

Texas Department of State Health Services

The Texas Immunization Registry Site Renewal Guide

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When is a Site Renewal Needed?

Any active user can renew their site agreement. A site renewal may be needed if:

The two-year site agreement has expired.

The Point of Contact (POC) needs to be changed. Requests for a POC change should be planned by the organization to not cause an interruption in service. To update an organization, Point of Contact (POC), the organization's site agreement must be renewed. Any staff member within the organization that has an active ImmTrac2 account can log in to the system and begin the renewal process. During the renewal process, the user can update the POC and amend any other information before submitting for approval. The approval processes can take up to 14 business days.

Users need to be added or removed from the organization. If more than three users need to be added or changed, the POC should do a renewal.

If any required field (for example, organization name, address, city, or Point of Contact) has changed, you must do a site renewal. Please contact ImmTrac Customer Support by phone at 800-348-9158 (option 4) or email ImmTrac2@dshs.texas.gov.

The only time that a new ImmTrac2 **registration** has to be completed is:

If an organization is registering for the first time, or

If an organization was bought out and the physical address changes as well. If the name and staff are the only thing changing, then they can complete a site renewal to update the facility name and add new users.

Site agreement renewals can take up to 14 business days to approve. The Texas Immunization Registry staff will review the forms and process them in the order they are received.

2. Tips for Avoiding Errors:

Know when to use Syntropi and when to use ImmTrac2 for registrations or renewals.

Use Syntropi if you:

- Are signing up for or currently enrolled as a TVFC/ASN provider,
- Are signing up for or currently using bidirectional data exchange (BiDX),
- Were previously a provider who administered a Pandemic disaster Antiviral, Immunization, Medication (an AIM) during a declared Pandemic disaster event, or
- Were already registered in Syntropi.
- All other providers should use ImmTrac2.
- Complete all required fields that have an asterisk (*).
- Avoid listing any user, including doctor and nurses, more than once.
- Ensure all users have unique email addresses to prevent duplicate accounts.
- Ensure the first and last names of all users are spelled correctly.
- Include the titles of each individual user. (e.g., LVN, RN, MA, POC, PRC, RMP, etc.)
- Include phone numbers and the unique email address, confirming they are correct.
- Open each entry for doctors and nurses to check that all entries are complete.
- Notify the individual responsible for signing the registration or renewal to watch for the signature request email.

3. How to Begin the Renewal Process

Log in to ImmTrac2 using IAMOnline at https://iamonline.hhs.state.tx.us/.

If you are assigned to multiple organizations:

Select the "ImmTrac2" button next to the organization that needs the site renewal. Bolded organizations are parent organizations. If you see "Site Agreement Expired" – call Customer Support.



Figure 1: Multiple Organizations - Bolded Orgs are Parent Orgs

If you are only assigned to one organization:

M

You will only see the menu bar at the top. Click the "registration/renewal" tab.



Figure 2: Registration/Renewal Tab

On the "Manage Registration/Renewal" screen select "Manage Renewals". See Figure 3: Manage Renewals.

anage Regis	tration/Renewal
	Manage Renewals Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.
	Manage Registrations Select this link to register a new organization or to continue working on an incomplete registration.
	Access previously approved Registration or Renewal Select this link to access the previously approved Registration or Renewal
	Registration of Intent - Unidirectional Data Exchange Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Click to Renew

This is the status you will see when you need to start a New Renewal if needed for any reason.

Manage Renewals

 Manage Renewals

 Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

 Manage Registrations

 Select this link to register a new organization or to continue working on an incomplete registration.

 Access previously approved Registration or Renewal

 Select this link to access the previously approved Registration or Renewal

 Registration of Intent - Unidirectional Data Exchange

 Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

 Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved.

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Incomplete	ImmTrac2	13 days

Figure 4: Click to Renew

4. Starting the Renewal

The applicant who is registering or renewing is required to list themselves as the Organization Point of Contact (POC) and/or the Primary Registry Contact (PRC).

Best practice is to expand one section at a time to ensure all required fields are completed (these are the fields with an asterisk and in blue). Navigate to each section by clicking the down arrow to expand and the up arrow to minimize. See Figure 5: Site Agreement.

Site Agreement		
Welcome to the ImmTrac2 Online Renewall	Save Progres	s and Exit
Please review the information in each section below and make any necessary changes or updates.	Prin	t
Once all required fields have been completed, please select the proper submit button at the bottom of the form. To save your progress and return at a later time to complete the renewal process, select "Save Dropers and Fu". Applications that are left inactive for more than 14 calendar days will be	Exit without	t Saving
deleted and a new application must be started and saved.	Start O	ver
To reset the Renewal application back to the default information for the organization, click the "Start Over" button.		
If you have any questions about the ImmTrac2 renewal process, please contact the ImmTrac2 Customer Support Team at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.		
Warning: Time out will occur after 15 minutes of no activity. Please ensure you save your p avoid loss of data.	rogress frequ	ently to
	[expand all]	[minimize al
Registration Questions 🔻	, <u> </u>	-
Organization Demographics 🔻		
Parent/Headquarters Info 🔻		
Organization Point of Contact (POC) 🔻		
Primary Registry Contact 🔻		
User Accounts Info 🔻		
Responsible Medical Provider 💌		
Practicing Providers with Prescribing Authority 🔻		

Figure 5: Site Agreement

After each of the following Renewal sections, click the Save Progress and Continue button. Your Renewal will be timed out after 15 minutes of no activity.

Save Progress and Continue

Figure 6: Save Progress and Continue

5. Renewal Sections

5A. Registration Questions

This section helps to identify your organization. See Figure 7: Registration Questions.

