



Provider Manual

Immunization Quality
Improvement Program

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Section 1 Operations Manual for Providers

Introduction

The Texas Department of State Health Services (DSHS) Immunization Section prepared the Immunization Quality Improvement for Providers (IQIP) Operations Manual for use by Texas Vaccines for Children (TVFC) program providers and associated partners. Consultations on the policies in this manual are conducted routinely with the Centers for Disease Control and Prevention (CDC), DSHS, and other organizations.

The purpose of this manual is to consolidate IQIP policies and information into one source document for TVFC providers. Content includes information on the IQIP process, technical assistance guidance, and DSHS specific policy guidance.

Throughout the year, the DSHS Immunization Section will distribute new policies to TVFC providers. During the annual update of this manual, all previous policies from the prior year will be incorporated. This document serves as a companion document to further explain the required activities included in the “Program Evaluation” chapter of the Texas Vaccines for Children and Adult Safety Net (TVFC/ASN) Programs Operations Provider Manual.

Immunization Quality Improvement for Providers (IQIP) Background and Overview

Background

The Federal VFC program was created by the Omnibus Budget Reconciliation Act of 1993. The program was officially implemented in October 1994. VFC funds were awarded to state/local jurisdictions to conduct quality assurance reviews (QARs or VFC visits), which were formal site visits to assess VFC enrolled providers’ compliance with the requirements of the VFC program, beginning in 1995. In the same year, the Senate instructed the CDC to “ensure that all states receiving Section 317 immunization funds, conduct annual provider assessments in all public clinics using the CDC-approved methodology, ”one which later evolved into a program known as “Assessment, Feedback, Incentives, and eXchange” (AFIX). The assessment visits were implemented in public-sector clinics to improve immunization practices and vaccination coverage.

In 1999, the National Vaccine Advisory Committee (NVAC) recommended that all immunization providers, both public and private, should have their vaccination coverage assessed annually and that private providers should be assisted in this effort by state and local health departments. This recommendation provided support to expand the implementation of AFIX to private provider settings. In 2000, the Task Force on Community Preventive Services completed a review of immunization focused Quality Improvement (QI) literature and “strongly recommended” assessment and feedback (key components of the AFIX process) in the Guide to Community Preventive Services (Community Guide). The separate VFC and AFIX initiatives were combined in 2000 to allow the programs to achieve a broader reach among both public and private providers. That year, supplemental funds were awarded to 37 awardees to support a combined VFC-AFIX initiative. A 2011 update of the task force’s review concluded that assessment and feedback remained effective interventions for improving vaccination coverage.

Recommendations from the CDC scientific and programmatic staff in 2017–2018, resulting from operational research and an internal evaluation of the AFIX program, focused on the need to refine the CDC’s approach to provider level immunization QI efforts. Recommendations also focused on the need to scale such efforts to function within the boundaries of constraints faced by the CDC and awardee immunization programs as well as the current healthcare environment. Those recommendations resulted in the transition from AFIX to IQIP.

IQIP Program

IQIP is an immunization quality improvement program for health-care providers enrolled in the TVFC Program. The purpose of IQIP is to promote and support the implementation of provider-level quality improvement strategies. IQIP strategies are designed to support health-care providers in identifying opportunities to increase vaccine uptake in adherence with the Advisory Committee on Immunization Practices (ACIP) recommended routine immunization schedule by improving immunization service delivery and ensuring providers are:

- Aware of and knowledgeable about their vaccine coverage and missed opportunities to vaccinate.
- Motivated to try new immunization service delivery strategies and incorporate changes into their current practices.
- Capable of sustaining changes and improvements to their vaccination delivery services.
- Able to use available data from the Immunization Information System (IIS) and/or Electronic Health Record (EHR) to improve services and coverage.

The core quality improvement strategies of the IQIP program will support Texas Vaccine for Children (TVFC) providers by focusing on:

- Facilitating return for vaccination.
- Leveraging the reporting functionality of the statewide immunization registry, ImmTrac2.
- Giving a strong vaccine recommendation (including emphasis on HPV vaccine for providers with adolescent patients).
- Strengthening vaccination communications.

Using the IQIP process, TVFC-enrolled providers will be assessed on immunization delivery practices and will collaborate with the DSHS TVFC Quality Assurance Contractor (TMF) IQIP consultant to identify strategies to enhance their immunization workflow to improve vaccine uptake. Vaccination coverage is measured at or near the time of an initial contact (site visit) to establish baseline performance and again one year later to evaluate progress. Technical assistance and support are given via telephone calls at two and six-month intervals to aid providers in staying on course with their Strategy Implementation Plans (SIPs). At the end of 12 months, a final discussion of SIP progress and sustainability of practice changes occurs. Preparation by TVFC IQIP consultant for the IQIP visits is described in table below




Site Visit 	<ul style="list-style-type: none"> • Pre-visit preparation • Assess provider immunization workflow • Review assessment reports and set coverage goals • Discuss/select QI strategies and provide technical assistance • Establish action items for the Strategy Implementation Plan (SIP) • Enter data into the IQIP Database
Two-Month Check-In 	<ul style="list-style-type: none"> • Prepare by reviewing synopsis and notes from the site visit • Review SIP and discuss implementation status • Identify barriers and provide technical assistance • Establish new action items for updated SIP, if necessary • Enter data into the IQIP Database
Six-Month Check-In 	<ul style="list-style-type: none"> • Prepare by reviewing synopsis and notes from the two month visit • Review SIP and discuss implementation status • Identify barriers and provide technical assistance • Establish new action items for updated SIP, if necessary • Enter data into the IQIP Database
12-Month Follow-Up	<ul style="list-style-type: none"> • Prepare by reviewing synopsis and notes from the six month visit • Review 12-month coverage rates, SIP and discuss implementation status • Identify barriers and provide technical assistance • Establish new action items for updated SIP, if necessary • Enter data into the IQIP Database • Send provider high-level summary, including selected strategies, over and final SIP; encourage continued efforts

Figure 1: IQIP Cycle Texas Vaccines for Children (TVFC) Program

The TVFC program provides low-cost vaccines to eligible children from birth through 18 years of age. The mission of this program is to remove barriers to immunizations by allowing private providers to immunize eligible patients in their communities at little to no cost to the parent. Today there are more than 3,000 Texas providers enrolled in TVFC. The TVFC program enables more than 5 million Texas children to have access to immunizations. This is accomplished through a network of support provided by DSHS and with assistance from PHRs and contracted LHDs. These organizations function as Responsible Entities (REs) to ensure compliance with state and federal requirements in their jurisdiction.

ImmTrac2

Texas uses ImmTrac2 as the statewide immunization registry, which IQIP leverages to assess vaccine coverage data. DSHS offers ImmTrac2 at no cost to all Texans. The registry is secure and confidential, and safely consolidates and stores immunization records from multiple sources in one centralized system.

Texas Health and Safety Code Sec. 161.007-161.009 requires all medical providers and payors to report all immunizations administered to clients who are 17 years of age and younger to ImmTrac2 within 30 days of administration of the vaccine. Texas law requires written consent by individuals to participate in the registry. Written or electronic consent for ImmTrac2, is required for an individual who is 17 years of age or younger and must be obtained once for participation. A written consent of the individual's parent or guardian must be submitted to DSHS. After written consent is submitted, the individual's immunization information will be included in the registry until the individual is 26 years of age. If written consent is not collected during the immunization visit, the individual's immunization administration will not be accounted for when vaccination coverage rates are assessed.

Access to the registry records is for those who have authorization. Authorized organizations include health-care providers, schools, and public health departments. The registry is part of the initiative to increase vaccine coverage across Texas.

ImmTrac2 Registry Education

All TVFC providers receiving a site visit will receive IQIP and ImmTrac2 education resources. These educational materials have been developed to provide guidance on how to improve reporting of vaccination administrations into ImmTrac2, and best practices to increase childhood and adolescent vaccination coverage rates at the provider site.

ImmTrac2 Resource Packet

All TVFC Providers will receive an ImmTrac2 resource packet and hands-on training during their scheduled IQIP visit. The packet will include the following guidance documents:

- ImmTrac2 Data Quality Guide
- ImmTrac2 Texas Immunization Provider Summary (TIPS) Report Guide
- Guide to Reminder/Recall Report
- Creating a List of Active Clients with the Ad Hoc List Report
- ImmTrac2 Brochures

ImmTrac2 Data Quality Guide

The ImmTrac2 Texas Immunization Provider Summary (TIPS) Report Guide is a report which includes the provider's registered organization information listed in ImmTrac2, an overall summary of user activity, online activity, and data exchange activity for the previous month. This data will assist the provider in identifying how many records are being reported to ImmTrac2, accepted, and rejected monthly. Please reference the document at dshs.texas.gov/immunizations/providers/materials.

ImmTrac2 Texas Immunization Summary (TIPS) Report Guide

The ImmTrac2 Texas Immunization Provider Summary (TIPS) Report Guide is a report to include the provider's registered organization information listed in ImmTrac2, an overall summary of user activity, online activity, and data exchange activity for the previous month. This data will assist the provider in identifying how many records are being reported to ImmTrac2, accepted, and rejected monthly.

Guide to Reminder/Recall Report

The Guide to Reminder/Recall Report can be generated in ImmTrac2 to help the provider increase immunization levels in their practice. This report gives step-by-step guidance on how to create lists of patients who are due or overdue for immunizations. The reminder recall system can also create and print mailing labels.

Creating a List of Active Clients with the Ad Hoc List Report

All patients assigned to the provider's organization in ImmTrac2 are included in the initial assessment of the coverage assessment rates. An Ad Hoc List Report in ImmTrac2 allows providers to review the status of the patients assigned under their organization. Providers will determine which patients are considered active. For the patients no longer seen at the provider site, providers can de-activate patients in ImmTrac2. This guidance document assists providers with defining filters for specific clients and choosing a sort order for the report to show inactive or MOGE (moved or gone elsewhere).

ImmTrac2 Customer Service Team

The ImmTrac2 Customer Service team will work with providers to reset passwords and provide guidance on how to generate the TIPS Report, Patient Active/Inactive List, and Reminder/Recall Reports in ImmTrac2. For further assistance, please contact the ImmTrac2 Customer Service Team at 800-348-9158, option 1, or email at ImmTrac2@dshs.texas.gov.

ImmTrac2 Inter-Operability Team

The ImmTrac2 Inter-Operability Team works with providers to ensure accurate exchange of medical records into the state registry. They serve as direct support to the provider, and will work diligently to assist in identifying, addressing, and resolving technical issues in collaboration with the provider and EHR vendor. Over 12 months, a representative from this team will work closely with the provider to resolve reporting issues. Contact information for the ImmTrac2 Inter-Operability Team is 800-348-9158, option 3, or email at ImmTracMU@dshs.texas.gov.

Section 2 IQIP Visits

IQIP at a Glance

IQIP at a Glance For providers

IQIP is CDC's national, Vaccines for Children (VFC) provider-level immunization quality improvement program. IQIP promotes and supports implementation of provider-level strategies designed to increase on-time vaccination of children and adolescents.



IQIP strategies

- Facilitate return for vaccination
- Give a strong vaccine recommendation (emphasize HPV vaccine if provider has adolescent patients)
- Strengthen vaccination communications
- Leverage IIS functionality to improve immunization practice
- Custom strategy based on state or local public health priorities

IQIP Process IQIP is a 12-month process where public health representatives and VFC providers collaborate to identify QI strategies to increase vaccine uptake by improving and enhancing vaccination workflow.

1

Site visit

- Provider's vaccination workflow is observed, and initial coverage is reviewed
- QI strategies are selected
- Technical assistance is provided by the IQIP consultant
- Action items are chosen for strategy implementation plan

2

Two and six month check-ins

- Progress toward strategy implementation is reviewed
- Technical assistance is provided by the IQIP consultant
- Strategy implementation plan is updated

3

12-month follow-up

- Progress toward strategy implementation is reviewed
- Technical assistance is provided by the IQIP consultant
- Year-over-year coverage change is reviewed

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IQIP Site Visit

Overview

By signing the TVFC Program Agreement, the signing clinician agrees to allow DSHS or DSHS quality assurance (QA) contractors to conduct IQIP site visits at least every other year at their site.

The IQIP Site Visit involves a goal setting discussion with the TVFC Provider and the site reviewer.

IQIP requires the presence of at least one of the provider's TVFC points of contact: Primary Vaccine Coordinator, Backup Vaccine Coordinator, or Signing Clinician (PVC, BVC, and/or SC) and any individuals who can make process changes at the provider location.

A core component of this visit is to focus on assessing provider-level vaccination coverage rates using the data reported to ImmTrac2.

During the IQIP site visit, staff at the facility will receive a Strategy Implementation Plans (SIP) to include quality improvement strategies and instructions on action items to be implemented at the facility, along with resources and ImmTrac2 guides.

Once the IQIP portion of the site visit is completed, the site reviewer will transition into the TVFC Compliance portion.

Note: Check-in activities will occur by phone or virtual meetings at two months, six months, and 12 months by the Texas DSHS Quality Assurance and Improvement (QAI) team IQIP consultant. At 12 months, the provider's coverage assessment rates will be re-evaluated.

Assessing Provider Immunization Workflow

The IQIP Site Visit will begin with a discussion about the provider's immunization workflow. The conversation should involve the provider describing each step of their immunization workflow from the moment the patient enters the clinic through the administration of the vaccines, documentation on the patient's medical record, and scheduling of the next immunization visit.

An SIP will be developed in collaboration between the provider point of contact and the TMF consultant to outline the quality improvement strategies selected, supporting action- items, and check-in activities.

Childhood and adolescent vaccination coverage rates will be presented by the consultant at the initial IQIP visit and 12-month check-in, and coverage goals will be agreed upon for the provider's SIP. Vaccination coverage rates are discussed in more detail in the Vaccine Coverage Rate Reports section on page 15.

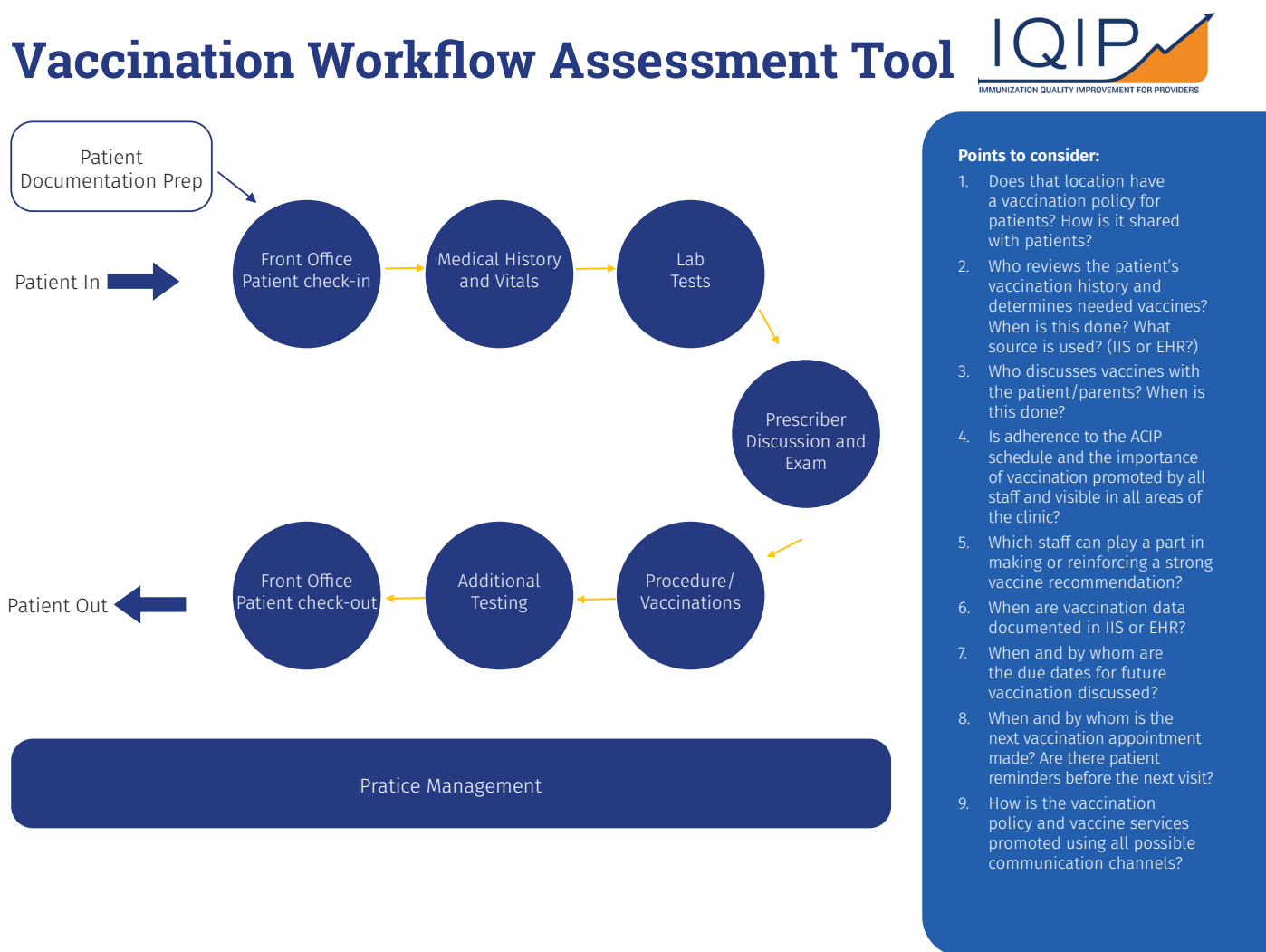


Figure 2

Vaccination Coverage Goals

Vaccination coverage goals will be populated in the IQIP database based on the ImmTrac2 immunization coverage rates entered into the database by the consultant.

