Managing Clients: Viewing and Editing Client Records

Welcome to the ImmTrac2 Training Video: Viewing and Editing Client Records

Training Objective: The objectives of this video are to demonstrate how to view and edit client records.

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.

This video demonstrates how to view and edit client records using the **Manage Client** option in the menu panel.

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

Client Search

On the **Client Search** screen, let's select the **Quick Search** option. Enter the **ImmTrac2 ID** 208105748 to search for the client Brian Blue. Then click the **Find** button.

Because we entered the client's correct information, the client record opens automatically on the **View Client** screen.

NOTE: *For information on how to search for clients, please review the ImmTrac2 Video: Searching for Client Records.*

View and Edit Client Record

On the **View Client** screen, the client's **Personal Information** displays at the top of the screen, and multiple demographic tabs at the bottom of the screen.

This screen allows you to view specific, non-immunization information relating to a client in ImmTrac2.

The screen is organized by the following demographic sections: Personal Information, Consent Information, Client AKA, Organization Information, Client Information, Address Information, Responsible Persons, Client Comments, and Client Notes.

To view the demographic information, click the down arrow to expand each section. From this screen you can only view the client's information. To make changes to the client's record, click the **Edit Client** button.

We are now on the **Update Client** screen.   Editable fields are white and required fields are indicated by blue text and an asterisks.

Personal Information

Personal Information: This section contains client specific information and is used to verify the correct client after performing a search. This section contains the following information:

- **Last Name**
- **First Name**
- **Middle Name**
- **Suffix**
- **Birth Date**

- **Mother's Maiden Last (Name)**:
- **Mother's First Name**
- **Client type**: ImmTrac2 assigns the client type when a new client is created, based on which consent is signed. There are 6 Client Types: IC - ImmTrac Child, IA - ImmTrac Adult, FR - First Responder, FM - Family Member of a first responder, DC - Disaster Consented, and DU - Disaster Unconsented.
- **ImmTrac2 Client**: A value of 'YES' in this field means that the client has consented to participate in the ImmTrac2 registry. All clients will have an ImmTrac2 Client value of 'YES' with the exception of **Disaster Unconsented** (DU) clients.

  DU Clients are entered into ImmTrac2 for the sole purpose of recording **AIMS** administered during an **officially declared disaster event**, and will have a value of 'NO' in this field.
- **Gender**
- **SSN**
- **Medicaid ID**
- **Birth Order**
- **Birth Country**
- **Birth State**
- **Birth County**
- **Client Identifier**: If the Client Has been assigned a client identifier by your organization, then ImmTrac2 will populate this field. This identifier is organization specific and does not pertain to any another organization in ImmTrac2.
- **ImmTrac2 ID**: ImmTrac2 assign's a system generated ID # known as an ImmTrac2 ID. This number is unique for each client within ImmTrac2.
- **Disaster Client**: If the client received a disaster–related immunization during a disaster event, then they are considered a Disaster Client and the filed value will equal 'Yes.'

The "Last Updated by" and "Created by" information at the bottom of this section notes the dates and ImmTrac2 Username for that transaction.

Clicking the **History Table** button displays a log of all transactions for this client made by any ImmTrac2 users.

The pop-up box displays the Action, Org ID, Org Name, Date and Username of who performed the action. Close the pop-up box to return to the registry.

Now let's review the additional demographic tab at the bottom of the screen.

Consent Information

Consent Information: This section displays First Responder and Disaster Information Retention consent attributes. Consent attributes may only be viewed on this screen and cannot be edited.

To edit consent attributes use the **Edit Consent Information** link in the Application Menu panel.

NOTE: *For more information on consent and consent attributes, please review the ImmTrac2 User Manual.*

Client AKA

Client AKA (Also Known As): This section is used to add additional names which the client may also be known as.

To enter an AKA you must enter the required information, **Last Name** and **First Name**. Let's enter an AKA of 'Bobby Blue,' entering Blue in the Last Name field and Bobby in the First Name field. Then click the **Add AKA** button.

When the screen refreshes, the newly added AKA displays in the **Client AKA Listing** section in alphabetical order.

NOTE: *Entering information in the bottom demographic tabs is optional, with the exception of the Address Information section. If you choose to add this optional information to a specific section, all fields with blue text and an asterisk must be populated.*

Organization Information

Organization Information: This section contains organization specific information about the client.

Status: The Status field represents the status of the client within your organization only. All clients by default have an 'Active' status in all organizations.

NOTE*: For a definitions of the Status option, please review the ImmTrac2 User Manual.*

If you change the client's status, the update is only applied to your organization. The exception, is setting a client's status to 'Inactive – Permanently Deceased.' When this status is selected, you must enter a **Date of Death.** The deceased status and date of death is saved for all organizations viewing the client's record.

For our example, let's change the client's status back to 'Active.'

Provider – PCP: Use this field to select the client's primary care physician. This information is mainly used for reporting purposes.

NOTE*: The PCP list, is a list of clinicians that were added during the Registration/Renewal period.*

Tracking Schedule: This field defaults to the ACIP (Advisory Committee on Immunizations Practices) Schedule, but a different schedule can be selected. The selected schedule will impact the immunizations recommended for the client.

Date of Death: If the client's status is 'Permanently Deceased,' this field becomes active and a Date of Death must entered. As previously mentioned, the deceased status and date of death will be displayed the same for all organizations.

Allow Reminder and Recall Contact: This option will default to 'Yes,' and allows reminder/recall notices to be sent to the client for immunizations due or past due.