Registration Questions		
* 1. Is your organization <u>authorized</u> to administer immunizations?	Yes	○ No
Note: A Texas licensed doctor or nurse could potentially be authorized to administer immunizations if <u>they</u> the supervision of a Prescribing Authority. Organizations selecting 'No' are not required to list a prescribing	are also a g authority acces	Prescribing Authority or are under and users are granted "view only" ss to client/immunization records.
* 2. Does your organization administer immunizations, antivirals, or prophylactic injections?	Yes	\bigcirc No
* 3. The TVFC Program serves financially vulnerable children from birth through 18 years of age. Would you like to be contacted with more information on the TVFC Program?	O Yes	● No
TVFC Program information	on can be fo	ound at <u>www.immunizetexas.com</u>
* 4. Would you like to enroll in the TVFC Program now?	O Yes	No No
* 5. Select your Organization Type	Private P	ractice v
* 6. The ASN Program serves uninsured adults 19 and over. Would you like to be contacted with more information on the ASN Program?	○ Yes	● No
ASN Program information	on can be fo	ound at <u>www.immunizetexas.com</u>
		Save Progress and Continue

Figure 7: Registration Questions

Question 1: If your organization is licensed in Texas to administer vaccines, select 'Yes'. If not select 'No'.

Question 2: If your organization administers immunizations, antivirals, or prophylactic injections, select 'Yes'. If not select 'No'.

Question 3: If you select 'Yes', the Texas Vaccines for Children program at DSHS are notified to contact you.

Question 4: This question is grayed out and cannot be selected.

Question 5: You can select from a drop-down box the type of organization.

Question 6: If you click yes, Adult Safety Net staff at DSHS are notified to contact you.

5B. Organization Demographics

ImmTrac2 does not accept exact duplicate physical addresses. Please include suite, building, or section numbers in Address line 2 to ensure that your organizations address is unique.

Examples: add a suite number, a building section, an area, a doctor's name; or for schools add elementary, middle, high, or ISD. See Figure 8: Organization Demographics.

Organization Demographics	A				
				[back to	top]
CURRENT ORGANIZATION COD	E: PETE0017				
CURRENT ORGANIZATION NAM	E: PETERSON PEDIATRICS				
CURRENT PHYSICAL ADDRESS	: 1100 W. 49TH STREET, AUSTIN TX, 74	3756			
- ** Organization Name and Ema	il Must be entered to before saving. **				
* Organization Name PET	ERSON PEDIATRICS				
* Organization Email PET	ERSON-PED@YAHOOOO.COM				
* Organization Physical Address	1100 W. 49TH STREET				
Physical Address Line 2			1		
* 011		t State TX at	* Zin Code	70750 +4	
Сцу	AUSTIN		Zip Code	10136 +4	
* County	Travis 🗸				
* Phone Number	512 - 123 - 4567	Ext			
Fax Number		Ext			
	Check box if Mailing Address is san	ne as the Physical Address			
* Organization Mailing Address	1100 W. 49TH STREET				
Mailing Address Line 2					
* City	AUSTIN	* State TX 🗸	* Zip Code	78756 +4	
	Check box if Delivery Address is sa	me as the Physical Address			
* Organization Delivery Address	1100 W. 49TH STREET				٦
Delivery Address Line 2					
* City	AUSTIN	* State TX 🗸	* Zip Code	78756 +4	
Organization Medicaid ID					
				Savo Brogross and Continu	
				Save Frogress and Continu	-

Figure 8: Organization Demographics

5C. Parent/Headquarters Info

If you do not have a parent organization (see Figure 9 Parent/Headquarters Info):

If your organization is the parent or stand-alone site being renewed, the No option must be selected.



Figure 9: Parent/Headquarters Info

If you have a parent organization (see Figure 10: Parent/Sub-Sites):



Figure 10: Parent/Sub-Sites

The parent organization must already be registered with ImmTrac2.

Enter the parent site's TXIIS ID and click Search (see Figure 11: Parent TXIIS ID). If you do not know the parent TXIIS ID, please contact ImmTrac Customer Support at 800-348-9158 or email ImmTrac2@dshs.texas.gov.

Parent/Headquarters Info					
					[back to top]
* Is this Org	anization a sub-office, m	obile unit or satellite office?	Yes ONO Pleas	se Specify V	
If this Organization is owned and/or man Organization must already be registered Number, then select "Search". If you do r at (800) 348-9158 or at ImmTrac2@dshs	aged by a Primary Organ with ImmTrac2. Please e not know the Parent Orga .texas.gov.	ization (e.g. this Organizati nter the Parent Organizatic nization's TXIIS ID or are u	ion is a sub-office, satellite on's TXIIS ID, formerly refe unsure if it is registered, plo	e office or mobile unit), the Paren erred to as PFS# or ImmTrac Pro ease contact ImmTrac2 Custome	t wider er Support
* Parent Organization's TXIIS ID	1234567890		Search		
Parent Organization's Name:					
Parent Organization's Physical Address					
Parent Organization's Phone					
Parent Organization's Fax					
				Save Progress and	Continue

Figure 11: Parent TXIIS ID

The "Please Specify" box is now visible. Click the drop-down arrow and select: sub-office, mobile unit, or satellite office. See Figure 12: Parent/Headquarters Info – Sub-Office.

Providers with multiple locations sharing one EHR (electronic health records) system or vendor must indicate Parent/Sub-site relationship for each location.

Definitions of organization types:

A sub-office is a public organizational site that reports up to the main office in their company.

A mobile unit is the same as a sub-office, but this is a unit that moves physically from site to site by some means of transportation.

A satellite office is a government site that reports up to another government office.