The coverage goals include a suggested percentage based on initial coverage rates within a 12-month period. Reviewer will recommend the coverage goals to the provider, and enter the agreed goal amounts into the SIP. In the tables below, IQIP database logic is displayed for childhood and adolescent age group coverage goals.

Table: Logic for suggested 12-month childhood coverage goals	
Initial Coverage	Suggested 12-month coverage goal
0% to less than 80%	Increase by 10 percentage points
80% to less than 85%	Increase to 90%
85% to less than 90%	Increase by five percentage points
90% to less than 95%	Increase to 95%
95% and greater	Maintain initial percentage

Table: Logic for suggested 12-month adolescent coverage goals	
Initial Coverage	Suggested 12-month coverage goal
0% to less than 70%	Increase by 10 percentage points
70% to less than 75%	Increase to 80%
75% to less than 90%	Increase by five percentage points
90% to less than 95%	Increase to 95%
95% and greater	Maintain initial percentage

Figure 8: The parameters utilized by the TVFC IQIP Site Reviewer when setting program goals for increasing their clinics coverage goals for the ACIP-recommended vaccines per patient population served

IQIP Check-in and Follow-up Visits

Check in activities will occur by phone or virtual meetings at two months, six months, and 12 months post IQIP site visit. The check-in and follow-up meetings will be conducted by the Texas DSHS Quality Assurance and Improvement (QAI) team IQIP consultant.

Scheduling of IQIP Check-Ins and Follow-ups

DSHS QAI Team will call and email you ahead of time to schedule your IQIP check-ins and follow-up. Providers must respond to the email in the timely manner to schedule their check-in and follow-up.

IQIP requires the presence of at least one of the provider's TVFC points of contact: Primary Vaccine Coordinator, Backup Vaccine Coordinator, or Signing Clinician (PVC, BVC, and/or SC).

Two-month check-in, six-month check-in, and 12-month follow-up can be scheduled and completed any time one month prior to the planned date or due date of each respective check-in or follow-up.

Example of Planned/Due dates post IQIP site visit,for an IQIP cycle:

IQIP Site Visit Date:	Two-Month Check-in Due by:	Six-Month Check-in Due by:	12-Month Follow-up Due by:
February 2, 2024	April 2, 2024	August 2, 2024	February 2, 2025

IQIP Check-ins: Two and Six-Month Process

IQIP consultants will:

- Conduct the check-in via telephone or Microsoft Teams meeting.
- Assess current implementation of selected QI strategies.
- Identify any barriers to strategy implementation.
- Provide technical assistance, demonstrations, or resources to assist in implementing the action items.
- Review and adjust action items to continue progress towards strategy implementation.
- Send follow-up email with the check-in summary.

IQIP 12-month Follow Up Process

IQIP consultants will:

- Conduct via telephone or Microsoft Teams meeting.
- Review and discuss the 12-month coverage assessment rates and see if the goals have been met.
- Assess current implementation of selected QI strategies.
- Identify any barriers to strategy implementation.
- Provide technical assistance, demonstrations, or resources to assist in implementing the action items.
- Review and adjust action items to continue progress towards strategy implementation.
- Send follow-up email with the IQIP Feedback Survey link and follow-up summary.

Note: IQIP Feedback Survey must be completed by the provider after 12 month follow-up.

IQIP Website

Additional information about IQIP can be found on the DSHS Immunization Section website. The webpage can be accessed at dshs.texas.gov/immunizations/providers/quality-assurance.

IQIP Functional Inbox

Email all questions or inquiries to the IQIP functional inbox at IQIP@dshs.texas.gov.

Please Note: The Texas IQIP Program Operations Manual for Providers will continue to undergo changes as we assess and adjust program implementation. Updates will be announced, and policy documents will be revised and edited as needed.

Section 3

IQIP Strategies for Providers

Description of IQIP Core Strategies for Providers

Immunization Quality Improvement for Providers (IQIP) promotes and supports the implementation of provider-level strategies designed to help increase on-time vaccination of children and adolescents. The IQIP core strategies call for quality improvement activities that focus on improvements to the vaccination workflow. IQIP supports both the implementation and improvement of these core strategies. If the practice already uses one of these strategies, IQIP can help to advance the efforts within that strategy.

Facilitate Return for Vaccination

Making vaccination more accessible by expanding practice hours available for appointments, allowing walk-in vaccination appointments, and ensuring the next vaccination appointment is scheduled before the patient leaves the office, are a few examples that can support parents in keeping their children on time for vaccination. Reminder and recall systems can also help reduce the likelihood of missed appointments.



Questions To Consider

How does your practice maintain accurate patient contact information? Are staff verifying and updating patient contact information at each appointment to support scheduling and reminder/recall efforts?

What steps does your practice take to prevent missed opportunities? Does staff routinely screen patients for vaccine eligibility at each visit regardless of visit type (e.g., sick visit, well-child, sports physicals, etc.); generate lists of patients that have upcoming appointments to view vaccines due using various technologies via EHR, IIS, or scheduling software platforms; and maintain accurate vaccination records?

Does your scheduling protocol ensure that appointments are scheduled for all future vaccines needed? Are you scheduling the next appointment (e.g., well-child visit, nurse-only, etc.) before the patient leaves the office, either in the exam room or at check-out; scheduling the next vaccination visit and the next well-child visit to occur the same day whenever possible; offering various types of appointments (e.g., nurse-only appointments, vaccination-only clinic days, etc.) where vaccinations can be administered?

How do you inform parents of future vaccine dates? Does staff give parents a copy of their current immunization record and a list of future recommended vaccines with precise due dates?

Does your practice implement reminder and recall systems? Are you using multiple methods (e.g., a combination of text messages, portal messages, emails, postcards, phone calls, etc.) to remind patients of upcoming appointments?

Leverage the Immunization Information System (IIS) to Improve Immunization Practice

Providers and patients can benefit from a well-maintained Immunization Information System (IIS). The IIS can provide consolidated vaccination records, forecast upcoming due dates to assist with scheduling, and send reminders for upcoming appointments. The IIS also helps providers to manage vaccine inventory and to self-monitor vaccination coverage to identify areas for improvement.



Questions To Consider

How does your practice maintain accurate patient contact information? Are you verifying and updating patient contact information in the IIS at each appointment to support scheduling, reminder, and recall efforts?

Are you routinely reporting to the IIS? Are you reporting all historical and administered vaccination data to the IIS to support complete, up-to-date patient records, vaccination recommendations, and coverage?

How often does your practice assess patient immunization status? Do clinicians assess immunization status in the IIS for patient active/inactive status and doses due at every patient encounter, including drop-ins and sick visits?

How is a patient's vaccination status communicated among staff during their visit? Do you use a prompt system to notify staff when vaccinations are due for every patient encounter, including drop-ins and sick visits?

How often does your practice attempt to bring patients without appointments back to the office for due or overdue vaccinations? Do staff routinely generate patient line lists to identify patients not up-to-date and overdue to determine future due dates for vaccines? Does your practice use reminder and recall functionality to communicate with patients about appointments (e.g., future well-child, vaccination-only, and follow-up sick appointments)?

How often does your practice assess its vaccination performance, and how? Does your practice generate practice-level coverage reports at regularly scheduled intervals for single vaccines and combination series for various age cohorts?

Give a Strong Vaccine Recommendation

(include HPV vaccine if the provider has adolescent patients)

On-time vaccination depends on parents choosing to vaccinate their children, and providers play a critical role in leading parents to that decision. Parents usually consider their child's healthcare professional one of the most trusted vaccine information sources. This IQIP strategy focuses on the provider-parent and provider-patient discussion. Selection of this strategy can support your clinic with training and resources focused on the evidence-based presumptive (or "announcement") approach for vaccine recommendation.



Questions To Consider

Do you use evidence-based methods when recommending vaccines? Do prescribers use effective communication approaches (e.g., presumptive language, bundling approach, sandwiching recommendations, etc.) when recommending vaccines?

Do you recommend all vaccines for which the patient is eligible? Do prescribers prevent missed opportunities by recommending all vaccines when they are due and recommending multiple vaccines simultaneously if the ACIP schedule indicates the patient is due for more than one vaccine at the time of the visit?

What approaches do you use to build trust with parents? Do you seek to understand the concerns behind parents' questions before responding? Willingness to listen and acknowledge parents' concerns plays a role in developing trust.

How do you ensure you are reaching all parents and patients equally? Does your practice take actions to reduce disparities / promote vaccine equity by training prescribers to recognize the diversity within their community and acknowledge the systemic, cultural, and historical reasons some patients may have low confidence in vaccines?

How do you stay current on the latest ACIP-recommendations? Do prescribers receive routine training to prepare for and focus on the vaccination discussion with parents on the current Immunization Schedules ? [cdc.gov/vaccines/hcp/imz-schedules/index.html](https://www.cdc.gov/vaccines/hcp/imz-schedules/index.html)

Strengthen Vaccination Communications

This strategy highlights the importance of promoting vaccination and helping providers increase positive messaging about vaccination to their patients. The strategy includes developing, reviewing, and disseminating the provider's patient vaccination policy. The strategy also includes other approaches to vaccination messaging, such as posting flyers and posters throughout the site and including vaccine-related content in emails, mailings, website content, and social media posts.



Questions To Consider

Does your practice have a vaccination policy for patients? How does staff share and promote your practice-wide vaccination policy with all new and existing patients (e.g., including new patient packets, displaying the policy in waiting areas and exam rooms)? How does your clinic promote the importance of on-time vaccination to new and existing patients?

What reliable information about vaccines do you provide to parents and patients? What materials do you share to promote vaccinations above and beyond the required Vaccine Information Sheets (VIS)? What resources do you provide to parents and patients that explain vaccination or address common concerns about vaccines?

How do you communicate your support of vaccination outside your practice? Do you have a website or utilize social media platforms? How can you incorporate positive vaccine messaging into these platforms?

How does your staff respond if parents or patients express vaccine hesitancy? Would staff benefit from training on common vaccine myths and misconceptions and how to respond to them?

The Interconnectedness of IQIP Core Strategies

Though they emphasize different aspects of a provider's routine vaccination workflow, the best practices associated with the four core IQIP strategies often overlap. For example, a well-maintained IIS helps to inform a strong vaccine recommendation, and it also helps to ensure that subsequent visits are scheduled to complete each vaccine series on time. Similarly, when a practice has a clear vaccination policy that all patients are aware of, it makes it easier for providers to give a strong recommendation in the exam room and stress the importance of scheduling the next vaccination appointment before the patient leaves. When selecting and implementing these QI strategies, it is essential to consider how they intersect and depend upon staff engagement across the practice.

Section 4

Immunization Champion

What does an immunization champion do?

- Immunization champions take the lead on immunization promotion activities in their clinics.
- By demonstrating leadership, collaboration, and advocacy, they ensure that the children in their care receive all the recommended vaccines on time.

Why be an immunization champion?

- Children rely on the champions in their lives to keep them safe and healthy.

Who can be an immunization champion?

- These champions may be physicians, nurses, or other health care professionals. Here are ways you can be an immunization champion in your clinic.

Facility Processes

- Develop and guide the implementation of procedures that support on-time vaccination of every child seen.
- Routinely assess procedures to ensure vaccination workflow continues to support the practice's vaccination policy and on-time vaccination.
- Conduct workshops in which clinic staff discuss barriers to vaccinating patients on time and ways to improve.

Training and Education

- Display Advisory Committee on Immunization Practices (ACIP) recommendations throughout the clinic.
- Train staff quarterly on ACIP recommendations, minimum ages and intervals, and contraindications.
- Ensure all office staff can accurately answer parent and/or patient vaccine-related questions or refer them to the appropriate resource.
- Work with staff to make sure they are comfortable addressing common parent and/or patient concerns or hesitancy about vaccines.
- Observe staff during vaccination visits and provide feedback.

Immunization Documentation

- Routinely check to ensure the clinic is reporting vaccinations and immunization status to the immunization information system (IIS) in a timely manner.
- Perform spot checks for completeness and accuracy of clinic immunization records.
- Regularly check patients' active/inactive status in the IIS and update if necessary.

Communications

- Stay up to date on vaccine recommendations and immunization quality improvement.
- Develop and propose social media posts. Research vaccine content to add to website.
- Make sure all vaccination promotion materials reflect current recommendations.
- Stay up to date on facility- or provider-level vaccination coverage. Share and discuss results routinely with staff, working together to evaluate progress and identify performance gaps.
- Update clinic staff on status of key immunization performance measures (e.g., missed opportunities, staff knowledge of vaccine recommendations, IIS data quality, etc.).

Section 5

ImmTrac2 Data Quality Guide

The Texas Immunization Registry

Data Quality Guide

Common issues of inaccurate report data

1. Reduce Duplicate Client Records by Entering Complete Client Demographics

When entering new clients into ImmTrac2, if available enter the client's:

- Complete phone number with area code,
- Personal Email address,
- Mother's first name, and
- Mother's maiden name.

At each office visit check if the phone number and email address of the client have changed and update records. This information will help prevent duplicate clients in the immunization database.

2. Encourage Clients to Sign Both a Standard Consent and a Disaster Consent

The most common reason why client records are rejected from ImmTrac2 is due to no consent on file so offer clients the opportunity to sign both a standard consent and a disaster consent. For immunization records to be stored in ImmTrac2, the parent, legal guardian, or managing conservator must complete an ImmTrac2 Minor Consent Form for their child. Adults must complete the ImmTrac2 Adult Consent form. These forms can be found online at dshs.texas.gov/immunizations/public/forms under the "ImmTrac2" drop-down menu.

Forms

These forms are available in PDF format and are spread across various departments, including the Immunization Unit. These resources cater to your needs within departments such as ASN, TVFC, ImmTrac2 and others.

Adult Safety Net (ASN) ▾

ImmTrac2 ▾

Texas Vaccines for Children Program (TVFC) ▾

Figure 1 - ImmTrac2 Forms Link

Once the “ImmTrac2” drop-down is expanded, scroll down to choose the consent for either Immunization Registry (ImmTrac2) – Adult Consent Form (Bilingual) or Immunization Registry (ImmTrac2) – Minor Registry Consent Form (Bilingual). The Disaster Consent can be used by both minors and adults.

F11-12956	Texas Immunization Registry (ImmTrac2) Disaster Information Retention Consent Form	02/2022
F11-11406	Immunization Registry (ImmTrac2) Authorization to Release Official Immunization History (Bilingual)	02/2022
F11-11936	Texas Immunization Registry (ImmTrac2) Newborn Registration Form	02/2022
F11-13366	Immunization Registry (ImmTrac2) - Adult Consent Form (Bilingual)	02/2022
C-7	Immunization Registry (ImmTrac2) - Minor Consent Form (Bilingual)	02/2024

Figure 2 - List of Forms

Facts about consents:

- You don't need to be in a disaster to sign a disaster consent.
- If clients were consented as a minor, when they reach the age of 18, they need to sign the consent forms as an adult. If they don't sign the adult consent forms before the age of 26, their standard immunizations when they were a minor will be deleted from the ImmTrac registry.

3. Make Sure You Select the Correct Organization

Users who are associated to multiple organizations could potentially select the wrong organization. This could add immunizations to an organization that did not administer the vaccine.

3A. How Do I Know If I Am Associated to Multiple Organizations?

After successfully logging into ImmTrac2, is the Manage Access screen. A user may be associated to multiple organizations. For example, see Figure 3 in which a user is associated to four different organizations.

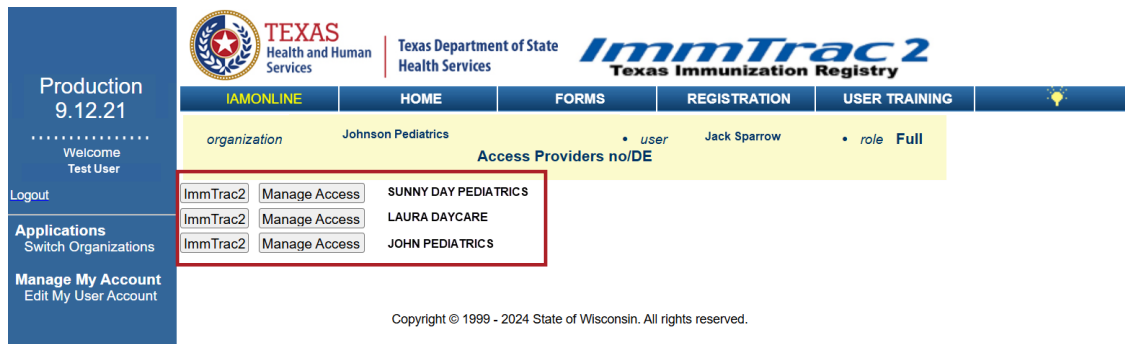


Figure 3 - User in Multiple Organizations

3B. How Do I Know If I Selected the Correct Organization?

The yellow banner at the top of the screen displays the organization name that you selected, the name of the user, and the user's role.

