

Texas Immunization Registry

The Texas Immunization Registry

ImmTrac2 Site Registration Guide

Texas Department of State Health Services Immunization Unit



Texas Immunization Registry

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Texas Department of State Health Services Immunization Unit



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1. When is a Site Registration Needed?

A new ImmTrac2 **registration** must be completed if:

- An organization is registering for the first time.
- An organization was bought out AND the physical address changes as well. If the name and staff are the only thing changing, then they can complete a site renewal to update the facility name and add new users.

Site agreement registrations can take up to 10 to 14 business days to approve. The Texas Immunization Registry staff will review the forms and process them in the order they are received.

2. How to Begin the Registration Process

Anyone can register their original site agreement. Go to <u>https://immtrac.dshs.texas.gov</u> and click the REGISTRATION button on the menu bar near the top of the screen. See *Figure 1: Start Registration*.



Figure 1: Start Registration

Click the Register link that pops up. See *Figure 2: Link to Register*.



Enter your email address and your Texas Vaccines for Children (TVFC) PIN number. If you do not have a TVFC PIN number, please select the "Continue" button.

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The Site Agreement (see Figure 3: Site Agreement Email and TVFC PIN) states:

ImmTrac2 offers *immunization* providers and other authorized organizations secure online access via the Internet. There are also secure electronic data import options available to organizations with client encounter or electronic health record (EHR) systems. If you have questions about the ImmTrac2 registration process and/or the TVFC program requirements, please contact ImmTrac2 Customer Support at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.

If you are ready to proceed with registration, please enter your email address below. If your organization has been assigned a TVFC PIN, please enter in the space below, then select the Continue button.

Site Agreement			
ImmTrac2 offers immunization providers and other authorized organizations secure online access via the Internet. There are also secure electronic data import options available to organizations with client encounter or electronic health record (EHR) systems. If you have questions about the ImmTrac2 registration process and/or the TVFC program requirements, please contact ImmTrac2 Customer Support at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.			
If you are ready to proceed with registra PIN, please enter in the space below, the	ation, please enter your email address below. hen select the Continue button.	If your organization has t	been assigned a TVFC
* Email]	
TVFC PIN (if applicable)]	
Confirm TVFC PIN]	
	I	Continue	Cancel

Figure 3: Site Agreement Email and TVFC PIN

The email address entered must be unique. If not, an error message will pop up. See *Figure 4: Email Error Message*.



Figure 4: Email Error Message

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3. Starting the Registration

Best practice is to expand one section at a time to ensure all required fields are completed (these are the fields with an asterisk and in blue). Navigate to each section by clicking the down arrow 💌 to expand and the up arrow 🔺 to minimize. You can also expand all sections or minimize all sections.

Applications left inactive (not updated) for more than 14 calendar days are deleted. See *Figure 5: Site Agreement*.

Site Agreement	
Welcome to the ImmTrac2 Online Registration! Please complete each section below. Once all required fields have been completed, please select the proper submit button at the bottom of the form. To save your progress and ratum at a later time, select Save Progress and Exit". Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved. If you have questions about the ImmTrac2 registration process, or you are uncertain if your organization is already registered, please contact ImmTrac2 Customer Support at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.	Save Progress and Exit Print Exit without Saving Start Over
Warning: Time out will occur after 15 minutes of no activity. Please ensure you save your p avoid loss of data.	rogress frequently to
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

Figure 5: Site Agreement

After each Registration section, click the Save Progress and Continue button at the bottom right of each section. Your Registration will be timed out after 15 minutes of no activity. See *Figure 6: Save Progress and Continue Button*.

Save Progress and Continue

Figure 6: Save Progress and Continue Button

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4. Registration Sections

4A. Registration Questions

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

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

Figure 7: Registration Questions

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

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

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

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

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

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



4B. Organization Demographics

ImmTrac2 does not accept exact duplicate physical addresses. Please include one of the following if needed to ensure that your organizations address is unique in Physical Address Line 2 (see *Figure 8: Organization Demographics*):

- Suite,
- Building,
- Section numbers,
- Doctor's name,
- For schools:
 - o Elementary,
 - Middle,
 - o High, or
 - o ISD

Also be sure to include the Delivery Address at the bottom of this section.

Organization De	emographics 🔺	
	[back to	<u>top] (</u>
** Organization	Name and Email Must be entered to before saving. **	7
* Organiza	tion Name Pauls Seventh Pediatric Practice	
* Organiza	ation Email emailaddress@gmail.com	
* Organization Physical Address	1100 W. 49th Street	
Physical Address Line 2	Suite 303.5	
* City	Austin * State TX ∨ * Zip Code 78756 +4	
* County	Travis 🗸	
* Phone Number	512 - 123 - 4567 Ext	
Fax Number	Ext	
	Check box if Mailing Address is same as the Physical Address	
* Organization Mailing Address	1100 W. 49th Street	
Mailing Address Line 2	Suite 303.5	
* City	Austin	
	Check box if Delivery Address is same as the Physical Address	
* Organization Delivery Address	1100 W. 49th Street	
Delivery Address Line 2	Suite 303.5	
* City	Austin * State TX ∨ * Zip Code 78756 +4	
Organization Medicaid ID		
	Save Progress and Continu	ue

Figure 8: Organization Demographics



4C. Parent/Headquarters Info

If you do not have a parent organization (see *Figure 9 Parent/Headquarters Info*) because your organization is the parent or is a stand-alone site being registered, the **No** option must be selected.

Parent/Headquarters Info 🔺	
* Is this Organization a sub-office, mobile unit or satellite office? O Yes No	[back to top]
	Save Progress and Continue

Figure 9: Parent/Headquarters Info

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



Figure 10: Parent/Sub-Sites

- 1. The parent organization must already be registered with ImmTrac2.
- Enter the parent site's TXIIS ID and click **Search** (see *Figure 11: Parent TXIIS ID*). If you do not know the parent TXIIS ID, please contact ImmTrac Customer Support by emailing <u>ImmTrac2@dshs.texas.gov</u> or call 1-800-348-9158.