		[bai
* Is this Organization a sub-office, mobile unit or satellite office?	Yes O No Please Specify	~
anization is owned and/or managed by a Primary Organization (e.g. this Organizati ion must already be registered with ImmTrac2. Please enter the Parent Organizatio hen select "Search". If you do not know the Parent Organization's TXIIS ID or are u 48-9158 or at ImmTrac2@dshs.texas.gov.	Sub-office Mobile Unit n's a sub-office, satellite o n's TXIIS ID, formerly referr nsure if it is registered, please contact I	the Parent fice nTrac Provid∉ mmTrac2 Customer Si
Parent Organization's TXIIS ID 1234567890 Parent Organization's Name:	Search	
Parent Organization's Physical Address		
Parent Organization's Phone Parent Organization's Fax		

Figure 12: Parent/Headquarters Info - Sub-Office

5D. Organization Point of Contact (POC)

The Organization Point of Contact (POC) serves as the Organization's main POC for ImmTrac2. This individual is responsible for completing the ImmTrac2 registration/renewal and updating the organization's demographics and/or a user's profile. The Organization POC may be the assigned Registry and/or Texas Vaccines for Children (TVFC) Program contact and may assign individuals within their organization as Registry and/or TVFC contacts. This individual may also be the Authorized Signer with the ability to electronically sign the registration/renewal. For more information, please review the "Authorized Signer" tab.

When completing the Organization Point of Contact section, do not check the box if this contact already has aImmTrac2 user account. See Figure 13: POC – Add User Account.

NOTE: The Organizational Point of Contact can be the same person as the Primary Registry Contact at your organization.

Organization Point of Contact (POC) 🔺	
	[back to top]
The Organization Point of Contact (POC) serves as the Organization's main POC for ImmTrac2. This individual is responsible for a registration/renewal and updating the organization's demographics and/or a user's profile. The Organization POC may be the assign Vaccines for Children (TVFC) Program contact and may assign individuals within their organization as Registry and/or TVFC contact the Authorized Signer with the ability to electronically sign the registration/renewal. For more information, please review the "Authorized Signer with the ability to electronically sign the registration/renewal.	completing the ImmTrac2 gned Registry and/or Texas acts. This individual may also be prized Signer" tab.
Access privileges to manage users within an organization are restricted to certain organization types within ImmTrac2 and require training. For more information and to enroll in the online "Provider Supervisor Role" training, please visit the ImmTrac2 Training we www.immunizetexas.com	"Provider Supervisor Role" absite at:
* First Name ELROY Middle JETSON	N
* Title Immunizations Manager	
* Contact Phone Number 512 - 123 - 4567 Ext	
* Email ELROY.JETSON@YAHOOOOO.COM	
If an ImmTrac2 user account is necessary for this person, check here to copy data you have enter accordion tab, which will be used to create user accounts.	red to the User Account Info
	SAVE PRODESS AND COMMINE

Figure 13: POC - Add User Account

5E. Primary Registry Contact

The Primary Registry contact is the main point of contact for ImmTrac2 related matters and client immunization related items. The ImmTrac2 Primary Registry contact may be the assigned Organization Point of Contact (POC) and/or Texas Vaccines for Children (TVFC) Program contact. These contact roles may or may not be the same person.

When completing the Primary Registry Contact section, do not check the box if this contact already has an ImmTrac2 user account. See Figure 14: Primary Registry Contact – Add User Account.

Also, the title of the Primary Registry Contact is now required so be sure to include it.

Primary Registry Contact 🔺
[back to top]
Primary Registry contact is the main point of contact for ImmTrac2 related matters and client immunization related items. The ImmTrac2 Primary Registry contact nay be the assigned Organization Point of Contact (POC) and/or Texas Vaccines for Children (TVFC) Program contact. These contact roles may or may not be he same person.
* First Name JOHNNY Middle JETSON
* Title Primary Registry Contact
* Contact Phone Number 512 - 123 - 4567 Ext
* Email JOHNNY.JETSON@yahoooo.com
If an ImmTrac2 user account is necessary for this person, check here to copy data you have entered to the User Account Info accordion tab, which will be used to create user accounts.
Save Progress and Continue

Figure 14: Primary Registry Contact - Add User Account

5F. User Account(s) Info

In this section enter people in your organization who need to be ImmTrac2 users, but do not have a current ImmTrac user Name. See Figure 15: User Accounts Info.

Everyone accessing ImmTrac2 is assigned a username. Usernames must not be shared. For security purposes, each user is required to provide an email address. All email addresses will be verified by the system for uniqueness. Please review your organization's current list of users who will be accessing ImmTrac2.

Staff that are no longer associated to your organization can be removed by selecting the check box on the right side of the user's name.

User Accounts Info 🔺									
								[<u>pack to top]</u>
Each individual accessing ImmTrac2 is assigned a username. Usernames must not be shared. For security purposes, each user is required to provide an e-mail address. All e-mail addresses will be verified by the system for uniqueness. Please review your Organization's current list of users who will be accessing ImmTrac2. Please indicate which current users need their access removed and which new users need to be additionally added to your organization.									
Current Use	rs								
First Name	Middle	Last Name	Phone Number	Ext	Email	Account Status	Username	Org Status	Remove Access
ELROY		JETSON			ELROY.JETSON@YAHOOO.COM	Active	EL1234JE	Active	
+ Add Additional Users Save Progress and Con								Continue	

Figure 15: User Accounts Info

If additional users need to be added, select "Add Additional Users". See Figure 16: Add Additional Users.

Add Additional Users

Figure 16: Add Additional Users

Save Progress and Continue

If you are a current ImmTrac2 user, do not add yourself as an additional user. See Figure 17: Avoid Adding Users That Already Exist.

Add Additional Users

+ Add Additional Users

Save Progress and Continue

Figure 17: Avoid Adding Users That Already Exist.

If the "Add Additional Users" hyperlink was incorrectly selected, the entry can be removed by selecting the "Delete Entry" button. See Figure 18: Delete Entry.