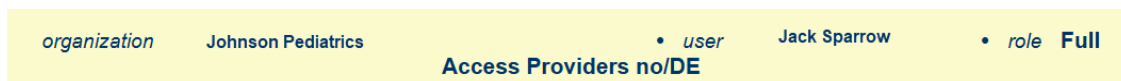


Figure 4 - Logged into Correct Organization

3C. How Can I Switch Between Organizations in ImmTrac2?


On the Manage Access screen, select “ImmTrac2” for the organization which you would like to add immunizations on behalf of.

Production
9.12.21
.....
Welcome
Test User

Logout

Applications
Switch Organizations

Manage My Account
Edit My User Account



TEXAS
Health and Human
Services

Texas Department of State
Health Services

ImmTrac2
Texas Immunization Registry


IAMONLINE

HOME

FORMS

REGISTRATION

USER TRAINING



organization

Johnson Pediatrics

• user

Jack Sparrow

• role

Full

Access Providers no/DE

ImmTrac2

Manage Access

SUNNY DAY PEDIATRICS

ImmTrac2

Manage Access

LAURA DAYCARE

ImmTrac2

Manage Access

JOHN PEDIATRICS

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Figure 5 – Switch Between Organizations

4. Inactivate Clients You No Longer See

Some reports generated from ImmTrac2 only include clients who are listed as 'Active' with the organization (for example, the Reminder/Recall report). Important: to ensure the accuracy of these reports, update the status of clients who are no longer associated to your practice.

4A. How Do Clients Become 'Active' with an Organization?

- Each new client added to ImmTrac2 is automatically 'Active' with that organization. This applies for clients added online as well as clients added through data exchange.
- When a historical or current immunization is added to a client's record. This includes updates that occur online as well as through data exchange.
- A client can also be manually flagged as 'Active' online on the 'Edit Client' screen under the Organization Information tab.

Organization Information ▲

[\[back to top\]](#)

Status **ACTIVE** ▼

Provider- PCP ▼

* Tracking Schedule ACIP ▼

Date of Death

Allow Reminder and Recall Contact? Yes ▼

Last Notice

Figure 6 – Active Status

4B. How Do Clients Become 'Inactive' with an Organization?

1. **Manually:** You can manually flag a client as 'Inactive' online by going into the client record, clicking the Organization Information tab, and changing the status.



Figure 7 – Inactive Status

2. **Manage Client Status Criteria:** Another way to make clients you no longer see inactive is to go to the ImmTrac2 application and click on the “manage client status criteria” link. See the “ImmTrac2 Manage Client Status Criteria” guide at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-15951.pdf. You can change the status of many clients quickly using this tool.

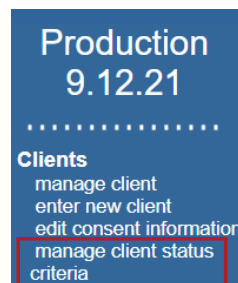


Figure 8 – Manage Client Status Criteria Link

3. **Data Exchange:** Clients can also be flagged as 'Inactive' through data exchange. For additional information please feel free to contact your Electronic Health Records (EHR) vendor or the ImmTrac2 Interoperability Team toll free at 800-348-9158 or email ImmTracMU@dshs.texas.gov.

4C. Other Considerations

- Only users associated to your organization can update the status of a client in ImmTrac2.
- Clients can be flagged as 'Active' for multiple ImmTrac2 organizations, which means they may show up as 'Active' for multiple organizations.

4B. How Do Clients Become 'Inactive' with an Organization?

1. **Manually:** You can manually flag a client as 'Inactive' online by going into the client record, clicking the Organization Information tab, and changing the status.



The screenshot shows the 'Organization Information' tab in the ImmTrac2 application. A red box highlights the 'Status' dropdown menu, which is currently set to 'ACTIVE'. The dropdown list includes the following options: INACTIVE-LOST TO FOLLOW UP, INACTIVE-MOGE, INACTIVE-MOOSA, INACTIVE-ONE TIME ONLY, INACTIVE-OTHER, INACTIVE-PERMANENTLY (DECEASED), and INACTIVE-UNKNOWN. Other fields visible include 'Date of Death', 'Allow Reminder and Recall Contact?' (set to 'Yes'), and 'Last Notice'.

Figure 7 – Inactive Status

2. **Manage Client Status Criteria:** Another way to make clients you no longer see inactive is to go to the ImmTrac2 application and click on the “manage client status criteria” link. See the “ImmTrac2 Manage Client Status Criteria” guide at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-15951.pdf. You can change the status of many clients quickly using this tool.

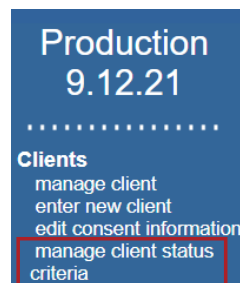


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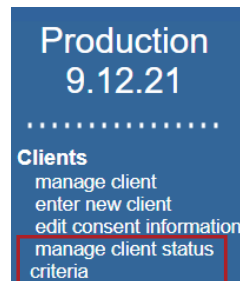


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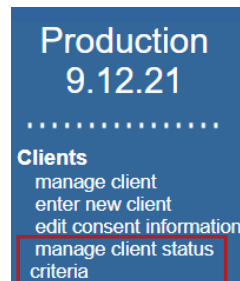


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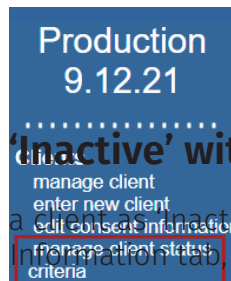
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Figure 7 – Inactive Status

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3. **Data Exchange:** Cl For additional info. (EHR) vendor or th ImmTracMU@dshs

ds
ail

Figure 7 – Inactive Status

4C. Other Considerations

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Section 6 Guide to the Reminder/Recall Report

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Summary

The Reminder/Recall Report generates client notices, which include letters, cards, mailing labels, and client listings. Reminder and recall notices can be generated for each client if the following conditions in the client record are met:

- The client status is “Active” in the Client Information section for your organization.
- The “Allow Reminder and Recall Contact?” indicator in the Client Information section is “Yes.”
- The client has complete address information listed in the Address Information section.

Generate Reminder/Recall Report

See Figure 1: Generate Reminder/Recall Report

ImmTrac2

Texas Immunization Registry

Enterprise Portal

home

registration/renewal

manage access/account

forms

user training

logout

contact us

organization

Texas DSHS

•

user

Andrea Godoy

•

role

Report Access

Reports Available

Generate Report	Description	Output
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.	Status
Ad Hoc List Report	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.	Status
Check Reminder List	The Check Reminder List allows Provider Organizations to be able to view their clients for statewide reminder/recalls prior to the state reminder recall process being ran.	
1 Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.	Status
Clients and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.	Status
CoCASA Extract	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.	Status
Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	Status
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	Status
Manage Ad hoc Template	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.	Status
Reminder/Recall Custom Letters	The Reminder/Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.	
Reminder/Recall Report 2	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	Status

Clients

manage client

enter new client

manage client status

criteria

edit consent information

Immunizations

manage immunizations

Schools

manage list

find student

check school report

Reports

generate report

scheduled report

Data Exchange

registration of intent

Maintenance

manage clinicians

manage schools

Admin Support

manufacturer listing

trade name listing

vaccine group listing

vaccine listing

vaccine relationships

Manage My Account

edit my user account

Figure 1: Generate Reminder/Recall Report

To generate the Reminder/Recall Report, follow the steps below.

1. Click the Generate Report option from the menu panel.
2. Select the Reminder/Recall Report.

Reminder/Recall Request

3 Create New List ...

☒ Enter new Reminder Recall Request Criteria List Name

☐ Use a previous Reminder Recall Request Criteria

Select Client Population ...

☒ Clients Associated with organization Texas DSHS

☐ Clients Residing in Selected County

☐ Clients Associated with organization Texas DSHS or Residing in Selected County

Available Counties

4 Indicate the Tracking Schedule ...

☒ Use Tracking Schedule Associated with Each Client

☐ Use Tracking Schedule Selected for All Clients

5 Select the Vaccine Group To Report on ...

☒ Use All Vaccine Groups

☐ Use Vaccine Groups Selected

Adeno
Amantadine
Anthrax
BCG
Bamlanivimab
Baricitinib
Bebtelovimab
Chikungunya
Cholera

Add
Remove

☒ Vaccines Due Now

☐ Vaccines Past Due

☐ Both

6 Select Subpotent Recall ...

☐ Use Subpotent Vaccinations

Figure 2: Generate Reminder/Recall Report Part 2

3. Set the Request Criteria: The Create New List Section gives users the option of selecting saved reminder recall request criteria or creating a new reminder recall request.

- Enter new Reminder Recall Request Criteria: Selecting the radio button and supplying a list name will generate a new reminder recall request report that can be generated as a report or saved as a template and later generated as a report.
- Use a previous Reminder Recall Request Criteria: Selecting the “Use a previous Reminder Recall Request Criteria” radio button and selecting a list name displays that template’s criteria. Once the criteria displays, users can edit the criteria from the previous list before generating the report.

4. Indicate the Tracking Schedule: Choose which set of recommended immunizations and corresponding dates will be compared to each client’s immunization history.

5. Select the Vaccine Group to Report on: Choose which vaccines will be included in the report by selecting a vaccine and clicking the Add button. Also select which vaccines to include, vaccines that are Due Now, Past Due, or Both.

6. Selecting Subpotent Recall: This filter will show the clients with Sub-potent vaccinations recorded.

7. Selecting a School or Primary Care Provider: This filters the clients who have been assigned to the selected school or physician.

7 Select the School & Primary Care Provider ...

School Provider (PCP)

8 Enter Additional Demographic Criteria ...

City Zip Code County

Language Vaccine Eligibility

Occupation

High Risk/Exemptions

9 Enter the Date Criteria ...

NOTE: If Target Date is blank, today's date will be used.

☒ Target Date Range From To

☒ Date of Birth Range From To

☐ Age Range

10 Select the Vaccine Groups to Display ...

☒ Use All Vaccine Groups

☐ Use Vaccine Groups Selected

Adeno
Amantadine
Anthrax
BCG
Bamlanivimab
Baricitinib
Bebtelovimab
Chikungunya
Cholera

Add Remove

11 Specify How to Sort the Report Data ...

Sort 1st By Last Name Ascending Sort 3rd By

Sort 2nd By First Name Ascending Sort 4th By

12 Save & Generate Generate Cancel

Figure 3: Generate Reminder/Recall Report Part 3

8. Enter Additional Demographic Information: Entering and/or selecting these options allows filtering of clients whose records match specific demographic information.

9. Enter the Date criteria: Select a Date Range to filter clients.

- Target Date – Entering a target date range will return clients who are due now, are past due, or will be due for the selected vaccine within the specified date range.
- Birth Date - Entering a birth date range will return clients who were born between the dates entered.
- Age Range - Entering an age range will return clients whose age falls between the dates entered.

10. Select Vaccine Groups to Display: Selecting Vaccine Groups to display will filter for the vaccine groups that display on the report as being recommended. By default, all vaccine groups that are due now or past due display on the report.

11. Specify How to Sort the Report Data: Allows a choice of sorting options. The default is last name in ascending order, then first name in ascending order.

12. Click the Save & Generate button to save the request criteria and to generate the report.

- If previous Reminder Recall Request Criteria was selected, this will save any changes made to template.
- Click the Generate button to generate the report and not save as a template or save changes to the criteria list.
- Click the Cancel button to return to the Generate Reports screen.

Reminder Request

Status Screen See Figure 4: Status Screen.

Once the reports are generated the Reminder Request Status screen displays. This screen will only retain one report at a time, and as new reports are generated the previous report will no longer be accessible. The status indicates the percentage of completion for the report. Periodically click on Refresh to update the completion percentage information. The time it will take for the report to generate will depend upon the number of clients associated with the provider organization.

Reminder Request Status						Refresh
Started	Completed	Status	Clients	Target From	Target To	Cancel
04/04/2024 08:35 AM		QUEUE		04/04/2024	04/04/2024	
Reminder Output Status						
No Reminder Outputs Logged						

Figure 4: Status Screen

This screen will also display all the reminder output options that were generated for the specific report.

1. When redirected to the Reminder Request Status screen, click the Refresh button until the status is 100%.
2. When the report is ready, click on the blue hyperlink to go to the Reminder Request Process Summary screen.

Note: The report will run in the background similar to other reports, allowing users to exit ImmTrac2 or work on other ImmTrac2 tasks until it completes. To go to the Reminder Request Status screen, click on “generate report” on the menu panel and click the “Status” link next to the Reminder/Recall Report link.

Reminder Request Process Summary Screen

The Summary screen is broken up into three sections: Reminder Request Criteria, Reminder Request Output Options, and Last Notice Date Options. From the Summary screen, users can create various reminder output options.

Reminder Request Criteria: This section lists the number of clients involved in the search and the criteria used to define the search. The Total Number of Clients Eligible for Reminder at the bottom of the screen is dependent upon the search criteria and is narrowed down by each criteria step. See Figure 5: Reminder Request Criteria.

Reminder Request Process Summary		
Reminder Request Criteria		
Step	Criteria Evaluated at this Step	Clients
1	Clients that reside in the selected county : TRAVIS.	
2	Additional criteria includes: <ul style="list-style-type: none">• Clients born between 05/05/1992 and 05/05/2000;• School is not specified;• Provider is not specified;	0
3	Clients that have a Valid Address . Additional criteria includes: <ul style="list-style-type: none">• City is not specified;• Clients that reside in the following zip code: 78754.	0
4	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">• Clients that are Past Due for one or more vaccinations as of 04/04/2024;• Use the following vaccine groups: HPV;• Use ACIP for all clients.	0
Total Number of Clients Eligible for Reminder		0
Reminder Request Output Options		
In order to access reminder request output options, your reminder request must return one or more Clients.		
Last Notice Date Options		
Preview Clients that will display on the Reminder Recall Report.	Preview Clients	
Increment last notice date for all clients eligible for this reminder .	Increment Eligible	
Increment last notice date for all clients immunized by Texas DSHS.	Increment Immunized	
Return to the previous screen.	Cancel	

Figure 5: Reminder Request Criteria

Reminder Request Output Options: This section lists the various reminder output options available, including both standard outputs and custom outputs. See below and see also Figure 6: Reminder Request Output Options.

- **Output** – This column displays the types of reports that can be produced. These reports are described in detail in the table below. Clicking the Hyperlink in the Output column will generate the report that was selected.
- **Description** - This column provides a brief description of the output option.
- **Additional Input** - This column displays options for including additional information on the output report and defining a report:
 - **Report Name:** Enter the Name to describe the output report.
 - **Free text:** Enter in text that will appear on the report.
 - **Phone number:** Enter in the phone number that will appear on the output report.

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>

Figure 6: Reminder Request Output Options

Reminder Letter

The letter output option allows users to generate a standard form letter to the parent/guardian for each client returned on the query. The letter allows room at the top for the organization’s letterhead. The body of the letter includes the client’s immunization history, recommended immunizations, and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letter, follow the steps below (see Figure 7: Generate Reminder Letter Steps 1-2):

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	<div>1</div> <div>Duplex Printing <input type="checkbox"/></div> <div>Report Name <input type="text" value="04.04.24"/></div> <div>Free Text <div>Please call our office if you have questions or would like to schedule an appointment</div></div> <div>Phone # <input type="text" value="512-555-5555"/></div>

Figure 7: Generate Reminder Letter

1. Under the Additional Input column, there are options to enter the following:

- Duplex printing – printing on both sides.
- Report Name - if a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
- Free Text - include a maximum of 400 characters in this field. This information will be displayed as the closing for each letter.
- Phone - the telephone number is presented in the closing for each letter.

2. Click the Reminder Letter hyperlink.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
04/04/2024 09:23 AM	04/04/2024 09:23 AM	100 %	31	04/04/2024	04/04/2024

Refresh

Cancel

3

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
04.04.24	Reminder Letter	04/04/2024 09:28 AM	04/04/2024 09:28 AM		Processing
04.04.24(Spanish)	Reminder Letter	04/04/2024 09:28 AM	04/04/2024 09:28 AM		Processing

4


Figure 8: Generate Reminder Letter

3. Users are redirected back to the Reminder Request and Output Status screen. If needed, click the Refresh button until the status is “Ready.” See Figure 8: Generate Reminder Letter Steps 3 and 4.

4. The Reminder Letter will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish.

- For clients who have selected Spanish as their “Language Spoken” option in the Client Information tab of their client’s record, the Reminder Letter will be output in Spanish.

- Click on the Reminder Letter hyperlink to view or print the letters in a PDF file. See Figure 9: Reminder Letter Example.



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Texas Immunization Registry

Dear Parent/Guardian of Johnny B Goode,

Our records indicate that Johnny B Goode has received the following immunizations:

Immunization Record		Tracking Schedule: ACIP	
Vaccine Group	Date Administered	Series	Vaccine
HepA	09/06/2018	1 of 2	HepA-Ped 2 Dose
HepB	11/28/2001	1 of 3	HepB-Peds
HPV	10/20/2016	1 of 2	HPV9
	09/06/2018	2 of 2	HPV9
Meningo	09/06/2018	1 of 1	MCV4P
Varicella	09/06/2018	1 of 2	Varicella

Our records also show that Johnny B Goode may be due for the following immunizations. If Johnny received these or other immunizations from another health care provider, please call our office so that we can update Johnny's record. Otherwise please take Johnny to a health care provider to receive them.