Parent/Headquarters Into A		
	bi	ack to to
* Is this Organization a sub-office, mobile unit or satellite office?)	Yes O No Please Specify V	
this Organization is owned and/or managed by a Primary Organization (e.g. this organization must already be registered with ImmTrac2. Please enter the Parent O lumber, then select "Search". If you do not know the Parent Organization's TXIIS support at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.	Organization is a sub-office, satellite office or mobile unit), the Parent Organization's TXIIS ID, formerty referred to as PFS# or ImmTrac Pro ID or are unsure if it is registered, please contact ImmTrac2 Custome	l vider r
* Parent Organization's TXIIS ID	Search	
* Parent Organization's TXIIS ID	Search	
Parent Organization's TXIIS ID Parent Organization's Name: Parent Organization's Physical Address	Search	
Parent Organization's TXIIS ID Parent Organization's Name: Parent Organization's Physical Address Parent Organization's Phone	Search	
 Parent Organization's TXIIS ID Parent Organization's Name: Parent Organization's Physical Address Parent Organization's Phone Parent Organization's Pax 	Search	

Figure 11: Parent TXIIS Search

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- 3. The "Please Specify" box is now visible. Click the drop-down arrow and select: Sub-office, Mobile Unit, or Satellite Office. See *Figure 12: Parent/Headquarters Info Sub-Office.*
 - a) Providers with multiple locations sharing one EHR (electronic health records) system/vendor must indicate Parent/Sub-site relationship for each location.
 - b) Definitions of organization types:
 - i. A **sub-office** is a public organizational site that reports up to the Main Office in their company.
 - ii. A **mobile unit** is the same as a sub-office, but this is a unit that moves physically from site to site by some means of transportation.
 - iii. A **satellite office** is a government site that reports up to another government office.

Parent/Headquarters Info 🔺	
	[back to top]
* Is this Organization a sub-office, mobile unit or satellite office? • Yes • No	Please Specify
If this Organization is owned and/or managed by a Primary Organization (e.g. this O unit), the Parent Organization must already be registered with ImmTrac2. Please en referred to as PFS# or ImmTrac Provider Number, then select "Search". If you do no unsure if it is registered, please contact ImmTrac2 Customer Support at (800) 348-9	rganization is a sub-office, satellite office or mobile ter the Parent Organization's TXIIS ID, formerly of know the Parent Organization's TXIIS ID or are 158 or at ImmTrac2@dshs.texas.gov.
* Parent Organization's TXIIS ID 1100260002 Search	Please Specify Sub-office
Parent Organization's Name: DSHS HSR 7 HQ - TEMPLE (RE)	Mobile Unit
Parent Organization's Physical 2408 S 37TH ST Address	Saleline Onice
TEMPLE TX, 76504-7168	
Parent Organization's Phone 254-778-6744	
Parent Organization's Fax	
	Save Progress and Continue

Figure 12: Parent/Headquarters Info - Sub-Office



4D. Organization Point of Contact (POC)

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

The title for the Organization Point of Contact is now required and is highlighted below.

When completing the Organization Point of Contact section, *do not* check the box if this contact already has an ImmTrac2 user account. See *Figure 13: POC – Add User Account.*

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

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

Figure 13: POC - Add User Account

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4E. Primary Registry Contact

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

The title of the Primary Registry Contact is now a required field and is highlighted below.

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

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

Figure 14: Primary Registry Contact - Add User Account



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4F. User Account(s) Info

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

Each individual accessing ImmTrac2 is assigned a username. Usernames must not be shared. For security purposes, each user is required to provide an email address. All email addresses will be verified by the system for uniqueness.

Please fully complete each section one at a time before adding another. If additional users need to be added, select "Add Additional Users".

User Accounts Info 🔺		
		[back to top]
Each individual accessing I required to provide an e-ma	ImmTrac2 is assigned a username. Usernames must not be shared. For security ail address. All e-mail addresses will be verified by the system for uniqueness.	/ purposes, each user is
* First Name	Paul Middle * Last Name St	tone
Phone Number	512 -123 -4567 Ext	
* Email	Emailaddress@gmail.com ×	
Current ImmTrac2 Username		
+ Add Additional Users	sa sa	ave Progress and Continue

Figure 15: User Accounts Info



If the "Add Additional Users" hyperlink was incorrectly selected, the entry can be removed by clicking the "Delete Entry" button. See *Figure 16: Delete Entry*.

User Accounts Info 🔺	
	[back to top]
Each individual accessing I required to provide an e-ma	mmTrac2 is assigned a username. Usernames must not be shared. For security purposes, each user is ail address. All e-mail addresses will be verified by the system for uniqueness.
* First Name	Paul Middle * Last Name Stone
Phone Number	512 - 123 - 4567 Ext
* Email	Emailaddress@gmail.com
Current ImmTrac2 Username	
* First Name	George Middle * Last Name Stone
Phone Number	Ext Ext
* Email	AnotherAddress@gmail.com ×
Current ImmTrac2 Username	Delete Entry
+ Add Additional Users	Save Progress and Continue

Figure 16: Delete Entry

NOTE: Users can only report immunizations for organizations that they have access to.

Users must be associated to each organization where the immunization was administered. If a user is associated with a parent organization, they *do not* need to be associated with the sub-site, *unless* they are adding immunizations for the sub-site.



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4G. Responsible Medical Provider

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

Note that a phone number is now required for the Responsible Medical Provider.

Organizations must have a designated Chief Medical officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a Texas licensed medical professional with prescribing authority for organizations that administer immunizations. See *Figure 17: Responsible Medical Provider*.

Responsible Medical Pr	rovider 🔺
	[back to top]
Organizations must have a section. They must be a Tex immunizations.	designated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" cas licensed medical provider and/or a licensed prescribing authority for Organizations administering
* First Name	Paul Middle * Last Name Stone
* Job Title [Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine
* License Number	N1234 * NPI Number
Provider Medicaid ID	
Employee ID Number	
* Email 〔	PaulStone@yahoooo.com
* Phone Number	512 - 123 - 4567 Ext
	Save Progress and Continue

Figure 17: Responsible Medical Provider

See Figure 18: License Types for the drop-down menu of License Type.