Each individual accessing ImmTrac2 is assigned a username. Usernames must not be shared. For security purposes, each user is required to provide an e-mail address. All e-mail addresses will be verified by the system for uniqueness. Please review your Organization's current list of users who will be accessing ImmTrac2. Please indicate which current users need their access removed and which new users need to be additionally added to your organization.

Current Use	ers									
First Name	Middle	Last Name	Phone Number	Ext	Email		Account Status	Username	Org Status	Remove Access
ELROY		JETSON			ELROY.JETSON@Y	AHOOO.COM	Active	EL1234JE	Active	
Add Additio	nal Use	rs								
	* First Nam	ELROY			Middle	* La	st Name	ELROY		
Ρ	hone Numbe	er			Ext]				
	* Ema	ail ELROY.JETS	ON@YAHOOO.CON	1						
Current ImmTra	c2 Usernam	ie 🦳								
									Delet	e Entry



NOTE: Users can only report immunizations for organizations to which they have access. Users will need to be associated to each organization where the immunization was administered. if a user is associated with a parent organization, they do not need to be associated with the child site, unless they are adding immunizations for the child organization.

5G. Responsible Medical Provider

This section is for the Chief/Senior Medical Authority or a Texas Licensed Medical Professional (Example: MD, DO, NP, PA, or Pharmacist) over that organization.

Organizations must have a designated Chief Medical officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas licensed medical professional with prescribing authority for organizations that administer immunizations. See Figure 19: Responsible Medical Provider.

Responsible Medical Provi	der 🔺
	[back to top]
Organizations must have a desi licensed medical provider and/o	gnated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas r a licensed prescribing authority for Organizations administering immunizations.
* First Name	Paul Middle * Last Name Peterson
* Job Title	Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine V
* License Number	N1023 * NPI Number 1234567890
Provider Medicaid ID	
Employee ID Number	
* Email	Paul.Peterson@yahoooo.com
* Phone Number	Ext Ext
	Save Progress and Continue

Figure 19: Responsible Medical Provider

MD Doctor of Medicine

DO Doctor of Osteopathic Medicine PA Physician Assistant NP Nurse Practitioner RPh Registered Pharmacist PharmD Doctor of Pharmacy CNM Certified Nurse Midwife CPM Certified Professional Nurse Midwife APRN Advanced Practice Registered Nurse OD Optometrist

Figure 20: License Types

The formats for license numbers are:

- MD is a letter and four numbers. Example: N5678
- PA is "PA" followed by four or five numbers. Example: PA12345
- The NPI Number consists of 10 numbers, formed by nine numbers followed by a numeric check digit. Example: 1234567893
- Advanced Practice Nurses should put an "AP" in front of their license number. Example: AP123456
- There are no RN or LVN license types. RN and LVN license types will never be collected on this screen.

5H. Practicing Providers with Prescribing Authority

This section is for Texas Licensed Medical Professional(s) who will be prescribing immunizations. These providers must have a Texas license number and an NPI number. See Figure 21: Practicing Providers with Prescribing Authority.

NOTE: They will be the ones that are attached to the immunization information in the "Administered by" field.

If the "Add Additional Entry" hyperlink was incorrectly selected, the entry can be removed by selecting the "Delete" button.

Practicing Providers with P	rescribing Authority 🔺	
		[back to top]
List all Texas licensed health ca	e providers (MD, DO, NP, PA, APRN, Pharmacist) at your facility who have prescribing authority.	
* First Name	Johnny Middle * Last Name	Appleseed
* Job Title	Practicing Provider	
* Specialty	Pediatrics	
* License Type	MD Doctor of Medicine	
* License Number	N2345 * NPI Number 2345678921	
Provider Medicaid ID		
Employee ID Number		
* Email	Paul.Peterson@yahoooo.com	
+ Add Additional Entry		Save Progress and Continue

Figure 21: Practicing Providers with Prescribing Authority

MD Doctor of Medicine
DO Doctor of Osteopathic Medicine
PA Physician Assistant
NP Nurse Practitioner
RPh Registered Pharmacist
PharmD Doctor of Pharmacy
CNM Certified Nurse Midwife
CPM Certified Professional Nurse Midwife
APRN Advanced Practice Registered Nurse
OD Optometrist

Figure 22: License Types

The formats for license numbers are:

- MD is a letter and four numbers. Example: N5678
- PA is "PA" followed by four or five numbers. Example: PA12345
- The NPI Number consists of 10 numbers, formed by nine numbers followed by a numeric check digit. Example: 1234567893
- Advanced Practice Nurses should put an "AP" in front of their license number. Example: AP123456
- There are no RN or LVN license types. RN and LVN license types will never be collected on this screen.

5I. Agree and Sign

See Figure 23: Agree and Sign. This is a long document so only the top and bottom portions are displayed below. You must read and agree with the Organization Agreement and Confidentiality Statement. See Figure 23: Agree and Sign

