



TEXAS
Health and Human
Services

Texas Department of State
Health Services

ImmTrac2 Guide to the Ad Hoc List Report

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Getting Started

Purpose

The Ad Hoc List Report offers a user-defined report and lists results for Full-Access Provider users. You can select fields to be displayed in the report, define filters for which clients you wish to include, and choose the sort order for the report, which makes it a good choice for creating a list of active clients.

Recommended Browser

See *Figure 1: Icons for Browsers*. The recommended browser for ImmTrac2 is **Google Chrome**. ImmTrac2 does not support Windows 10 Edge. Users may experience issues using ImmTrac2 with Edge on drop-down menus or radio button selection and other functions.



Figure 1: Google Chrome Browser

Getting Started with the Ad Hoc List Report

- Log into the appropriate organization in ImmTrac2. On the left side of the screen, on the menu panel look for "Reports" and click on "generate report". See Figure 2: Generate Report.

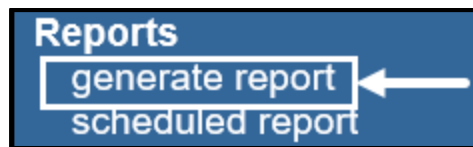


Figure 2: Generate Report

- In the list of reports available, click on "Ad Hoc List Report". See Figure 3: Ad Hoc List Report.

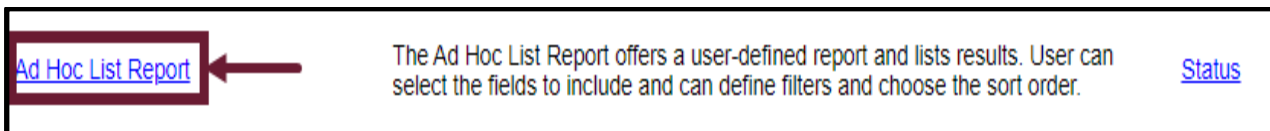


Figure 3: Ad Hoc List Report

Section 1: Choose Active Clients, Inactive Clients, or Both

The first choice to make is if you want to list active clients or inactive clients (see *Figure 4: Select Active or Inactive Clients*). To create a list of active clients, click on "Active" and then click the "Add" button, or double-click the "Active" link. The word Active will be moved from the left box to the right box. In this example, do not click on any of the inactive statuses because you want to create a list of active clients.

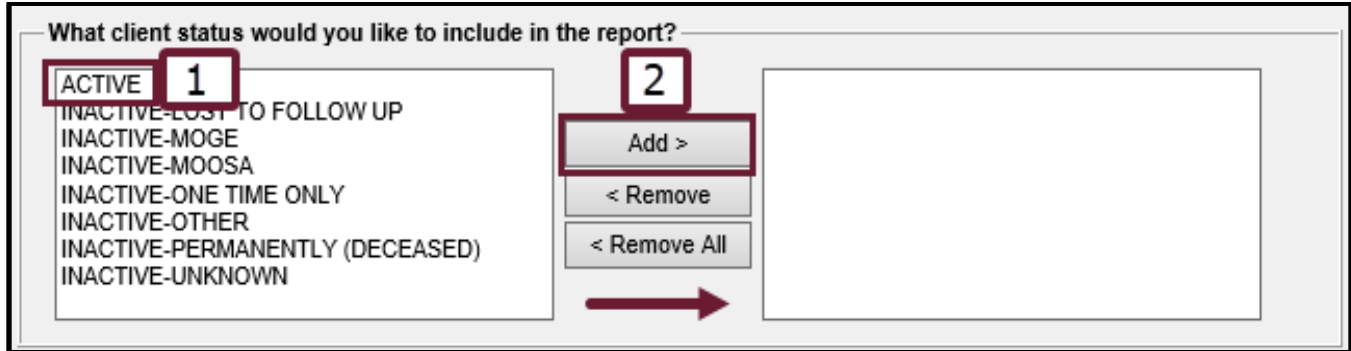


Figure 4: Select Active or Inactive Clients

Note that **clients can be active in more than one organization**. An example would be if a client in Austin has difficulty getting a COVID-19 immunization but drives to Round Rock or San Antonio and receives the immunization. In that case, the client would still be active in the original organization in Austin, but would also be active in the organization that administered the COVID-19 immunization and entered it into ImmTrac2.