Figure 18: License Types

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The formats for license numbers are:

- MD is a letter and four numbers. Example: N5678
- PA is "PA" followed by four or five numbers. Example: PA12345
- The NPI Number consists of 10 numbers (all numeric). Example: 1234567893
- Advanced Practice Nurses do not put the "AP" in front of their license number. Up to seven (7) numeric characters are accepted here. Example: 1234567
- There are no RN or LVN license types available here to select. The RN and LVN license types will NEVER be collected on this screen.



4H. Practicing Providers with Prescribing Authority

This section is for Texas Licensed Medical Professional(s) that will be prescribing immunizations. These providers must have a Texas license number and an NPI number. See *Figure 19: Practicing Providers with Prescribing Authority.* They will be the ones that are attached to the immunization information in the "**Administered by**" field in ImmTrac2.

NOTE: A *free* NPI Number (National Plan and Provider Enumeration System (NPPES)) can be applied for at <u>https://nppes.cms.hhs.gov/#/.</u>

If the "Add Ad	lditional Entry"	hyperlink wa	as mistakenly	selected,	the entry	can be
removed by cl	licking the "Del	ete" button.	-		-	

Practicing Providers w	vith Prescribing Authority 🔺		
			[back to top
List all Texas licensed hea	Ith care providers (MD, DO, NP, PA, APRN, PI	narmacist) at vour f	facility who have prescribing authority.
			······, ····· · ···· · ···············
t First Maria			
* First Name			- Last Name Stone
* Job Title	Chief Medical Officer		
* Specialty	Pediatrics		
* License Type	MD Doctor of Medicine		
* License Number	N1234	* NPI Number	1234567899
Provider Medicaid ID]	
Employee ID Number]	
* Email	StatePaulSpock+6@gmail.com]	
* First Name	Middle		* Last Name
* Job Title]	
* Specialty]	
* License Type	×		
* License Number		* NPI Number	
Provider Medicaid ID]	
Employee ID Number]	
* Email]	Delete
+ Add Additional Entry	¥ 		Save Progress and Continue

Figure 19: Practicing Providers with Prescribing Authority

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See *Figure 20: License Types* for the drop-down menu of License Type.

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

Figure 20: License Types

The formats for license numbers are:

- MD is a letter and four numbers. Example: N5678
- PA is "PA" followed by four or five numbers. Example: PA12345
- The NPI Number consists of 10 numbers (all numeric). Example: 1234567893
- Advanced Practice Nurses do not put the "AP" in front of their license number. Up to seven (7) digits are accepted here. Example: 1234567
- There are no RN or LVN license types available here to select. The RN and LVN license types will NEVER be collected on this screen.



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4I. Agree and Sign

See *Figure 21: Agree and Sign.* This is a long document so only the top and bottom portions are displayed below. You must **read and agree** with the Organization Agreement and Confidentiality Statement.

elcome to the ImmTrac2 Online Regis	stration	Save Progress and Ex
ease complete each section below. O	nce all required fields have been completed, please select the e form. To save your progress and return at a later time, select	Print
ave Progress and Exit". Applications eleted and a new application must b	s that are left inactive for more than 14 calendar days will be be started and saved.	Exit without Saving
reset the Registration application	and clear all fields, click the "Start Over" button.	Start Over
you have questions about the ImmTra ganization is already registered, pleas imTrac2@dshs texas gov.	ac2 registration process, or you are uncertain if your se contact ImmTrac2 Customer Support at (800) 348-9158 or at	
and and	and a second	anti a martina a su a
F.		
I agree to protect the ImmTr	rac2 usemame and password from unauthorized users.	
G. I verify that I am an authoriz	ed ImmTrac2 Registry user and will only use the ImmTrac2 username as	signed by DSHS.
H. I have read and agree to the	e terms on this ImmTrac2 Organization Agreement and Confidentiality Sta	atement.
Authorized Signer		
* Select one		
O I am not the Authorized Signer		
Note: Selecting this o	ption confirms that you are not an Authorized Signer and unable to or Signature button below will send a request for signature by the A	sign for this Organization withorized Signer identifie
Clicking the Submit fo in this form.		
Clicking the Submit fo in this form.	The Responsible Medical Prov	vider OR
Clicking the Submit fo In this form.	The Responsible Medical Pro- the person authorized to sign	vider OR 1 the form
Clicking the Submit fo in this form.	The Responsible Medical Pro- the person authorized to sign	vider OR 1 the form
Clicking the Submit form.	The Responsible Medical Prov the person authorized to sign	vider OR h the form
Clicking the Submit form.	The Responsible Medical Prov the person authorized to sign	vider OR a the form

Figure 21: Agree and Sign

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

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

The Responsible Medical Provider accordion tab lists information about the Responsible Medical Provider. See previous *Figure 17: Responsible Medical Provider.*

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

A Site Agreement Renewal is *required* every two (2) years.

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



4J. Agree and Sign – I Am Not the Authorized Signer

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

If the person filling this form out is **not** the Authorized Signer, (see *Figure 22: I Am Not the Authorized Signer*) then:

- Select the option "I am not the Authorized Signer",
- Click the "Submit for Signature" box to have the form emailed to the Authorized Signer's email address to sign the form.

Authorized Signer				
* Select one				
I am not the Authorized Signer				
Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form.				
\bigcirc I am the Authorized Signer				
Responsible Medical Provide	r or Authorized Signer: Paul Stor	le		
	↓ I			
Save Progress and Continue	Submit for Signature	Submit for Approval		

Figure 22: I Am Not the Authorized Signer



Who is the Authorized Signer? The default Authorized Signer is the Responsible Medical Provider. See *Figure 23: Responsible Medical Provider*.

Responsible Medical Provi	der 🔺
	[back to top]
Organizations must have a des Texas licensed medical provide	ignated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" section. They must be a r and/or a licensed prescribing authority for Organizations administering immunizations.
* First Name	Paul Middle * Last Name Stone
* Job Title	Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine
* License Number	N1234 * NPI Number 1234567899
Provider Medicaid ID	
Employee ID Number	
* Email	PaulStone@yahooooo.com ×
	Save Progress and Continue

Figure 23: Responsible Medical Provider

The Authorized Signer will receive an email with a Random Access Code, a link to "review and sign", and a link to "decline signing" (see *Figure 24: Authorized Signer*).