(ba	<u>:k to top]</u>
Organization Agreement and Confidentiality Statement	
This agreement and confidentiality statement is by and between the Texas Department of State Health Services (DSHS, hereinafter) and PETERSON PEDIATRICS made entered into on Date 04/09/2025 concerning the access and use of ImmTrac2.	and
1. DSHS agrees to:	
 A. Provide: Secure access to ImmTrac2 for compatible computers at registered organizations. Training and support to authorized organization staff on using ImmTrac2,including periodic briefing sessions as needed. Customer support for assistance with questions and technical support for ImmTrac2 Information resources-specific issues [Customer Support: Monday the Friday (except state holidays) from 8:00 AM to 4:30 PM CST by e-mailing ImmTrac2@dshs.texas.gov or calling(800) 348-9158]. 	ırough
 B. Maintain: Registry data for: (a) participants from birth to age 18 years old, (b) first responders, (c) first responder immediate family members 18 years of age and c participants age 18 years and older, (e) persons entered in preparation for or in response to a declared public health emergency or disaster related event (information is retained to f sears after the event has been declared over unless consent to further retain information permanently is obtained)- all consis Texas Health & Safety Code Chapter 161. Registry information privacy in accordance with state and federal law, and DSHS policy. 	lder, (d) ænt with
C. Adhere to DSHS ImmTrac2 security and customer support access policies and procedures as follows: - Assign each individual user a unique username. ImmTrac2 support staff members will remind organizations that usernames for ImmTrac2 web access or shared. - Disable new user accounts which are not used within 30 days of creation. - Diable new user accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Auto-lock accounts which are not used within 120 days of creation. - Michoek accounts which are not used writhin 120 days of creation. - ImmTrac2 will handle all out-of-state access requests on a case by case basis. Out-of-state providers and schools must be actively providing service to of clients. The number of Texas access regarding access and/or release of client data. By signing this agreement, an out-of-state provider affirmatively agrees to be bound by Texas law, and stipulated to Tarvis County. Texas as the venue for any legal proceedings stemming from the provider immTrac2 usage. All ImmTrac2 users are also subject to federal privacy laws.	exas n into
2. Organizations/individuals accessing ImmTrac2 agree to:	
H.	
Thave read and agree to the terms on this minimate organization Agreement and connicentiality Statement.	
Authorized Signer	
- Selectione	
I am not the Authorized Signer Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization.	t for
Signature button below will send a request for signature by the Authorized Signer identified in this form.	
O I am the Authorized Signer	
Responsible Medical Provider or Authorized Signer: Paul Peterson	

Figure 23: Agree and Sign

The applicant filling out the registration or renewal may or may not be the person who electronically signs the form.

NOTE: Anyone authorized by the Medical Authority may sign the form on their behalf.

The Responsible Medical Provider accordion tab lists information about the Responsible Medical Provider. See previous Figure 19: Responsible Medical Provider.

All required fields on the electronic form must be filled out before the registration or renewal applicant can 'Submit for Signature' or 'Submit for Approval'.

A Site Agreement Renewal is required every two years.

The details of the site agreement include the legal requirements for who can access the registry as well as the usage policies that each organization agrees to abide by. ImmTrac2 contains Protected Health Information (PHI) and Personal Identifiable Information (PII). At the point the responsible medical provider or authorized signer submits the form for approval to the Texas Immunization Registry, the person is required to acknowledge (check box) that they have read and agree to the terms of the agreement and confidentiality statement.

5J. Agree and Sign – I Am Not the Authorized Signer

This section is to be completed by the medical staff completing the form for the Texas Medical Licensed Professional who will be taking responsibility to ensure all users comply with the agreement for all PHI and PII data contained in ImmTrac2.

If the person filling this form out is not the Authorized Signer, (see Figure 24:) then:

Select the option "I am not the Authorized Signer",

Select the "Submit for Signature" box to have the form emailed to the Authorized Signer to sign the form.



Figure 24: I Am Not the Authorized Signer

Who is the Authorized Signer? The default Authorized Signer is the Responsible Medical Provider. See Figure 25: Responsible Medical Provider.

sponsible Medical Provi	ier 🔺
	[back to]
anizations must have a designsed medical provider and/or	nated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas a licensed prescribing authority for Organizations administering immunizations.
* First Name	Paul Middle * Last Peterson
* Job Title	Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine
* License Number	N1023 * NPI Number 1234567890
Provider Medicaid ID	
Employee ID Number	
* Email	Paul.Peterson@yahoooo.com
* Phone Number	Ext
	Save Progress and Continue

Figure 25: Responsible Medical Provider

The Authorized Signer will receive an email with a Random Access Code, a link to "review and sign", and a link to "decline signing". (see Figure 26: Authorized Signer).

ImmTrac2 Registration – Your action is needed			¢	ß
ImmTrac2@dshs.texas.gov to: Paul Peterson 👻	☆	٢	¢	:
The Organization Point of Contact (POC) for your Organization, (ELROY JE as an Authorized Signer who qualifies to sign the ImmTrac2 Registration/Re PEDIATRICS). We have temporarily saved the data entered during the Imm process. Your action is required within 30 calendar days to proceed with the	ETSON enewal mTrac2 is Regi	l) has id for (PE Registi stration	lentified TERSC ration	l you)N
Please click a link below to access the incomplete Registration/Renewal an provide your email address and this access code: <u>WLZ84A7M</u> Should you contact the ImmTrac2 Customer Support Team at (800) 348-9158 or at Imm	d conti i have a <u>nTrac2</u> (nue. Pl any issu @ <u>dshs.</u> t	lease ies, ple <u>texas.g</u>	ase <u>ov</u>
The URL to review and sign the incomplete Registration/Renewal is: <u>https:// .tx.us/TXUAT/enrollProviderEntry.do?action=LOADBYRACSIGNER</u> .	/uat-im	mtrac.d	shs.sta	<u>te</u>
The URL to decline signing the incomplete Registration/Renewal is: <u>https://</u> . <u>.tx.us/TXUAT/enrollProviderEntry.do?action=DECLINE</u> .	uat-imr	ntrac.ds	shs.stat	<u>e</u>
Figure 26: Authorized Signer				

If the link to review and sign is selected, a web page asks for the random access code and the email of the official signer (See Figure 27: Random Access Code).

NOTE: The Random Access Code will never have a period at the end of it. Please be careful when copying and pasting the code to not include the period.

Site Agreement		
* Random Access Code (* Email]	
		Submit

Figure 27: Random Access Code

The Site Agreement is displayed with the message, "Successfully Submitted Organization Re-enrollment for signature". See Figure 28: Successfully Submitted for Signature.