When you search for clients who are active in your organization, you will get clients you gave immunizations to, including clients you normally do not see.

Likewise, if some of your clients went to another organization and received an immunization, the immunizations given by other organizations will be listed on the immunizations that your client received, even though they were not administered by you.

If you look in the client's record and see an immunization that has a "No" in the Owned column for that immunization, then another organization administered that immunization (see *Figure 5: Not Owned By Your Organization*). You can see which organization administered the immunization by clicking on the word "No".

Vaccine Group	Date Admin	Age At Immunization	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster	Edit
SARS-COV2	01/07/2021	33Y	1 of 2	COVID-19,mRNA,LNP-S,PF,100mcg/0.5 mL [Moderna COVID-19 Vaccine ®]	Full	No			Yes	

Select	Vaccine Group	Vaccine	Earliest Date	Re	Due Date
Select <input type="checkbox"/>	Influenza-seasnl	Flu NOS	01/01/1997		1/1997
Select <input type="checkbox"/>	SARS-COV2	COVID-19 vaccine, NOS	02/04/2021	02/04/2021	02/04/2021

Figure 5: Not Owned By Your Organization

Section 2: What Items Do You Want to Display?

The second choice to make is which items you want to display on the client listing. See *Figure 6: Items to be Displayed on the Report*. The window on the left side lists items you can select to be displayed on the report, and the window on the right-side lists items that you have selected to be displayed.

To select an item to display, either double-click on an item in the left window, or click once on the item and then click the "Add" button. After an item has been selected it will be moved to the window on the right.

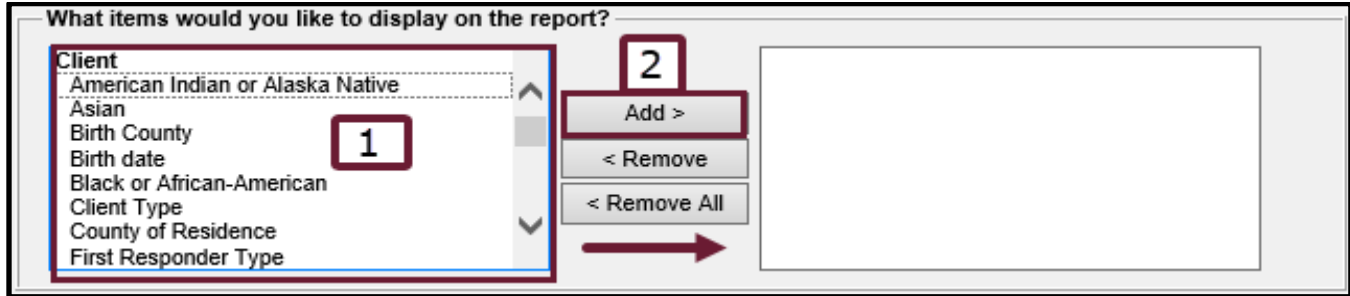


Figure 6: Items to be Displayed on the Report

Some items you might want to display would be First name, Last name, Birth date, Gender, Trade name, Vaccination date, Vaccine. See *Figure 7: Example of Selected Items*.

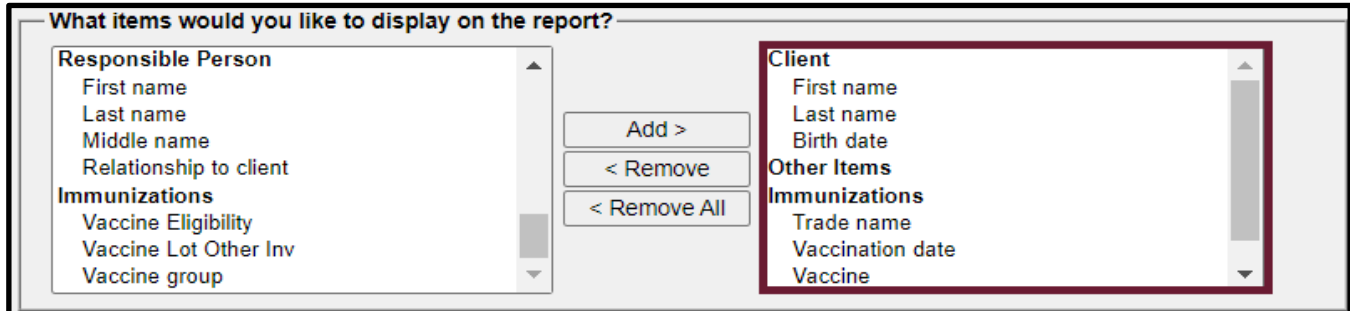


Figure 7: Example of Selected Items

To reverse the selection, either double-click on the item in the right window, or click once on the item and then click the "Remove" button. Clicking "Remove All" will remove all selections and allow you to start over. See *Figure 8: Removing Items to be Displayed*.