ImmTrac2 Registratio	on – Your action is needed Inbox	×	ē	Ø
ImmTrac2@dshs.texas.gov to	When copying the access code, don't include the period.	10:07 AM	*	:
The Organization Point of Contact (POC) for your Organization, (Paul Stone) has identified you as an Authorized Signer who qualifies to sign the ImmTrac2 Registration/Renewal for (Pauls Seventh Pediatric Practice). We have temporarily saved the data entered during the ImmTrac2 Registration process. Your action is required within 30 calendar days to proceed with this Registration. Please click a link below to access the incomplete Registration/Renewal and continue. Please provide your email address and this access code: AVRXT9E8 Should you have any issues, please contact the ImmTrac2 Customer Support Team at (800) 348-9158 or at ImmTrac2@dshs.texas.gov				
The URL to review and sign the incomplete Registration/Renewal is: <u>https://training-immtrac.dshs.texas.gov/TXTRN/enrollProviderEntry.do?</u> action=LOADBYRACSIGNER.				<u>.do?</u>
The URL to decline signing the inco action=DECLINE.	omplete Registration/Renewal is: <u>https://training-imm</u>	ntrac.dshs.texas.gov/TXTRN/enrollProv	iderEntry.	<u>do?</u>

Figure 24: Authorized Signer

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If the link to **review and sign** is clicked, a webpage asks for the random access code and the email of the official signer (See *Figure 25: Random Access Code*).

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



Figure 25: Random Access Code

The Site Agreement is displayed with the message, "Successfully Submitted Organization Enrollment for signature". See *Figure 26: Successfully Submitted for Signature*.

Successfully Submitted Organization Enrollment for signature.	
Site Agreement	
Welcome to the ImmTrac2 Online Registration! Please complete each section below. Once all required fields have been completed, please select the proper submit button at the bottom of the form. To save your progress and return at a later time, select "Save Progress and Exit". Applications that are left inactive for more than 14 calendar days will be deleted and a new application must be started and saved. To reset the Registration application and clear all fields, click the "Start Over" button. If you have questions about the ImmTrac2 registration process, or you are uncertain if your organization is already registered, please contact ImmTrac2 Customer Support at (800) 348-9158 or at ImmTrac2@dshs.texas.gov.	Save Progress and Exit Print Exit without Saving Start Over

Figure 26: Successfully Submitted for Signature

If the link to *decline* signing the Site Agreement is chosen, then the option to decline is displayed. Please be careful when copying and pasting the Random Access code *do not* include a period at the end of the code. See *Figure 27: Decline to Sign*.



Site Agreement	
* Random Access Code * Email	
	Decline

Figure 27: Decline to Sign

If the "Decline" button is chosen, an email is sent to the person who submitted the registration for signature, stating that the Authorized Signer declined the request to submit the registration, and to select someone else as the Authorized Signer and resubmit the registration for signature. See *Figure 28: Authorized Signer Declined*.

ImmTrac2@dshs.texas.gov
ImmTrac2 Authorized Signer - Action Required

The contact you have originally identified as an Authorized Signer has declined your request to submit your organization's Registration for approval. Please access your Registration and modify the authorized signer and resubmit for signature.

Please provide your email address and this access code: 84CWXUQD.

The URL to access the incomplete Registration/Renewal is: <u>https://training-</u> immtrac.dshs.texas.gov/TXTRN/enrollProviderEntry.do?action=LOADFROMRAC

Figure 28: Authorized Signer Declined



4K. Agree and Sign – I Am the Authorized Signer

This section is to be completed by the Responsible Medical Provider or a person Authorized to Sign the agreement. The Responsible Medical Provider is responsible to ensure all users comply with the agreement for the Protected Health Information (PHI) and Personally Identifiable Information (PII) data contained in ImmTrac2. See *Figure 29: Signed by the Responsible Medical Provider.*

 Select one I am not the Authorized Signer Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form. I am the Authorized Signer I am the Authorized Signer I am the Authorized Signer I and Confidentiality Statement Acceptance I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section Responsible Medical Provider or Authorized Signer: Paul Spock Signature Paul Spock Tritle Chief Medical Officer Email Doctorgood@gmail.com Date/Time Submit for Signature Submit for Signature 	Authorized Signer	
 I am not the Authorized Signer Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form. I am the Authorized Signer I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section I have read and agree to comply with the Organization Agreement and Conf	* Select one	
Note: Selecting this option confirms that you are not an Authorized Signer and unable to sign for this Organization. Clicking the Submit for Signature button below will send a request for signature by the Authorized Signer identified in this form. I am the Authorized Signer Organization Agreement and Confidentiality Statement Acceptance I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section Responsible Medical Provider or Authorized Signer: Paul Spock Signature Paul Spock To sign, please type your name. Title Chief Medical Officer Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature Submit for Signature Submit for Signature	O I am not the Authorized Signer	
 I am the Authorized Signer Organization Agreement and Confidentiality Statement Acceptance I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section Responsible Medical Provider or Authorized Signer: Paul Spock Signature Paul Spock To sign, please type your name. * Title Chief Medical Officer Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature 	Note: Selecting this option confirms that you are not an Authorized Clicking the Submit for Signature button below will send a request f in this form.	Signer and unable to sign for this Organization. or signature by the Authorized Signer identified
Organization Agreement and Confidentiality Statement Acceptance	I am the Authorized Signer	
I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section Responsible Medical Provider or Authorized Signer: Paul Spock Signed by the Responsible Medical Provider Signed by the Responsible Medical Provider Submit for Signature Responsible Medical Responsible Medical Responsible Medical Submit for Signature Submit for Sig	Organization Agreement and Confidentiality Statement Acceptance	
Responsible Medical Provider or Authorized Signer: Paul Spock Signed by the Responsible Medical Descention * Signet ure To sign, please type your name. Provider * Title Chief Medical Officer Provider * Email Doctorgood@gmail.com Poste/Time Save Progress and Continue Submit for Signature Submit for Approval	I have read and agree to comply with the Organization Agreement and Cont	fidentiality Statement as presented in this section
Signature Paul Spock To sign, please type your name. * Title Chief Medical Officer * Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature Submit for Approval	Responsible Medical Provider or Authorized Signer: Paul Spoc	* Sianed by the
To sign, please type your name. * Title Chief Medical Officer * Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature Submit for Approval	* Signature Paul Spock	Responsible Medical
* Title Chief Medical Officer * Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature Submit for Approval	To sign, please type your name.	Provider
* Email Doctorgood@gmail.com Date/Time Save Progress and Continue Submit for Signature Submit for Approval	* Title Chief Medical Officer	
Date/Time Save Progress and Continue Submit for Signature Submit for Approval	* Email Doctorgood@gmail.com	
Save Progress and Continue Submit for Signature Submit for Approval	Date/Time	1
	Save Progress and Continue Submit for Signature	Submit for Approval