[Successfully Submitted Organ	nization Re-enrollment for approva	al.
Site Agreement			
			Print
Varning: Time out will occur after 1	5 minutes of no activity. Please	ensure you save your progress	s frequently to avoid loss of data.
			feynand all1 fminimiz

Figure 28: Successfully Submitted for Signature

If the link to decline signing the Site Agreement is selected, then the option to decline is displayed. Please be careful when copying and pasting the Random Access code to not include a period at the end of the code. See Figure 29: Decline to Sign.

Site Agreement	
* Random Access Code * Email	Decline

Figure 29: Decline to Sign

If the Decline option is chosen, an email is sent to the person who submitted the renewal for signature, stating that the Authorized Signer declined the request to submit the renewal, and to select someone else as the Authorized Signer and resubmit the renewal for signature. See Figure 30: Authorized Signer Declined.

DI	mmTrac2@dshs.texas.gov	Peterson,Pail	IL	3:41 PM
	mmTrac2 Authorized Signer	Action Required	1	~
The con your red access y signatu	itact you have originally quest to submit your org your Renewal and modif re.	dentified as a anization's Re the authorize	n Authorized Sigr newal for approva ed signer and rest	ner has declined al. Please ubmit for
Please p	provide your email addre	ss and this ac	cess code: ASPD2	2ND8.
The URI immtrac	L to access the incomple c.dshs.texas.gov/TXTRN	e Registratior enrollProvider	/Renewal is: <u>http</u> Entry.do?action=	os://training- LOADFROMRAC
	Figure 30: A	uthorized Si	gner Declined	

5K. Agree and Sign – I Am the Authorized Signer

This section is to be completed by the Responsible Medical Provider or a person authorized to sign the agreement. The Responsible Medical Provider is responsible to ensure all users comply with the agreement for the Protected Health Information (PHI) and Personally Identifiable Information (PII) data contained in ImmTrac2. See Figure 31: Signed by the Responsible Medical Provider.

Authorized Signer
* Select one
\bigcirc I am not the Authorized Signer
Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form.
I am the Authorized Signer
Organization Agreement and Confidentiality Statement Acceptance
I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section
Responsible Medical Provider or Authorized Signer: Paul Peterson
* Signature Paul Peterson
To sign, please type your name.
* Title Chief Medical Officer
* Email Paul.Peterson@yahooooo.com
Date/Time
Save Progress and Continue Submit for Signature Submit for Approval

Figure 31: Signed by the Responsible Medical Provider

The check box "I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section" must be checked.

The Signature line must be entered, along with the title and email address of the Authorized Signer. Then select "Submit for Approval".

Although the Responsible Medical Provider is listed on the Authorized Signer page, an Authorized Signer who is not the Responsible Medical Provider can also sign on behalf of them and submit the form for approval. See Figure 32: Authorized Signer Who Is Not the Responsible Medical Provider. In this case, the signer is authorized by the provider to sign for him/her.

Authorized Signer
* Select one
◯ I am not the Authorized Signer
Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form.
I am the Authorized Signer
Organization Agreement and Confidentiality Statement Acceptance
I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section Responsible Medical Provider or Authorized Signer: Paul Peterson
* Signature Johnny Appleseed
To sign, please type your name.
* Title CEO
* Email JohnnyAppleseed@yahoooo.com
Date/Time
Save Progress and Continue Submit for Signature Submit for Approval

Figure 32: Authorized Signer Who Is Not the Responsible Medical Provider

Once the application is successfully submitted, the Authorized Signer will receive a "Submitted Successfully" message at the top of the screen.

NOTE: Please allow up to 14 business days to process. For additional assistance, please contact the ImmTrac2 Customer Support Team.

6. Status of the Renewal

The types of Renewal Application Status are as follows:

6A. Click to Renew

This is the status mentioned earlier that you will see when you need to start a New Renewal if needed for any reason. See Figure 33: Click to Renew.

Manage Renewals

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

must be started and save	<u>ed.</u>				
		Site			
Organization Name	Org Code	Agreement	Application	Last Edited By	Application

Applications that are left inac	ive for more than 1	<u>4 calendar days</u>	will be deleted	and a new	application
must be started and saved.					

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Click to Renew	ImmTrac2	13 days
					-

Figure 33: Click to Renew

6B. Incomplete

There is some missing or partial information that needs to be added or updated per the email you were sent. The information must be completed before it can be successfully submitted and processed in the system. See Figure 34: Incomplete.

Manage Rene	wals
	Manage Renewals Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.
	Manage Registrations Select this link to register a new organization or to continue working on an incomplete registration.
	Access previously approved Registration or Renewal Select this link to access the previously approved Registration or Renewal
	Registration of Intent - Unidirectional Data Exchange Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.
<u>Renewals:</u>	
When submitti application an complete the r click the "Inco	ing a renewal for an existing organization, please review the information in each section of the d make any necessary changes or updates. To save your progress and return at a later time to renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, mplete Renewal" link below.

<u>Applications that are left inactive for more than 14 calendar days will be deleted and a new application</u> <u>must be started and saved.</u>

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Incomplete	ImmTrac2	13 days

Figure 34: Incomplete

6C. Submitted for Signature

The person filling out the Site Renewal is not the Authorized Signer. See Figure 35: Submitted for Signature.

Manage Renewals

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved.

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Submitted for Signature	ImmTrac2	14 days

Figure 35: Submitted for Signature

The Authorized Signer indicated in the site renewal will receive an email with a Random Access Code who will then sign the renewal and submit it for approval. The default for the authorized signer will be the name used in the Responsible Medical Provider tab. See Figure 36: Default Signer is the Responsible Medical Provider.

