

The client was not found in the Registry database and since Matt Moriarty DID sign a Disaster Consent, select the option "WITH Signed Disaster-Related Consent", and click Submit.

Click "Okay" to continue adding the client, and then add the AIM for the client.

The Personal Information Tab of the client's record is displayed here, including the Mother's maiden last name since we had it.

On the Client Information tab, select the appropriate race and ethnicity.

The Address Information Tab of the client's record is displayed here, including the client's phone number and e-mail address, which is very helpful.

Click the "Continue Add" button to continue.

View the Client Summary for Matt. If it looks incorrect, you can click the Edit Client Info button to go back. To proceed, click the "Continue" button.

View the Consent Affirmation for Matt. At this point you can change the type of consent. We are leaving it as a disaster consented client. Click the "Affirm" button to continue.

View the Consent Affirmation Confirmation for Matt. Now Matt has a client record and a client ID established. To add an immunization click the "Go To Client" button.

On the View Client screen, click the "Edit Client" button.

Click the "Immunizations" button to view and enter immunizations.

On the Client Information screen, click "Add New Imms" to enter a new immunization. We'll cover entering immunizations later.

In the third example,

- David Disney was not found in the ImmTrac2 database, and
- He signed both a standard consent AND a disaster consent.
- This requires creating a client record with a standard consent, which would be an ImmTrac Child (IC) or ImmTrac Adult (IA) consent, and also adding a disaster consented (DC) modifier.

To begin, search for the client record by selecting the "enter new client" link.

Next do a Smart Search for David Disney and click Find.

In this example, no clients were found for the requested search criteria.

The client was not found in the Registry database. Since David Disney DID sign a standard ImmTrac Adult consent AND a Disaster Consent, select the

first option "Add a client" to create a new client record with an ImmTrac Adult consent. Later, we will add the disaster consent modifier to David's record.

The Personal Information Tab is displayed here, including the Mother's maiden last name since we had it.

On the Client Information tab, select the appropriate race and ethnicity.

The Address Information Tab is displayed here, including the client's phone number and e-mail address, which is very helpful to include.

Click the "Continue Add" button to continue.

View the Client Summary for David. If it looks incorrect, you can click the "Edit Client Info" button to go back. To proceed, click the "Continue" button.

View the Consent Affirmation for David. **This screen is important!** Because we had earlier selected the "Add a client" option, on this screen the "ImmTrac2 Adult" button, a standard consent, is already selected. On this screen check the third box to add a disaster consent also! Click the "Affirm" button to continue.

View the Consent Affirmation Confirmation for David. At this point David has a client record and a client ID established. To add an immunization, click the "Go To Client" button.

On the View Client screen, click the "Edit Client" button.

Click the "Immunizations" button to view and enter immunizations.

On the Client Information screen, click "Add New Imms" to enter a new immunization. We'll cover entering immunizations later.

In the fourth example,

- Jessica Jones was found in the ImmTrac2 database with client type IA (ImmTrac Adult), and
- She had signed a disaster consent.
- Since she already has a client record, this requires merely adding a disaster consent (DC) modifier to her existing client record.

To begin, search for the client record by selecting the "enter new client" link.

Next do a Smart Search for Jessica Jones and click find.

Jessica Jones WAS found in the Registry database so click the ImmTrac2 ID to go to the client record, make sure it's the right client, and if so, then add a consent to the existing client.

On the View Client screen, click the "Edit Client" button.

On the Update Client screen click the "Edit Consent" button.

Since Jessica already had a client record, client type IA (ImmTrac Adult), all we need to add is her new disaster consent. Click "Option 1: Add Consent Forms and attributes for this client", then click the third box for her new disaster information retention consent, then click the "Update Client" button to continue.

These are the major client types:

- IA for ImmTrac Adult,
- IC for ImmTrac Child,
- DC for Disaster Consented, and
- DU for Disaster Unconsented. On this screen the Client Type is displayed in the upper right corner showing that Jessica has an ImmTrac Adult standard consent.

This screen displays the DIR attributes:

- "M" is for a disaster consented client who is a minor,
- "Y" is for a disaster consented client who is an adult,
- "N" is for a client who is not disaster consented, whether minor or adult.
- The upper right corner of this display shows that Jessica currently has a Disaster Immunization Retention attribute of N, since we have not finished adding her disaster consent.

Click the "Affirm" button to add Jessica's disaster consent.

Note that Jessica's DIR attribute is now Y. She has a disaster consent and is an adult.

Jessica's client record has been updated. Click the "Edit Client" button to continue.

On the Update Client screen, click the "Immunizations" button to view or add immunizations.

On the Client Information screen, click the "Add New Imms" button to view and add immunizations. We'll cover entering immunizations later.