Last Notice: The date the client last received a reminder/recall notice.

Client Identifiers: Organizations can give their clients a unique alpha numeric ID, in addition to the system generated ImmTrac2 ID.

Multiple Client IDs may be entered and a primary ID may be selected by clicking the **Primary** radio button. In this example, the client already has one Client Identifier of **ABC123**.

Let's add a 2nd **Client Identifier** of 999RT. Then click the **Add Client Identifier** button. After the screen refreshes, the newly added ID will be listed in the **Client Identifiers** section.

To make this ID the primary identifier, select the **Primary** radio button.

To remove a Client Identifier, click on the check box next to the option you wish to remove, and then click on the **Remove Identifier** button. After the page refreshes, the **Client Identifiers** section is updated and the ID no longer displays.

Client Information

Client Information: This section provides additional information about the client.

Race: Use the checkboxes to select the appropriate race(s) of the client.

Ethnicity: Use the drop down list to select the appropriate ethnicity of client.

School: Use the drop down list to select the client's school. ***NOTE**: The school list for your organization can be maintained using the Manage Schools menu option.*

Occupation: Use the drop down list to select the client's occupation. ***NOTE**: This list is pre-defined and cannot be updated by any user.*

Language Spoken: Use the drop down list to select client's language spoken. The Language Spoken field determines which language will be used to send reminder/recall notices to Client.

Information in this section is mainly used for reporting purposes.

Address Information

Address Information: This section allows user to view or update the client's address information. This section requires all fields with blue text and asterisks to be populated and is entered when the client record is created. All other fields are optional.

Clicking on the **View Client Address History** link will open a separate window with the client's address history. The client's address history will display. Close the window to return to the registry.

Select the **No Viable Address** checkbox if information was sent to the client and the information was returned as not deliverable. When the client record is saved and next accessed, a message will display at the top of the screen notifying the user to 'Please obtain the correct address for the client.'

Responsible Persons

Responsible Persons: This section is used to identify and list any person responsible for the client.

If the client has a Responsible Person identified, this section will open with the Primary person selected and their information displayed. In this example, there is one responsible person listed.

Instructions on how to apply changes, display on the top of the client details.

To update a responsible person, make the needed changes and then click the **Apply Changes** button. The updates are visible in the **Responsible Person Listing**.

To enter a new Responsible Person, click the **Add New** button to clear the data fields. When the screen refreshes, the data fields are blank and new instructions display at the top of the section.

Enter the required a Last Name, and First name. Next, use the drop down list to select the relationship to the client. Let's select **Mother** for this example. Then click the **Apply Changes** button.

When the screen refreshes, the new responsible person displays in the Responsible Persons Listing section.

To review and edit a Responsible Person not already selected, click the radio button next to their name. Then click the **Review** button. The screen refreshes and the **Details for Responsible Person** section is load with the responsible person's information.

To remove a Responsible Person, select the checkbox next to their name and then click the **Remove** button.

When the screen refreshes, the **Responsible Person Listing** is updated.

Client Comments

Client Comments: This section allows users to enter immunization related comments such as contraindication information, allergies and vaccine refusals.

Comments such as anaphylactic reactions or allergies, may impact the immunizations recommended for the client.

NOTE*: For more details on which comments impact the Recommend Tracking Schedule, see the ImmTrac2 User Manual appendix.*

To add a new comment, use the drop down list and select the appropriate comment. Enter a **Start Date** related to the comment.

NOTE*: When saving, ImmTrac2 will validate if a* ***State Date*** *and* ***End Date*** *are required, and will display a validation message if these are required fields.*

Click the **Add Comment** button. The screen refreshes and the **Client Comment Listing** section is updated with the new comment.

To remove a comment, select the check box next comment and then click the **Remove** button. The screen refreshes and the **Client Comment Listing** section is updated.

Client Notes

Client Notes: This section is used to enter notes on the client. Notes can be added and viewed by any user in ImmTrac2 with the exception of View-Only users.

However, notes can only be updated or deleted by the user who originally added the note, or the ImmTrac2 Customer Support team.

To add a note, enter the note in the text field. If you wish to quickly clear the information, click the **Reset Note Text** button. To save the note, click the **Add New Note** button.

This will insert the note in the Historical Notes section in a "***pending***" status until you save the client record.

To edit a note, select the radio button next to the note you wish to update and then click the ***Review*** button. When the note is populated in the text field, make any needed changes and then click the ***Apply Note Update*** button. Updates are applied to the '***pending'*** note.

To delete a note, select the check box next to the note to be deleted and then click the ***Remove*** button. Click "OK" to continue and delete the note. When the screen refreshes, the note is removed.

When all edits are made to the client's record, you **MUST** still click the **Save** button at the top of the screen to save all changes.

Saving Edits

IMPORTANT: Even if you have already "Applied Changes" in the below demographic section, it is important to remember to save all changes by clicking on the **Save** button at the top of the screen or all changes will be lost.

If there is missing information or errors in the updates, the screen will display a "Validate Error" message. Click **OK** to return to the client record and make the needed changes.

Let's review the command buttons at the top of the screen.

Clicking the **Save** button will save data and refresh the screen.

Clicking the **History / Recommended** button will save data and redirect users to the client's **Immunization Record**.

Clicking the **Edit Consent** button will save data and redirect users to the **Edit Consent** screen.

Clicking the **Reports** button will save data and redirect users to the client immunization reports.

Clicking the **Cancel** button will disregard any changes and return users to the **Client Search** screen.

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.