TEXAS
Health and Human
Services

Texas Department of State
Health Services

The Texas Immunization Registry (ImmTrac2)

Provider Activity Dashboard

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Introduction

Once in ImmTrac2, select the link for “scheduled report” in the Reports section. Then select the “Provider Activity Dashboard” link.

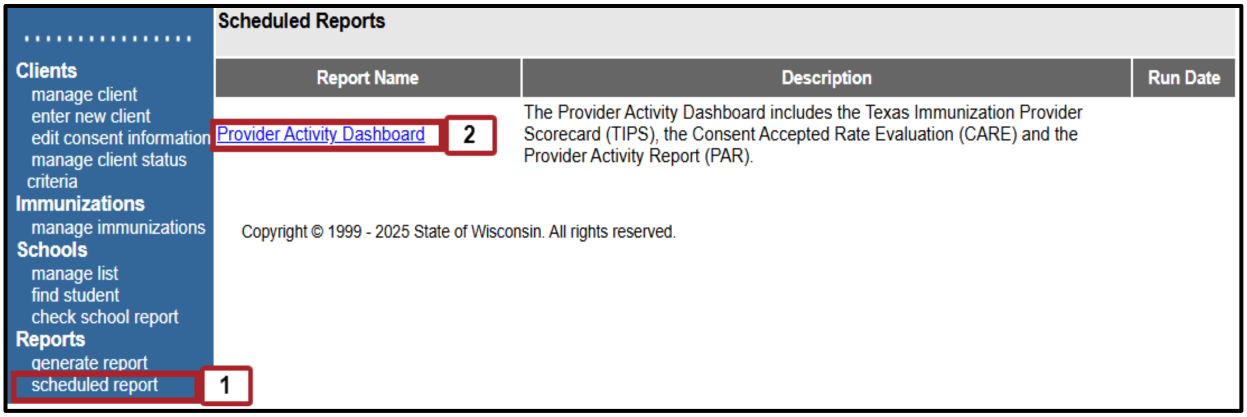


Figure 1 - Provider Activity Dashboard Link

Select one of four reports in the top right corner:

1. The Texas Immunization Provider Summary (TIPS),
2. The Consent Acceptance Rate Evaluation (CARE) Report,
3. The Provider Activity Dashboard (PAR), and,
4. The Frequently Asked Questions (FAQ) report.

The Provider Activity Dashboard defaults to the TIPS report landing page.

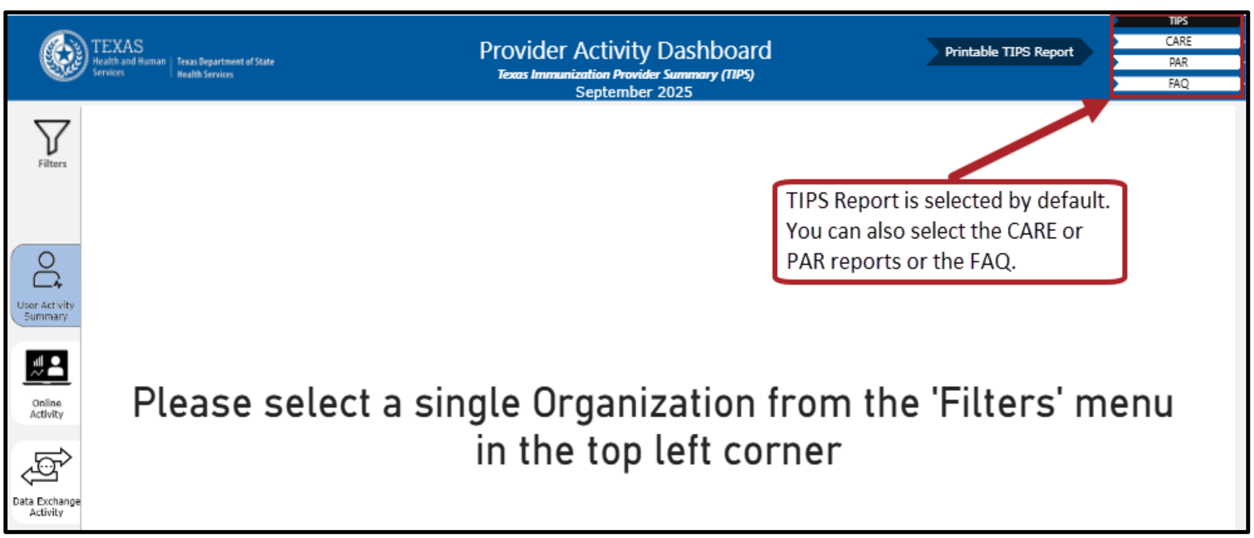


Figure 2 - TIPS, CARE, or PAR Options

The **TIPS** report provides each registered organization in ImmTrac2 with an overall summary of the user activity, online activity, and data exchange activity for the previous month. Users can see how many active users they have, how many clients and immunizations they added that month, and how efficient their data exchange transactions are with the Registry. The TIPS report gives an overall picture of how an organization is performing.

The **CARE** report lists the number of data exchange files submitted, data exchange clients submitted, data exchange clients accepted, and the percentage of data exchange clients accepted. This report helps monitor the efficiency of your data exchange transactions with the Registry.

The **PAR** report was designed for parent organizations, local health departments, and public health regions to see how well organizations that report to them are performing regarding reporting immunizations. It has all the information from the TIPS report, plus additional columns. Individual stand-alone organizations can also receive the PAR but since no organizations report to them, they only see data for their organization listed.

The **FAQ** report lists frequently asked questions on the Provider Activity Dashboard and provides the answers.

The Texas Immunization Provider Summary (TIPS) Report

Choose an Organization and Reporting Period

The Provider Activity Report opens to the TIPS report, but you can also manually choose it by selecting the TIPS button in the upper right corner of the dashboard. 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.

The upper left corner of the TIPS report has what looks like a funnel and is a filter where you select the organization that applies to the TIPS report. Select the “Filters” icon.

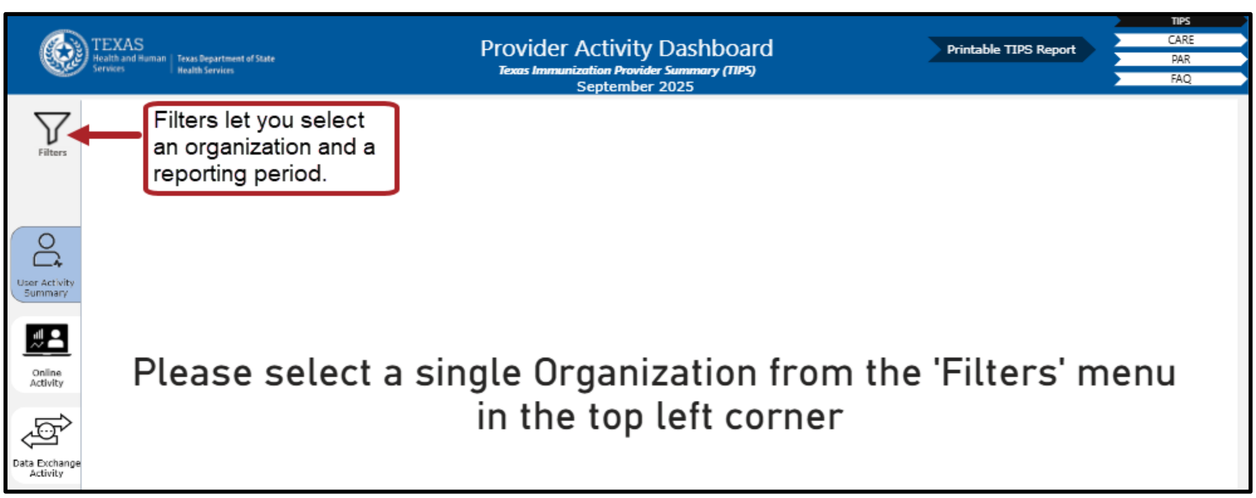


Figure 3 - Select an Organization

Selecting the down arrow in the "Monthly Reporting Period" box allows you to choose a month and year for the TIPS reporting period. The default is the latest reporting period.

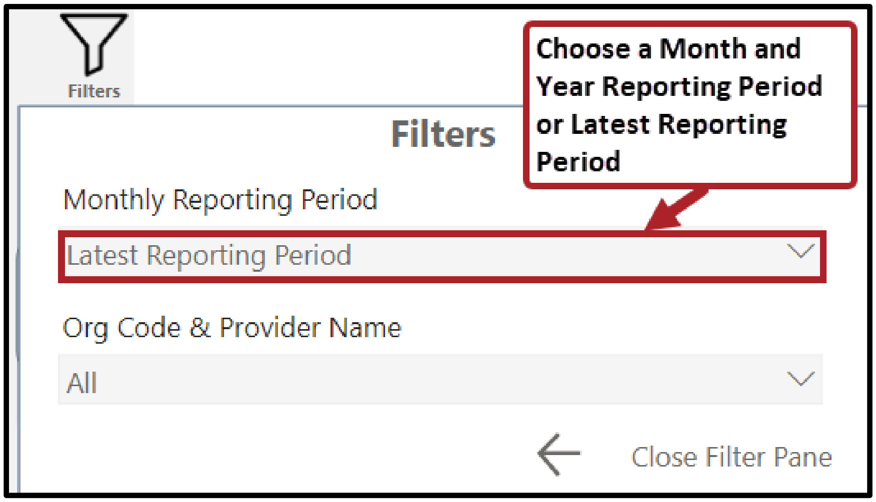


Figure 4 - Choose a Reporting Period

Select the down arrow in the field for the "Org Code and Provider Name" to select an organization. See *Figure 5 - Select an Org Code and Provider Name.*

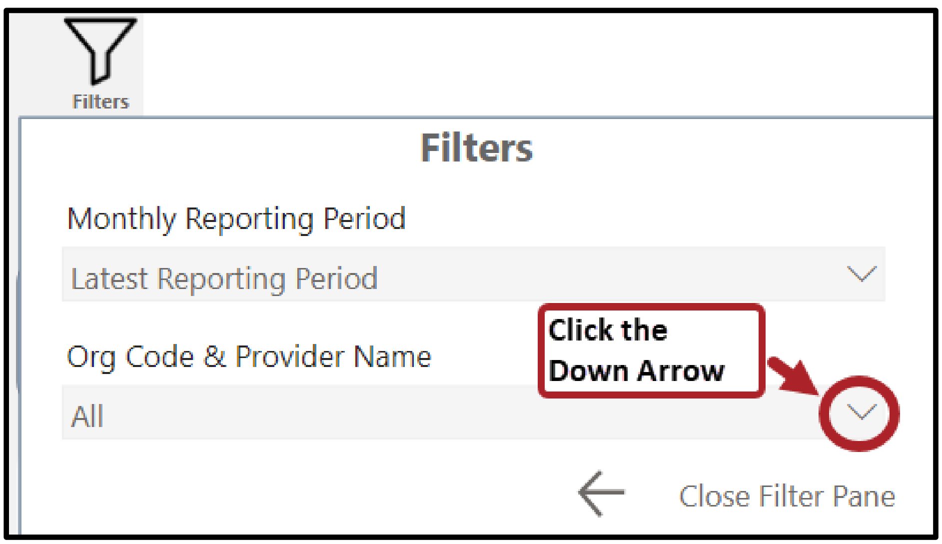


Figure 5 - Select an Org Code and Provider Name

Look carefully to see the magnifying glass and the word "Search", which is the search field. Enter the Org Code or organization name in the search box and select a selection box to the left of the organization that you want. Responsible entities and parent organizations will see organizations that report to them. You will only see your organization listed if you do not have any organizations that report to your organization.

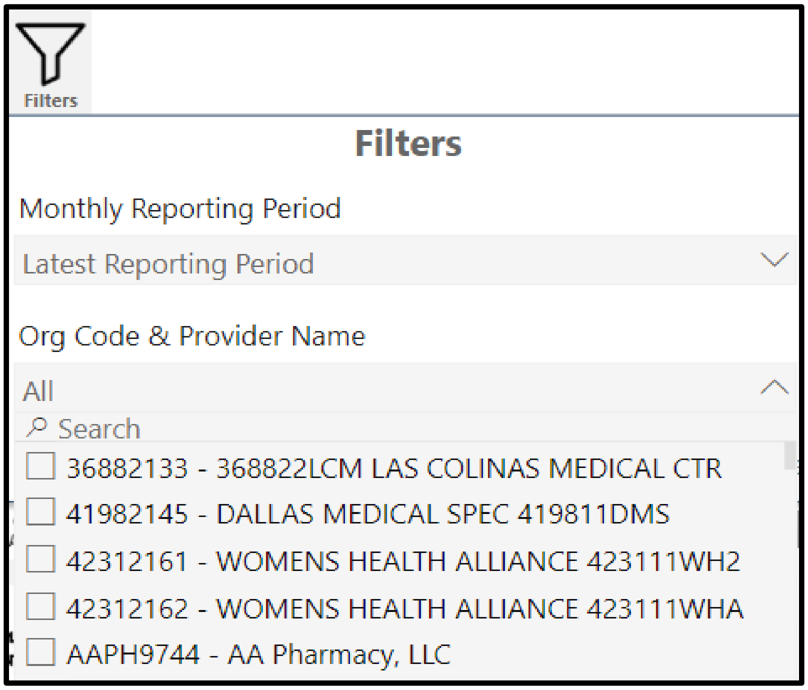


Figure 6 - Organizations That Report to You

See *Figure 7 - Example of Reporting Period and Organization* for an example of selecting LHD Dallas County for the organization and using the latest reporting period.