Immunizations Due
Flu NOS
HepA, NOS
HepB, NOS
MMR
Polio, NOS
Tdap
Varicella

Please call our office if you have questions or would like to schedule an appointment.

The number for our office is: (512) 999-1234

Figure 9: Reminder Letter Example

Reminder Card

The Reminder Card output option allows users to generate a standard reminder card for the parent/guardian for each client returned on the query. The card allows room at the top for a greeting. The body of the card includes the client's recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number.

To generate Reminder Cards, follow the steps below (see Figure 10: Generate Reminder Card and Figure 11: Generate Reminder Card).

1. Under the Additional Input column, users have the option of entering:
 - a. Report Name - If a Report Name is not indicated, the report will simply be named "Reminder Card" on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
 - b. Free Text - Includes a maximum of 400 characters in this field. This information will be displayed as the closing for each card.
 - c. Phone - The telephone number is presented in the closing for each of the card.
2. Click the Reminder Letter hyperlink.

Figure 10: Generate Reminder Card

3. Users are redirected back to the Reminder Request and Output Status screen, and if needed click the Refresh button until the status is "Ready."
4. The Reminder Card will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish. Click on the Reminder Card hyperlink to view or print the letters in a PDF file.

Reminder Request Status						Refresh
						Cancel
Started	Completed	Status	Clients	Target From	Target To	
04/05/2024 07:37 AM	04/05/2024 07:41 AM	100 %	1550	04/05/2024	04/05/2024	

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Reminder card 4-5-24 (Spanish)	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready
Reminder card 4-5-24	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready

Figure 11: Generate Reminder Card

See Figure 12: Generate Reminder Card Example.

Dear Parent of Johnny B Goode

Our records show that Johnny B Goode may be due for the following immunizations. If Johnny received these or other immunizations from another health care provider, please call our office so that we can update Johnny's record. Otherwise please schedule an appointment for Johnny to receive them.

Vaccine Group	Date Needed
Influenza-seasnl	07/01/2019

The number for our office is: (512) 999-1234
Please call our office if you have questions or would like to schedule an appointment.

Figure 12: Generate Reminder Card Example

Mailing Labels

The labels output option produces 30 labels per screen on Avery Mailing Labels #5160.

See Figure 13: Generate Reminder Mailing Labels Example.

To the Parent/Guardian of: ANCE MARLIN BOB 234 MULBERRY LANE AUSTIN TX 78749	To the Parent/Guardian of: LANI BOB 123 MULBERRY LANE AUSTIN TX 78723	To the Parent/Guardian of: LARRY BOB 123 MULBERRY DRIVE AUSTIN TX 78749
---	--	--

Figure 13: Generate Reminder Mailing Labels Example

Client Query

Listing The Client Query Listing displays contact information for those clients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every client that was returned in the report query process.

See Figure 14: Client Query Listing Example.

Report run on : 08/02/2019

Client Query Listing

Page 1 of 1

Client Name (FML)	Phone Number	Address	City/State/ZIP
JOHNNY B GOODE - 08/02/2002	(512) 123-4567	9934 PRIVATE ROAD	ANYTOWN, TX 76999-ACIP
Tracking Schedule:			
Vaccine	Immunizations Due	Immunization Dates	
DTP/aP	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)	
HepA	Complete	1) 02/13/2006 2) 09/09/2014	
HepB	Complete	1) 02/05/2002 2) 03/05/2002 3) 09/17/2002	
Hib	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)	
HPV	Complete	1) 09/09/2014 2) 01/30/2017	
Influenza-seasnI	07/01/2019	1) 11/23/2010 2) 11/03/2017	
Meningo	Complete	1) 08/13/2014 2) 06/04/2018	
Meningococcal B	Complete	1) 06/04/2018 2) 07/12/2018	
MMR	Complete	1) 08/12/2003 2) 02/13/2006	
PneumoConjugate	Complete	1) 08/08/2002 2) 08/12/2003 3) 02/10/2004	
Polio	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)	
Td/Tdap	08/13/2024	1) 08/13/2014	
Varicella	Complete	1) 02/10/2004 2) 02/13/2006 3) 08/13/2014	


Figure 14: Client Query Listing Example

Extract Client

Data The Client Extract Data displays in an XML format and contains every client and their demographic information that was returned in the report query process.

Client Reminder/Recall Spreadsheet

The Client Extract Data displays client demographic information, immunization history, and recommendations for those clients identified as being due/overdue in the Reminder/Recall output in an Excel spreadsheet. This report lists every client that was returned in the report query process. See Figure 15: Reminder/Recall Spreadsheet Example.

**TEXAS**
Health and Human
Services

Texas Department of State
Health Services

Texas Immunization Registry

Figure 15: Reminder/Recall Spreadsheet Example.

To generate the Mailing Labels, Client Query Listing, Extract Client Data, and Client Reminder/Recall Spreadsheet, follow the steps below.

See Figure 16: Generate Reminder Output Options Step 1-2.

Note: The reminder output options are generated one at a time.

1. Under the Additional Input column of the table enter a Report Name - if a Report Name is not indicated, the report will simply be named “Mailing Labels” or “Client List”, or “Client XML”, or “Client Reminder/Recall Spreadsheet” on the Reminder Report Status screen with the date and time it was generated. Enter up to 20 characters in each file name field.
2. Click the appropriate Output hyperlink: “Mailing Labels”, “Client Query Listing”, “Extract Client Data”, or “Client Reminder/Recall Spreadsheet”.

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
2 Mailing Labels	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>

Figure 16: Generate Reminder Output

3. You will be redirected back to the Reminder Request Status and Output Status screen (See Figure 17: Generate Reminder Output Options Step 3-4). Click the Refresh button until the status is “Ready.”
4. Each reminder output will be listed in the Output Status section as an active hyperlink - click on the applicable option to open the output file.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
04/05/2024 07:37 AM	04/05/2024 07:41 AM	100 %	1550	04/05/2024	04/05/2024

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Reminder card 4-5-24 (Spanish)	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready
Reminder card 4-5-24	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready

Figure 17: Generate Reminder Output

Last Notice Date Options

The Reminder Request Process Summary screen allows users to reset the last notice date, which will affect future reminder/recall notices generated using this information.

See Figure 18: Reminder/Recall Last Notice Date Options.

Last Notice Date Options	
Preview Clients that will display on the Reminder Recall Report.	Preview Clients
Increment last notice date for all clients eligible for this reminder .	Increment Eligible
Increment last notice date for all clients immunized by Texas DSHS.	Increment Immunized
Return to the previous screen.	Cancel

Figure 18: Reminder/Recall Last Notice Date Options

Preview Clients: view a list of clients included in the Reminder Recall Report. This information includes a hyperlink to each client's demographic record. This is the same screen that display if the Check Reminder List is selected from the Generate Report menu option.

Increment Eligible: used to reset the last notice date for all clients eligible for this reminder. The last notice date is viewable on the client's demographic record under the organization information section. Increment Immunized: used to increment the last notice date for all clients immunized by your organization.

Cancel: to return to the Reminder Request Status screen. Custom Letter In addition to the standard letter, ImmTrac2 allows users to create and store up to three custom letters to be used for reminders and recalls. Once a custom letter is created it is available for selection on the Reminder Request Output Option screen for the Reminder Report.

See Figure 19: Reminder Request Output Options.

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Please call our office if you have questions or would like to schedule an appointment Phone # <input type="text"/> 512-555-5555
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> 4.4.24 Free Text <input type="text"/> Please call our office if you have questions or would like to schedule an appointment Phone # <input type="text"/> 512-555-5555
Mailing Labels	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>
Reminder Letter 1	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>
akunjur	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>

Figure 19: Reminder Request Output Options

Create a New Reminder/Recall Custom Letter

NOTE: One advantage of the Reminder/Recall Custom Letter is that you can choose to not include the client's immunization history in the letter if you do not want to include it. To create Reminder/Recall Custom Letters, follow the steps below.

See Figure 20: Generate Reminder/Recall Custom Letters.

Reports generate report scheduled report Data Exchange registration of intent Maintenance manage clinicians manage schools Admin Support manufacturer listing trade name listing vaccine group listing vaccine listing vaccine relationships Manage My Account edit my user account	Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.	Status
	Clients and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.	Status
	CoCASA Extract	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.	Status
	Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	Status
	Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	Status
	Manage Ad hoc Template	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.	Status
	Reminder/Recall Custom Letters 2	The Reminder/Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.	
	Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	Status

Figure 20: Generate Reminder/Recall Custom Letters

1. Click the Generate Report option from the menu panel.
2. Select Reminder/Recall Custom Letters.
3. On the Reminder/Recall Customer Letter screen, click the New Customer Letter link to begin creating the custom letter. See Figure 21: Reminder/Recall Custom Letters Step 3.

Reminder/Recall Custom Letters

[akunjur](#)

Delete

[Reminder Letter 1](#)

Delete

[New Custom Letter](#) **3**

Cancel

Figure 21: Generate Reminder/Recall Custom Letters

4. Fill out the template using Figure 22: Reminder/Recall Custom Letters Step 4 and also see the Reminder/Recall Custom Letters Options to help complete the customized template.

Top Margin

Number of blank lines at the top of the letter: 3

Client Address

Include a name with the client address: (no name)

☐ Include client address

Salutation

Enter a salutation for the letter: Dear

Include a name at the end of the salutation: (no name)

Paragraph 1

First Part

Include a name between the first and second parts of this paragraph: (no name)

Second Part

Immunization History

☐ Include immunization history

Paragraph 2

Immunization Recommendations

☐ Include immunization recommendations

Paragraph 3

Closing

Enter a closing for the letter:

☐ Include provider organization name in the closing

☐ Include provider organization phone number in the closing

Name and save the custom letter

Name the custom letter: Reminder Letter 1

SaveCancel

Figure 22: Generate Reminder/Recall Custom Letters

Reminder/Recall Custom Letter options:

- **Top Margin.** From the drop-down list provided, choose the number of blank lines at the top of the letter. These blank spaces will leave room for your office letterhead. This field will default to 3.
- **Client Address.** Check the box to include the client's address at the top of the letter.
- **Salutation.** Enter a greeting in the text box to begin the letter. For example, "Dear" or "Greetings." Use the drop-down arrow to determine if you want to Include a name at the end of the salutation. If "Name" is selected, the name of the client will show up after the salutation. If "Responsible Person" is chosen, the letter will read <salutation> Parent/Guardian of <client name>. For example, "Dean Parent/Guardian of Peggy Sue."
- **Paragraph 1 First Part.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Paragraph 1 Name Option.** Include a name between the first and second part of this paragraph: Choose the name to appear within the paragraph from the drop-down list. Select either parent/guardian, client name or no name.
- **Paragraph 1 Second Part.** If you chose to enter a name, add the remaining text for the first paragraph in this field.
- **Immunization History Option.** Check the box to include the client's immunization history in the letter. If you do not want to include the client's immunization history in this letter, do not check the box "Include immunization history."
- **Paragraph 2.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Immunizations Recommended Option.** Check this box to include the immunization needed forecast for the client in the letter.
- **Paragraph 3.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Closing.** Enter a closing word or statement for the letter in this field. You have the option of checking a box to include the name of the provider organization in the closing, and another option of checking a box to include the phone number of the organization in the closing.

5. Enter the Customer Letter Name, and then Click the Save Figure 23: Reminder/Recall Custom Letters Data Step 5.

- The screen will refresh, but no message displays.
- Click the Cancel button. See button to return to the previous Reminder/Recall Customer Letters screen as seen in step 3, where the newly created letter displays as a hyperlink.

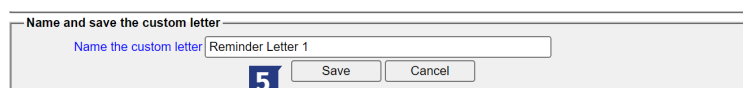


Figure 23: Generate Reminder/Recall Custom Letters

Edit a Reminder/Recall Custom Letter

To edit an existing Reminder/Recall Customer Letter, follow the steps below.
See Figure 24: Edit Reminder/Recall Custom Letters Step 1.

1. Once you have navigated to the Reminder/Recall Custom Letter screen, click the customer letter link.



Figure 24: Edit Reminder/Recall Custom Letters

2. Update the customer letter data or letter name as needed, and then click the Save button. See Figure 23: Reminder/Recall Custom Letters Data Table for details on each data field.

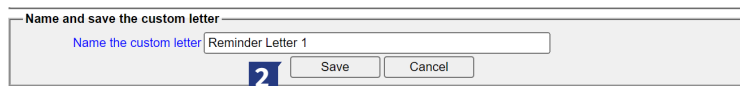


Figure 23: Generate Reminder/Recall Custom Letters

- The screen will refresh, but no message displays. (Not Shown)
- Click the Cancel button to return to the previous Reminder/Recall Customer Letters screen as seen in step 3. If the letter name was updated, the new name displays.

Delete a Reminder/Recall Custom Letter

To delete an existing Reminder/Recall Customer Letters, follow the steps below.

See Figure 25: Delete Reminder/Recall Custom Letters Steps 1 and 2.

1. Once users have navigated to the Reminder/Recall Custom Letter screen, click the Delete
2. Click the OK button next to the letter to be deleted to delete the Reminder/Recall Custom Letter.

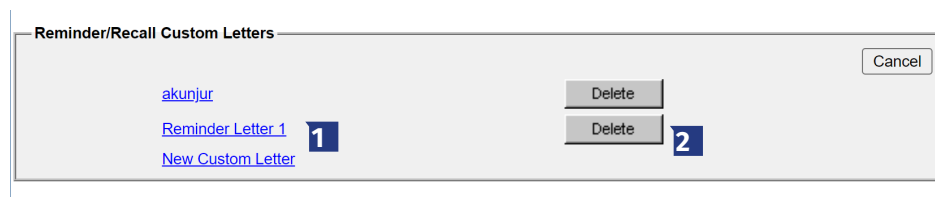
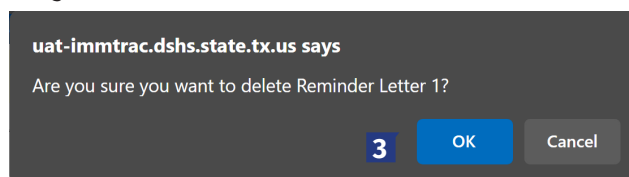


Figure 25: Edit Reminder/Recall Custom Letters



Section 7

ImmTrac2 TIPS Guide

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Section 1: Description of the TIPS Report

The TIPS report provides each registered organization in ImmTrac2 an overall summary of the user activity, online activity, and data exchange activity for the previous month.

Organization Details

See Figure 1: Organization Details.



Figure 1: Organization Details

1. Facility/Organization Name as displayed in ImmTrac
2. TVFC/ASN provider identification number (if applicable).
3. Each organization will be rated based on the user activity, online activity, and data exchange activity (if applicable) for the previous month. Organizations will receive one of the following ratings: Exceeds Expectations, Meets Expectations, or Not Rated.
4. Org Code – Unique identifier for each organization.
5. TX IIS ID – Unique identifier for each organization.
6. Name of the Organization Point of Contact.
7. Email address of the Organization Point of Contact.
8. Expiration date of the ImmTrac2 site agreement.
9. Reporting period for the previous month and displayed as MM/YYYY.

User Activity Details

See Figure 2: User Activity Details.

User Activity Summary:

Displays the user activity for the reporting period and compares the total users versus the active users.

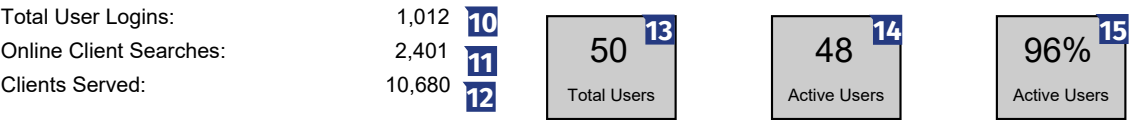


Figure 2: User Activity Details

- 10. Number of logins during the reporting period by active users (14).
- 11. Number of online clients searched during the reporting period.
- 12. Number of active clients associated to the organization.
- 13. Total number of users associated to the organization.
- 14. Number of active users associated to the organization.
- 15. Percentage of active users.

Online Activity Details

See Figure 3: Online Activity Details.

Online Activity:

Displays counts of clients, immunizations added, and reporting latency for online activity.



Figure 3: Online Activity Details

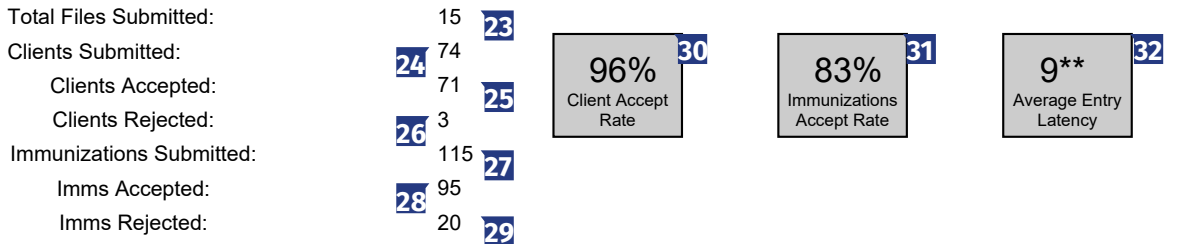
- 16. Total number of clients added online.
- 17. Total number of immunizations added online.
- 18. Number of immunizations added online to minors.
- 19. Number of immunizations added online to adults.
- 20. Number of minor consents added online.
- 21. Number of adult consents added online.
- 22. Average number of days between when an immunization was administered and added online in ImmTrac

Data Exchange Activity Details

See Figure 4: Data Exchange Activity Details.