Responsible Medical Provi	der 🔺
	[back to top]
Organizations must have a desi- licensed medical provider and/o	gnated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas r a licensed prescribing authority for Organizations administering immunizations.
* First Name	Paul Middle * Last Name Peterson
* Job Title	Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine
* License Number	N1023 * NPI Number 1234567890
Provider Medicaid ID	
Employee ID Number	
* Email	Paul.Peterson@yahoooo.com
* Phone Number	123 -456 -7890 Ext
	Save Progress and Continue

Figure 36: Default Signer is the Responsible Medical Provider

6D. Submitted for Approval

The renewal has been successfully signed and sent to DSHS for processing. See Figure 37: Submitted for Approval.

Manage Renewals

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

<u>Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved.</u>

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Submitted for	ImmTrac2	14 days
			Approval		

Figure 37: Submitted for Approval

NOTE: Please allow up to 14 business days to process. For additional assistance, please contact the ImmTrac2 Customer Support Team.

After your site renewal has been successfully submitted to DSHS, the Organization Point of Contact will receive an email confirming receipt by DSHS. See Figure 38: Submitted for Approval.



ImmTrac2@dshs.texas.gov 10:20 AM (3 hours ago) 🕁 🙂 🕤

÷

Your ImmTrac2 Renewal request for PETERSON PEDIATRICS has been received. Please allow 10-14 days for processing. If you do not receive an e-mail after 14 days of your registration submission date confirming approval or denial, contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov.

Figure 38: Submitted for Approval

6E. Returned

The renewal has been reviewed by DSHS and returned to the Organization email to be corrected and resubmitted. The reviewer at DSHS will notate what needs to be changed. See Figure 39: Returned.

Manage Renewals

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

<u>Applications that are left inactive for more than 14 calendar days will be deleted and a new application</u> <u>must be started and saved.</u>

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	<u>Returned</u>	ImmTrac2	14 days

Figure 39: Returned

See the example below. Figure 40: Example of Returned Renewal Email displays an email informing an organization that their renewal was returned with specific instructions to correct before resubmitting.



ImmTrac2@dshs.texas.gov to Paul Peterson 1:13 PM (O minutes ago) 🛧 🙂 🕤 🚦

You have been identified as the Authorized Signer of record for the following organization:

Authorized Signer: Paul Peterson Organization: PETERSON PEDIATRICS Type: RENEWAL FORM ID: DSHS336992 Date Submitted: 03/26/2025

During an initial review of your organization's Renewal form, the following values were changed:

Summary of Changes

NONE - See DSHS Specific Instructions at the bottom of this email

The changes listed above or described in the DSHS Specific Instructions section below, require your review and the enrollment form previously submitted must be resubmitted for approval. Please use your ImmTrac2 log in account credentials to log in. Once logged in use the top menu bar to navigate to the Registration/Renewal page. On the Manage Registration/Renewal page, select the link titled Access Saved/In Progress Registration or Renewal. Select the appropriate Form ID, make any necessary form changes, and resubmit your form for approval.

DSHS Specific Instructions

Please provide a valid medical license for the Johnny Appleseed.

If you have any questions about this email or the recertification process, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or ImmTrac2@dshs.texas.gov.

Figure 40: Example of Returned Renewal Email

6F. Approved

When your site renewal has been approved by DSHS, the Organization Point of Contact will be emailed notification of approval. See Figure 41: Example of Approved Site Renewal Email.



ImmTrac2@dshs.texas.... 10:38 AM (2 hours ago) ☆ ☺ ∽ : to Paul Peterson ▼

Your renewal application for ImmTrac2 has been approved.

If you have any questions, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov.

Figure 41: Example of Approved Site Renewal Email

7. Accessing Previously Approved Renewals

If you want to see your Site Agreement Renewal that has previously been approved, you can select the "registration/renewal" tab at the top of the screen and then select "Access previously approved Registration or Renewal". See Figure 42: Access Previously Approved Registration or Renewal.

organization PETERSON PEDIATRICS • user PAUL PETERSON role Full Access Providers no/DE

Manage Registration/Renewal

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact <u>ImmTracMU@dshs.texas.gov</u>.

Figure 42: Access Previously Approved Registration or Renewal

Then select the organization name in blue to view the organization's site agreement. You can print out the renewal once it is opened. See Figure 43: Previously Approved Registration or Renewal.

Manage Renewals

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

<u>Applications that are left inactive for more than 14 calendar days will be deleted and a new application</u> <u>must be started and saved.</u>

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	04/09/2027	Click to Renew	ImmTrac2	

Figure 43: Previously Approved Registration or Renewal

8. Troubleshooting Site Renewals

8A. Check for Errors After Submitting Renewal

When you select "Submit for Approval" at the end of the site agreement, the renewal will be checked for missing or invalid information on required fields.

For some fields with missing or invalid information, an error message will appear at the top of the registration (see Figure 44: Validation Error Message at Top of Renewal Form). Carefully go back through the application, open each section one at a time, and look for any required fields marked with asterisks that are blank or any sections that have red error messages (see Figure 45: Validation Error Message at Top of Section).

Validation Errors

- Please scroll down through each accordion tab to review validation error(s) listed at the top of the section.
- Please enter information in all required fields with an asterisk (*)

Figure 44: Validation Error Message at Top of Renewal Form

Responsible Medical Provider 🔺	
	[back to to
	1
Validation Errors	
 The value entered for phone number is invalid and (or) incomplete. 	
 Please enter information in all required fields with an asterisk (*) 	

Organizations must have a designated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas licensed medical provider and/or a licensed prescribing authority for Organizations administering immunizations.

Figure 45: Validation Error Message at Top of Section

8B. Common Issues for Completing Site Renewals

Required fields have an asterisk (*) and are in blue. Before submitting a renewal, review each section of the application and look for required fields that are blank.