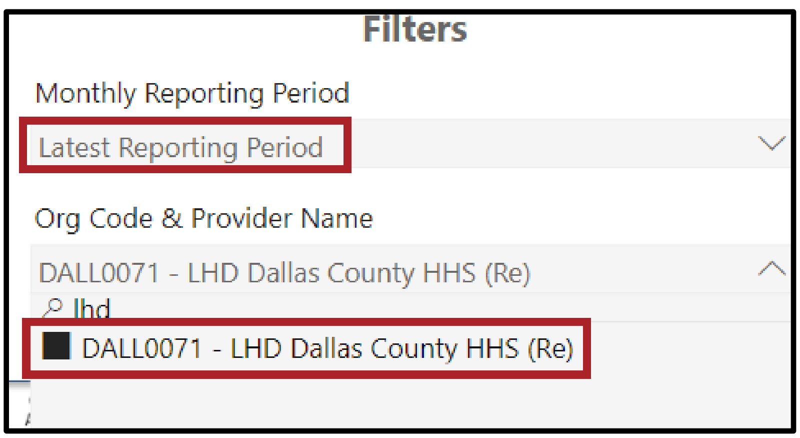


Figure 7 - Example of Reporting Period and Organization

Select the "Close Filter Pane" label in the bottom right corner of the Filters box. See *Figure 8 - Close Filter Pane.*

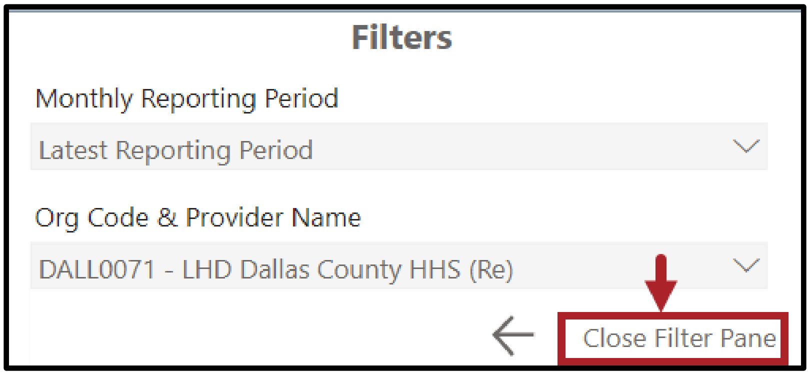


Figure 8 - Close Filter Pane

In the TIPS report at the top of the screen are the organizations:

- TVFC PIN Number,
- Texas IIS ID,
- Org Code,
- Point of Contact Name,
- Provider Name,
- Point of Contact Email Address,
- Site Agreement Expiration Date, and the
- TIPS Rating.

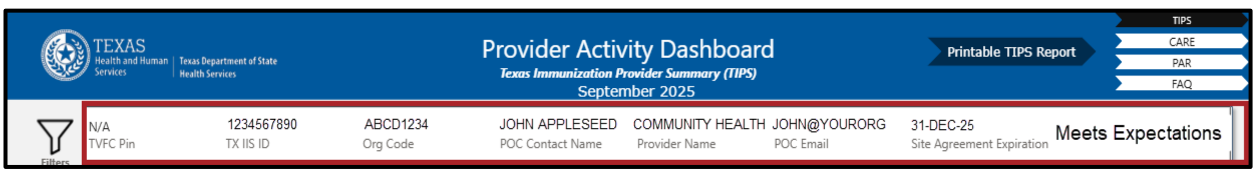


Figure 9 -Top of the Screen

Near the top center of the TIPS report, the month and year that you selected for the reporting period are displayed. The three tabs are displayed vertically on the left-side of the dashboard:

- The **User Activity Summary Tab,**
- The **Online Activity Tab**, and
- The **Data Exchange Activity Tab.**

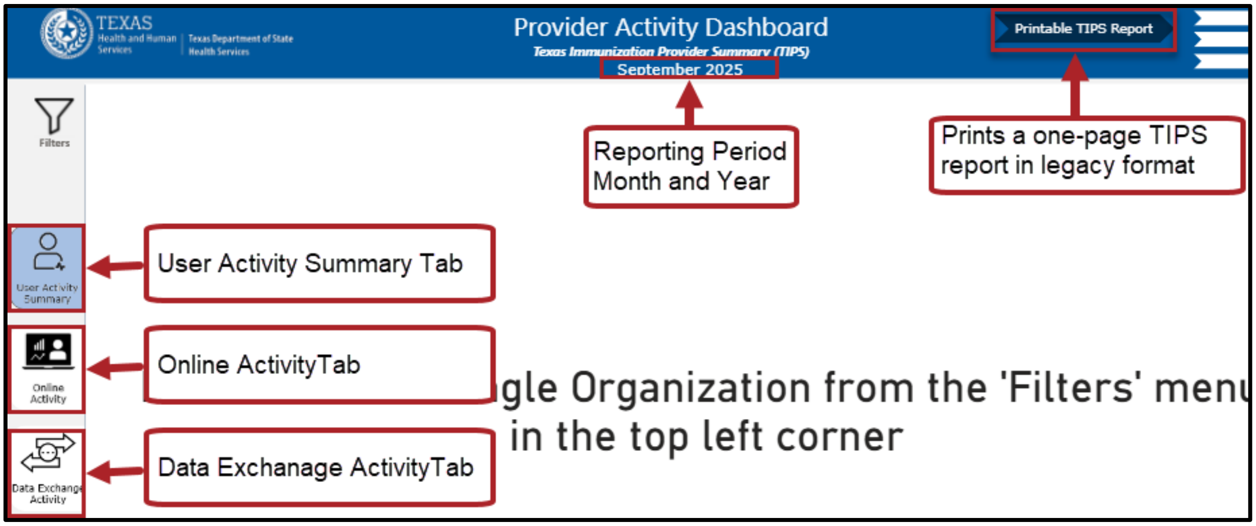


Figure 10 - The Three Tabs of the TIPS Report

NOTE: The button "Printable TIPS Report" in the upper right corner allows users to print the TIPS report in the one-page legacy format.

TIPS User Activity Summary Tab

Selecting the first tab on the left displays the User Activity Summary.

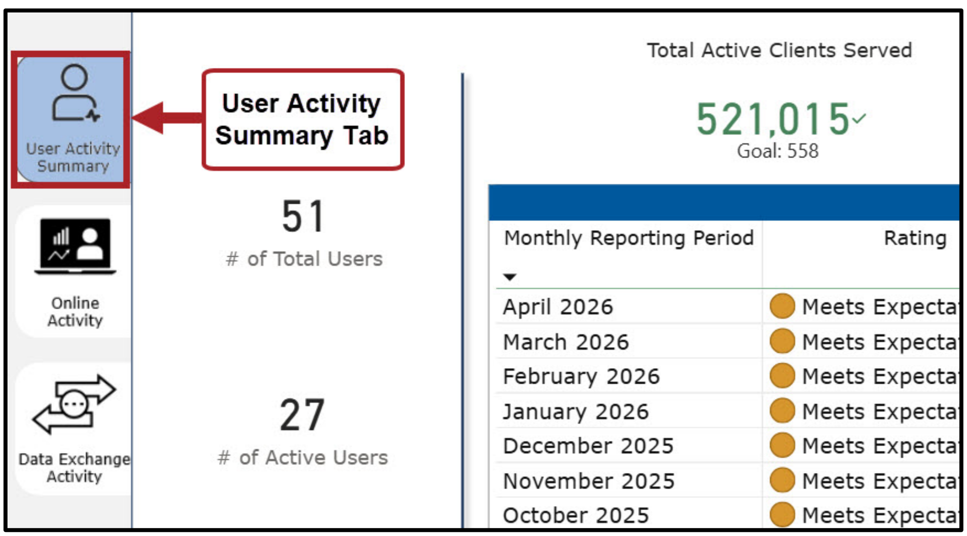
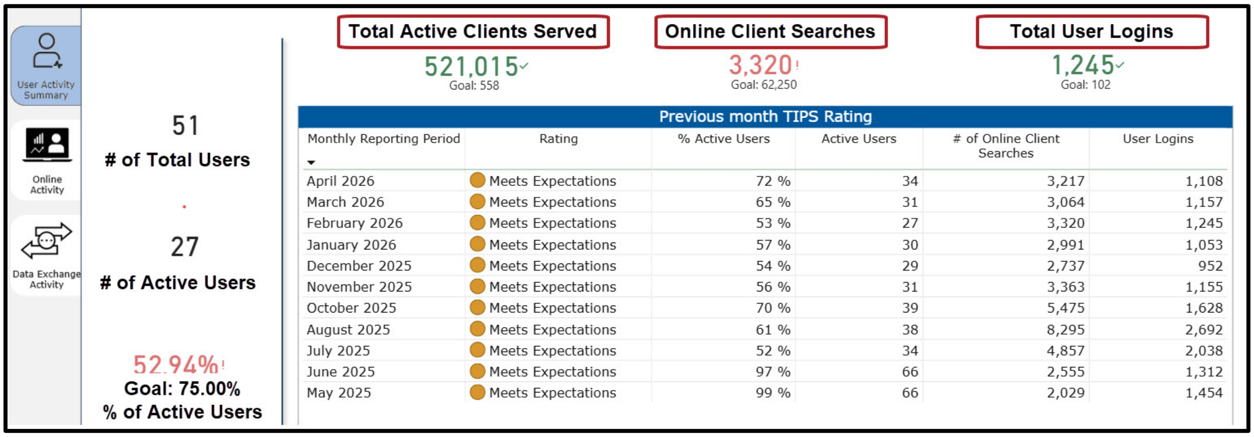


Figure 11 - User Activity Summary Tab

User Activity Summary – Top Headings

The headings at the top of the User Activity Summary include:

- **Total Active Clients Served** - how many clients were active in this organization at the time of the reporting period,
- **Online Clients Searches** - how many client records were opened through the online ImmTrac2 application, and
- **Total User Logins** - how many times users in this organization logged into the ImmTrac2 online application for this reporting period.



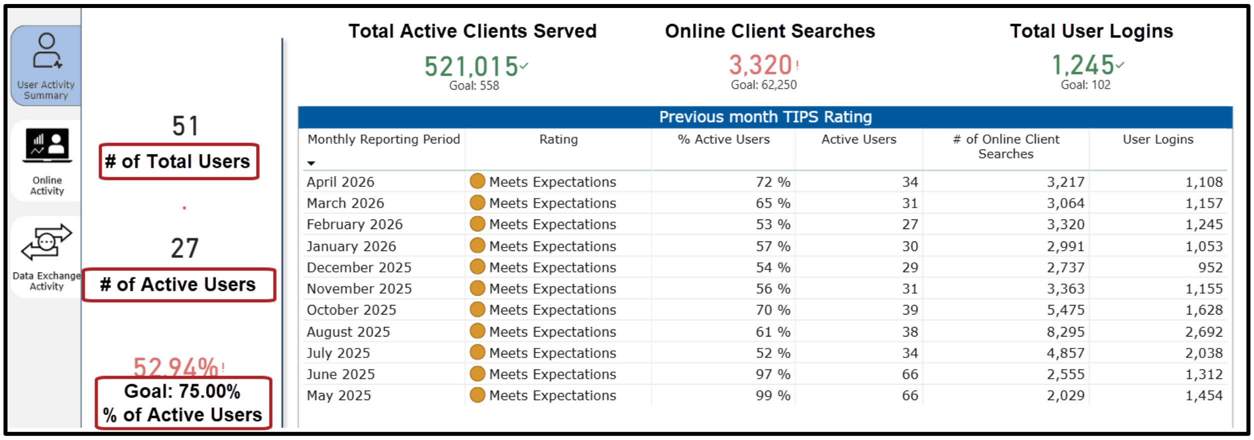
Monthly Reporting Period	Rating	% Active Users	Active Users	# of Online Client Searches	User Logins
April 2026	Meets Expectations	72 %	34	3,217	1,108
March 2026	Meets Expectations	65 %	31	3,064	1,157
February 2026	Meets Expectations	53 %	27	3,320	1,245
January 2026	Meets Expectations	57 %	30	2,991	1,053
December 2025	Meets Expectations	54 %	29	2,737	952
November 2025	Meets Expectations	56 %	31	3,363	1,155
October 2025	Meets Expectations	70 %	39	5,475	1,628
August 2025	Meets Expectations	61 %	38	8,295	2,692
July 2025	Meets Expectations	52 %	34	4,857	2,038
June 2025	Meets Expectations	97 %	66	2,555	1,312
May 2025	Meets Expectations	99 %	66	2,029	1,454

Figure 12 - User Activity Summary – Top Headings

User Activity Summary – Side Headings

Side headings for User Activity Summary:

- **Number of Total Users** - how many users the organization had in this reporting period that could have logged into the ImmTrac2 application,
- **Number of Active Users** - the number of users in the organization who in fact did log into the ImmTrac2 application at least once in the reporting period, and
- **Goal for Active Users** - 75%. See *Figure 13 - User Activity Summary – Side Headings* for an example where the goal was exceeded.