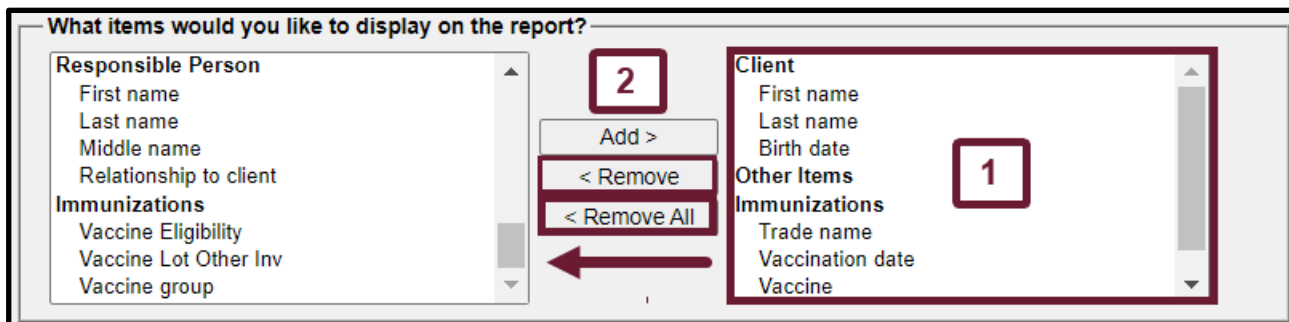
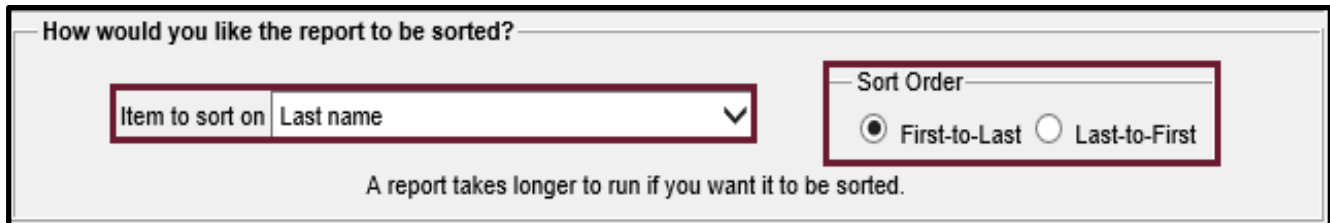


Figure 8: Removing Items to be Displayed

Section 3: “How would you like the report to be sorted?”

In the third section, choose which item you want the report to be sorted on, and if you want the sort order to be “First-to-Last” or “Last-to-First”. See *Figure 9: Choosing How to Sort*.



How would you like the report to be sorted?

Item to sort on Last name

Sort Order

First-to-Last Last-to-First

A report takes longer to run if you want it to be sorted.

Figure 9: Choosing How to Sort

Note that the list of items to sort on will be the same list that you chose to display in the prior step. In other words, you can't sort on an item that you didn't already choose to display.



Section 4: “How would you like to filter the data?”

You don’t have to enter anything in the third section if you do not want to filter the data you have already chosen. Here’s how you build a filter (see *Figure 10: Building a Filter*):

How would you like to filter the data?

1 Item to filter on Birth date Additional Optional Selection

2 Comparison BETWEEN

Value to compare to 08/15/2019

3 and 11/15/2019

4 Add/Save Edit

Figure 10: Building a Filter

- **Step 1:** Choose an item to filter on from the drop-down list. In this example “Birth date” was chosen.
- **Step 2:** Choose a comparison. The options you have for comparisons depend on the item you chose in step 1. In this example, the comparison options are “before”, “Equals”, “Not equal to”, “After”, “Between”, “Is”, and “Is Not”.
- **Step 3:** Select values. In this example, the data is set to select clients whose birthday lies between 8/15/2019 and 11/15/2019.
- **Step 4:** Click the “Add/Save Edit” button to add this edit to the filter. See Figure 10: Generating the Report for the next steps:

Selected Filters

Birth date BETWEEN 08/15/2019 AND 11/15/2019

5

Edit

Remove

And/Or

Group

UnGroup

6 Generate Cancel

Figure 10: Generating the Report

- **Step 5:** Note that the filters previously selected have been added to the “Selected Filters” box.
- **Step 6:** You can click the “Generate” button to generate the report, or you can continue to build more complex filters (see the section on Building Complex Filters later).