Figure 29: Signed by the Responsible Medical Provider

- The checkbox "I have read and agree to comply with the Organization Agreement and Confidentiality Statement as presented in this section" must be checked.
- The Signature line must be entered, along with the title and email address of the Authorized Signer. Then click "Submit for Approval".



Texas Immunization Registry

Although the Responsible Medical Provider is listed on the Authorized Signer page, an Authorized Signer *who is not the Responsible Medical Provider* can also sign on behalf of them and submit the form for approval. See *Figure 30: Authorized Signer Who Is Not the Responsible Medical Provider*.

Authorized Signer	
* Select one	
O I am not the Authorized Signer	
Note: Selecting this option confirms that you are not an Authorized Clicking the Submit for Signature button below will send a request for in this form.	Signer and unable to sign for this Organization. or signature by the Authorized Signer identified
I am the Authorized Signer	
Organization Agreement and Confidentiality Statement Acceptance	
have read and agree to comply with the Organization Agreement and Cont Responsible Medical Provider or Authorized Signer: Paul Stone	The Authorized Signer is NOT the Responsible Medical
* Signature Bill Smith	Provider, but IS
To sign, please type your name.	the application.
* Title CEO	
* Email Bill.Smith@yahooooo.com	
Date/Time	↓
Save Progress and Continue Submit for Signature	Submit for Approval

Figure 30: Authorized Signer Who Is Not the Responsible Medical Provider

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

NOTE: Please allow up to *10 to 14 BUSINESS days* to process. For additional assistance, please contact the ImmTrac2 Customer Support Team.



Texas Immunization Registry

5. Status of the Registration

The types of Registration Application status are as follows:

5A. Incomplete

There is some missing or partial information that needs to be added or updated per the email you were sent. The information must be complete before it can be successfully submitted and processed in the system. See *Figure 31: Incomplete*.

Manage Registrations				
Manage Select thi incomple	Renewals is link to renew an existing ImmTrac2 (te renewal.	Organization or to continue working on an		
Manage Select thi registratio	Registrations is link to register a new organization or on.	r to continue working on an incomplete		
Access Select thi	previously approved Registration or is link to access the previously approve	r Renewal ed Registration or Renewal		
Registra Select thi immuniza	tion of Intent is link to access the Registration of Inte ation reporting with ImmTrac2.	ent to pursue electronic data exchange and		
Registrations See important note below				
When submitting a registra your progress and return a continue working on your in	tion for a new organization, please co t a later time to complete the registrati ncomplete registrations, click the "Inco	ave on, select "Save P ogress and Exit". To omplete" link bel. w.		
Applications that are left must be started and save	inactive for more than 14 calander and the second	days will be deleted and a new application		
Click the "Start New Reg	istration" button to begin a new reg	istration application. Start New Registration		
Organization Name	Organization Address	Application Status Expires		
Pauls Sixth Pediatric Practice Pauls Fifth Pediatric Practice	1100 W. 49th Street, Austin TX 78756 1100 W. 49th Street, Austin TX 78756	Incomplete 14 days Submitted for Approval		

Figure 31: Incomplete



Texas Immunization Registry

5B. Submitted for Signature

The person filling out the registration is not the Authorized Signer. See *Figure 32: Submitted for Signature*.

enewals link to renew an existing ImmTrac2 Orga e renewal.	anization or to continue working on an
legistrations link to register a new organization or to o n.	continue working on an incomplete
reviously approved Registration or Re link to access the previously approved R	newal Registration or Renewal
on of Intent link to access the Registration of Intent t ion reporting with ImmTrac2.	to pursue electronic data exchange and
ion for a new organization, please comple a later time to complete the registration, complete registrations, click the "Incompl	ete each section of the application. To save select "Save Progress and Exit". To ete" link below.
nactive for more than 14 calander day: <u>1.</u>	s will be deleted and a new application
stration" button to begin a new registra	ation application. Start New Registration
Organization Address	Application Status Expires
1100 W. 49th Street, Austin TX 78756	Submitted for Signature
	enewals link to renew an existing ImmTrac2 Orga e renewal. egistrations link to register a new organization or to on reviously approved Registration or Re link to access the previously approved F on of Intent link to access the Registration of Intent to ion reporting with ImmTrac2. on for a new organization, please complet a later time to complete the registration, complete registrations, click the "Incomplete a later time to complete the registration, complete registrations, click the "Incomplete the registrations, click the "Incomplete the registration to begin a new registration complete registration to begin a new registration that is a new registration of the the registration of the the test of test of the test of the test of the test of the test of test of test of test of the test of test

Figure 32: Submitted for Signature



Texas Immunization Registry

The Authorized Signer indicated in the registration will receive an email with a Random Access Code who will then sign the registration and submit it for approval. The default for the authorized signer will be the name used in the Responsible Medical Provider tab. See *Figure 33: Default Signer is the Responsible Medical Provider*.