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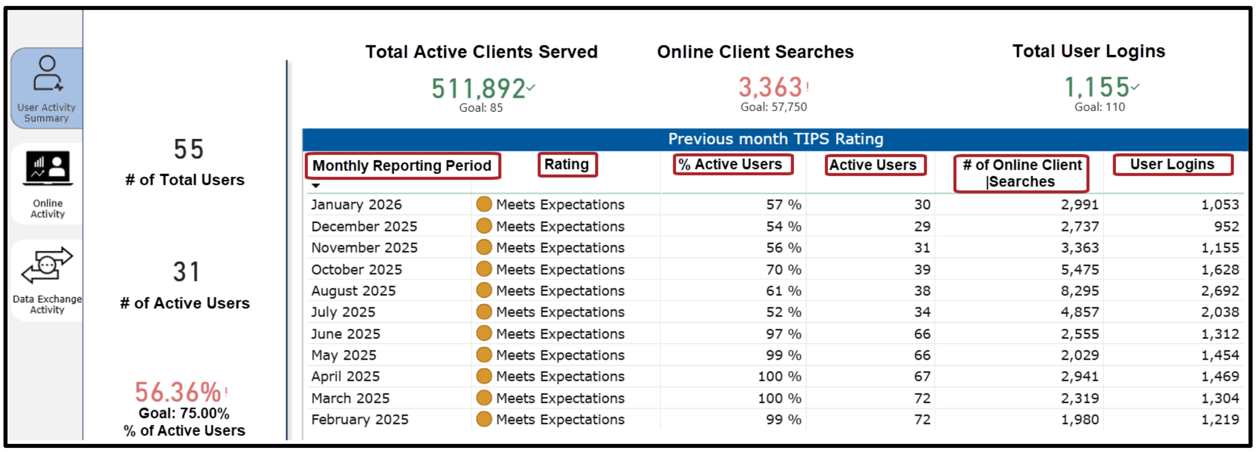
June 2025	Meets Expectations	97 %	66	2,555	1,312
May 2025	Meets Expectations	99 %	66	2,029	1,454

Figure 13 - User Activity Summary – Side Headings

User Activity Summary – Table Headings

In the center of the User Activity Summary is a summary of the last 12-month reporting periods for this organization (see *Figure 14 - User Activity Summary – Table Headings*.) The headings for this table include:

- **Monthly Reporting Period** lists in a month and year format,
- **TIPS Rating** for each month is either Exceeds Expectations, Meets Expectations, or Not Rated (which means they did not meet expectations),
- **Percent Active Users** for each month is the number of active users divided by the number of total users, then multiply times 100 to give a percentage,
- **Number of Active Users** are users in the organization who logged into the ImmTrac2 online application during that month and year,
- **Number of Online Client Searches** for the month and year is the number of times all the active users in the organization performed a client search in the online ImmTrac2 application, and
- **Number of User Logins** is the number of times in the month all the active users logged into the ImmTrac2 application.



Monthly Reporting Period	Rating	% Active Users	Active Users	# of Online Client Searches	User Logins
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May 2025	Meets Expectations	99 %	66	2,029	1,454
April 2025	Meets Expectations	100 %	67	2,941	1,469
March 2025	Meets Expectations	100 %	72	2,319	1,304
February 2025	Meets Expectations	99 %	72	1,980	1,219

Figure 14 - User Activity Summary – Table Headings

TIPS Online Activity Tab

Select the second tab on the left to display the Online Activity (see *Figure 15 - Online Activity Tab*).

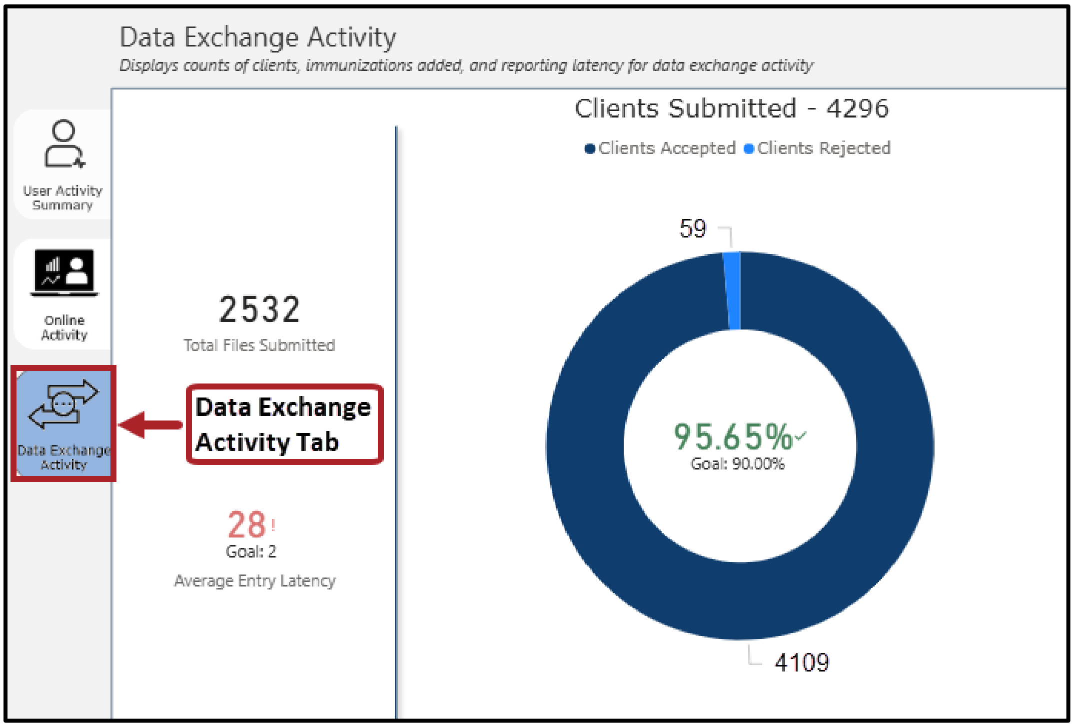


Figure 15 - Online Activity Tab

Online Activity Display

In the Online Activity display:

- Displayed at the very top are the **month and year of the report** and is relevant to the headings on the top and the left-side.
- The **headings** Immunizations Added, Clients Added, and the Average Entry Latency (in days) **displays on the top** with the totals for the month and year.
- The number of Adult Clients Added, the number of Minor Clients Added, the Number of Adult Immunizations Added, and the Number of Minor Immunizations Added **display in headings on the left-side** and include the totals are for the month, and year.
- The **graph** in the center gives the number of immunizations added and the number of clients added for the previous twelve months. See *Figure 16 - Online Activity Display* for an example showing the month and year for December 2023.

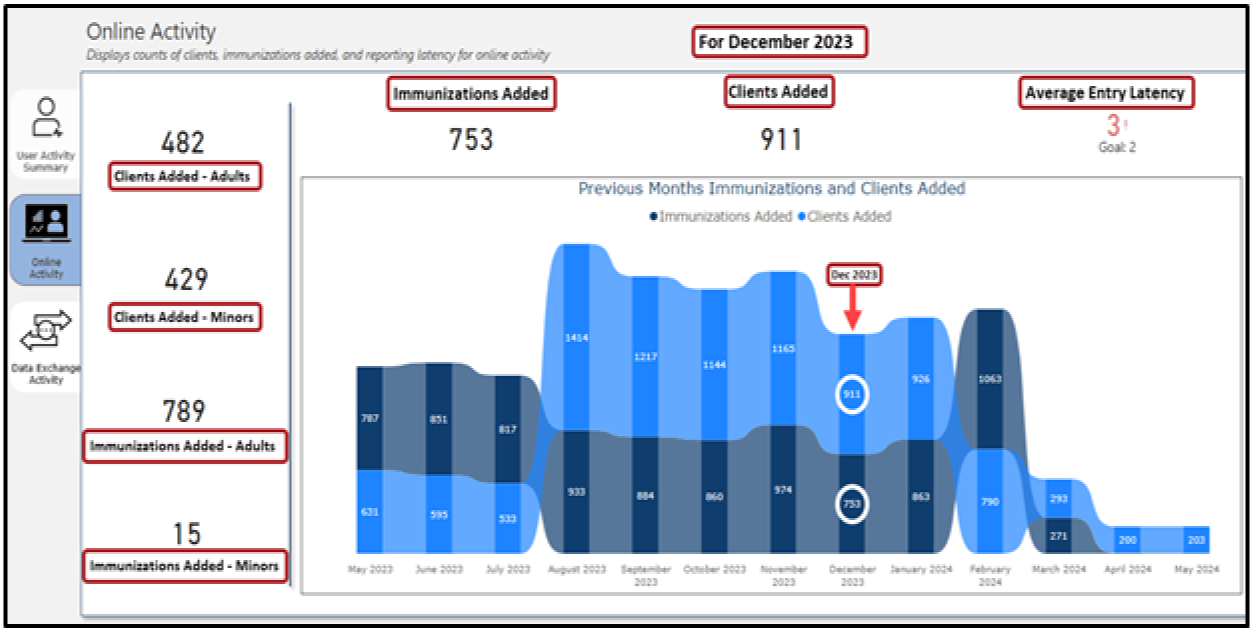


Figure 16 - Online Activity Display

TIPS Data Exchange Activity Tab

Select the third tab on the left to display the Data Exchange Activity. See *Figure 17 - Data Exchange Activity Tab*.

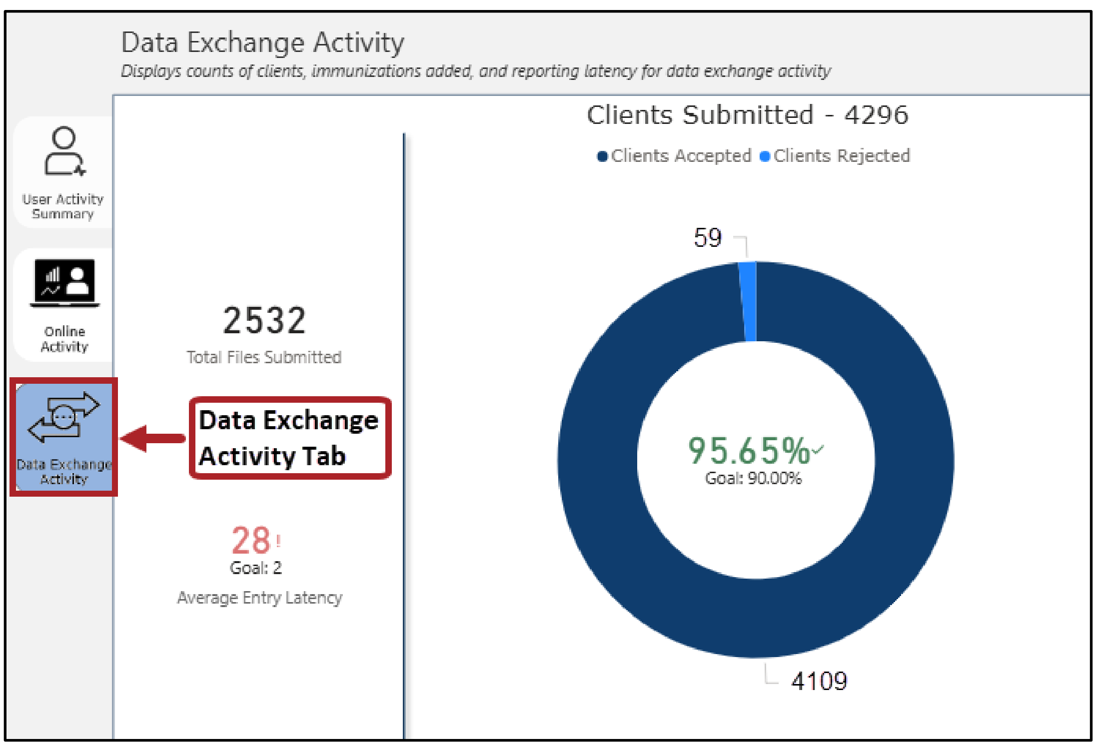


Figure 17 - Data Exchange Activity Tab

Data Exchange Activity Display

- The total number of files submitted and the Average Entry Latency display on the left side. The number of clients submitted via data exchange and the number of immunizations submitted shows at the top of the display.
- In the figure on the left, the percentage of clients accepted displays in the center of the circle, with a goal of at least 90% of clients accepted. The number of clients accepted displays just below this circle.
- In the figure on the right, the percentage of immunizations accepted displays in the center of the circle, with a goal of at least 90% of immunizations accepted. The number of immunizations accepted displays just below this circle.
- Pay attention to the number of clients and immunizations accepted. If a large percentage of clients or immunizations get rejected, check with your EHR vendor or email the Registry Data Exchange group at ImmTracMU@dshs.texas.gov. A lack of consent causes many of the rejected clients and immunizations in the Registry.

  NOTE: Clients Accepted + Clients Rejected may not equal Clients Submitted as other types of status other than accepted or rejected, such as possible duplicates can require further review.