Unique organization name: The organization name must be unique. For large organizations with similar names, use a unique identifier specific to the site. (Ex: "Pediatric Clinic – Dr. Paul Smith" or "Kindercare – 1003" or "Martin Luther King Middle – Austin ISD")

Unique physical address: If the address already exists in ImmTrac2 by a different business, use address line 2 to make the address unique, such as adding a suite number.

Look out for spaces before, after, or in Email addresses:

User Account Info: If you are a "current user", do not add yourself as an additional user.

Advanced Practice Nurses (APN) should not put an "AP" in front of their license number.

The email address for each user must be unique. For security purposes, each user account is required to have a unique email address. This will allow each individual user to reset their own password and retrieve their Org Code and Username.

NOTE: Each individual user should not share their credentials as this violates the organization site agreement.

8C. Save Progress and Exit

To save your progress and return later, select "SAVE PROGRESS AND EXIT".

Save Progress and Exit

Figure 46: Save Progress and Exit Button

Then a message appears asking if you are sure you want to exit (see Figure 47: Exit Message).

ve you sure you want to exit? Select the Cancel to remain on the current screen. Select OK to save information you have entered.

Figure 47: Exit Message

If "OK" is selected and you want to save and exit, a message appears that progress has been saved and ImmTrac2 has sent you an email with instructions on how to return to the incomplete application. If you think you did not receive an email, please check the Authorized Signer email box (and your spam, junk mail, and clutter folders) and verify that the email listed is correct. **NOTE**: Applications left inactive for more than 14 calendar days will be deleted and a new application must be started and saved. See Figure 48: Progress Saved Message.





If you have started the renewal process, then saved it and exited, when coming back to open the renewal, the "Incomplete" or "Click to Renew" application status may be selected to open the renewal and continue. See Figure 49: Incomplete Renewal.

Manage Renewals						
Manage Renewals Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.						
Manage Select t registra	e Registration his link to regi tion.	ns ster a new orgar	nization or to continue	e working on an incom	olete	
Access Select t	previously a his link to acc	pproved Regis ess the previous	tration or Renewal ly approved Registra	tion or Renewal		
Registration of Intent - Unidirectional Data Exchange Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.					je with the or bidirectional	
Renewals:						
When submitting a renew application and make any complete the renewal pro click the "Incomplete Ren	al for an exist necessary ch cess, select " ewal" link belo	ing organization nanges or update Save Progress a ow.	, please review the ir es. To save your prog nd Exit". To continue	nformation in each sect gress and return at a la working on an incomp	ion of the ter time to lete renewal,	
Applications that are let must be started and say	<u>ít inactive for</u> /ed.	more than 14 c	alendar days will b	e deleted and a new a	application	
Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires	
PETERSON PEDIATRICS	PETE0017	03/26/2027	Incomplete	ImmTrac2	13 days	

Figure 49: Incomplete Renewal

An email with the title "ImmTrac2: Incomplete Renewal" is sent to the Authorized Signer email address listed in the Site Agreement. The opened email tells you how to access the incomplete renewal. See Figure 50: Incomplete Renewal Message.

ImmTrac2@dshs.texas.gov

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to PAUL.PETERSON@YAHOOOO.COM

PAUL PETERSON

Thank you for starting the process to renew your organization. At this point, your renewal is **still Incomplete.** Your renewal will **expire in 14 days** if it is not updated or completed. Further action is required to finish this process and have your renewal submitted for approval.

Please follow these instructions to access your Incomplete renewal.

- 1. Login to ImmTrac2.
- 2. Agree to the Confidentiality Statement.
- 3. Select an organization to login to.
- If you are only associated to one organization, go to step 4.
- 4. Select the 'registration/renewal' tab at the top of the screen.
- 5. Select Manage Renewals.
- 6. Select your in-progress renewal.

If you have any questions, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov

Figure 50: Incomplete Renewal Message

To continue the in-progress renewal,

Go back into ImmTrac2, select the "registration/renewal" tab in the menu bar near the top of the screen, select "Manage Renewals" (see Figure 51: Manage Renewals Screen), and select the renewal that is still in progress by clicking on the word "Incomplete" in that row.

Manage Renewals

Select this link to renew an existing ImmTrac2 Organization or to continue working on an incomplete renewal.

Manage Registrations

Select this link to register a new organization or to continue working on an incomplete registration.

Access previously approved Registration or Renewal

Select this link to access the previously approved Registration or Renewal

Registration of Intent - Unidirectional Data Exchange

Select this link to access the Registration of Intent for unidirectional data exchange with the Texas Immunization Registry. This link is NOT for bidirectional data exchange. For bidirectional data exchange ROI, please contact ImmTracMU@dshs.texas.gov.

Renewals:

When submitting a renewal for an existing organization, please review the information in each section of the application and make any necessary changes or updates. To save your progress and return at a later time to complete the renewal process, select "Save Progress and Exit". To continue working on an incomplete renewal, click the "Incomplete Renewal" link below.

Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved.

Organization Name	Org Code	Site Agreement Expiration Date	Application Status	Last Edited By	Application Expires
PETERSON PEDIATRICS	PETE0017	03/26/2027	Incomplete	ImmTrac2	13 days

Figure 51: Manage Renewals Screen

When incomplete renewals are left inactive for more than 14 calendar days, they will be deleted from ImmTrac2. After 14 days, a new application must be saved or submitted.

For more information and support with renewals or registrations, contact the Texas Immunization Renewal/Registration Team.

Email: ImmTrac2@dshs.texas.gov

Phone: 800-348-9158, press option 4

Registration website: dshs.texas.gov/

ImmTrac Information Website: <u>dshs.texas.gov/immunizations/providers/programs</u>



TEXAS
Health and Human
ServicesTexas Department of State
Health Services

Texas Department of State Health Services Immunizations Section Stock # 11-15252 Rev. 04/2025