Responsible Medical F	Provider 🔺
	[back to top]
Organizations must have a section. They must be a Te immunizations.	a designated Chief Medical Officer or Senior Practicing Provider for the "Responsible Medical Provider" exas licensed medical provider and/or a licensed prescribing authority for Organizations administering
* First Name	Ichabod Middle * Last Name Crane
* Job Title	Chief Medical Officer
* Specialty	Pediatrics
* License Type	MD Doctor of Medicine V
* License Number	N1234 * NPI Number 1234567890
Provider Medicaid ID	
Employee ID Number	
* Email	Ichabod.crane@dshs.texas.gov
	Save Progress and Continue

Figure 33: Default Signer is the Responsible Medical Provider



Texas Immunization Registry

5D. Submitted for Approval

The registration has been successfully signed and sent to DSHS for processing. See *Figure 34: Submitted for Approval.*

Manage Registrations			
Manage Select th incomple	Renewals is link to renew an existing ImmTrac2 Organiz te renewal.	ration or to continue working on an	
<mark>Manage</mark> Select th registrati	Registrations is link to register a new organization or to con on.	tinue working on an incomplete	
Access Select th	previously approved Registration or Renew is link to access the previously approved Reg	wal istration or Renewal	
Registra Select th immuniza	tion of Intent is link to access the Registration of Intent to p ation reporting with ImmTrac2.	ursue electronic data exchange and	
Registrations			
When submitting a registration for a new organization, please complete each section of the application. To save your progress and return at a later time to complete the registration, select "Save Progress and Exit". To continue working on your incomplete registrations, click the "Incomplete" link below.			
Applications that are left inactive for more than 14 calander days will be deleted and a new application must be started and saved.			
Click the "Start New Reg	istration" button to begin a new registratio	on application. Start New Registration	
Organization Name	Organization Address	Application Status Expires	
Pauls Fifth Pediatric Practice	1100 W. 49th Street, Austin TX 78756	Submitted for Approval	
Pauls Sixth Pediatric Practice	1100 W. 49th Street, Austin TX 78756	Submitted for Signature	
Chips Ahoy Pediatric Clinic	1100 Buddy Holly Avenue, Lubbock TX 79424	Submitted for Approval	
Pauls Fourth Pediatric Practice	1100 W. 53rd, Austin TX 78756	Approved	
Pauls Third Pediatric Practice	1100 W. 53RD STREET, AUSTIN TX 78756	Approved	

Figure 34: Submitted for Approval

NOTE: Please allow up to *10 to 14 BUSINESS days* to process. For additional assistance, please contact the ImmTrac2 Customer Support Team.



Texas Immunization Registry

After your registration has been successfully submitted to DSHS, the Organization Point of Contact will receive an email confirming receipt by DSHS. See *Figure 35: Submitted for Approval*.

ImmTrac2@dshs.texas.gov	May 6, 2020, 12:59 PM	Δ
-------------------------	-----------------------	----------

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

Figure 35: Submitted for Approval



Texas Immunization Registry

5E. Returned

The registration has been reviewed by DSHS and returned to the Organization email to be corrected and resubmitted. The reviewer at DSHS will notate what needs to be changed. See *Figure 36: Returned*.

Manage Registrations		
Manage Select thi incomple	Renewals is link to renew an existing ImmTrac2 Organ te renewal.	ization or to continue working on an
Manage Select thi registratio	Registrations is link to register a new organization or to co on.	ontinue working on an incomplete
Access p Select thi	previously approved Registration or Ren is link to access the previously approved Re	ewal gistration or Renewal
Registra Select thi immuniza	tion of Intent is link to access the Registration of Intent to ation reporting with ImmTrac2.	pursue electronic data exchange and
Registrations		
When submitting a registra your progress and return a continue working on your ir	tion for a new organization, please complete t a later time to complete the registration, se noomplete registrations, click the "Incomplet	e each section of the application. To save elect "Save Progress and Exit". To e" link below.
Applications that are left must be started and save	inactive for more than 14 calander days ed.	will be deleted and a new application
Click the "Start New Regi	istration" button to begin a new registrat	ion application. Start New Registration
Organization Name	Organization Address	Application Status Expires
Pauls Fifth Pediatric Practice	1100 W. 49th Street, Austin TX 78756	Returned

Figure 36: Returned



Texas Immunization Registry

See the example below. *Figure 37: Example of Returned Registration Email* displays an email informing an organization that their registration was returned with specific instructions to correct before resubmitting.

From: ImmTrac2@dshs.texas.gov Date: 18 August 2019 Subject: ImmTrac2 Enrollment Action Required - Changes Made to Enrollment Form To: john@johnspharmacy.com You have been identified as the Authorized Signer of record for the following organization:

Authorized Signer: John Smith Organization: John's Pharmacy Type: REGISTRATION FORM ID: DSHS175618 Date Submitted: 08/18/2019

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

Summary of Changes

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

The changes listed above or described in the DSHS Specific Instructions section below, require your review and the enrollment form previously submitted must be resubmitted for approval. You must re-access your Registration form to complete this action. To access the Registration form, please click the link below and continue. Enter the provided access code S4J13ABC, your email address and then click the Submit button. Once you have accessed the Registration form, review changes made and then resubmit your form for approval.

The URL to access the Registration form is: https://immtrac.dshs.texas.gov/TXPRD/enrollProviderEntry.do?action=LOADBYRACSIGNER

DSHS Specific Instructions

Please provide a valid medical license for John Smith

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

Figure 37: Example of Returned Registration Email



Texas Immunization Registry

5F. Approved

When your site registration has been approved by DSHS, the Organization Point of Contact will be emailed notification of approval. See *Figure 38: Example of Approved Site Registration Email*.

Welcome to ImmTrac2 Inbox ×

lmmTrac2@dshs.texas.gov

Your enrollment application for ImmTrac2 has been approved. You will soon receive a separate e-mail with your login information.

If you have any questions, please contact the ImmTrac2 Customer Support Team at 1-800-348-9158 or at ImmTrac2@dshs.texas.gov. Figure 38: Example of Approved Site Registration Email



6. Accessing Previously Approved Registrations

If you want to see your previously approved Site Registration, click the "registration/renewal" tab at the top of the screen and then select "Access previously approved Registration or Renewal". See *Figure 39: Access Previously Approved Registration or Renewal*.

home re	gistration/renewal	manage access/account	forms	user training	logout	contact us	¥.
orgar	nization	user PAUL SPOCI	K • role	Full Access F	roviders	no/DE	
Manage Regis	1 tration/Renewal						
	Manage Renew Select this link to incomplete rene	a ls o renew an existing ImmTra wal.	ac2 Orga	nization or to co	ontinue wo	orking on an	
	Manage Regist Select this link to registration.	rations o register a new organization	on or to c	ontinue working) on an inc	complete	
	Access previou Select this link to	Isly approved Registration access the previously approved the previously approved the previously approved to the previously appro	on or Rer proved R	newal egistration or Re	enewal		
	Registration of Select this link to immunization re	Intent access the Registration of porting with ImmTrac2.	of Intent to	o pursue electro	nic data e	exchange and	

Figure 39: Access Previously Approved Registration or Renewal

You can print out the Site Agreement once it is opened. See *Figure 40: Site Agreement*.