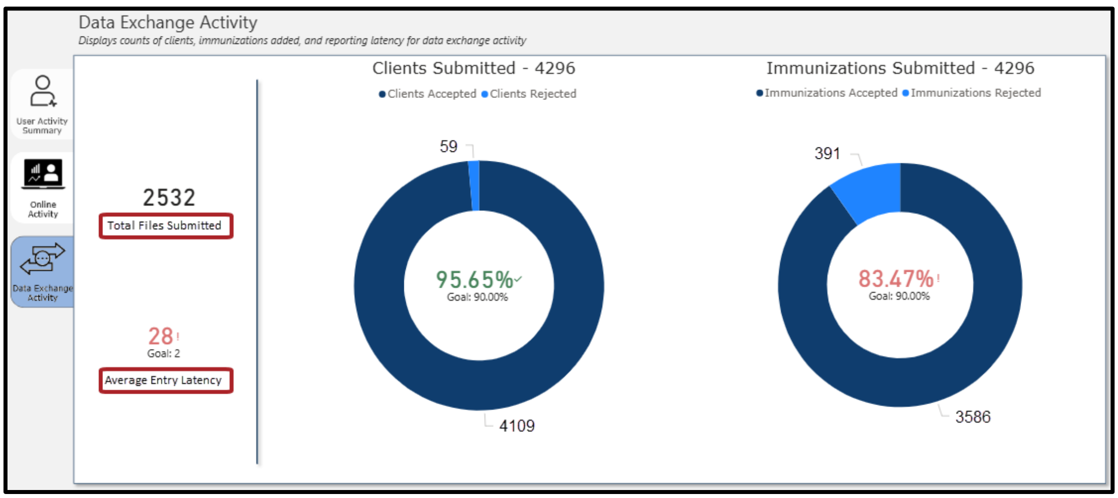
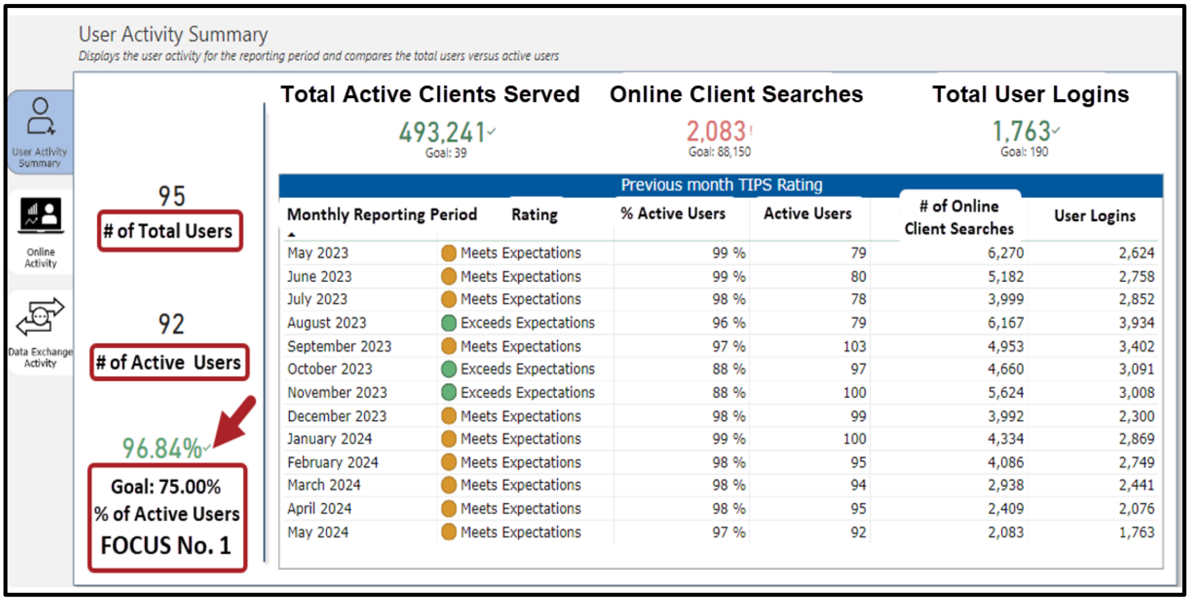


Figure 18 - Data Exchange Activity Display

TIPS Focus Areas

Focus 1: Percent of Active Users

Calculate the **Percent of Active Users** by dividing the Number of Active Users by the Number of Total Users and multiplying by 100 to get a percentage with a minimum goal of 75% active users.



Monthly Reporting Period	Rating	% Active Users	Active Users	# of Online Client Searches	User Logins
May 2023	Meets Expectations	99 %	79	6,270	2,624
June 2023	Meets Expectations	99 %	80	5,182	2,758
July 2023	Meets Expectations	98 %	78	3,999	2,852
August 2023	Exceeds Expectations	96 %	79	6,167	3,934
September 2023	Meets Expectations	97 %	103	4,953	3,402
October 2023	Exceeds Expectations	88 %	97	4,660	3,091
November 2023	Exceeds Expectations	88 %	100	5,624	3,008
December 2023	Meets Expectations	98 %	99	3,992	2,300
January 2024	Meets Expectations	99 %	100	4,334	2,869
February 2024	Meets Expectations	98 %	95	4,086	2,749
March 2024	Meets Expectations	98 %	94	2,938	2,441
April 2024	Meets Expectations	98 %	95	2,409	2,076
May 2024	Meets Expectations	97 %	92	2,083	1,763

Figure 19 - Focus Area 1 – Percent of Active Users

See Appendix A "Instructions to Request Adding or Disassociating Users" for further information on adding or disassociating users.

Focus 2: Logins per Active User

Calculate the **Logins per Active User** by dividing the Total User Logins by the Number of Active Users. Each active user should log into ImmTrac2 at least twice per month as a goal.

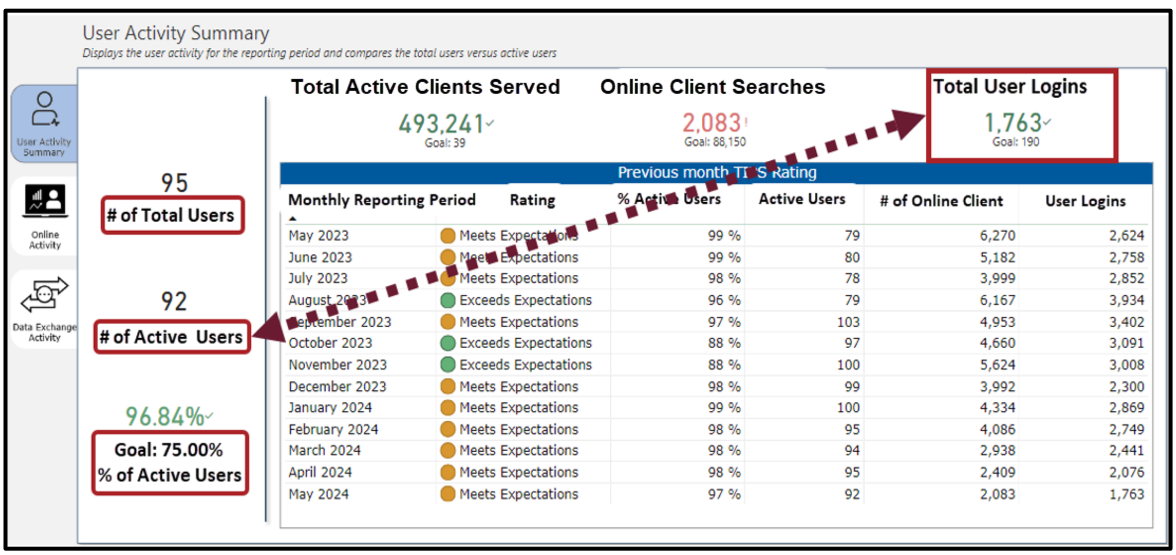


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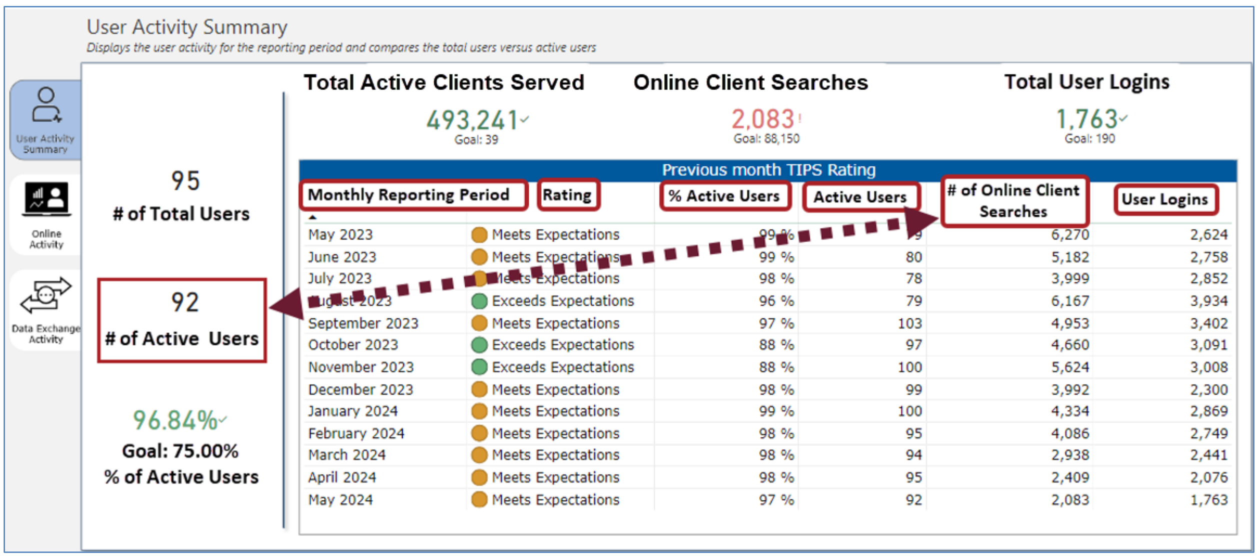
Figure 20 - Focus Area 2 – Logins per Active User

Suggestions: Users should log into ImmTrac2 (or their EHR if using bidirectional data exchange) before each patient encounter to ensure:

- The client previously consented and was added to ImmTrac2. If you do not find the client after performing a "smart" search, educate the client on the benefits of the Texas Immunization Registry and give them an opportunity to complete **both** a standard consent form and a disaster consent form. Disaster consent forms do not require disasters and are available at dshs.texas.gov/immunizations/public/forms.
- The client's immunization records are up to date.

Focus 3: Online Client Searches per Active User

Calculate the **Number of Online Client Searches per Active User** by dividing the Number of Online Client Searches by the Number of Active Users.



Monthly Reporting Period	Rating	% Active Users	Active Users	# of Online Client Searches	User Logins
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Figure 21 - Focus Area 3 – Online Client Searches per Active User

Focus 4: Number of Immunizations Added per Active Client

The **Number of Immunizations Added per Active Client** requires finding three numbers. The first tab on the left, the User Activity Summary, displays the number of Total Active Clients Served.

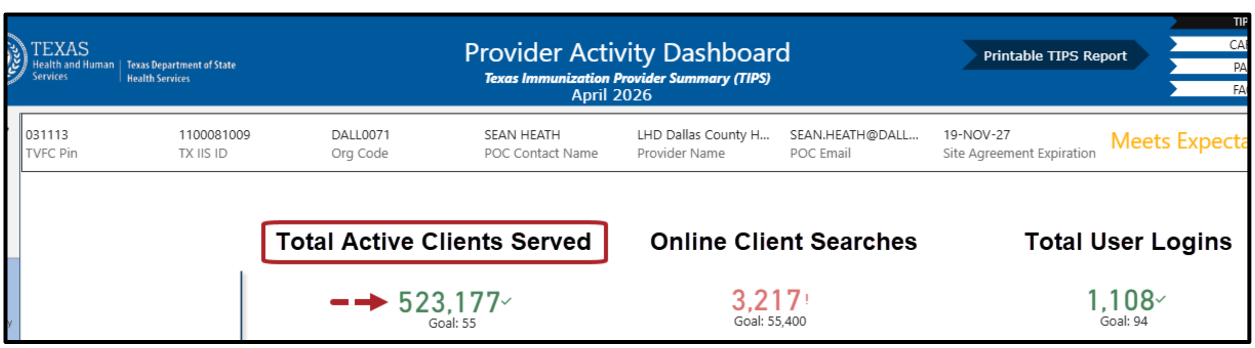

Figure 22 - Focus Area 4 – Total Active Clients Served

The second tab on the left, Online Activity, displays the number of Online Immunizations Added.

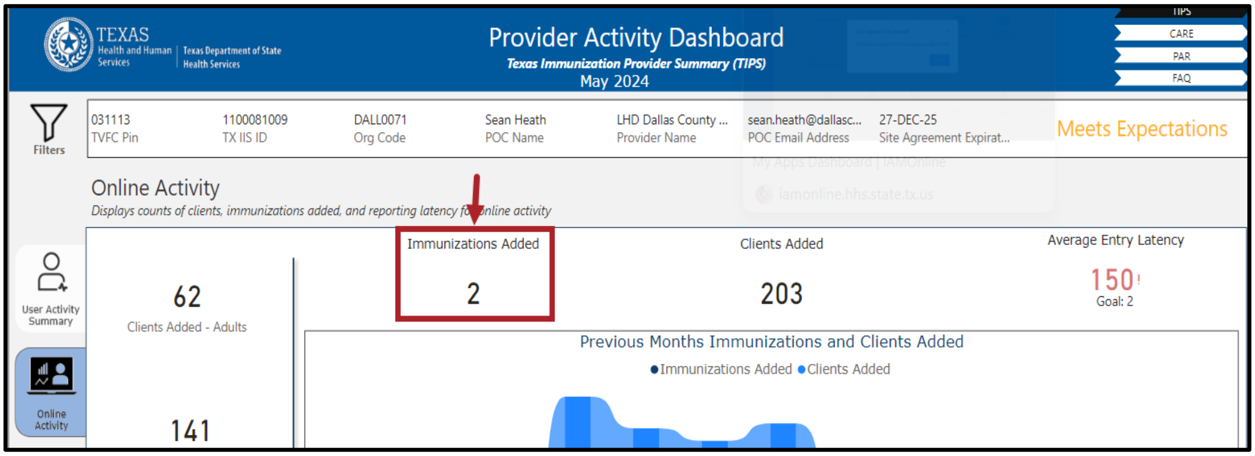

Figure 23 - Focus Area 4 – Online Immunizations Added

The third tab on the left, Data Exchange Activity, displays the Immunizations Accepted.