Data Exchange Activity:

Displays counts of clients, immunizations added, and reporting latency for data exchange activity.



**** Average Entry Latency:** In days, the amount of time taken to report immunizations via Data Exchange.

Data Exchange Details:

EHR Vendor:	Oracle Cerner	33
EHR Software:	Oracle Health	34

Figure 4: Data Exchange Activity Details

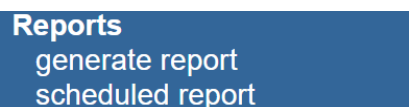
- 23. Number of data exchange files submitted during the reporting period.
- 24. Number of client records submitted.
- 25. Number of client records accepted.
- 26. Number of client records rejected.
- 27. Number of immunizations submitted.
- 28. Number of immunizations accepted.
- 29. Number of immunizations rejected.
- 30. Percentage of client records accepted.
- 31. Percentage of immunizations accepted.
- 32. Average number of days between when an immunization was administered and added through data exchange.
- 33. Electronic Health Record (EHR) Vendor as indicated on the Registration of Intent.
- 34. EHR Software as indicated on the Registration of Intent.

NOTE: Regarding items 24, 25, 26, and 30, if a patient's data is submitted multiple times within a file they will be counted as unique patients, not the same patient. Example: Patient John Smith is reported three times in a file, the system will count John Smith as three clients not as one.

Section 2: How to Generate the TIPS

Report To generate the TIPS report, follow these steps:

1. Log into the appropriate organization in ImmTrac
2. On the left side of the screen, on the menu panel look for “Reports” and click on “generate report”. See Figure 5: Generate Report.



Reports
generate report
scheduled report

Figure 5: Generate Report

3. In the list of reports available, click on “Texas Immunization Provider Summary (TIPS)”. See Figure 6: Link for Texas Immunization Provider Summary (mockup).

Generate Report	Description	Output
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.	Status
Ad Hoc List Report	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.	Status
Check Reminder List	The Check Reminder List allows Provider Organizations to be able to view their clients for statewide reminder/recalls prior to the state reminder recall process being ran.	
Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.	Status
Clients and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.	Status
CoCASA Extract	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.	Status
Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	Status
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	Status
Manage Ad hoc Template	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.	Status
Reminder/Recall Custom Letters	The Reminder/Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.	
Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	Status
Texas Immunization Provider Summary	The Texas Immunization Provider Summary (TIPS) allows a user to view a summary of the organization's activity for the previous month.	
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.	Status

Figure 6: Link for Texas Immunization Provider Summary (mockup)

NOTE: The TIPS report is generated on the first day of each month and overwrites the previous month's report.

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Section 3: Strategies to Optimize Your TIPS

Rating The following are focus areas to improve your organization's TIPS rating and to ensure that the data in ImmTrac2 is more complete, accurate, and reported in a timely manner.

Focus 1: Number of Active Users

 **Target:** At least 75% active users

User Activity Summary:

Displays the user activity for the reporting period and compares the total users versus the active users.

Total User Logins:	1,012			
Online Client Searches:	2,401	50	48	96%
Clients Served:	10,680	Total Users	Active Users	Active Users



- **Calculation:** The number of Active Users divided by the number of Total Users. An active user is one who has logged into ImmTrac2 within the past 90 days.
- **Target:** Greater than 75% active users.
- **Suggestions:**
 - Disassociate inactive users in your organization. Refer to Section 4: Instructions to Request Adding or Disassociating Users.
 - If adding or disassociating more than five users, please complete a Renewal of your Site Agreement in ImmTrac
- **Note:** Having a high percentage of inactive users is a security risk and asks the question, "Why do these users need access to ImmTrac2?". The Number of Active Users is the starting point for the remaining focus points.

Focus 2: Number of Logins per Active User

 **Target:** Each user logs in at least twice per month

User Activity Summary:

Displays the user activity for the reporting period and compares the total users versus the active users.

Total User Logins:	2 1,012 	50 	48	96%
Online Client Searches:	2,401	Total Users	Active Users	Active Users
Clients Served:	10,680			

- **Calculation:** The number of Total User Logins divided by the number of Active Users.
- **Target:** Each active user should log into ImmTrac2 twice per month.
- **Suggestions:** Before each patient encounter, users should log into ImmTrac2 to ensure:
 - The client has previously consented and been added to ImmTrac If the client is not found after performing a “smart” search, educate the client on the benefits of the Texas Immunization Registry and give them an opportunity to complete the ImmTrac2 consent form.
 - That client immunization records are up-to-date.
- **Which shots are coming due and/or are past due.**
 - All ImmTrac2 users log in at least twice, including Data Exchange organizations.

Focus 3: Number of Online Client Searches per Active User


Target: Minimum 50 client searches per active user per month



- **Calculation:** The number of Online Client Searches divided by the number of Active Clients Served.
- **Target:** Having a minimum of 50 client searches per active user per month.

User Activity Summary:

Displays the user activity for the reporting period and compares the total users versus the active users.

Total User Logins:	1,012	50	48	96%
Online Client Searches:	3 2,401 	Total Users	Active Users	Active Users
Clients Served:	10,680			

- **Suggestions:**
 - Look up client immunization records before each visit. Client searches are preliminary to accessing a client’s immunization record. Searches are also prerequisite to adding a new client online.
 - Review the “Benefits of Utilizing TIR Guide”.

Focus 4: Number of Immunizations Added per Client


Target: Maximize online immunizations added and data exchange immunizations accepted and number of active clients.



- **Calculation:** The sum of Online Immunizations Added and Data Exchange Immunizations Accepted, divided by the number of Active Clients Served.
- **Target:** Maximize this number.

User Activity Summary:

Displays the user activity for the reporting period and compares the total users versus the active users.

Total User Logins:	1,012			
Online Client Searches:	2,401			
Clients Served:	10,680		<div>50 Total Users</div>	<div>48 Active Users</div> <div>96% Active Users</div>

Online Activity:

Displays counts of clients, immunizations added, and reporting latency for online activity.

Clients Added:	16			
Immunizations Added:	45			
Adult:	36			
Child:	9			
		<div>16 Child Clients</div>	<div>4 Adult Clients</div>	<div>3* Average Entry Latency</div>

** Average Entry Latency: In days, the amount of time taken to enter an online immunization.*

Data Exchange Activity:

Displays counts of clients, immunizations added, and reporting latency for data exchange activity.

Total Files Submitted:	15			
Clients Submitted:	74			
Client Accepted:	71			
Client Rejected:	3			
Immunizations Submitted:	115			
Imms Accepted:	95			
Imms Rejected:	20			
		<div>96% Client Accept Rate</div>	<div>83% Immunizations Accept Rate</div>	<div>9** Average Entry Latency</div>

• **Suggestions:**

- Use the Creating a List of Active Clients to generate a List of Active Clients.
- Using the Active Client list to update clients who are no longer under your care:
- If clients have moved elsewhere or have not been seen for a long time, change their status to “inactive” in the Organization Information tab of the client record. See Figure 7: Organization Information – Inactive Status.

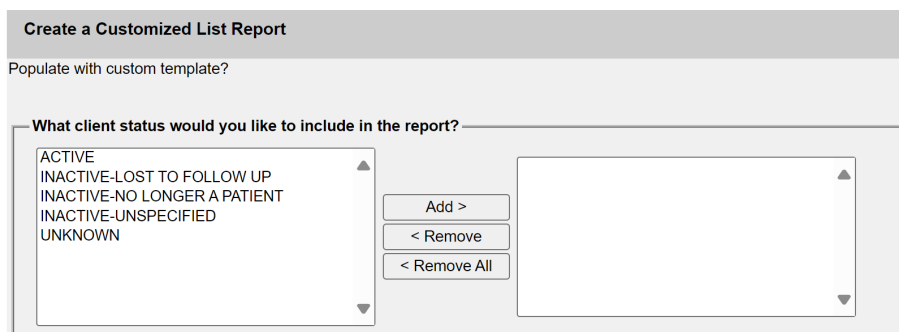


Figure 7: Organization Information – Inactive Status

Focus 5: Average Latency

Target: No more than two days on average between administering an immunization and reporting it,¹¹ either online or electronically through data exchange.



- **Calculation:** The average of Online Average Entry Latency and Data Exchange Average Entry Latency.
- **Target:** No more than two days on average between administering an immunization and

Online Activity:

Displays counts of clients, immunizations added, and reporting latency for online activity.

Clients Added:	16	16	4	3*
Immunizations Added:	45	Child Clients	Adult Clients	Average Entry Latency
Adult:	36			
Child:	9			

* Average Entry Latency: In days, the amount of time taken to enter an online immunization.

Data Exchange Activity:

Displays counts of clients, immunizations added, and reporting latency for data exchange activity.

Total Files Submitted:	15			
Clients Submitted:	74	96%	83%	9**
Clients Accepted:	71	Client Accept Rate	Immunizations Accept Rate	Average Entry Latency
Clients Rejected:	3			
Immunizations Submitted:	115			
Imms Accepted:	95			
Imms Rejected:	20			


** Average Entry Latency: In days, the amount of time taken to report immunizations via Data Exchange.

reporting it, either online through the user interface or electronically through data exchange.

- **Suggestions:**
 - Review your organizations procedures for entering immunizations to see what could help get immunizations entered more quickly after they are administered.

Focus 6: Acceptance Rate of Clients and Immunizations Submitted through Data Exchange

Target: 90% or more of the client records and immunization records sent through data exchange are

 accepted.



- **Calculation:** The average of the Client Accept Rate and the Immunizations Accept Rate, both from data exchange.

Online Activity:

Displays counts of clients, immunizations added, and reporting latency for online activity.

Clients Added:	16	16	4	3*
Immunizations Added:	45	Child Clients	Adult Clients	Average Entry Latency
Adult:	36			
Child:	9			

* Average Entry Latency: In days, the amount of time taken to enter an online immunization.

Data Exchange Activity:

Displays counts of clients, immunizations added, and reporting latency for data exchange activity.

Total Files Submitted:	15			
Clients Submitted:	74	96%	83%	9**
Clients Accepted:	71	Client Accept Rate	Immunizations Accept Rate	Average Entry Latency
Clients Rejected:	3			
Immunizations Submitted:	115			
Imms Accepted:	95			
Imms Rejected:	20			

** Average Entry Latency: In days, the amount of time taken to report immunizations via Data Exchange.

- **Target:** Greater than 90% of client records and immunizations sent through data exchange are accepted.
- **Suggestions:**
 - Contact the Texas Immunization Registry's Interoperability Team at 800-348-9158, option 3, to receive help with your data exchange.
 - Contact your EHR vendor to correct issues resulting in errors.

Section 4: Instructions to Request Adding or Disassociating Users

Requests

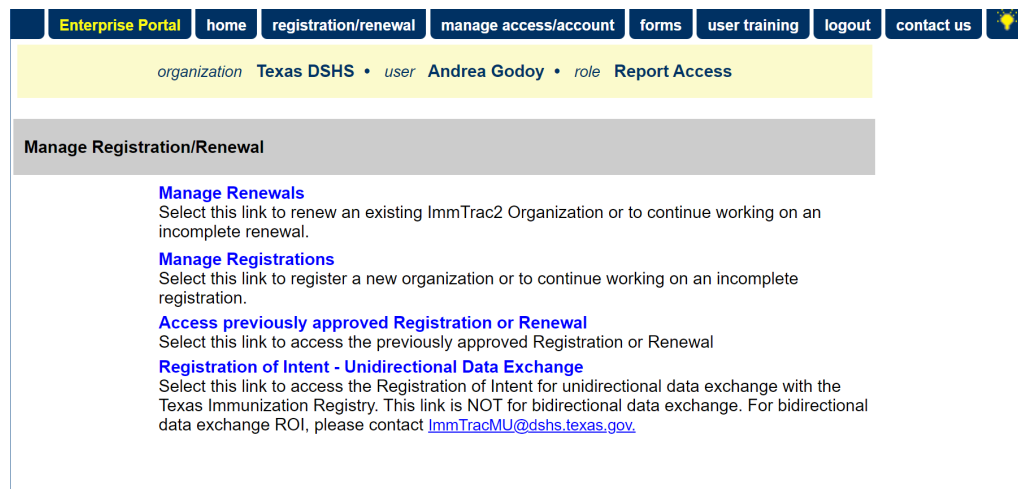
All requests to ADD a new user or DISASSOCIATE a user must be requested by one of the following at the registered organization:

- Organization Point of Contact (POC)
- Primary Registry Point of Contact
- Primary Vaccine Coordinator (listed in ImmTrac2)
- Secondary Vaccine Coordinator (listed in ImmTrac2)

If you aren't sure who these contacts are at your organization, then:

1. Log into the appropriate organization in ImmTrac
2. Click on the “registration/renewal” tab at the top of the ImmTrac2 screen.
3. Click on “Access previously approved Registration or Renewal”. See Figure 8: Access Previously Approved Registration or Renewal.

Figure 8: Access Previously Approved Registration or Renewal



4. Then click on the small black triangles to open the “Organization Point of Contact (POC)”

tab and the “Primary Registry Contact” tab. This provides you the names of the individuals serving in these roles. See Figure 9: POC and Primary Registry Contact Tabs.

Warning: Time out will occur after 15 minutes of no activity. Please ensure you save your progress frequently to avoid loss of data.

[\[expand all\]](#) [\[minimize all\]](#)

Registration Questions ▼
Organization Demographics ▼
Parent/Headquarters Info ▼
Organization Point of Contact (POC) ▼
Primary Registry Contact ▼
User Accounts Info ▼
Responsible Medical Provider ▼
Practicing Providers with Prescribing Authority ▼
Agree and Sign ▼

[\[expand all\]](#) [\[minimize all\]](#)

5. Email requests to ImmTrac2@dshs.texas.gov using the Email Request Instructions and Email Request Template provided below.

More Than Five Users

If you have more than five users to add or disassociate, please submit a renewal of your site agreement and make the updates to the users through the renewal process.

Security Notes

- ImmTrac2 login credentials are assigned to an individual person and must not be shared. Repeated violations may result in loss of access privileges for the individual and/or the organization.
- Each ImmTrac2 user account requires a unique e-mail address so that ImmTrac2 users can reset their own passwords when needed.
- Organization Point of Contacts should carefully consider who needs ImmTrac2 access. Access requests should only be for individuals on a need-to-know and a need-to-have basis. Please do not add more users than what is needed. The more users requested, the longer the user creation process may take.
- Please instruct users at your organization to login as soon as possible. If new user accounts are not accessed within 30 days of creation, the account will be locked. If new user accounts are never accessed within 120 days of creation, they will be deleted.

Email Request Instructions to Add or Disassociate Up to Five Users

- Copy and paste the Email Request Template into an email.
- Add the missing information
 - Organization and Point of Contact Information
 - List of users to be added or disassociated
 - Put an “X” next to the Action Required of either adding or disassociating user.
- Add the subject line: Add-Disassociate Users for [Enter your Organization’s Name].
- Send email to ImmTrac2@dshs.texas.gov.

Email Request Template

Organization and Point of Contact Information

ORGANIZATION NAME:

STREET ADDRESS:

POINT OF CONTACT (POC) FULL NAME:

PHONE NUMBER:

POINT OF CONTACT EMAIL ADDRESS:

ORGANIZATION'S ORG CODE, TX IIS IDnumber (aka PFS IDnumber): (if known)

List of Users to be Added or Disassociated

First User Action Required:

Add This User____

Disassociate This User ____

USER FIRST NAME:

USER LAST NAME:

UNIQUE USER EMAIL ADDRESS:

USER JOB TITLE: CLINICIAN / NURSES LICENSE number:

PHONE NUMBER:

Second User Action Required:

Add This User____

Disassociate This User ____

USER FIRST NAME:

USER LAST NAME:

UNIQUE USER EMAIL ADDRESS:

USER JOB TITLE:

CLINICIAN / NURSES LICENSE number:

PHONE NUMBER:

Third User Action Required:

Add This User____

Disassociate This User ____

USER FIRST NAME:

USER LAST NAME:

UNIQUE USER EMAIL ADDRESS:

USER JOB TITLE:

CLINICIAN / NURSES LICENSE number:

PHONE NUMBER:

Fourth User Action Required:

Add This User____

Disassociate This User ____

USER FIRST NAME:

USER LAST NAME:

UNIQUE USER EMAIL ADDRESS:

USER JOB TITLE:

CLINICIAN / NURSES LICENSE number:

PHONE NUMBER:

Fifth User Action Required:

Add This User____

Disassociate This User ____

USER FIRST NAME:

USER LAST NAME:

UNIQUE USER EMAIL ADDRESS:

USER JOB TITLE:

CLINICIAN / NURSES LICENSE number:

PHONE NUMBER:

Section 5: Data Exchange Related Information

Focus 1: If Data Exchange Activity is blank

If the TIPS Report shows no data under the Data Exchange Activity, then the organization should review and complete the below qualifications to determine if they are ready to establish a data exchange connection with the registry (i.e., completing the registration of intent).