TEXAS Texas Department of State Health and Human Health Services Texas Immunization Registry
home registration/renewal manage access/account forms user training logout contact us
organization Pauls Fifth Pediatric Practice • user PAUL SPOCK • role Full Access Providers no/DE
Site Agreement
Print Exit
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 a
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 💌

Figure 40: Site Agreement



Texas Immunization Registry

7. Troubleshooting Site Registrations

7A. Check for Errors After Submitting Registration

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

For some fields with missing or invalid information, an error message will appear at the top of the registration (see *Figure 41: Validation Error Message at Top of Registration Form*). CAREFULLY go back through the application, open each section one at a time, and look for any required fields marked with asterisks that are blank or any sections that have red error messages (see *Figure 42: Validation Error Message at Top of Section*).

Validation Errors

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

User Accounts Info 🔺					
					[back to top]
		7			
Validation Error	rs				
 Currently an have one se be duplicate 	n email address is entere ection filled out with their ed. Please review the ent	d more than oi information an ries on this tab	nce. Eac id email a o for dupl	h user sho addresses licates.	uld only cannot
Each individual accessing I required to provide an e-ma	ImmTrac2 is assigned a username. Usern ail address. All e-mail addresses will be v	names must not be sha erified by the system fo	red. For secur r uniqueness.	ity purposes, eacl	h user is
* First Name	Paul Mid	dle *	Last Name	Stone	
Phone Number		Ext			
* Email	Paul.Stone@yahoooooo.com				
Current ImmTrac2 Username					
* First Name	Paul Middle	* Last Name S	tone		
Phone Number	Ext [
* Email	Paul.Stone@yahoooooo.com	×			
Current ImmTrac2 Username				De	lete Entry
+ Add Additional Users				Save Progress ar	d Continue

Figure 41: Validation Error Message at Top of Registration Form

Figure 42: Validation Error Message at Top of Section

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7B. Browser Issues

For a browser, use the most recent version of Google Chrome or Internet **Explorer 11** to avoid problems when submitting the site renewal.

Google Chrome

The Google Chrome icon looks like a disk with red, yellow, and green colors. See *Figure 43: Google Chrome Icon*.



Figure 43: Google Chrome Icon

To make sure that you have the most recent version of Google Chrome follow these steps.

1. In the upper right corner of the browser click on the three vertical dots, which is the "More" icon. See *Figure 44:* "*More" Icon*.



2. If you see an option to Update Google Chrome, click it and then click Relaunch. If you did not see an option to Update Google Chrome then you are using the latest version of Chrome.

Internet Explorer 11

The icon for Internet Explorer 11 is a blue "e" with a halo around it. See *Figure 45: Internet Explorer 11 Icon*.



Figure 45: Internet Explorer 11 Icon

How can you tell if you're in version 11 of Internet Explorer? In the upper right corner of the browser click the "gear" or "cog". See *Figure 46: Internet Explorer Gear or Cog*.



Figure 46: Internet Explorer Gear or Cog

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Texas Immunization Registry

Then click "About Internet Explorer" from the dropdown selections. See *Figure 47: About Internet Explorer*.

Print	>
File	>
Zoom (100%)	>
Safety	>
Add site to Apps	
View downloads	Ctrl+J
Manage add-ons	
F12 Developer Tools	
Go to pinned sites	
Compatibility View setting	s
Internet options	+
About Internet Explorer	

Figure 47: About Internet Explorer

A popup message will display which version of Internet Explorer you are using. See *Figure 48 About Internet Explorer - Version*.



Figure 48: About Internet Explorer - Version

If you are having issues logging in to ImmTrac2 you may need to check your computer settings.

To check compatibility settings in Internet Explorer 11:

1. Find and left click the small cog wheel in upper right corner of your browser (see *Figure 49: Internet Explorer Gear or Cog*).



Figure 49: Internet Explorer Gear or Cog

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2. In the drop-down box, click Compatibility View Settings (see *Figure 50: Drop-Down Box*).



Figure 50: Drop-Down Box

- 3. In the Compatibility View Settings box (see *Figure 51: Compatibility View Settings*):
 - A. The large box titled "Websites you've added to Compatibility View" should be blank, and
 - в.
 - C. The two boxes below it should NOT be checked.



Figure 51: Compatibility View Settings

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If you do have websites listed in the large box titled "Websites you've added to Compatibility View", to remove them (see *Figure 52: Removing Websites*):

- 1. Click on the website name in the large box,
- 2. Click the Remove button, and
- 3. When finished removing websites click the Close button

Compatibility View Settings	X
Change Compatibility View Settings	
Add this website:	
A	dd
Websites you've added to Compatibility View:	nove
 Display intranet sites in Compatibility View Use Microsoft compatibility lists Learn more by reading the <u>Internet Explorer privacy statement</u> 	<u>nt</u>
a	ose

Figure 52: Removing Websites



7C. Login Issues

Org Codes have four letters followed by four numbers, such as ABCD1234 and are system generated.

Usernames are two letters, four numbers, and two letters and are system generated. The first two letters are the first two letters of the user's first name, and the last two letters are the first two letters of the user's last name. In-between are four numbers. Example: pa1234sp.

Passwords (see Figure 53: Password Requirements):

Password Requirements:
Must be between 8 and 16 characters
Must have at least one of each of the following:
Upper case letter
Lower case letter
Numeric value
Special character
At least 4 characters must be different from previous
password
No dictionary words
Cannot reuse last 6 passwords

Figure 53: Password Requirements

Do not share your usernames or passwords, per the confidentiality agreement you agree to each time when logging in.