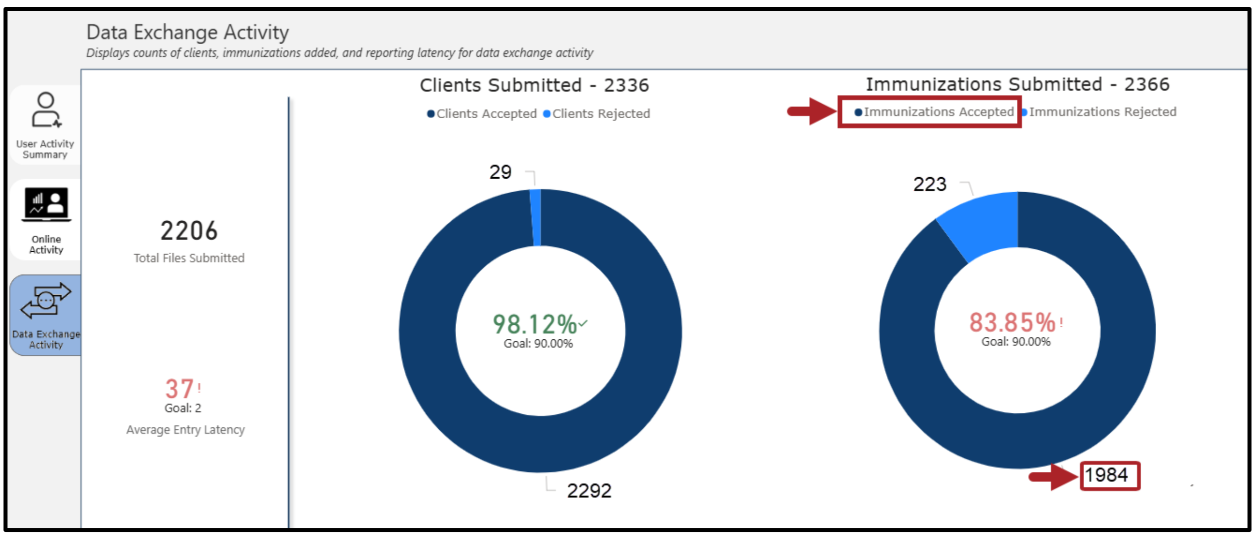

Figure 24 - Focus Area 4 – Data Exchange Immunizations Added

Calculate the Number of Immunizations Added per Active Client by adding the Number of Online Immunizations Added (found on the Online Activity Tab) to the Number of Data Exchange Immunizations Accepted (found on the Data Exchange Activity Tab) and divide that total by the Number of Active Clients Served (found on the User Activity Tab).

Inactivate clients that you no longer use as one way to increase the Number of Immunizations Added per Active client. One method to use is through the "Manage Client Status Criteria" function of ImmTrac2 online. See the publication Texas Immunization Registry (ImmTrac2) "Manage Client Status Criteria," stock no. 11-15951, for further information.

Focus 5: Average Latency

Average Latency is the time between when an immunization was administered and when it was reported to DSHS. To calculate the average Latency, first find the Average Entry Latency (found on the Online Activity Tab), then add the Data Exchange Average Entry Latency (found on the Data Exchange Activity tab), and divide the total by two to get the Average Latency.

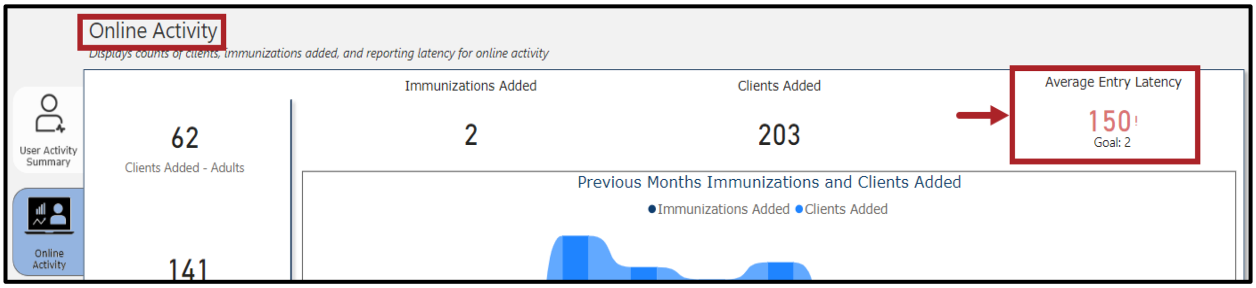

Figure 25 - Focus Area 5 – Average Online Entry Latency

Then add to that the Data Exchange Average Entry Latency (found on the Data Exchange Activity tab) and divide that total by two to get the Average Latency.

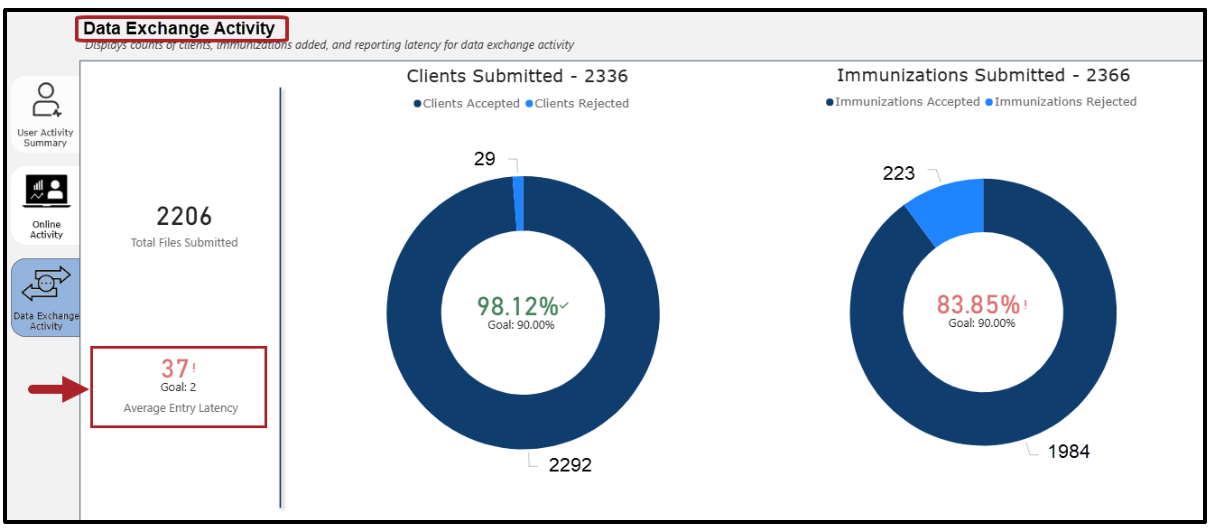

Figure 26 - Focus Area 5 – Average Data Exchange Entry Latency

Focus 6: Data Exchange Acceptance Rate

To calculate the **Data Exchange Acceptance Rate**, on the Data Exchange Activity tab, divide the total accepted clients by the total submitted clients.

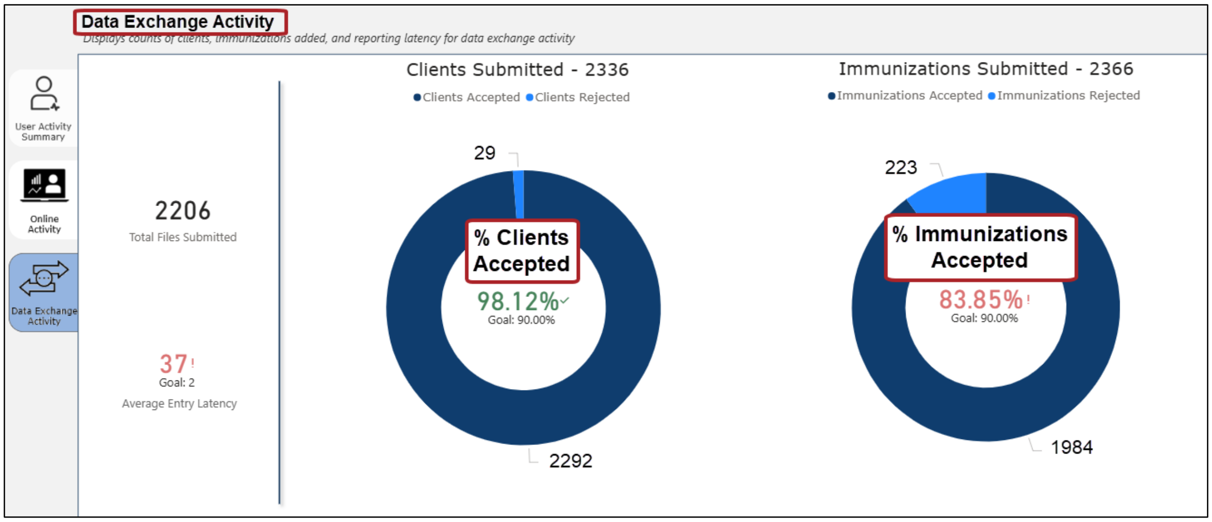

Figure 27 - Focus Area 6 –Data Exchange Acceptance Rate

What If No TIPS Data

If the TIPS Report shows no data in Data Exchange Activity, then the organization should review and complete the qualifications below to determine if they are ready to establish a data exchange connection with the Registry.

Prior to Establishing a Data Exchange Connection with the Registry, Organizations Must:

- Have up to date ImmTrac2 renewal agreements for all facilities registered with ImmTrac2 within their organization.
- Register all facilities not currently registered with ImmTrac2 by completing an ImmTrac2 Site Agreement.

NOTE: Organizations with expired ImmTrac2 site agreements cannot proceed with registering for data exchange with the Registry until their site renews the agreements.

Registry Status Qualifications

1. Ensure the organization's information is up to date with the Registry. Renew the main headquarters or stand-alone facility with the Registry. Organizations must renew location information every two years.
   Most Organizations should use Syntropi for registrations or renewals. Guides for registering or renewing through Syntropi include:
   - Texas Immunization Registry (ImmTrac2) "Site Registration Through Syntropi Guide," stock no. 11-16844, available at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-16844.pdf, and
   - Texas Immunization Registry (ImmTrac2) "Site Renewal Through Syntropi," stock no. 11-16804, available at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-16804.pdf.

Out-of-State and a few other state and federal agencies still use ImmTrac2 with plans to migrate to Syntropi. Guides for registrations or renewals through ImmTrac2 include:

- The Texas Immunization Registry (ImmTra2) "Site Registration Guide," stock no. 11-15175, available at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-15175.pdf, and
- The Texas Immunization Registry (ImmTrac2) "Site Renewal Guide," stock no. 11-15252, available at dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/11-15252.pdf.

2. All associated facilities register as sub-sites of the main organization (i.e., not as separate or stand-alone facility) with the Registry. For organizations with multiple facilities, each facility administering immunizations must register with the Registry, and must properly link as a sub-site to the main organization.

   Organization staff need active ImmTrac2 user accounts to login to the Registry. Each facility within the organization must have designated staff with an ImmTrac2 user account.

3. Identify staff at the organization as lead contacts and/or team for establishing and overseeing the data exchange connection with the Registry. Identified staff collaborate with the Texas Immunization Registry (ImmTrac2) throughout and after establishing the data exchange connection.

   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.

   Contact Texas Immunization Registry (ImmTrac2) Customer Service at 800-348-9158 for assistance with ImmTrac2 registrations, renewals or user accounts.

Data Exchange Qualifications

1. To engage in electronic data exchange, the organization must have an EHR system that meets the registry standards and requirements. The organization, through their EHR system, must submit patient and immunization information in HL7 Version 2.5.1 files to the registry. The organization should confirm with their EHR vendor that the system can send data in this format.

   The organization, through their EHR system, must have the capability to submit either batch or bidirectional immunization files to the registry.

   - **Batch** transmission of data combines data into one file and submit files weekly. Speak with your EHR vendor to confirm batch HL7 files configuration capability.
   - **Bidirectional (BiDX)** exchange of patient and immunization data is a two-way, real-time communication between a facility's Electronic Health Record (EHR) system or vendor and the registry's Immunization Information System (IIS). BiDX allows a health care organization to search (also known as querying) for a patient's immunization record and retrieve the immunization record if the patient is a registry client. It also allows for the querying of a patient's immunization record to identify what immunizations the patient may need, known as querying and forecasting.