Registry Status Qualifications

1. Ensure the organization's information is up to date with the registry.
 - a. The main headquarters or stand-alone facility is renewed with the registry.
 - i. Renewal of location information is required every two years.
 - b. All associated facilities are registered as sub-sites of the main organization (i.e., not as a separate or stand-alone facility) with the registry.
 - i. If the organization has multiple facilities, each facility that administers immunizations must be registered with the registry. Additionally, they must be properly linked as a sub-site to the main organization.
 - c. Organization's staff have active ImmTrac2 user accounts to login to the registry.
 - i. Each facility within the organization must have designated staff who have an ImmTrac2 user account.
2. Identify staff at the organization who will be the lead contacts and/or team for establishing and overseeing the data exchange connection with the registry.
 - a. Identified staff will collaborate with the registry throughout and after the data exchange connection is established.
 - b. Suggested staff include, but not limited to, staff who oversee other types of data exchange for the organization, senior or lead clinical staff, subject matter experts, trainers, or IT support staff. For assistance with ImmTrac2 registrations, renewals or user accounts, contact the Texas Immunization Registry Customer Service at 800-348-915

Section 8 ImmTrac2 Guide to the Ad Hoc List Report

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Introduction

The Ad Hoc Count Report is a tool designed to generate detailed counts of client or immunization data based on customized criteria within the Texas Immunization Registry, ImmTrac2. It provides flexible data extraction, allowing users to refine results using various filters and grouping options. Filters include client status, client factors, and immunization factors, with the added option to group data by rows or columns. This flexibility lets users tailor the report to their specific needs by defining filters and selecting the sort order, making data extraction more customizable and efficient. This guide provides step-by-step instructions on producing and understanding the available filters and factors in the Ad Hoc Count Report.

Part 1: How to Access the Ad Hoc Count Report

Navigate to <https://IAMOnline.hhs.state.tx.us> and log in using your IAMOnline user credentials and password. Then select the ImmTrac2 application to log in.

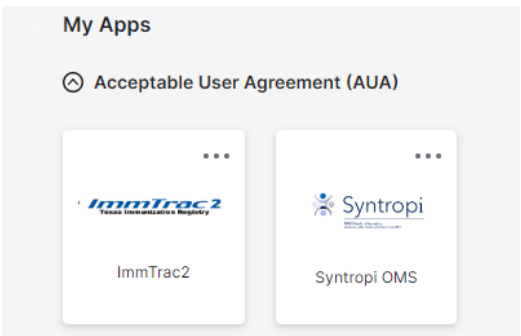


Figure 1: IAMOnline application page

Once logged into ImmTrac2, go to the Reports section and click on "modernized reports" in the menu bar on the left.

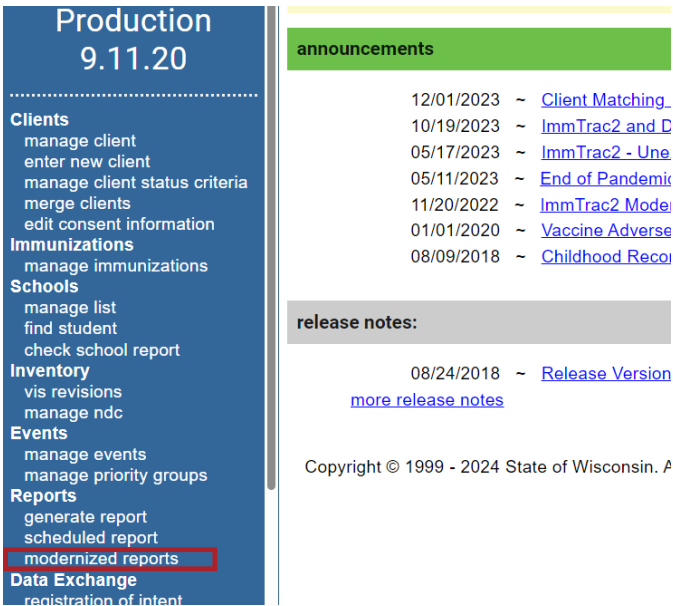


Figure 2: Modernized report

From the list of available modernized reports, select the Ad Hoc Count Report link.

	Generate Report	Description	Output
<div><div>.....</div><div>Clients</div><div>manage client</div><div>enter new client</div><div>manage client status</div><div>criteria</div><div>merge clients</div><div>edit consent information</div><div>Immunizations</div><div>manage immunizations</div><div>Schools</div></div>	18 Year Target Client List	The 18 Year Old Target Client Report is scheduled for clients who turned 18 years old in the last 2 months from the report date or are going to turn 18 years within the next 2 months of the report date. This report runs on the 1st of every even month.	Status
	Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.	Status

Figure 3: Ad Hoc Count Report Link

Part 2: Setting the Initial Filters

The **1** Ad Hoc Counts Dashboard is displayed and includes the Header at the top of the screen and the **2** Side Menu Bar on the left side.

The screenshot shows the 'Counts Dashboard' for 'Clients and Immunizations'. The header includes the Texas Health and Human Services logo and the Texas Department of State Health Services. The side menu bar on the left has two tabs: 'Ad-Hoc Counts Filters' (selected) and 'Generate Report'. The main content area contains three filter sections: 'VACCINATION DATE' with two date pickers set to 6/7/2022 and 6/7/2024, a 'COUNT TYPE' dropdown menu set to 'Clients', and an 'IMMUNIZATIONS ADMINISTERED BY ORGANIZATION' checkbox which is currently unchecked. A note below the date pickers states 'Enter Date in Format MM/DD/YYYY' and '*Data available for rolling 2 years'.

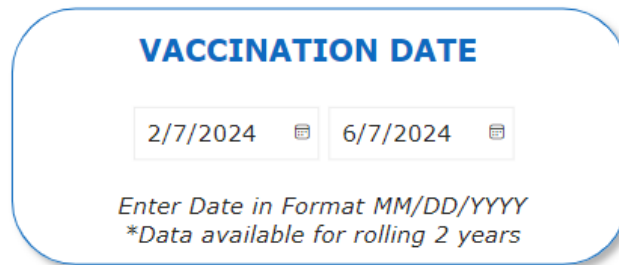
Figure 4: Ad Hoc Count Dashboard and side menu

The Side Menu Bar consists of two tabs: the Ad-Hoc Counts Filters (the default page) and the “Generate Report” tab. The Ad Hoc Count Filters is the default page that appears once the Ad Hoc Count Report link is selected. In this stage you can set the:

- Vaccination Date Filter,
- Count Type Filter, and the
- Immunization Administered by Organization checkbox.

Vaccination Date Filter

The Vaccination Date filter narrows the search for client or immunization counts. Dates can be entered using the calendar icon or typed manually.

The image shows a rounded rectangular filter box with a blue border. At the top, the text "VACCINATION DATE" is displayed in bold blue. Below this, there are two date input fields. The first field contains "2/7/2024" and the second contains "6/7/2024", each followed by a small calendar icon. At the bottom of the box, there is a line of text: "Enter Date in Format MM/DD/YYYY" and a line below it: "*Data available for rolling 2 years".

VACCINATION DATE

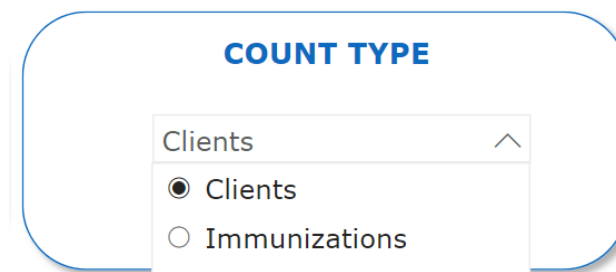
2/7/2024 6/7/2024

Enter Date in Format MM/DD/YYYY
*Data available for rolling 2 years

Figure 7: Vaccination Date Filter

Count Type Filter

The Count Type filter allows users to choose between the two options of counting clients or immunizations.

The image shows a rounded rectangular filter box with a blue border. At the top, the text "COUNT TYPE" is displayed in bold blue. Below this, there is a dropdown menu. The dropdown is open, showing two options: "Clients" with a radio button selected (indicated by a filled circle) and "Immunizations" with an unselected radio button (indicated by an empty circle). The dropdown menu has a small upward arrow icon on its right side.

COUNT TYPE

Clients

☒ Clients

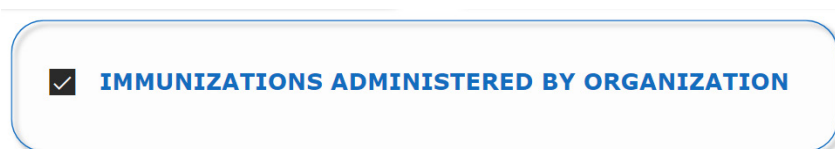
☐ Immunizations

Figure 8:Count Type Filters

Immunization Administered by Organization Filter

When this filter is checked:

- If the count type is set to “Immunizations”, the report will include only immunizations administered by your organization, rather than immunizations administered to your clients by all organizations.
- If the count type is set to “Clients”, the report includes only clients who received immunizations administered by your organization.


The image shows a rounded rectangular filter box with a blue border. Inside the box, there is a checked checkbox (indicated by a small square with a checkmark) followed by the text "IMMUNIZATIONS ADMINISTERED BY ORGANIZATION" in bold blue.

☒ **IMMUNIZATIONS ADMINISTERED BY ORGANIZATION**

Figure 9:Immunizations Administered by Organization Checkbox

Part 3: Generate Report

The “Confirm and Generate Report” button allows you to review and confirm your filter selections before generating the report.



TEXAS

Health and Human
Services

Texas Department of State
Health Services

Counts Dashboard

Clients and Immunizations

Ad-Hoc Counts Filters

Generate Report

VACCINATION DATE

10/1/2023 to 12/31/20...

COUNT TYPE

Clients

☒ IMMUNIZATIONS ADMINISTERED BY ORGANIZATION

Confirm and
Generate Report

Figure 10: Generate Report Tab

Refresh

The "Refresh" button updates the report status until it reaches "COMPLETE".

		Refresh
	Started	Completed
	08/13/2024 09:07:04 PM	08/13/2024 09:07:36 PM

Figure 11: Refresh Tab

When the status shows complete, click the report link "Clients Count" or "Immunization Count" to view the report.

Ad Hoc Report Status			
			<input type="button" value="Refresh"/> <input type="button" value="Cancel"/>
Report Type	Started	Completed	Status
Clients Count	09/18/2024 02:14:22 PM		PROCESSING


Figure 12: Clients Count link processing

Ad Hoc Report Status			
			<input type="button" value="Refresh"/> <input type="button" value="Cancel"/>
Report Type	Started	Completed	Status
Immunizations Count	09/18/2024 03:32:23 PM	09/18/2024 03:33:04 PM	COMPLETE

Figure 13: Immunizations Count link and Complete Status

Initial Display of Report

The Clients or Immunizations Count result is displayed.



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Counts Dashboard

Clients and Immunizations

Vaccination Date between 2/7/2024 to 6/7/2024, for Clients Count

FILTERS

- Client Status
- Client Factors
- Immunization Factors

Select Row Grouping
Ctrl + Click to multiselect

Select Column Grouping

*Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".

Ethnicity	FEMALE	MALE	Total
Hispanic or Latino	633	391	1024
Not Hispanic or Latino	528	377	905
Total	1161	768	1929

Figure 14: Client Counts Displayed

Part 4: Grouping Data for the Report

The Counts Dashboard appears when a report is generated. It shows the type of report and provides additional grouping options for users to further customize their results. The page is divided into sections:

- 1 Report Header
- 2 Row and Column Grouping Options
- 3 Results Display
- 4 Filters

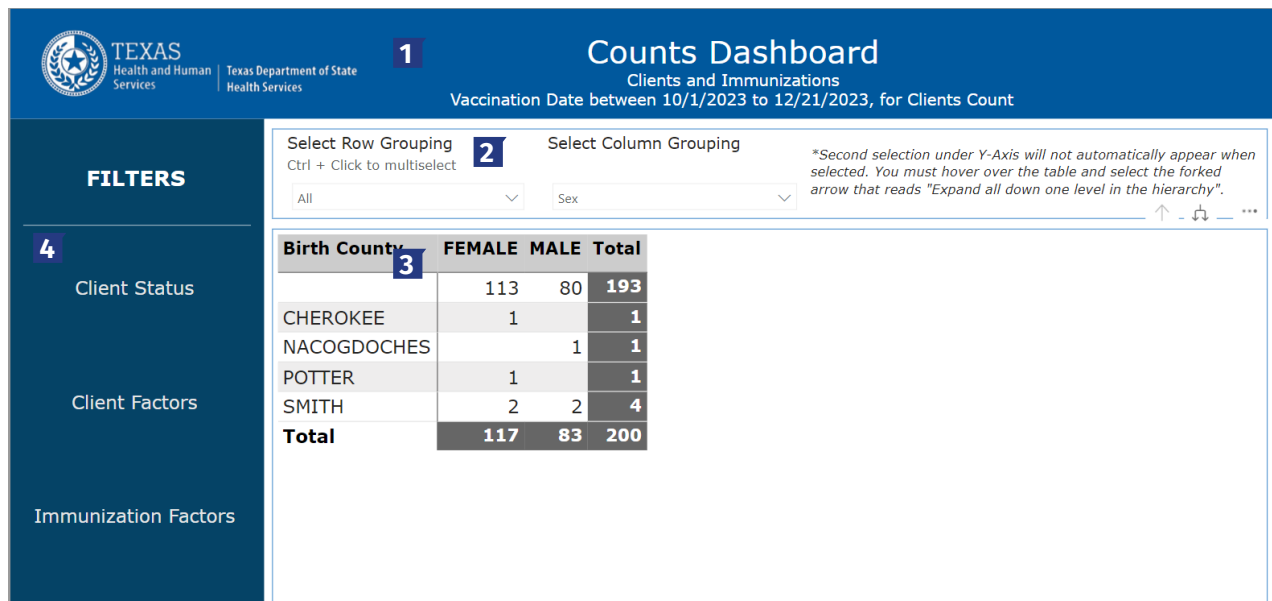


Figure 16: Report Dashboard

Report Header

1 The Header section displays the title "Counts Dashboard" and identifies the report as focusing on Clients and Immunizations. It also specifies the date range for the data (in this example 10/1/2023 to 12/21/2023), noting the vaccination date range for a count of clients. This section provides key context for the report being viewed.

Grouping Options

Now that the clients or immunizations option (depending on which you selected earlier) has been selected, the Grouping Options allow you to customize how you want to see the data grouped by row and column.

Row Grouping

"Select Row Grouping" has a drop down option that provides filters to narrow the report or customize it. To select multiple filters users should point to the filter of choice and press "ctrl" and click.

When multiple filters or "all" is selected in the Select Row grouping, a Fork icon appears, enabling users to expand the report and view more details in the order the filters were chosen. Additionally, an upward arrow allows users to reverse the selected filter options for further customization.



Figure 18: Fork Icon

Column Grouping

The "Select Column Grouping" applies selected filters to the report column. The filters are found under the drop-down option and users can use them to narrow their report or customize it. Multi-selection of filters is not available for this option.

Department of State Health Services

Clients and Immunizations
Vaccination Date between 10/1/2023 to 12/21/2023, for Clients Count

Select Row Grouping
Ctrl + Click to multiselect
All

Select Column Grouping
Sex

*Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".

Figure 19: Grouping Options

When a fork icon is used to reveal the result of a filter report, it is shown on the displayed section of the dashboard.

TEXAS
Health and Human Services | Texas Department of State Health Services

Counts Dashboard
Clients and Immunizations
Vaccination Date between 2/7/2024 to 6/7/2024, for Clients Count

Select Row Grouping
Ctrl + Click to multiselect
Multiple selections

Select Column Grouping
Race

*Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".

Birth Date	Birth County	Ethnicity	First Responder TYpe	Asian	Black	White	Total
02-MAY-20		Not Hispanic or Latino	N	1			1
		Total		1			1
		Total		1			1
		Total		1			1
06-JUL-20	HARRIS	Not Hispanic or Latino	N			1	1
		Total				1	1
		Total				1	1
		Total				1	1
07-JUN-10		Not Hispanic or Latino	N			1	1
		Total				1	1
		Total				1	1
		Total				1	1
11-FEB-20	HARRIS	Hispanic or Latino	N			1	1
		Total				1	1
		Total				1	1

*Totals for clients will be a distinct count of all clients in a category. Totals for immunizations will be a sum of the count of all immunizations.

Figure 20: Example of filter Report using the fork icon

Display of Client Count or Immunization Count

This section displays the total count of the report type (Client or Immunization) that were generated.

Birth County	FEMALE	MALE	Total
	113	80	193
CHEROKEE	1		1
NACOGDOCHES		1	1
POTTER	1		1
SMITH	2	2	4
Total	117	83	200

Figure 21: Example of Client Count Grouped by Birth County and Gender

Ethnicity	FEMALE	MALE	Total
	110	84	194
Hispanic or Latino	507	349	856
Not Hispanic or Latino	932	657	1589
Recipient Refused	9	5	14
Total	1558	1095	2653

Figure 22: Example of Immunization Count Grouped by Ethnicity and Gender

Report Filters

The side menu on the Counts Dashboard features several report filters, including Client Status, Client Factors, and Immunization Factors. These filters enable users to tailor the report by selecting specific criteria, ensuring the generated data aligns with their reporting needs.

