Managing Clients – Searching for Client Records Video Script

Welcome to the ImmTrac2 Training Video: Searching for Client Records

Training Objective: The objective of this video is to demonstrate how to search for client records in the ImmTrac2 Registry.

An ImmTrac2 Client is anyone in the State of Texas who has granted consent to be added to the Texas Immunization database system known as ImmTrac2.

There are 5 places in ImmTrac2 where a Client Search may be performed:
1. **Manage Client** (to search for a client).
2. **Enter New Client** (to add a new client).
3. **Edit Consent Information** (to edit consent attributes of a client).
4. **Manage Immunizations** (to add, edit or delete an immunization).
5. **Find Student** (to find a student/client).

This video demonstrates how to search for client records using the **Manage Client** option in the menu panel.

Remember, when searching for clients in ImmTrac2 all searches are on a statewide level and not just within your organization!

Click the **Manage Client** menu option to perform a client search.

Search Options

On the **Client Search** screen, there are three search options available: **Quick Search**, **Basic Search** and **Smart Search**.

Quick Search

Let's begin with Quick Search. Use the down arrow to expand the **Quick Search** options.

The Quick Search requires the least amount of information to be entered to perform a search, but the information must be 100% accurate to find the correct client.

When using Quick Search, you can search by one of the four options:

- **ImmTrac2 ID:** This is a system generated ID number that is unique for a client no matter what organization is accessing the client record.
- **Client ID**: This is an organization specific ID that can optionally be entered for a client that represents the organization's Patient ID or Chart Number for that client within the organization.
- **SSN# and Birth Date**.
- **Medicaid ID**.

Let's perform a search by entering the Immtrac2 ID number 208105748. Click the **Find** button.

Because we entered the client's correct information, the client record opens automatically on the View Client screen. The client's **Personal Information** is displays at the top of the screen, and multiple demographic at the bottom of the screen.

NOTE: *For information on how to view and edit the client record, please review the ImmTrac2 Video: Viewing and Editing Client Records.*

Let's click the **Return to Search** button and review the next search option.

Basic Search

Next is the Basic Search.

The **Basic Search** requires more information to be entered to perform a search, but it allows you to enter partial but correct information.

The search option requires the following information to be entered: **First Name**, **Last Name** and **Birth Date**.

The Birth Date format is 2 digits for month, 2 digits for day, and 4 digits for the year. Users can also use the calendar icon to select a date. The '**Gender**' and '**Children Only**' fields are optional.

In this example, let's search Brian Blue' for 'with a birth date of 'January 1st 2010.' Click the **Find** button.

Because the information we entered was accurate, and only one record was found, this search immediately returns the client record for Brian Blue.

Let's return to the **Client Search** screen, and clear the data fields.

If some instances you may not have the client's complete first name or last name. In this case, you can enter partial information by entering a minimum of 2 letters in both the First and Last Name fields. Let's enter in a partial first name of BR and last name of Blue.

This search also allows for **Wild Card** searching in the Birth Date field. If you don't know the full date of birth use any combination of question marks in the birth date field. Just insert question marks for any of the birth date format which you are not sure.

This is known as **Wild Card** searching.

This example results in 5 **Possible Matches** which are listed below in the search results.

For every search in ImmTrac2 there are 3 possible search outcomes:

1) <u>The client's record will immediately displayed</u> - If only one client matches the search criteria, the client record will display on the **View Client** screen as previously demonstrated.

2) <u>No clients match the search criteria</u> – This happen for 2 possible reasons:

   a. The client you are searching for does not exist in ImmTrac2 or
   b. The information you entered in the search criteria is not accurate or complete enough to find the client's record.

3) <u>Multiple client records are found</u> - When the search results in possible matches, a table with up to 50 potential client matches will list below the **Client Search** section. If the number of potential client matches is greater than 50, then only the first 50 clients will be displayed and you must perform a new search entering more complete and accurate information to narrow the search results.

It is always best to search using as much accurate information as possible to narrow search results and locate the exact client. The more correct information you give, the greater the chances that you will find the client's records.

Review the information provided in the **Possible Matches** list to find the correct client. If you cannot find your client, attempt a new search using different search criteria or a new search option.

If you suspect the client is not in the ImmTrac2 database, add the client using the **Enter New Client** menu option.

NOTE: *For more information on how to enter clients, please view the ImmTrac2 Video: Entering a New Client.*

Once you locate the correct client, click the **ImmTrac2 ID** hyperlink to view the client record.

Let's return to the **Client Search** screen and review the next search option. Click the **Clear** button to clear the data fields and search results.

Smart Search

Last, we'll look at **Smart Search.** The Smart Search is the most intelligent search and uses a more complex searching process than the other 2 searches.

Smart Search requires the following information to be entered: **First Name**, **Last Name**, **Birth Date**, **Gender**, and **Street Address**.

This search allows you to enter partial information in the **First Name**, **Last Name** and **Street Address** fields. If you accidently enter incorrect information in these fields, such as a typo, this search could still potentially locate your client.

The **Birth Date** field does **NOT** have the wild card search capability so you must enter the full date of birth.

Let's search for Brian Blue again but with a typo in the first and last name fields. Let's enter "Brain" in the First Name field, and "Bleu" in the Last Name field.

Enter a complete Birth Date. Use the drop down arrow to select the Gender.

When entering the address, users must enter at least a numeric value. For this example, we'll enter "123."

ImmTrac was able to find the client even though we entered in some incorrect information.

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at https://immtrac.dshs.texas.gov at your convenience.