Additional Users: Once a complete renewal is received, processed and approved, the Additional Users will receive an email with their credentials along with a temporary password email to log into ImmTrac2. The user will receive two separate emails. One email will contain the credentials, and the other email will have the user's password.

If new user accounts are not accessed within 30 days of creation, the account will be locked. It can be unlocked by clicking the "Forgot Password" button. See *Figure 54: Forgot Password Button.*

Forgot Password?

Figure 54: Forgot Password Button

If a new user account is <u>never</u> accessed within 120 days of creation, the user credentials are deleted.

Interruption in Access: Requests to change a Point of Contact will require the ImmTrac2 site agreement to be renewed. When the ImmTrac2 site agreement expires, users will be temporarily disabled until the site agreement has been processed and approved.



Texas Immunization Registry

7D. Common Issues for Completing Site Registrations

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

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

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

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

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

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

The email address for each user must be unique. For security purposes, each user account is required to have a unique e-mail address. This will allow each individual user to reset their own password and retrieve their Org Code and Username. See *Figure 55: Forgot Username and Forgot Password Buttons, Figure 56: Reset Password*, and *Figure 57: Forgot Username*.

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



Figure 55: Forgot Username and Forgot Password Buttons

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Texas Immunization Registry

User Information		
To reset your password, please enter your Org Code, Username, and Email address associated with your ImmTrac2 account and click Submit.		
* Org Code:		
* Username:		
* Email address:		
	* Required field	
	Submit	

Figure 56: Reset Password

Forgot Username		
To retrieve your username, please enter your First Name, Last Name, and Email Address associated with your ImmTrac2 account and click Submit.		
* First Name		
* Last Name		
* Email Address		
* Required field		
	Submit	

Figure 57: Forgot Username



Texas Immunization Registry

7E. Save Progress and Exit

To save your progress and return later, select "SAVE PROGRESS AND EXIT". See *Figure 58: Save Progress and Exit Button*.

Save Progress and Exit

Figure 58: Save Progress and Exit Button

Then a message appears asking if you are sure you want to exit (see Figure 59: Exit Message).

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

Figure 59: Exit Message

If "OK" is selected and you want to save and exit, a message appears that progress has been saved and ImmTrac2 has sent you an email with instructions on how to return to the incomplete application. *If you think you did not receive an email, please check the Authorized Signer email box (and your spam, junk mail, and clutter folders) and verify that the email listed is correct.*

NOTE: Applications left inactive for more than 14 calendar days will **be deleted and a new application must be started and saved.** See *Figure 60: Progress Saved Message.*

Progress has been saved. Imm I rac2 will send an email with instruction on how to return to this incomplete application. A inactive for more than 14 calendar days will be deleted and a new application must be started and saved.	pplications that are left
	OK

Figure 60: Progress Saved Message

If you have started the registration process, then saved it and exited, when coming back to open the registration, the "Incomplete" application status may be clicked to open the registration and continue. See *Figure 61: Incomplete Registration*.



Manage Registrations				
Manage Select thi incomplet	Renewals s link to renew an existing ImmTrac2 Orgar te renewal.	nization or to continue v	vorking on an	
Manage Registrations Select this link to register a new organization or to continue working on an incomplete registration.				
Access previously approved Registration or Renewal Select this link to access the previously approved Registration or Renewal				
Registration of Intent Select this link to access the Registration of Intent to pursue electronic data exchange and immunization reporting with ImmTrac2.				
Registrations				
When submitting a registra your progress and return a continue working on your ir	tion for a new organization, please complet t a later time to complete the registration, so noomplete registrations, click the "Incomple	e each section of the a elect "Save Progress ar te" link below.	pplication. To save nd Exit''. To	
Applications that are left inactive for more than 14 calander days will be deleted and a new application				
must be started and save	<u>d.</u>			
Click the "Start New Regi	stration" button to begin a new registrat	tion application. Sta	t New Registration	
Organization Name	Organization Address	Application Statu	Application S Expires	
Pauls Sixth Pediatric Practice	1100 W. 49th Street, Austin TX 78756	Incomplete	14 days	
Pauls Fifth Pediatric Practice	1100 W. 49th Street, Austin TX 78756	Submitted for Approva	al	

Figure 61: Incomplete Registration

An email is sent to the Authorized Signer email address listed in the Site Agreement. The opened email tells you to allow 10 to 14 days for processing. See *Figure 62: Registration Request Received.*



Figure 62: Registration Request Received

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To continue the in-progress registration,

- Go back into ImmTrac2, select the "registration/renewal" tab in the menu bar near the top of the screen,
- Select "Manage Registrations" (see Figure 63: Manage Registrations Screen), and
- Select the registration that is still in progress by clicking on the word "Incomplete" in that row.

Manage Registrations			
Manage Select thi incomple	Renewals is link to renew an existing ImmTrac2 Organization or to continue working on an te renewal.		
Manage Select thi registratio	ge Registrations this link to register a new organization or to continue working on an incomplete ration.		
Access previously approved Registration or Renewal Select this link to access the previously approved Registration or Renewal			
Registration of Intent Select this link to access the Registration of Intent to pursue electronic data exchange and immunization reporting with ImmTrac2.			
Registrations			
When submitting a registration for a new organization, please complete each section of the application. To save your progress and return at a later time to complete the registration, select "Save Progress and Exit". To continue working on your incomplete registrations, click the "Incomplete" link below.			
Applications that are left inactive for more than 14 calander days will be deleted and a new application			
must be started and save	<u>a.</u>		
Click the "Start New Regi	istration" button to begin a new registr	ration application. Start New Registration	
Organization Name	Organization Address	Application Status Expires	
Pauls Sixth Pediatric Practice Pauls Fifth Pediatric Practice	1100 W. 49th Street, Austin TX 78756 1100 W. 49th Street, Austin TX 78756	Incomplete 14 days Submitted for Approval	

Figure 63: Manage Registrations Screen

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

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

Email: <u>ImmTrac2@dshs.texas.gov</u> Phone: 800-348-9158, press option 4

Registration Website: <u>https://www.dshs.texas.gov/</u>

ImmTrac Information Website: <u>https://www.dshs.texas.gov/immunize/immtrac/</u>

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