After you click the generate button, the Ad Hoc Report Status screen appears and will display "PROCESSING" in the status column. As the report generates it will display the status as a percentage. Click the "Refresh" button to get updates. See *Figure 11: Refresh Button*.

Ad Hoc Report Status					
				Refresh	Cancel
Report Type	Started	Completed	Status	Row Count	
LIST	11/18/2019 11:34 AM		PROCESSING	0	

Figure 11: Refresh Button

Once the report has generated the status will change to "DONE" and can be accessed by clicking the "LIST" link to see the report. See *Figure 12: The LIST Link to the Report*.

Ad Hoc Report Status					
				Refresh	Cancel
Report Type	Started	Completed	Status	Row Count	
LIST	11/18/2019 11:34 AM	11/18/2019 11:35 AM	DONE	0	

Figure 12: The LIST Link to the Report

Please note that only one Ad Hoc List Report can be generated at a time. If the report is still being processed and you need to do other work in ImmTrac2, as long as you stay logged in to that organization you can go back to the generated reports and click the "Status" link of the Ad Hoc List Report to take you back to the Ad Hoc Report Status screen and see if the report is done. See *Figure 13: Status Link to the Report*.

Ad Hoc List Report	The Ad Hoc List Report offers a user-defined report and lists results. User can select the fields to include and can define filters and choose the sort order.	Status
------------------------------------	--	------------------------

Figure 13: Status Link to the Report

Section 5: Building Complex Filters

You can combine edits to create more complex filters. For example, if you want to restrict the data to clients who were born between 01/01/1970 and 01/01/2000, you could additionally filter on a group of vaccines and again click the "Add/Save Edit" button to add that to the selection criteria. See *Figure 14: Filter with a Group of Edits*.

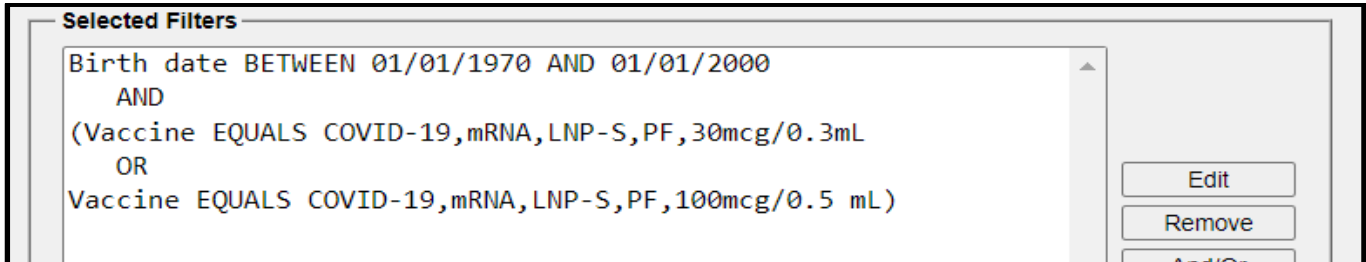


Figure 14: Filter with a Group of Edits

5A. Building Complex Filters: Edit Button

To change an edit line in the filter, click on the edit (in this case Birth date BETWEEN 01/01/1970 AND 01/01/2010) and then click the "Edit" button. You will be able to change that line. See *Figure 15: Edit Button*.