Health care organizations can also update a registry client's personal and immunization record (also known as reporting). Speak with your EHR vendor to confirm how to configure your system. Consult the Texas Immunization Registry (ImmTrac2) "Informational Guide on Bidirectional Data Exchange" publication, stock no. 11-15957, for more information on bidirectional data exchange.

2. The organization must ensure their patient and immunization data do not have data quality issues or errors. The organization must take and own responsibility for the patient and immunization data submitted as part of establishing a data exchange connection with the Texas Immunization Registry (ImmTrac2).
   - To ensure the organization submits great data quality, the organization must identify any data quality errors and correct them in a timely manner.
   - Speak with your EHR vendor to confirm the organization's systems are configured to the federal and state requirements for data exchange to decrease the likelihood of data quality errors.

NOTE: The Texas Immunization Registry (ImmTrac2) verifies that organizations completed the pre-requisite qualifications prior to establishing a data exchange connection with an organization.

Contact the Texas Immunization Registry at 800-348-9158, option 3 or email ImmTracMU@dshs.texas.gov for data exchange support.

The Consent Accepted Rate Evaluation (CARE) Report

The CARE Report dashboard is divided into three sections:

1. The Header,
2. Search Filters, and
3. Specific header and column sections.

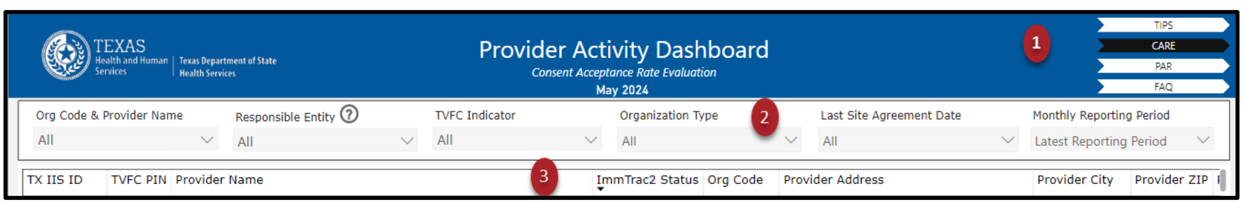

Figure 28 - The Three Sections of the CARE Report

On the Provider Activity Dashboard, in the top right corner, select "CARE".

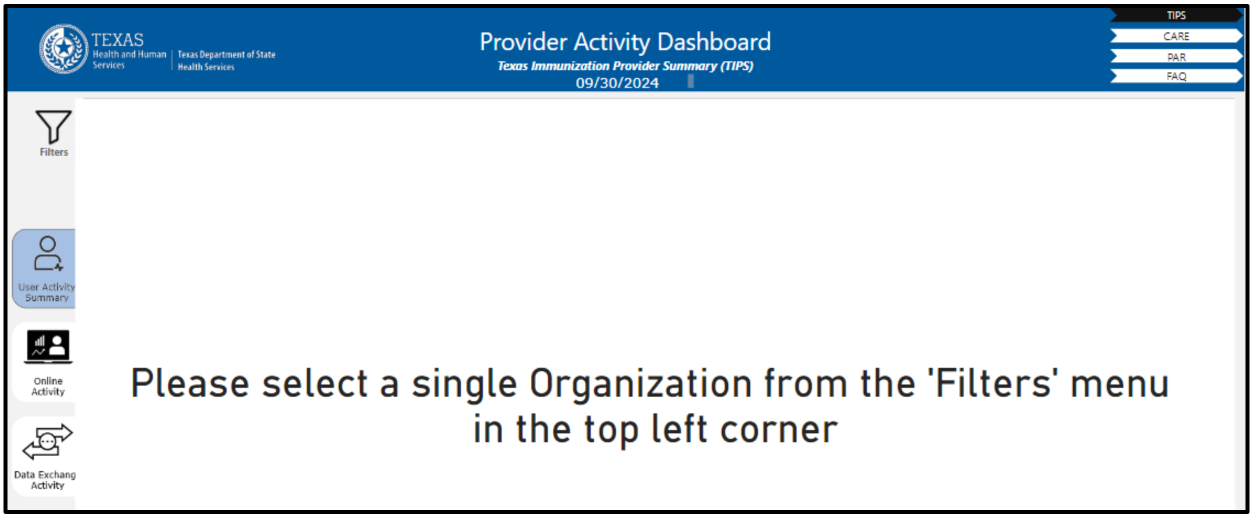

Figure 29 - Selecting the CARE Report

In the **Search Filter** section of the CARE report, each category has a drop-down menu for user selection. The list of search filters includes the following options:

- Org Code & Provider Name
- Responsible Entity
- TVFC Indicator
- Organization Type
- Last Site Agreement Date and
- Monthly Reporting Period.

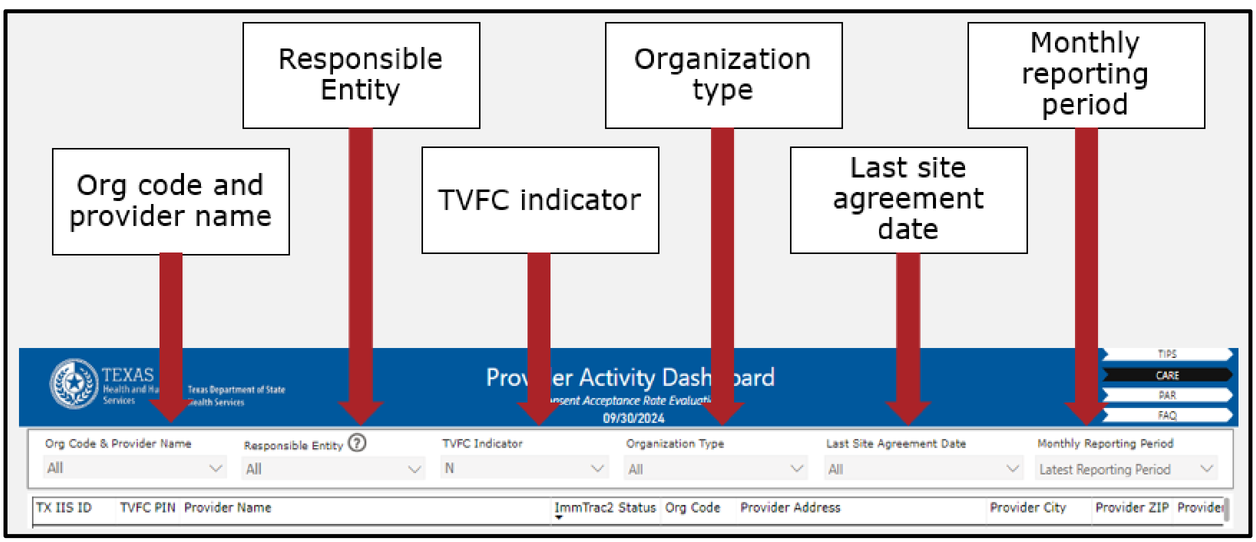

Figure 30 - CARE Search Filters

The "Org Code and Provider Name" filter enables users to search for organizations by finding their Org Code or Provider Name, allowing for partial searches, meaning users can input incomplete words or phrases to find relevant organizations. This feature supports smart search functionality by recognizing related words. Responsible entities and parent organizations see organizations that report to them. If you do not have any organizations that report to your organization, then you only see your organization listed.

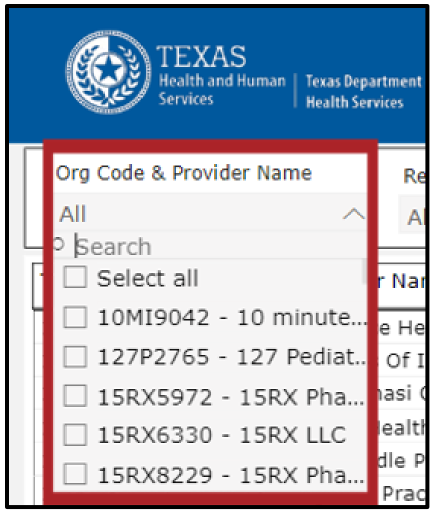

Figure 31 - Org Code and Provider Name Search

The Responsible Entity filter allows users to search for one local health department at a time. Please note while using this option, single responsible entities or providers can disregard this filter.

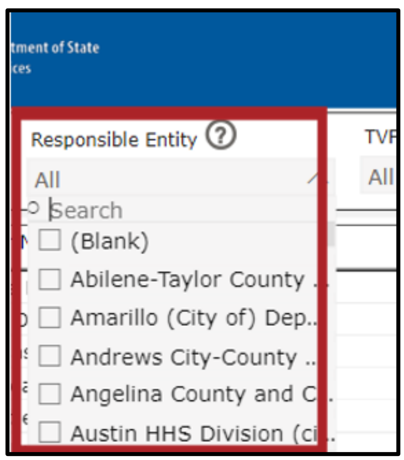

Figure 32 - Responsible Entity Search

The TVFC filter identifies organizations registered in the Texas Vaccine for Children (TVFC) program.

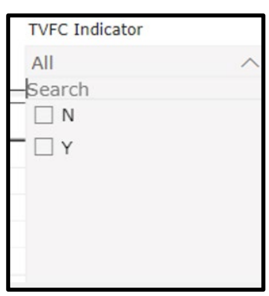

Figure 33 - TVFC Filter

The Organization Type filter categorizes Public Health Regions and local health departments sites into categories such as Childcare, College/University, etc.

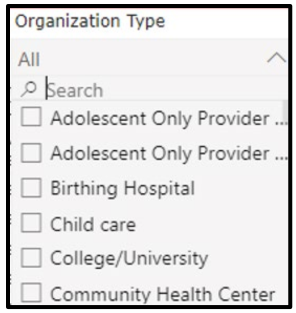

Figure 34 - Organization Type Filter

The Last Site Agreement Date filter displays dates related to site agreements, including the last dates of site registrations and renewals.

Figure 35 - Last Site Agreement Date Filter

The Monthly Reporting Period filter displays the months and years of the current and previous year's report records for organizations.

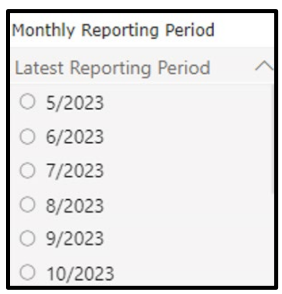

Figure 36 - Monthly Reporting Period Filter

How to Download the CARE Report

Each column header in the report features an upward-pointing arrow, allowing users to sort the data in an ascending chronological order. Selecting it again reverses the sorting order to a descending order. Hovering over the column header area to make the "More Options" icon visible.

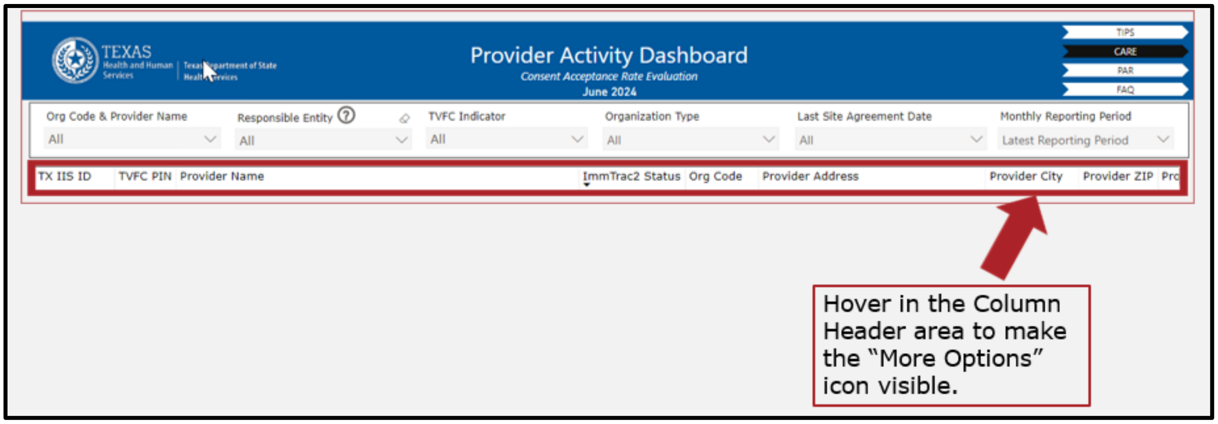

Figure 37 - Hover Over Column Header to See the "More Options" Icon

The **More Options** icon is situated in the far-right corner of the Search Filter section.

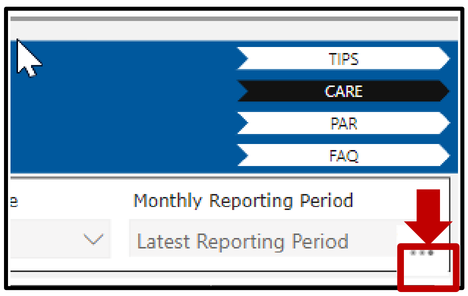

Figure 38 - More Options Icon

The additional options it provides include:

- Export data
- Sort descending
- Sort ascending, and
- Sort by, etc.

The 'Sort by' option offers column categories for sorting, such as TX IIS ID or TVFC Pin.