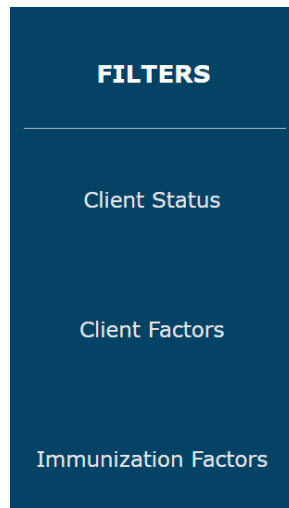


Figure 23: Filters

Client Status

The Client Status drop down allows users to filter active clients in the Immunization Counts report. For the Client Count report it offers additional filter options such as Blank, Active, Inactive, and “No Longer a Patient” to refine the data in the Total Clients report.

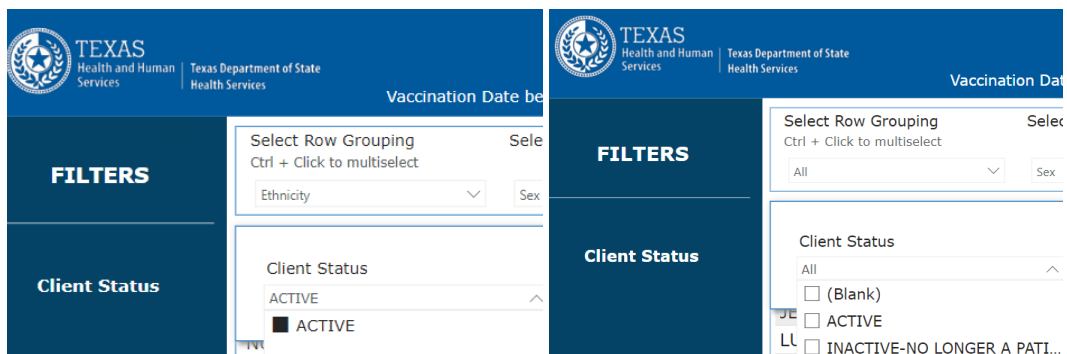


Figure 24: Client Status for Immunization and Client Count Report

Client Factors

The Client Factors section offers filters that allow users to further customize data by categories in their reports. The list of available Client factors includes: Birth County, Birth Date, City, Client Type, Death Indicator, DIR Attribute, Ethnicity, First Responder Type, Language Preferences, Phone Number, Primary Address Indicator, Primary Care Physician, Race, Sex, State, and Zip Code.

Birth County	Birth Date	City
All	All	All
Client Type	Death Indicator	DIR Attribute
All	All	All
Ethnicity	First Responder Type	Language Preference
All	All	All
Phone Number	Phone Number	Primary Address Indicator
All	All	All
Primary Care Physician	Race	Sex
All	All	All
State	Zip Code	
All	All	

Figure 25: Client Factors

Immunization Factors

The Immunization Factors section provides users with filters related to immunizations, allowing users to include or highlight specific data in their report based on the initial immunization count. The list of available Immunization factors includes: Display Inadvertent Vaccine Group, From Inventory, Prescribing Clinician, Trade Name, Vaccination Date, Vaccine Group, and Vaccine Lot.

Display Inadvertant Vaccine Group	From Inventory	Prescribing Clinician
All	All	All
Trade Name	Vaccination Date	Vaccine Group
All	All	All
Vaccine Lot		
All		

Figure 26: Immunization Factor

Part 5: Downloading the Ad Hoc Count Report

The Ad Hoc Count report can be downloaded either as-is (uncustomized) or customized using filters. Follow these steps to download the report:

- Access the Export Options: Hover your mouse over the far-right corner of the dashboard to reveal the "More Options" icon. Click on it to see additional actions.
- Select Export Data: From the drop down menu, select "Export Data" to begin the download process.

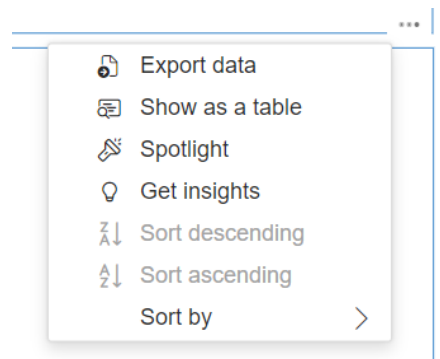


Figure 27: More Option

Choose Export Format

These formats are available for download in either Excel or CSV file types.

You can choose between two formats: **1** Data with Current Layout and Summarized Data.

Download the Report

Once you've selected the export format, click **2** "Export" at the bottom of the page to download and save the report to your device.


×

Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more about exporting data](#)

1


☒



Data with current layout

Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.


☐



Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

☐



Underlying data

ⓘ The report author turned off this option

File format:

.xlsx (Excel 150,000-row max) ▾

2

Export

Cancel

Figure 28: Export option "Data with Current layout"

Applied filters: Parameter is Sex										
	A	B	C	D	E	F	G	H	I	J
1	Applied filters:Parameter is SexCLIENT_STATUS is INACTIVE-NO LONGER A PATIENT									
2										
3	Birth Co	Birth D	Client I	Death I	DIR Att	Ethnic	First Re	From Ir	Has 2 o	Langua
4		27-JUN-18	IC	N	N	Hispanic c N	0	Y		SPANISH
5	HARRIS	19-DEC-19	IC	N	N	Hispanic c N	0	Y		ENGLISH
6	HARRIS	19-DEC-19	IC	N	N	Hispanic c N	0	Y		ENGLISH
7	HARRIS	19-DEC-19	IC	N	N	Hispanic c N	0	Y		ENGLISH
8	HARRIS	19-DEC-19	IC	N	N	Hispanic c N	0	Y		ENGLISH
9	HARRIS	19-DEC-19	IC	N	N	Hispanic c N	0	Y		ENGLISH
10	HARRIS	19-MAY-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
11	HARRIS	19-MAY-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
12	HARRIS	19-MAY-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
13	HARRIS	19-MAY-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
14		02-MAY-20	IC	N	N	Not Hispa N	0	Y		ENGLISH
15		02-MAY-20	IC	N	N	Not Hispa N	0	Y		ENGLISH
16		02-MAY-20	IC	N	N	Not Hispa N	0	Y		ENGLISH
17		02-MAY-20	IC	N	N	Not Hispa N	0	Y		ENGLISH
18		07-JUN-10	IC	N	N	Not Hispa N	0	Y		ENGLISH
19		07-JUN-10	IC	N	N	Not Hispa N	0	Y		ENGLISH
20		17-APR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
21		17-APR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
22		17-APR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
23		17-APR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
24		27-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
25		27-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
26		27-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
27		27-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
28		30-JUL-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
29	BRAZORIA	21-APR-20	IC	N	N	Hispanic c N	0	Y		
30	BRAZORIA	21-APR-20	IC	N	N	Hispanic c N	0	Y		
31	BRAZORIA	21-APR-20	IC	N	N	Hispanic c N	0	Y		
32	BRAZORIA	21-APR-20	IC	N	N	Hispanic c N	0	Y		
33	GALVESTC	11-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
34	GALVESTC	11-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
35	GALVESTC	11-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
36	GALVESTC	11-MAR-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
37	HARRIS	06-JUL-20	IC	N	M	Not Hispa N	0	Y		ENGLISH
38	HARRIS	06-JUL-20	IC	N	M	Not Hispa N	0	Y		ENGLISH
39	HARRIS	06-JUL-20	IC	N	M	Not Hispa N	0	Y		ENGLISH
40	HARRIS	11-FEB-20	IC	N	N	Hispanic c N	0	Y		ENGLISH
41	HARRIS	11-FEB-20	IC	N	N	Hispanic c N	0	Y		ENGLISH

Figure 29: Example of an Excel Exported Report

Section 9

ImmTrac2 Manage Client Status Criteria Guide

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Introduction

To use the Manage Client Status feature, select the “manage client status criteria” link in the menu bar on the left side of the screen (see Figure 1 – Link to Manage Client Status Criteria).

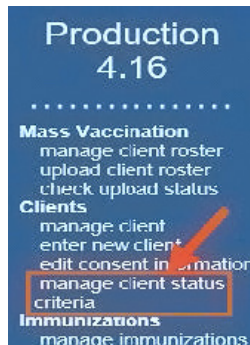


Figure 1 - Link to Manage Client Status Criteria

With the Manage Client Status Criteria feature, providers can retrieve a group of clients based on specific search criteria and perform bulk changes to the client status without having to go into each client record individually through the ImmTrac2 Manage Client screen. Exception: Clients with a status of “Deceased” will be updated individually through the “Manage Client” screen.

For example, providers who had clients that had moved away but were still listed as their clients now have an efficient way to change clients’ status in their organization from “active” to “inactive”. See Figure 2 – Manage Client Status Criteria.

A screenshot of the 'Manage Client Status Criteria' web application. The form has several sections: 'Select By Status' with radio buttons for Active, Inactive-unspecified, Inactive-lost to follow up, Inactive-no longer a client, and Inactive-misc; 'Select By Age' with radio buttons for 'By Age Range' (with 'From' and 'Through' year dropdowns) and 'Birth Date Range' (with 'Earliest Birth Date' and 'Latest Birth Date' date pickers); 'Select By Length of Time Since Last Immunization Given by YOUR Organization' with a 'Years' input and an 'Evaluation Date' date picker; and 'Select By Last Name' with a 'Last Name' input and 'Last Name Begin Range' and 'Last Name End Range' inputs. At the bottom, there is a 'New Status Value' dropdown, a 'Show 25 entries' button, and a 'Search' button. A table header is visible at the very bottom with columns: Last Name, First Name, Birth Date, ImmTrac2 ID, Current Status, Date of Last Immunization, and Immunization Entered By.

Figure 2 - Manage Client Status Criteria

The four areas of the Manage Client Status Criteria are (see Figure 3: The Filters and Display Table below):

- **Required Filters** These filters by status and range of ages or birth dates must be used.
- **Optional Filters** These filters are not required and include selecting clients by the number of years since a specified date.

- **Optional Real-Time Search Filter** This filter works with the Display/Change Status Table below it. Any set of characters that you enter in the “Search” field will be used to search each row in the table below and if it finds a match, the client on that row is included in the selection.
- **Display/Change Status Table** This table lists the clients that have met all the criteria you enter in the filters above. Only clients that met the requirements of the Required Filters AND the Optional Filters and the Option Real-Time Filter will be displayed in the Display/Change Status table. By selecting clients listed in the table and using the New Status Value field and the Save button, the status of all selected clients can be changed.

Clients with the Allow Reminder and Recall Contact flag set to “No” will be excluded from the search results.

The screenshot displays the ImmTrac2 Texas Immunization Registry interface. The left sidebar contains navigation links for Training, Mass Vaccination, Clients, Immunizations, Schools, Reports, Maintenance, Admin Support, and Manage My Account. The main content area is titled "Manage Client Status Criteria" and includes a "Find" button. The interface is divided into four numbered sections:

- 1. Required Filters:** Includes "Select By Status" with radio buttons for Active, Inactive-unspecified, Inactive-lost to follow up, Inactive-no longer a client, and Inactive-moge.
- 2. Optional Filters:** Includes "Select By Age" with "By Age Range" (From 10 Years to 25 Years) and "Birth Date Range" (Earliest Birth Date and Latest Birth Date). It also includes "Select By Length of Time Since Last Immunization Given by YOUR Organization" with a "Years" field (10) and an "Evaluation Date" field.
- 3. Optional Real-Time Search Filter:** Includes "Select By Last Name" with "Last Name", "Last Name Begin Range", and "Last Name End Range" fields. It also includes a "New Status Value" dropdown and a "Search:" field with a "Save" and "Cancel" button.
- 4. Display/Change Status Table (Works with Real-Time Filter):** A table with columns: Last Name, First Name, Birth Date, ImmTrac2 ID, Current Status, Date of Last Immunization, and Immunization Entered By. The table lists four clients: DISNEY DAVID, KLEIN KEVIN, NEWCLIENT IMA, and FORTLE KESHA.

At the bottom, it says "Showing 1 to 4 of 4 entries" and has "Previous", "1", and "Next" buttons.

Figure 3 - The Filters and Display Table

Required Filters

Select by Status

See Figure 4 – Select by Status.

Figure 4 - Select by Status

Description of this filter - The status options below allow you to select clients that have one of the following statuses for your organization:

- Active
- Inactive – unspecified
- Inactive – lost to follow-up
- Inactive – no longer a client
- Inactive – moge (moved or gone elsewhere)

Select by Age

See Figure 5 – Select by Age.

Figure 5 - Select by Age

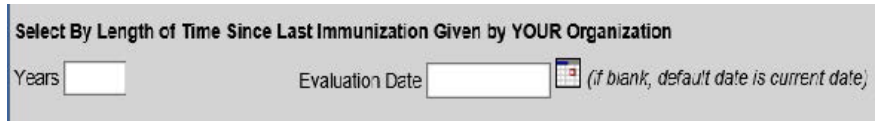
Description of this filter:

- By Age Range – Select clients with an age range From (years or months) Through (years or months).
- Birth Date Range – Select clients with an Earliest Birth Date (mm/dd/yyyy format, or use the calendar) to Latest Birth Date (mm/dd/yyyy format, or use the calendar).

Optional Filters

Select by Length of Time Since Last Immunization Given by your Organization

This is an optional filter. See Figure 6 – Select by Length of Time Since Last Immunization.



Select By Length of Time Since Last Immunization Given by YOUR Organization

Years Evaluation Date (if blank, default date is current date)

Figure 6 - Select by Length of Time Since Last Immunization

Description of this filter:

- Evaluation Date is in mm/dd/yyyy format or use the calendar.
- If you do not enter anything in the “Years” field but enter an evaluation date, an error message will popup: “You must enter the number of years if the Evaluation Date is entered” (see Figure 7 – Error Message for Evaluation Date but No Years).

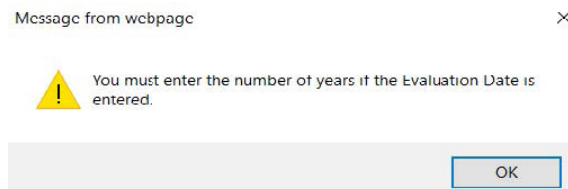


Figure 7 – Error Message for Evaluation Date but No Years

- If you do not enter anything in the Evaluation Date field, the current date is the default date.
- If you enter the number of “Years”, and either enter an Evaluation Date or take the current date as the default, and then click “Find”, clients who had immunizations administered by your organization between the Evaluation Date and going back for the number of years specified will not be displayed.

Select by Last Name

Select by last name is an optional filter. See Figure 8 - Select by Last Name



Select By Last Name

Last Name Last Name Begin Range Last Name End Range

Figure 8 - Select by Last Name

Description of this filter:

- If the Last Name is entered, at least the first two letters of the last name are required.
- If the Last Name Begin Range is entered, the first 2 characters of the last name are required, and you must also enter at least 2 characters in the Last Name End Range.
- If the Last Name End Range is entered, the first 2 characters of the last name are required, and you must enter at least 2 characters in the Last Name Begin Range.
- Last name has priority over the Last Name Begin Range and Last Name End
- Range. If anything is entered into the Last Name field, it will ignore anything entered in the Last Name Begin Range and Last Name End Range fields. It will use the Last Name field instead of the range fields.
- If nothing is entered into the Last Name field and data is entered in the Last Name Begin Range and Last Name End Range fields, it will search using the range data.

Optional Real-Time Search Filter

The optional real-time search filter is used in conjunction with the Display/Change table listed below it. This filter acts differently than the other filters in that you don't have to select the "Find" button in the upper right corner of the screen to make a change in clients displayed. Instead, any characters (numbers or letters) that you enter in the search field are used to search through each and every field in the display table to find a match. If a match is found on any row in the table, then the client on that row is included in the display table; otherwise the client is no longer displayed. See Figure 9 – Real-Time Search Filter Match.

The screenshot shows a software interface with a search bar at the top right containing the text "3683". Below the search bar is a button labeled "Match!". A red box highlights the "Match!" button and the search bar. Below the search bar is a table with the following columns: Last Name, First Name, Birth Date, ImmTrac2 ID, Cur Status, Last immunization, and Immunization Entered By. The table contains one row of data: KLEIN, KEVIN, 01/01/2010, 2192-3683, Active, 03/01/2010, and Pauls Pediatric Practice. A red box highlights the "3683" part of the ImmTrac2 ID in the table row, and a red arrow points from the "Match!" button to this box.

	Last Name	First Name	Birth Date	ImmTrac2 ID	Cur Status	Last immunization	Immunization Entered By
<input type="checkbox"/>	KLEIN	KEVIN	01/01/2010	2192-3683	Active	03/01/2010	Pauls Pediatric Practice

Figure 9 – Real-Time Search Filter Match.

Display/Change Status Table

The Display/Change Status table lists all the clients of your organization and their current status in relation to your organization. The table lists all clients related to your organization that match all the selection criteria listed in the required and optional filters.

Important Note: The “Date of Last Immunization” column in the table lists the date of the last immunization given by any organization. To the right of that field is the column “Immunization Entered By” that lists which organization gave the last immunization that the client received. If a different organization from yours gave the last immunization that the client received, that has no effect on the filter “Select by length of time from last immunization given by YOUR organization”. See Figure 10 – Date of Last Immunization.