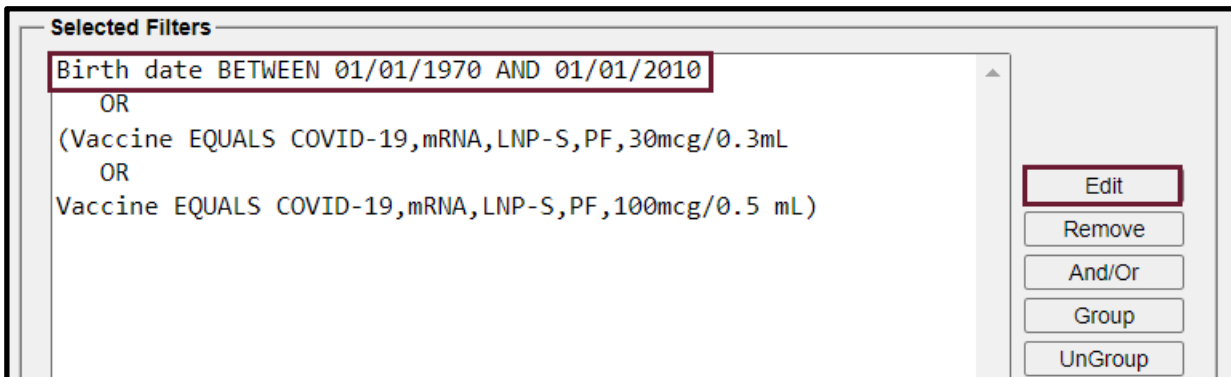


Figure 15: Edit Button

5B. Building Complex Filters: Remove Button

To remove an edit line from the filter (in this case Birth date BETWEEN 01/01/1970 AND 01/01/2010), click on the line and then click the "Remove" button. See *Figure 16: Remove Button*.

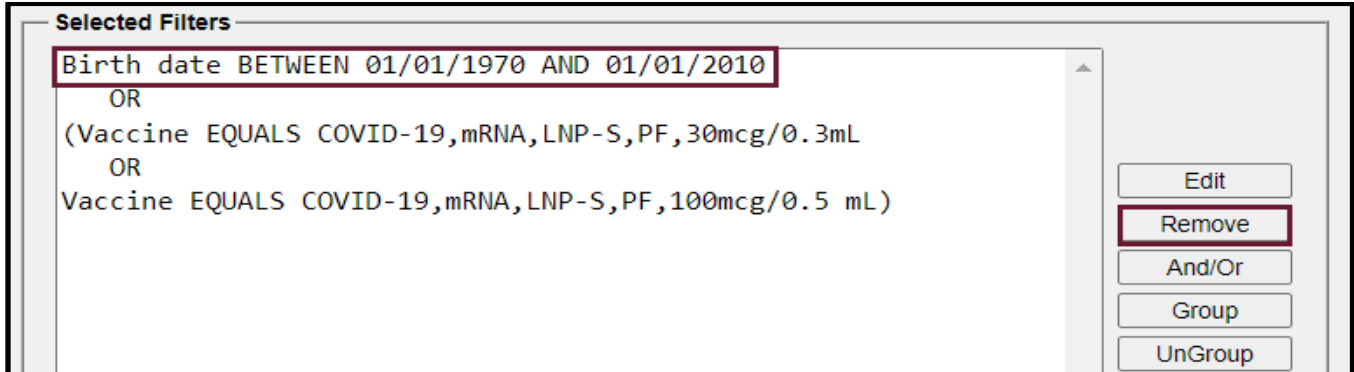


Figure 16: Remove Button

5C. Building Complex Filters: And/Or Button

If you have multiple lines and want to switch an "AND" to an "OR" or vice versa, click the "AND" or "OR" and then click the "And/Or" button. The button will toggle between "AND" and "OR". See *Figure 17: And/Or Button*.