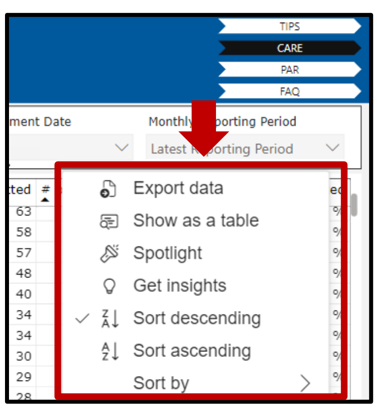

Figure 39 - More Options List

To export data to an Excel spreadsheet, select the first option in the list, "Export data."

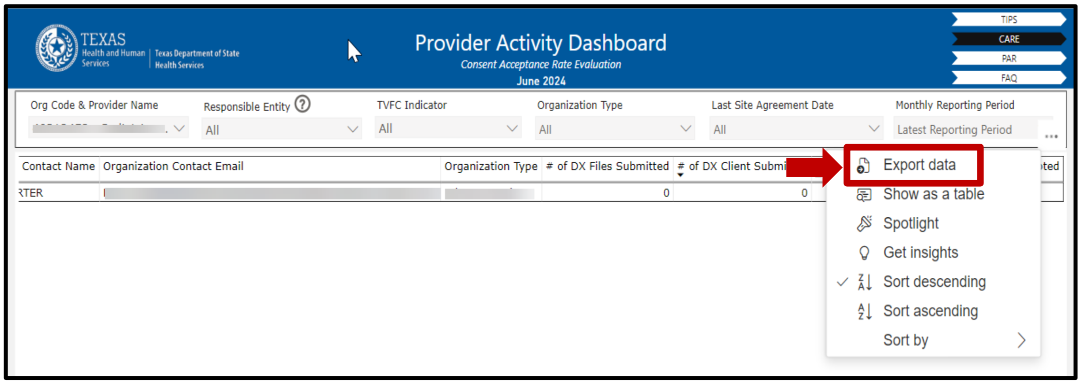

Figure 40 - Export Data Option

Choose your preferred format of download layout by selecting either:

- "Data with current layout" exports as a simple Excel spreadsheet, or
- "Summarized data" exports an Excel table with filters on each column.

Then select the "Export" button at the bottom of the page.

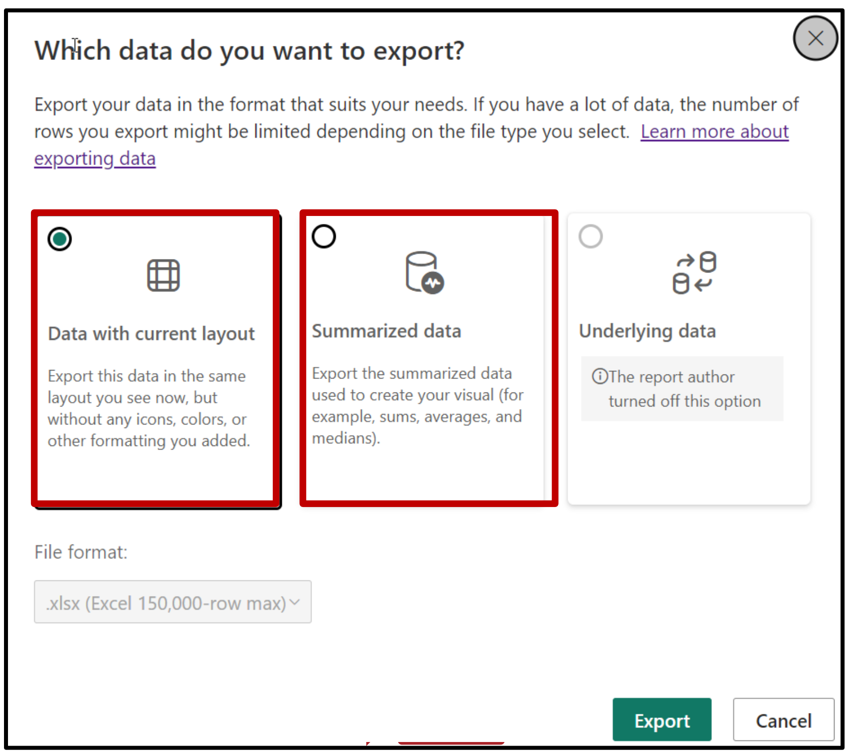

Figure 41 - Export data Option

A pop-up window confirming a "Successful export" appears, proceed with saving the downloaded report.

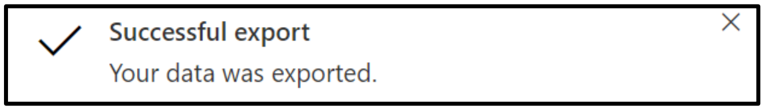

Figure 42 - Successful Export Message

Columns in the CARE Report

The columns of the CARE report include demographic information about the provider and most importantly, the number of data exchange files submitted, data exchange clients submitted, data exchange clients accepted, and the percentage of data exchange clients accepted.

- Texas IIS ID
- TVFC PIN number
- Provider name
- ImmTrac2 status (open or closed)
- Org code
- Provider:
  - Address
  - City
  - Zip code
  - County
  - Phone
  - Fax
- Region
- Responsible Entity
- Organization contact name, email, and type
- Number of Data Exchange (DX) files submitted
- Number of DX clients submitted
- Number of DX clients accepted
- Percentage of DX clients accepted

The Provider Activity Report (PAR)

On the upper right corner of the Provider Activity Dashboard, select "**PAR**" to search for and view a Provider Activity Report.

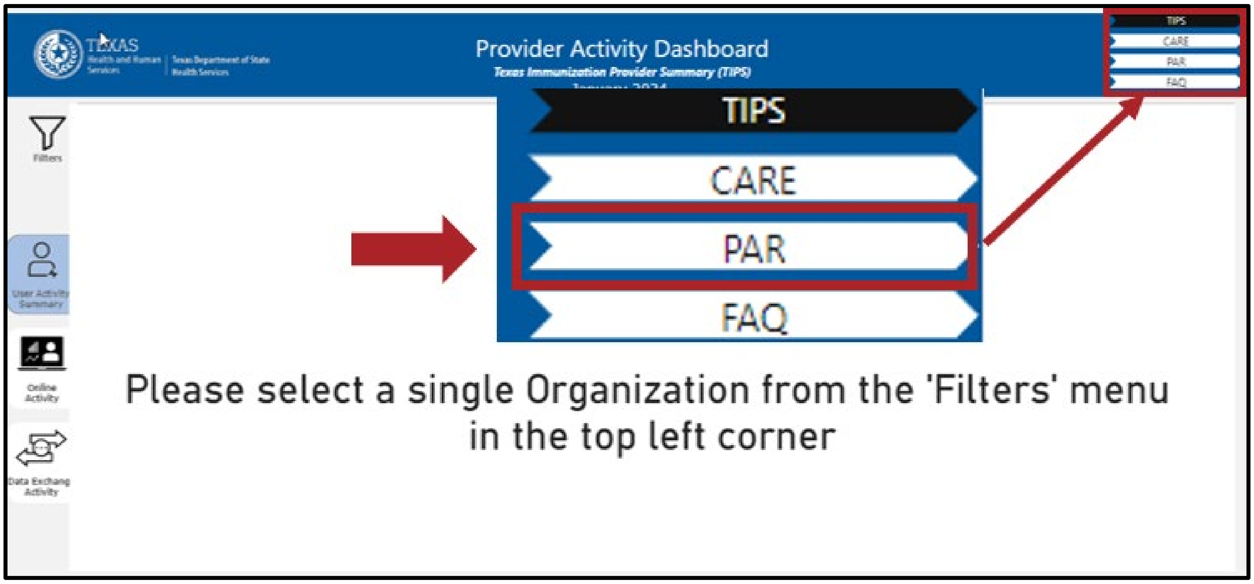

Figure 43 - Provider Activity Dashboard with PAR Selected

The PAR has three sections:

1. The Header,
2. Search Filters, and,
3. Column Header and Table section.

The search filters affect the data seen in the table below it.

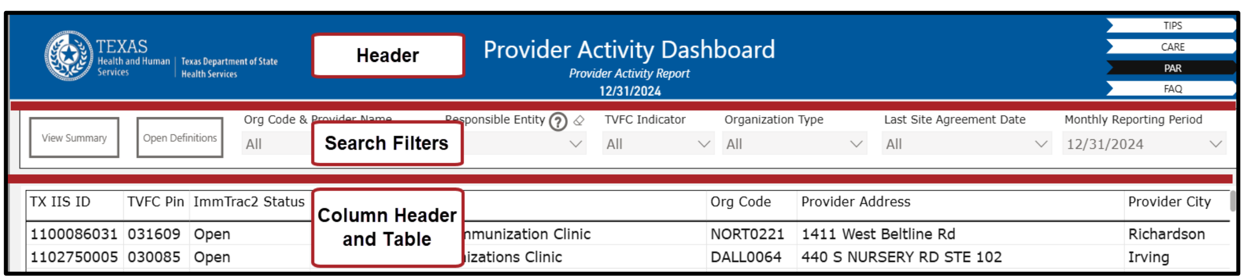

Figure 44 - Sections of the PAR Report

Header Section

The **Header** section features the reporting month and year near the center of the header, and the types of reports to view: **TIPS, CARE, PAR**, and **FAQ** located on the far right. Select the PAR button to begin the PAR report. See *Figure 45 - Header Section of the PAR Report.*

Figure 45 - Header Section of the PAR Report

Search Filters and Table Displays

Below the header appears search filters with drop-down menus that affect the dashboard table.

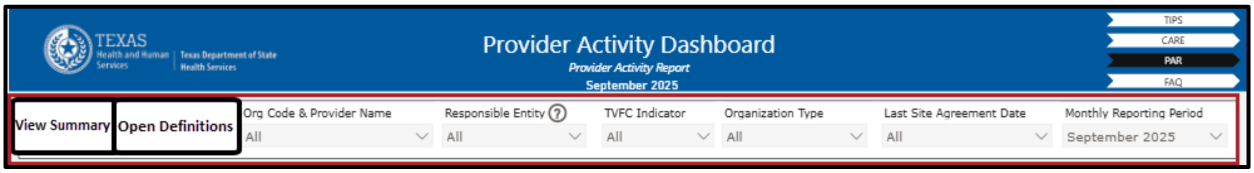

Figure 46 - Search Filters of the PAR Report

The button on the far-left toggles between "View Summary" and "View Details," see detailed view shown below. The detailed view of the PAR displays many columns in the data table showing data after applying the filters. Responsible entities and parent organizations see organizations listed that report to them. **If you do not have any organizations reporting to your organization, then you only see your organization listed.**

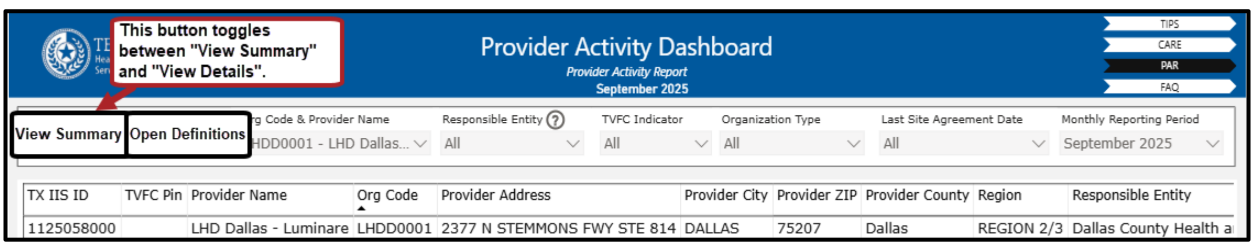

Figure 47 - Detailed View of the Dashboard

Detailed View Headings

TX IIS ID

TVFC Pin

Provider Name

Org Code

Provider Address

Provider City

Provider ZIP

Provider County

Region

Responsible Entity

Provider Phone

Provider Fax

POC Contact Name

POC Phone

POC Email

PRC Contact Name

PRC Phone

PRC Email

TVFC Indicator

Organization Type

Site Registration Date

Site Agreement Expiration Date

Org Administers Imms

# of All Users

# of Active Users

# of User Logins

# of Active Clients Served

# of Online Client Searches

Total # of Minor Clients Consented

Total # of Adult Clients Consented

Total # Consented Online

# of Imms Added Online

# of Historical Imms Added Online

Online Latency

# of DX Clients Queried

# of DX Client Records Submitted

# of DX Client Records Accepted

# of DX Client Records Rejected

# of DX Minors Consented

# of DX Adults Consented

Total # of DX Clients Consented

# of DX Imms Added

# of DX Imms Rejected

# of DX Clients Updated

Total # of Minor Clients Consented

Total # of Adult Clients Consented

Total # of All Clients Consented

TIPS Rating

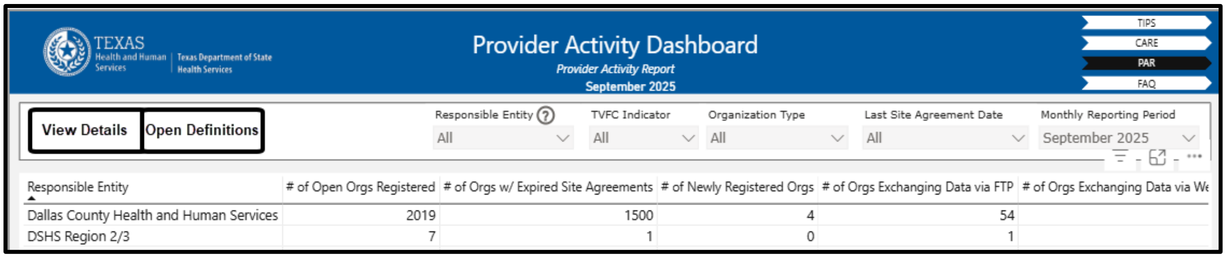

Figure 48 - Summary View of the Dashboard

Summary View Heading

Responsible Entity

# of Open Orgs Registered

# of Orgs w/Expired Site Agreements

# of Newly Registered Orgs

# of Orgs Exchanging Data via FTP

# of Orgs Exchanging Data via Web Services

# of Adult Clients Consented

# of Minor Clients Consented

TIPS – Not Rated

TIPS – Meets Expectations

TIPS – Exceeds Expectations

Column Definitions

The next button in the filters section toggles between “Open Definitions” and “Close Definitions”. The **Open Definitions button** provides definitions of column headers for the view currently displayed in the table, the Summary View, or the Detailed View.