<input type="checkbox"/>	Last Name	First Name	Birth Date	ImmTrac2 ID	Current Status	Date of Last Immunization	Immunization Entered By
<input type="checkbox"/>	BADGER	BILLY	01/01/1990	219234341	Active		
<input type="checkbox"/>	DISNEY	DAVID	01/01/2000	219233681	Active	01/01/2016	Texas DSHS
<input type="checkbox"/>	JONES	JESSICA	01/01/2000	219233682	Active	08/01/2012	Pauls Pediatric Practice
<input type="checkbox"/>	KLEIN	KEVIN	01/01/2010	219233683	Active	03/01/2010	Pauls Pediatric Practice

Figure 10 - Date of Last Immunization

You can change the status of one or more clients in the table by

- Clicking on the selection box on the left-most column of any rows, or
- Clicking the left-most box in the heading to select all rows (clients).

Next, select the arrow on the drop-down box in the “New Status Value” field to list possible new statuses for the clients you have selected. See Figure 11– Drop-Down Box of New Status Value.

New Status Value							
Show	25	▼	entr	Search:			
<input type="checkbox"/>	Last Name	Name	Date	ID	Current Status	Date of Last Immunization	Immunization Entered By
<input type="checkbox"/>	DISNEY	DAVID	01/01/2000	219233681	Active	02/01/2008	Pauls Pediatric Practice
<input checked="" type="checkbox"/>	JONES	JESSICA	01/01/2000	219233682	Active	08/01/2012	Pauls Pediatric Practice
<input type="checkbox"/>	NEWCLIENT	IMA	01/01/2000	219234040	Active		
<input type="checkbox"/>	PURPLE	KEISHA	01/01/2006	219113360	Active	05/19/2020	Texas DSHS

Inactive-lost to follow up
 Inactive-moge
 Inactive-no longer a client

Figure 11 - Drop-Down Box of New Status Value

Select the new status for the select clients. In the above figure, Jessica Jones was selected. Then click the save button to save the new status for the selected client(s).

If you wish to select all the clients in the table to make a change in their status, click the box on the far left in the column header (see Figure 12 – Select All Rows).

<input checked="" type="checkbox"/>	Last Name	First Name	Birth Date	ImmTrac2 ID	Current Status	Date of Last Immunization	Immunization Entered By
<input checked="" type="checkbox"/>	BADGER	BILLY	01/01/1990	219234341	Active		
<input checked="" type="checkbox"/>	DISNEY	DAVID	01/01/2000	219233681	Active	01/01/2016	Texas DSHS
<input checked="" type="checkbox"/>	JONES	JESSICA	01/01/2000	219233682	Active	08/01/2012	Pauls Pediatric Practice
<input checked="" type="checkbox"/>	KLEIN	KEVIN	01/01/2010	219233683	Active	03/01/2010	Pauls Pediatric Practice
<input checked="" type="checkbox"/>	NEWCLIENT	IMA	01/01/2000	219234040	Active		
<input checked="" type="checkbox"/>	PURPLE	KEISHA	01/01/2006	219113360	Active	05/19/2020	Texas DSHS
<input checked="" type="checkbox"/>	PURPLE	KEISHA	01/01/2019	219115360	Active		
<input checked="" type="checkbox"/>	SMITH	BRANDY	01/01/2010	219233460	Active	07/30/2020	Pauls Pediatric Practice

Figure 12 - Select All Rows

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Resource Name	Resource Link	Resource Description
General Immunization Resources		
Child and Adolescent Immunization Schedules Source: Centers for Disease Control and Prevention Audience: Providers Last Updated: 11/2023	cdc.gov/vaccines/hcp/imz-schedules/child-adolescent-age.html	Recommended vaccination schedule for ages 18 years or younger
Talking to Parents about Vaccines Source: Centers for Disease Control and Prevention Audience: Providers Last Updated: 06/2024	cdc.gov/iqip/hcp/talking-to-parents/?CDC_AAref_Val=cdc.gov/vaccines/programs/iqip/talking-to-parents.html	Check out materials to assist providers in starting conversations about vaccines with parents.
Strengthen Vaccination Communication		
American Academy of Pediatrics (AAP) Source: AAP Audience: Providers Last Updated: 06/2021	aap.org/en/news-room/campaigns-and-toolkits/call-your-pediatrician/	Using humor and real world conversations, the #CallYourPediatrician campaign aims to reach parents with timely reminders that going to the pediatrician is important and safe.
#HowIRecommend Source: Centers for Disease Control and Prevention (CDC) Audience: Providers Last Updated: 11/2021	cdc.gov/vaccines/?CDC_AAref_Val=cdc.gov/vaccines/howirecommend/index.html	The #HowIRecommend video series highlights clinicians, who explain how they are achieve high vaccination rates and effectively addressing vaccination questions. These short videos cover a range of topics including: making effective recommendations to increase vaccination rates, helping parents understand why vaccination is important, addressing parents' questions about vaccine safety and, involving everyone in vaccination efforts.

Resource Name	Resource Link	Resource Description
<p>5 Ways to Boost Your HPV Vaccinations Rates</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 07/2024</p>	<p>cdc.gov/hpv/hcp/vaccination-considerations/boost-rates.html?CDC_AAref_Val=cdc.gov/hpv/hcp/boosting-vacc-rates.html</p>	<p>Practical and proven strategies that could increase HPV vaccination rates. Strategies include: Bundling recommendation, ensuring consistent messages, using every opportunity to vaccinate, providing personal examples, and effectively answering questions.</p>
<p>Foster Support for Vaccination in Your Practice</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 11/2020</p>	<p>cdc.gov/vaccines/hcp/conversations/your-practice.html</p>	<p>Patients and parents can feel more confident about vaccinating when everyone in the practice shares the same message. From the front desk to the exam room to checkout, everyone plays an important role in supporting vaccination. Adopt these best practices to ensure you never miss an opportunity to vaccinate.</p>
<p>HPV Vaccination Resources for Health Professionals</p> <p>Source: American Cancer Society (ACS)</p> <p>Audience: Providers</p> <p>Last Updated: 01/2022</p>	<p>cancer.org/health-care-professionals/hpv-vaccination-information-for-health-professionals/hpv-vaccination-resources-for-health-professionals.html</p>	<p>Resources for health professionals that include: patient education material; provider education and tools; and link to HPV Roundtable Resources Library.</p>
<p>National Immunization Awareness Month (NIAM)</p> <p>Source: National Immunization Awareness Month (NIAM)</p> <p>Audience: Awardees and Providers</p> <p>Last Updated: 07/2024</p>	<p>cdc.gov/vaccines/events/niam/</p>	<p>Toolkit for communicating with Healthcare Professionals: key messages, sample social media content, and educational resources for healthcare professionals. Use the resources to assist in communicating to healthcare professionals, parents, and patients about immunization.</p>

Resource Name	Resource Link	Resource Description
<p>Teen Vaccination Coverage Publications and Resources</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 08/2024</p>	<p>cdc.gov/teenvaxview/publications/?CDC_AAref_Val=https://cdc.gov/vaccines/imz-managers/coverage/teenvaxview/pubs-presentations.html</p>	<p>Resources that promote preteens and teens immunization and stress the importance and benefits of vaccines. Resources include: HPV Vaccination Partner Toolkit; preteens and teens related fact sheets, flyers, and posters; preteen and teen related podcasts, PSAs and videos.</p>
<p>Provider Resources for Vaccines Conversations with Parents</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 08/2024</p>	<p>cdc.gov/vaccines-children/hcp/?CDC_AAref_Val=https://cdc.gov/vaccines/hcp/conversations/index.html</p>	<p>These materials can help assist the provider in communicating with parents to best meet their needs and concerns about vaccines.</p>
<p>Resources to Encourage Routine Childhood Vaccinations</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 03/2023</p>	<p>cdc.gov/vaccines/hcp/childhood-vaccination-toolkit.html</p>	<p>CDC's call to action outlined the steps that healthcare providers and families can take to encourage catch up vaccination and protect children's health. Resources include: Catch up on Well Child Visits and Recommended Vaccinations; Resources for Health Care Professionals; Social Media Content; Infographic; Newsletter template</p>
<p>Talking with Parents about Vaccines for Infants</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 04/2018</p>	<p>cdc.gov/vaccines/hcp/conversations/talking-with-parents.html</p>	<p>Information for health care professionals. Resource discusses points to consider when speaking with parents about vaccines for infants.</p>

Resource Name	Resource Link	Resource Description
Vaccine Hesitancy: Resources and Information Source: Immunize Audience: Providers Last Updated: 06/2024	immunize.org/talking-about-vaccines/multiple-injections.asp	This site offers several resources to assist providers with communicating the safety, effectiveness and recommendations to parents about vaccines. Flyers, brochures and link to additional resources include: National Academy of Medicine, American Academy of Pediatrics (AAP), Vaccine Education Center (VEC), Children’s Hospital of Philadelphia, Centers for Disease Control and Prevention (CDC), and Immunization Action Coalition (IAC).
Talking with Vaccine Hesitant Parents Source: American Academy of Pediatrics (AAP) Audience: Providers Last Updated: 02/2024	aap.org/en/patient-care/immunizations/communicating-with-families-and-promoting-vaccine-confidence/talking-with-vaccine-hesitant-parents/	Nearly all pediatricians encounter parents who want to do what is best for their child – even though it may mean they have questions about vaccines. This resource includes information about key points to consider; strategies for talking to parents; examples; and policies.
Give a Strong Vaccine Recommendation		
“How I Recommend” videos for clinicians Source: Centers for Disease Control and Prevention Audience: Providers Last Updated: 08/2024	cdc.gov/flu-resources/php/resources/recommend-flu-vaccination.html	The #HowIRecommend video series highlights clinicians like you, who explain how they are achieving high vaccination rates and effectively addressing vaccination questions in their practices. These short, informative videos cover a range of topics related to HPV, flu, and other pediatric vaccinations, including making effective recommendations to increase vaccination rates, helping parents understand why vaccination is important for their child, and addressing parents’ questions about vaccine safety.

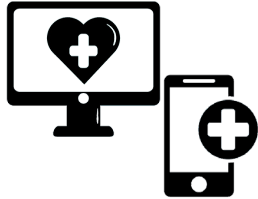
Resource Name	Resource Link	Resource Description
<p>5 Ways to Boost Your HPV Vaccination Rates</p> <p>Source: Centers for Disease Control and Prevention</p> <p>Audience: Providers Last Updated: 07/2024</p>	<p>cdc.gov/hpv/hcp/vaccination-considerations/boost-rates.html?CDC_AAref_Val=https://cdc.gov/hpv/hcp/boosting-vacc-rates.html</p>	<p>Implement these practical and proven strategies and increase HPV vaccination rates. Strategies include Bundling recommendation, ensuring consistent messages, using every opportunity to vaccinate, providing personal examples, and effectively answering questions.</p>
<p>HPV Educational Tools and Resources</p> <p>Source: Centers for Disease Control and Prevention</p> <p>Audience: Providers</p> <p>Last Updated: 07/2024</p>	<p>cdc.gov/hpv/hcp/educational-resources/</p>	<p>Using CDC's educational resources is a great way to help educate yourself and your office staff on the latest information and guidance on HPV vaccination, best practices for communicating with parents, and tips for boosting your vaccination rates. Sharing these resources with office staff also helps ensure a consistent message to parents about the importance of HPV vaccination.</p>
<p>Coadministration – Flu</p> <p>Source: Immunization Action Coalition</p> <p>Audience: Providers</p> <p>Last Updated: 09/2024</p>	<p>immunize.org/askexperts/experts_inf.asp</p>	<p>Clinical considerations for co-administering flu and COVID-19 and other childhood vaccines.</p>
<p>Make a Strong Influenza Vaccine Recommendation</p> <p>Source: Centers for Disease Control and Prevention</p> <p>Audience: Providers</p> <p>Last Updated: 08/2023</p>	<p>cdc.gov/flu/professionals/vaccination/flu-vaccine-recommendation.htm</p>	<p>A health care professional's strong recommendation is a critical factor that affects whether patients get an influenza vaccine. Most adults believe vaccines are important, but they need a reminder to get vaccinated. Follow up with each patient during subsequent appointments to ensure the patient received an influenza vaccine.</p>

Resource Name	Resource Link	Resource Description
<p>Communication Aids</p> <p>Source: American Academy of Pediatrics (AAP)</p> <p>Audience: Providers</p> <p>Last Updated: 07/2023</p>	<p>aap.org/en/patient-care/immunizations/communication-aids/</p>	<p>Communication aids to guide and improve vaccine conversations with several resources and tools to help address immunization issues for children of all ages.</p>
<p>Need Help Responding to Vaccine-Hesitant Parents?</p> <p>Source: Immunize</p> <p>Last Updated: 07/2023</p>	<p>immunize.org/wp-content/uploads/catg.d/p2070.pdf</p>	<p>One-pager outlining sources for science-based materials are available from these respected organizations.</p>
<p>Communicating with Families and Promoting Vaccine Confidence</p> <p>Source: American Academy of Pediatrics (AAP)</p> <p>Audience: Providers</p> <p>Last Updated: 12/2023</p>	<p>aap.org/en/patient-care/immunizations/communicating-with-families-and-promoting-vaccine-confidence/</p>	<p>Resources include AAP Immunization Campaign Toolkit; Communicating Effectively About Immunizations; Responding to Common Parental Concerns; Vaccine Hesitant Parents: Learn more about the types of parental attitudes toward immunizations and simple strategies for speaking to parents about vaccines.</p>
<p>Vaccine Confidence and Addressing Concerns</p> <p>Source: Immunize.org</p> <p>Audience: Providers</p> <p>Last Updated: 06/2024</p>	<p>immunize.org/clinical/vaccine-confidence/</p>	<p>This site offers several resources to assist providers with communicating with parents about vaccines during the early years. Includes links to several sites; including AAP, CDC, VEC, and CHOP</p>
<p>Resources to Encourage Routine Childhood Vaccinations</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 10/2023</p>	<p>cdc.gov/vaccines/partners/routine-immunizations-lets-rise.html</p>	<p>Resources include Catch up on Well Child Visits and Recommended Vaccinations; Resources for Health Care Professionals; Social Media Content; Infographic; Newsletter template</p>

Resource Name	Resource Link	Resource Description
<p>Tools to Improve HPV Vaccination in Primary Care</p> <p>Source: HPV Immunization Quality Improvement Tools (HPV IQ)</p> <p>Audience: Providers</p> <p>Last Updated: 2024</p>	hpviq.org/	<p>Communication training material on talking with parents about vaccinations.</p>
<p>Vaccinations Are Safe: Explaining Why</p> <p>Source: Immunize.org</p> <p>Audience: Providers</p> <p>Last Updated: 11/2022</p>	immunize.org/wp-content/uploads/catg.d/p2073.pdf	<p>Eight page document containing information about the science of vaccines, supporting safety and efficacy.</p>
<p>Human Papillomavirus and Other Vaccines Recommended for Adolescents</p> <p>Source: American Academy of Pediatrics (AAP)</p> <p>Audience: Providers</p> <p>Last Updated: 05/2024</p>	aap.org/en/patient-care/immunizations/human-papillomavirus-vaccines/	<p>Resources include links to: EQIPP: Immunizations - Strategies for Success; PediaLink: HPV Vaccine: When, Why, and How and Why AAP Recommends Initiating HPV Vaccine as Early As Age 9; HPV Vaccine: Same Way Same Day; and other printable resources on HPV</p>
<p>Talking with Parents about HPV Vaccination</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 07/2024</p>	cdc.gov/hpv/hcp/vaccination-considerations/talking-with-parents.html?CDC_AAref_Val=cdc.gov/hpv/hcp/answering-questions.html	<p>Communication resources for providers on how to effectively recommend the vaccine and address parents questions.</p>

Resource Name	Resource Link	Resource Description
<p>HPV Educational Materials for Clinicians</p> <p>Source: Centers for Disease Control and Prevention (CDC)</p> <p>Audience: Providers</p> <p>Last Updated: 07/2024</p>	<p>cdc.gov/hpv/hcp/educational-resources/</p>	<p>Using CDC's educational resources is a great way to help educate yourself and your office staff on the latest information and guidance on HPV vaccination, best practices for communicating with parents, and tips for boosting your vaccination rates. Sharing these resources with office staff also helps ensure a consistent message to parents about the importance of HPV vaccination.</p>

Best Practices for Scheduling Immunization Appointments



✓ LET PATIENTS BOOK ONLINE, IN-PERSON OR OVER THE PHONE

The ability to book appointments using multiple methods allows efficiency and flexibility for your patients.



✓ OFFER MULTIPLE TIME-SLOT OPTIONS TO PATIENTS

Give patients as many options as possible to choose the best time slot for their schedule. This will reduce the chance of cancelations due to time conflicts.



✓ RECORD PATIENT'S CONTACT INFORMATION

Update/confirm patient's phone number, email, and mailing address at each visit. You'll need to be able to contact them for an upcoming appointment or to reschedule their next appointment.



✓ SEND PATIENT REMINDERS BEFORE APPOINTMENTS

Using different methods of appointment reminders reduces the risk of patients missing or canceling appointments.



✓ DESIGNATE AN APPOINTMENT SCHEDULER FOR YOUR OFFICE

Designate an individual(s) to manage appointment scheduling and provide them with training on childhood/adolescent immunization schedules.



Texas Department of State
Health Services

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Immunization Section

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