In the fifth example,

- Kevin Klein was found in the ImmTrac2 database with client type DU (disaster unconsented), and
- He had signed a disaster consent AND a standard consent.
- Since he already has a client record, this requires adding a standard ImmTrac Adult (IA) consent and disaster consent (DC) modifier to the existing record.

To begin, search for the client record by selecting the "enter new client" link.

Next do a Smart Search for Kevin Klein and click Find.

A client match for Kevin Klein WAS found in the Registry database so click the ImmTrac2 ID to go to the client record, make sure it's the right client, and if so then add a disaster consent to the existing client record.

Note that the Client Type for Kevin is Disaster Unconsented! Don't assume that being in the database means they signed a consent form!

On the View Client screen, note that we have added the Mother's First Name and the Mother's Maiden Last Name since we had it. Click the "Edit Client" button.

On the Update Client screen click the "Edit Consent" button.

Since Kevin already had a client record, type DU (Disaster Unconsented), we need to add his new standard ImmTrac Child consent and his new disaster retention consent.

- Click "Option 1: Add Consent Forms and attributes for this client".
- Next, click the first box to add his ImmTrac2 Child Consent, and
- Click the third box for his new disaster information retention consent.
- Finally click the "Update Client" button to continue.

Click the "Affirm" button to add Kevin's disaster consent.

Kevin's Client Type changed from DU (disaster unconsented) to IC (ImmTrac Child) because he added a standard consent. Kevin's Disaster Immunization Retention (DIR) attribute changed from "N" for no disaster consent, to "M" for disaster consent of a minor. Click the "Edit Client" button to view and add immunizations.

On the Update Client screen, click the “Immunizations” button to view or add immunizations.

On the Client Information screen, click the “Add New Imms” button to view and add immunizations.

Here’s a summary of the five clients.

1. Arthur was not found in ImmTrac2, and did NOT sign any consent, so we created a client record as Disaster Unconsented.
2. Matt was not found in ImmTrac2, but DID sign a Disaster Consent, so we created a client record as Disaster Consented.
3. David was not found in ImmTrac2, but signed both a Standard Consent and a Disaster Consent, so we created a client record as ImmTrac Adult and Disaster Consented.

To continue the summary,

4. Jessica was already an ImmTrac Adult in ImmTrac2, AND she added a Disaster Consent, so we added a Disaster Consent modifier to her existing record.
5. Kevin was already Disaster Unconsented in ImmTrac2 AND he added both an ImmTrac Child and a Disaster Consent, so we added a standard consent (ImmTrac Child) and a Disaster Consent modifier to the record. We’ll cover entering immunizations next.

This is the end of ImmTrac2, Disasters Part 2, The Tale of the Five Disaster Clients.

To learn more, consider viewing ImmTrac2, Disasters Part 3, Adding Disaster Immunizations.

Thank you, from all of us at the Texas Immunization Registry.

ImmTrac2, Disasters Part 3, Adding Disaster Immunizations

Welcome to ImmTrac2, Disasters Part Three, Adding Disaster Immunizations.

Next stop: Immunizations!

Assuming that the client and/or consent are added, it's time to go to the client record and add the immunization.

We begin this section on adding immunizations from the Client Information screen where you click the "Add New Imms" button.

When filling out required fields, it's important to fill out all required fields and at minimum include the priority group (if required), the date of administration, trade name, lot number, manufacturer, and dose. Note that the lot number is critical for vaccine tracking. This is an example for the Moderna vaccine.

This is a similar example displaying information for the Pfizer vaccine for COVID-19.

Be extremely careful when entering the lot number. The lot number is used to decrement inventory. If the lot number has any errors, that administration won't decrement inventory correctly.

Click the Save button to save the immunization record. Note that the fields for New Client Comments are optional and not required. Comments are selected from the drop-down box and will appear in the client's Official Immunization Record.

The Client Information screen now displays the immunization entered. This is an example using the Moderna vaccine.

This is an example of the Client Information screen displaying an immunization using the Pfizer vaccine.

For hospitals entering information on new homeless clients:

- If you can't get an address for the client, enter the hospital address.
- If you can't get the first and maiden/last name for the client's mother, enter the client's first and last names. That prevents duplicate names

for the client's mother if there are more than one homeless client at a single hospital.

- Besides the address, try to make the client's other information that you enter as unique as possible.
- PLEASE do not use "NA" or "UNKNOWN" as placeholders in any fields.

For more information on COVID-19 from the Texas Department of State Health Services and the Centers for Disease Control and Prevention, the CDC, see our public facing website at www.ImmunizeTexas.org.

Thank you, from all of us at the Texas Immunization Registry.