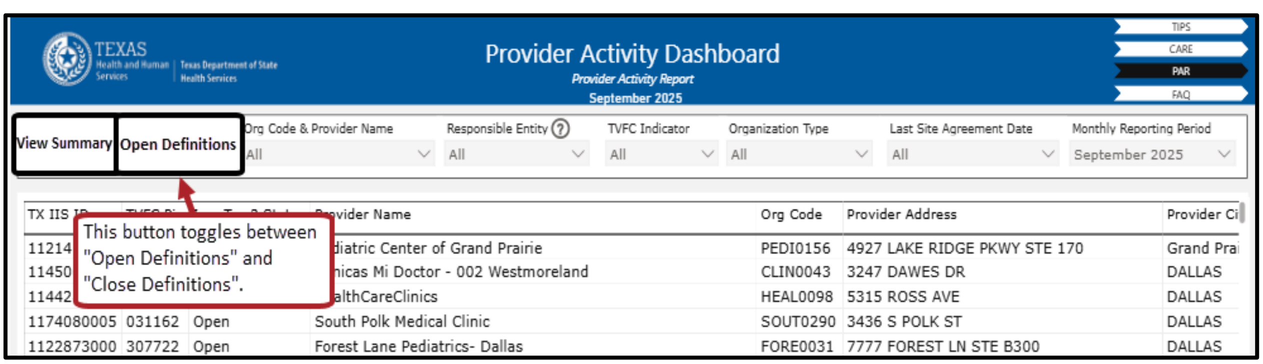

Figure 49 - Open / Close Definitions

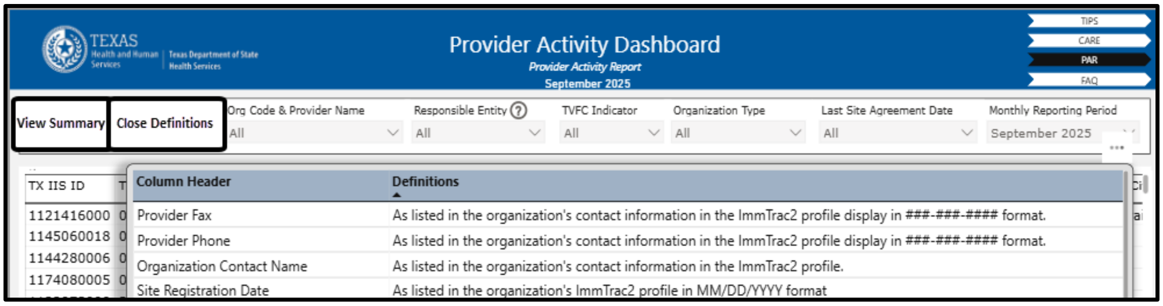

Figure 50 - Column Header Definitions in the Detailed View

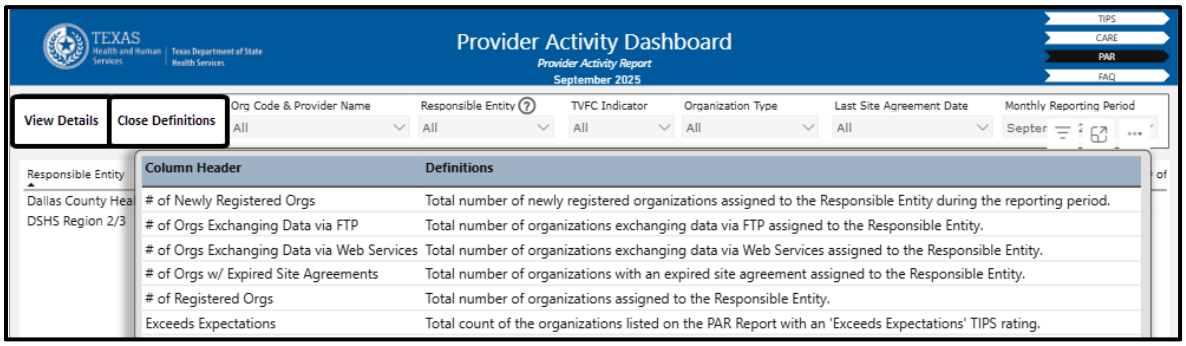

Figure 51 - Column Header Definitions in the Summary View

Remaining PAR Search Filters

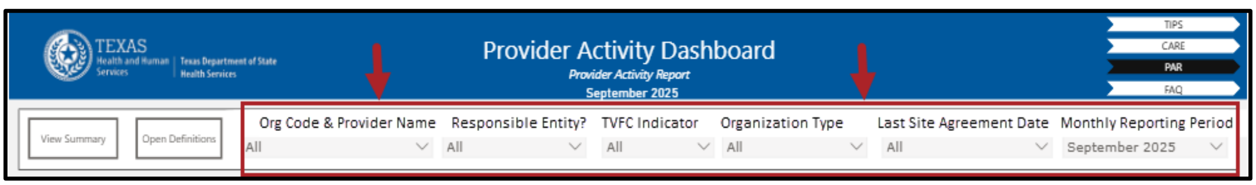

Figure 52 - Remaining PAR Filters

Other filters available in the PAR drop-down menus:

- Org Code and Provider Name
- Responsible Entity
- TVFC Indicator
- Organization Type
- Last Site Agreement Date, and
- Monthly Reporting Period.

Appendix A: Instructions to Request Adding or Disassociating Users

Requests

All requests to ADD a new user or DISASSOCIATE a user are preferred to 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 do not know the contacts in your organization, or if you wish to see a list of current ImmTrac2 users in your organization, regardless of whether you file site renewals through ImmTrac2 or Syntropi, then:

1. Log into the appropriate organization in ImmTrac2.
2. Select the blue “Manage Renewals” link as if you planned to renew your site.
3. Proceed
4. Select “Access previously approved Registration or Renewal”. See *Figure 53 - Access Previously Approved Registration or Renewal*.
5. Select the small black triangles to open the “Organization Point of Contact (POC)” tab and the “Primary Registry Contact” tab. This provides the names of the individuals serving in these roles. See *Figure 54 - POC and Primary Registry Contact Tabs*.
6. Email requests to ImmTrac2@dshs.texas.gov using the Email Request Instructions and Email Request Template provided below.

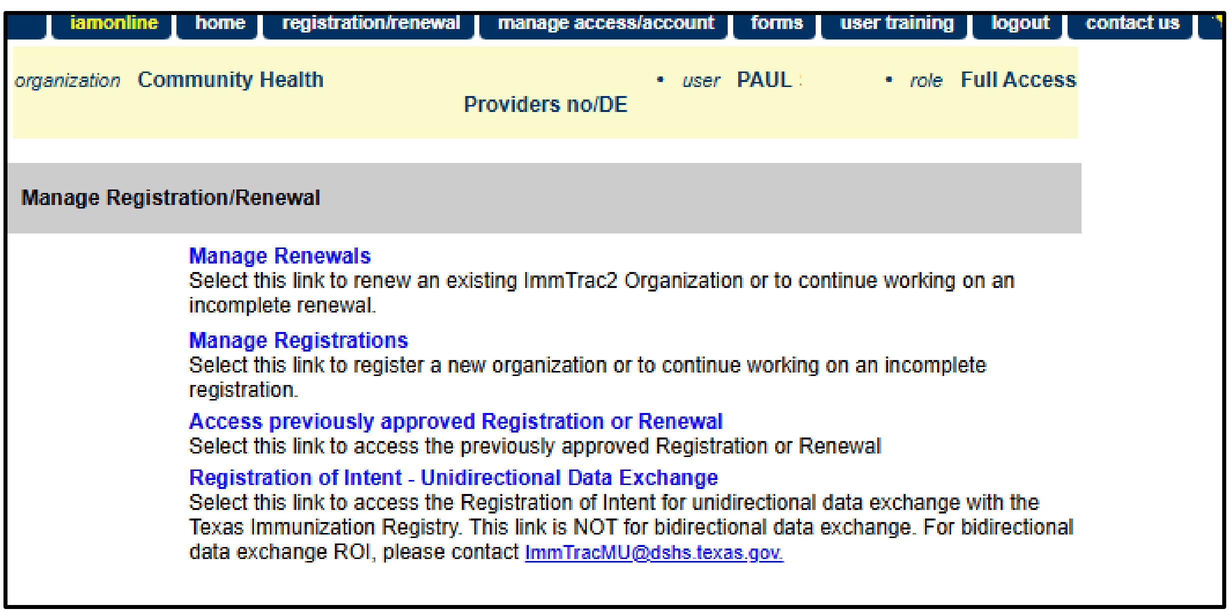

Figure 53 - Access Previously Approved Registration or Renewal

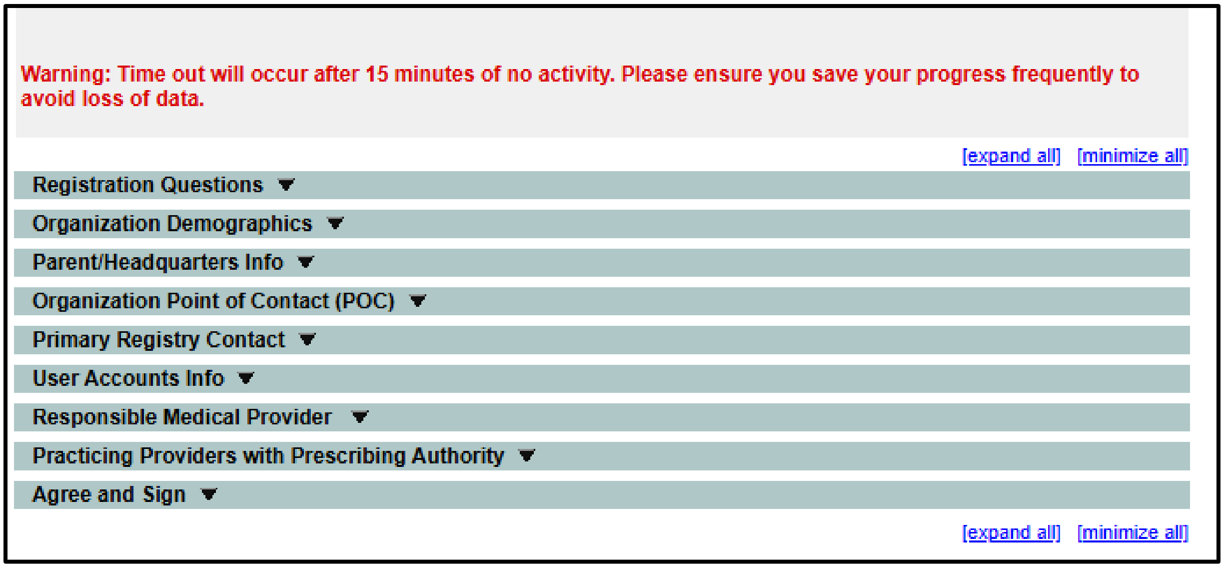

Figure 54 - POC and Primary Registry Contact Tabs

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 updates to the users through the renewal process.

Use Syntropi at https://enrolltexasiz.dshs.texas.gov/CRC/Site/emrlogin.asp to register or renew your ImmTrac2 site agreement, unless your organization:

- Is located outside the state of Texas,
- Is in the Department of Family and Protective (DFPS) Services, or
- Is in the Women and Infant Children (WIC) program

In these latter cases, register or renew your site with ImmTrac2 through IAMOnline at IAMOnline - Sign In.

Security Notes

- Do not share ImmTrac2 login credentials assigned to an individual. Repeated violations can 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. Request access only for individuals on a need-to-know and a need-to-have basis. Please do not add more users than needed. The more users requested, the longer the user creation process can take.
- Please instruct users at your organization to login as soon as possible. The account locks if new user accounts do not access ImmTrac2 within 30 days of creation. ImmTrac2 deletes new user accounts if not accessed within 120 days of creation.

Email Request Instructions to Add or Disassociate Up to Five Users

- Copy and paste the Email Request Template found on the next page into an email.
- Add the missing information:
  - o Organization and Point of Contact Information
  - o List of users to be added or disassociated
  - o 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 ID number (aka PFS ID number): (if known)

List of Users to Add or Disassociate

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:

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Texas Department of State Health Services

Texas Department of State Health Services
Immunization Section

Stock No. 11-16939
Rev. 05/2026