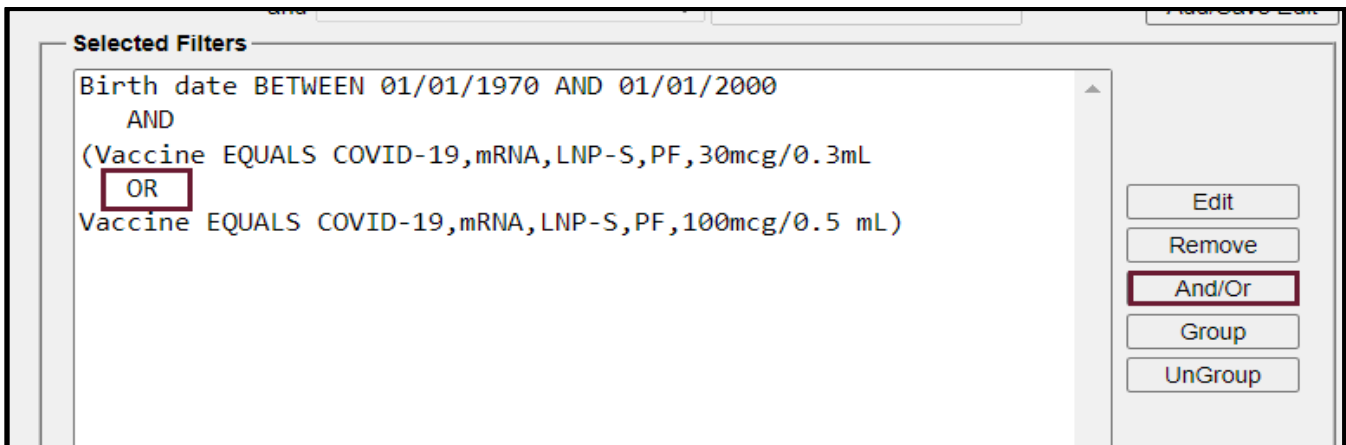


Figure 17: And/Or Button



5D. Building Complex Filters: Group Button

If you wish to group edits, such as this example that groups COVID-19 vaccines, after the edits have been entered, select the edit lines that you wish to group and then click the "Group" button. See *Figure 18: Group Button*. The group will be enclosed by parentheses.

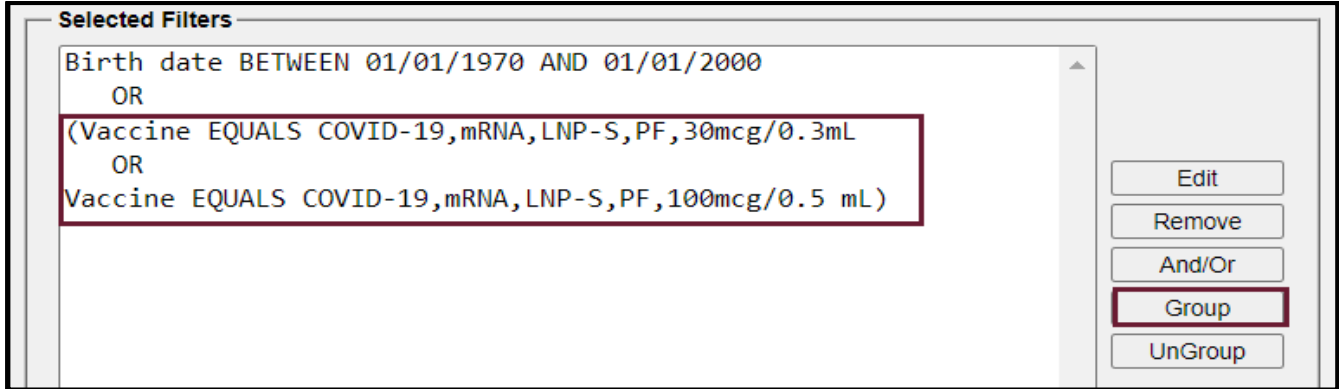


Figure 18: Group Button

5E. Building Complex Filters: UnGroup Button

The UnGroup button functions as the opposite of the Group button. Select a set of edit lines that you have grouped and wish to no longer group, then select the "UnGroup" button. See *Figure 19: UnGroup Button*. The parentheses surrounding the group will be removed.

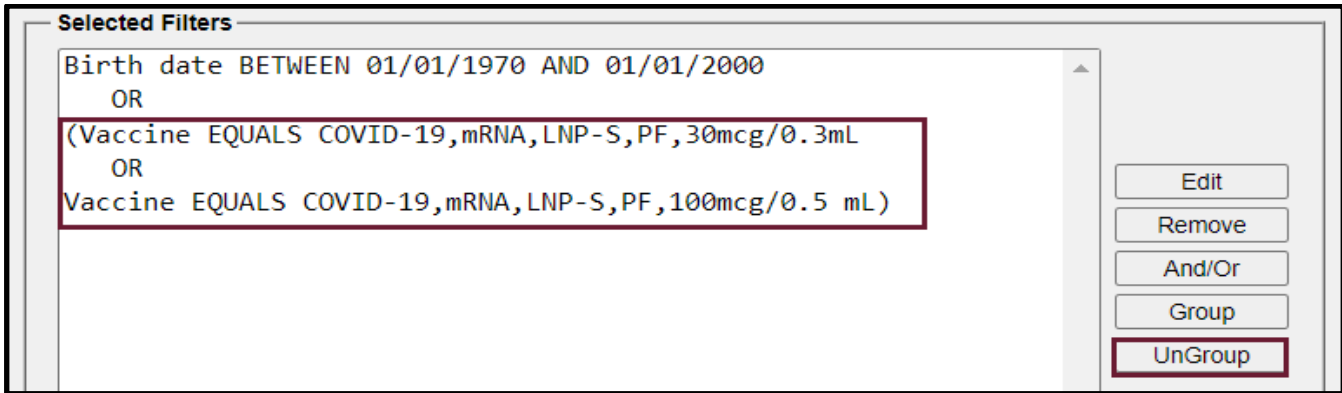
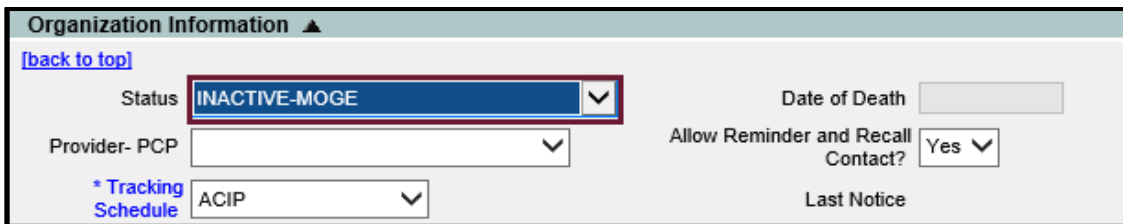


Figure 19: UnGroup Button

Section 6: How Clients Become Active

You might ask, “What makes a client active in an organization?” The status of a client will change from Inactive status to Active status if an organization:

- Creates a new client record,
- Adds an historical immunization to a client,
- Adds a new immunization to a client,
- Manually edits the Status field in the Organization Information tab of a client record to change it from inactive status (see *Figure 20 – Inactive Status*) to active status (see *Figure 21 – Active Status*), or



Organization Information ▲

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

Status **INACTIVE-MOGE** ▼

Provider- PCP ▼

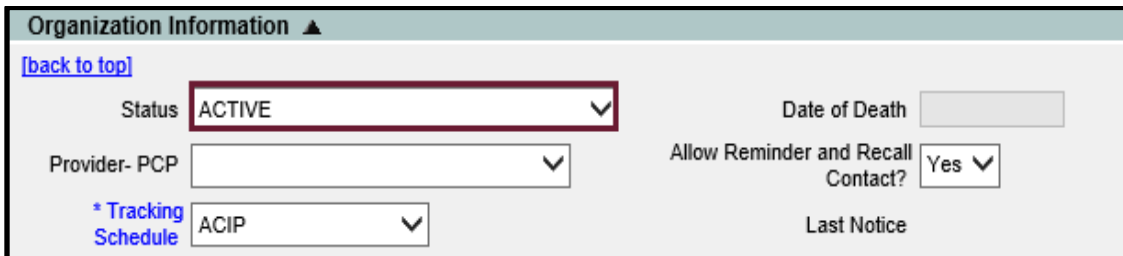
* Tracking Schedule ACIP ▼

Date of Death

Allow Reminder and Recall Contact? Yes ▼

Last Notice

Figure 20 - Inactive Status



Organization Information ▲

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

Status **ACTIVE** ▼

Provider- PCP ▼

* Tracking Schedule ACIP ▼

Date of Death

Allow Reminder and Recall Contact? Yes ▼

Last Notice

Figure 21: Active Status

- Uses the “manage client status criteria” feature in ImmTrac2 to change client status to or from active or inactive (see *Figure 22 – Manage Client Status Criteria*).

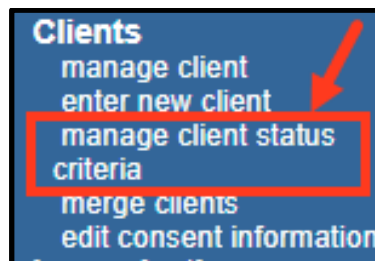


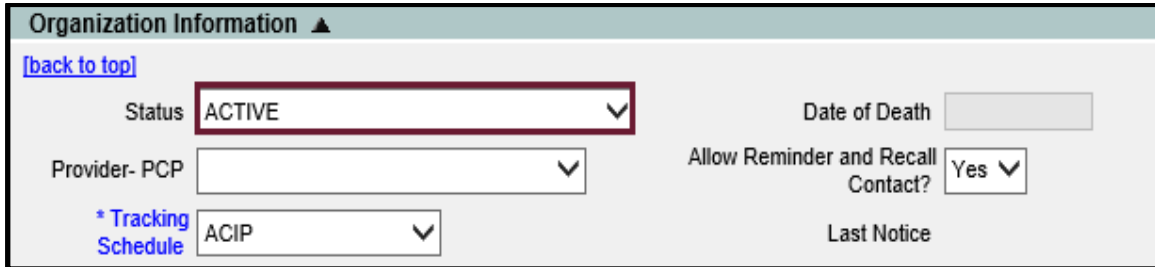
Figure 22 - Manage Client Status Criteria

For further information on how to use this feature, go to the [Forms and Documents](#) webpage and look for publication “11-15951 ImmTrac2 Manage Client Status Criteria”.

Section 7: How to Inactivate Clients

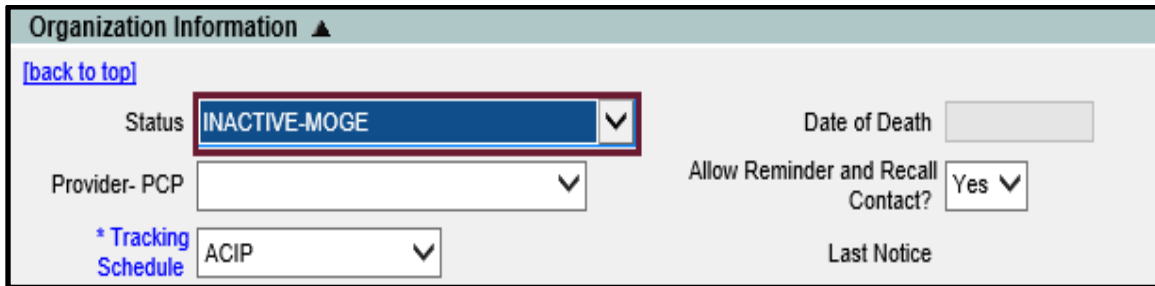
If you have clients that you have not seen in what you consider to be a long time and wish to make them inactive, you can do that by either:

- Manually editing the Status field in the Organization Information tab of a client record to change it from inactive status (see *Figure 23 – Inactive Status*) to active status (see *Figure 24 – Active Status*), or



The screenshot shows the 'Organization Information' tab with a 'back to top' link. The 'Status' dropdown menu is set to 'ACTIVE'. Other fields include 'Provider-PCP', '* Tracking Schedule' (set to 'ACIP'), 'Date of Death', 'Allow Reminder and Recall Contact?' (set to 'Yes'), and 'Last Notice'.

Figure 23: Active Status



The screenshot shows the 'Organization Information' tab with a 'back to top' link. The 'Status' dropdown menu is set to 'INACTIVE-MOGE'. Other fields include 'Provider-PCP', '* Tracking Schedule' (set to 'ACIP'), 'Date of Death', 'Allow Reminder and Recall Contact?' (set to 'Yes'), and 'Last Notice'.

Figure 24 - Inactive Status

- Using the “manage client status criteria” feature in ImmTrac2 to change client status to or from active or inactive (see *Figure 25 – Manage Client Status Criteria*). For further information on how to use this feature, go to the [Forms and Documents](#) webpage and look for publication “11-15951 ImmTrac2 Manage Client Status Criteria”.

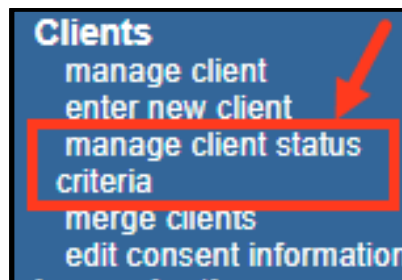


Figure 25 - Manage Client Status Criteria

Clients can also be flagged as ‘Inactive’ through data exchange. For additional information please contact your Electronic Health Records (EHR) vendor or the ImmTrac2 Interoperability Team toll free at (800) 348-9158 or email ImmTrac2@dshs.texas.gov.