Managing Immunizations - Viewing and Editing Immunization Records (Video Script #5)

Welcome to the ImmTrac2 Training Video: Viewing and Editing Immunization Records

The objectives of this video are to demonstrate how to view and edit client immunization records in the ImmTrac2 Registry.

Users can view any client and their immunization history that has consented to participate in ImmTrac2.

To fastest way to view client immunizations is to click the **Manage Immunization** link in the application menu panel and the Client Search screen will display.

Client Search Screen

On the **Client Search** screen, use one of the three search options to perform a client search. For our example, we'll select the **Quick Search** option.

Let's search using the ImmTrac2 ID **208105748**. Click the Find button.

Because we entered the correct ImmTrac2 ID, the client's immunization record displays immediately.

Client Information Section

At the top of the client's immunization record is the **Client Information section**.

This section should be used to verify the correct client record was opened, and displays the following information.

The system generated **ImmTrac2 ID** that is automatically assigned to each client.

The client's **Name**, **Date of Birth**, and **Gender**.

The **Tracking Scheduled** assigned to the client by the user's organizations. This defaults to the ACIP schedule, but can be changed at an organization level.

The **Client ID**, or the unique client identifier assigned to the client by the user's organization.

The client's **Address** and **Phone Number**.

The **Comments** that were selected and added to the client's record, and the client's **Current Age** in years, months and days.

Client Notes:

The **Client Notes** represents the total number of notes logged on the client's record. In this example Brian Blue had a total of 4 notes.

Click the blue hyperlink to view the existing notes or to add a note to the client's record.

The Client Notes screen opens in a separate browser window. The existing notes display at the bottom of the screen

Use the Create New Note section to enter a new notes on the client's record. Then click the **Save Note** button. The following message displays: *"Note successfully saved."*

Immunization Record

Next, let's review the Immunization Record. This section lists all immunizations received by the client that have been logged or uploaded into the ImmTrac2 registry.

The immunization table includes the following information:

Vaccine Group

The vaccine group for the immunization received.

Date Admin

The date the vaccine was administered.

Click the date hyperlink to view the "Explanation of Dose Status" pop-up window for that particular immunization.

The pop-up window displays the tracking schedule rules for the selected vaccine series. Close the pop-up window to return to ImmTrac2.

Series

A sequence number along with the total number of doses within the immunization series displays for a valid immunization. An example is "1 of 4."

Vaccine [Trade Name]

The name of the vaccine provided by the manufacturer.

Dose

The dose magnitude reflects how many or how much of a dose was administered to the client. For example 2 or 3 does, or a full or half dose. If the field is blank, it's a historical immunization.

Owned?

Indicates whether the immunization was entered by the user's organization or by another organization.

A blank means the user's organization entered the vaccine record. A '**No**' means the record was entered by another organization.

Click on the hyperlink to view the name and contact information of the organization that entered the record in a pop-up window.

The pop-up window provides the Organization's Name, Address, Contact Name and Phone number. Close the window to return to ImmTrac2.

Reaction

Displays an indication of whether a reaction occurred. A blank means no reaction was entered in ImmTrac2 for that vaccine.

A 'Yes' means a reaction was recorded. Click the hyperlink to open a pop-up window describing the reaction.

The pop-up window lists all reactions that occurred as a result of the administered immunization. Close the window to return to ImmTrac2.

Hist?

Indicates whether the immunization record was entered as a historical immunization.

A Historical Immunization was not administered by the user's organization, but the user's organization did add the information to the ImmTrac2 registry.

A '**Yes**' in this field indicates the record was entered as a historical immunization.

Disaster

Indicates whether the vaccine was administered during a disaster event. A '**Yes'** in this column means a disaster–related immunization was administered during a disaster event.

Edit

Displays a clickable icon that navigates the user to the Edit Immunization screen. Editing an immunization will be discussed later in the video.

Vaccines Recommended by the Selected Tracking Schedule

At the bottom of the screen is the **Vaccines Recommend by the Selected Tracking Schedule** section.

This section displays the recommended vaccines and the corresponding vaccination dates based on the selected tracking schedule for the client.

This section displays the following information.

Select

Use the **Select** check boxes to select any of the recommended vaccines to quickly add them to the client's record.

The Select check box does not display if the vaccine is no longer needed or recommended.

Vaccine Group

The vaccine group names for the recommended vaccine. Click the name to view the "Explanation of Dose Status" pop-up window.

The pop-up window displays the tracking schedule rules for the selected vaccine series. Close the window to return to ImmTrac2.

Vaccine

The vaccine name.

Earliest Date

The earliest date the client can receive the recommended vaccine.

Recommended Date

The date the client is recommended to receive the vaccine.

Past Due Date

The date the client is past due to receive the recommended vaccine.

Command Buttons:

Now that we have reviewed the main section of the Immunization screen, let's review the command buttons. There are 5 command buttons available on this screen.

Add New Imms: Click this button to add a new non-scheduled immunization to the client's immunization record.

Add Historical Imms: Click this button to add a historical immunization to the client's immunization record.

NOTE: *For more details on how to add immunizations, please view the ImmTrac2 Training Video: Adding Immunizations.*

Edit Client: Click this button to quickly navigate to the View/Edit Client record screen.

Reports: Click this button to navigate to the **Reports Available for Client** screen, to generate and print reports for the selected client.

This screen gives the user access to the client's **Official Immunization Record** and the **Immunizations Needed Report**. Selecting a report hyperlink opens the report in a separate browser window.

Click **Cancel** to return to the client's immunization record.

Print Official Immunization Record: Click this button to view and print the client's official immunization record in a separate browser window.

Click **OK** to acknowledge the client or guardian has consented to print the Official Immunization Record. The client's official immunization record displays.

NOTE: *The format of the official immunization record will change to meet the requirements of the Department of State Health Services.*

Close the browser window to return to ImmTrac2.

View Immunization Details / Edit an Immunization

Now that we have completed the review of the immunization history screen, let's learn how to view immunization details and edit an immunization.

Reminder*: Users can only edit immunization details if the vaccine was administer by their organization. This is represented by a blank in the Owned column.*

Click the **Edit** icon to open the **Edit Immunization** screen.

On the **Edit Immunization** screen, white fields are editable.

The Manufacturer, Vaccine Lot Number, Data Administered, and Vaccine Eligibility fields are required and must always remain populated.

The Reactions to Immunizations section at the bottom of the screen, should be used to note reactions to the vaccine. This section can be updated by any user regardless if the immunization is owned.

If edits are made, click the **Save** button to update the record and return to the client's immunization record.

Users can also delete an immunization if the vaccine is owned by their organization by clicking the **Delete** button.

When the pop-up message displays, click **OK** to delete the immunization. Users are returned to the immunization history and the client's record is updated.

Note*: The ImmTrac2 Customer Support Team can also delete immunization.*

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at https://immtrac.dshs.texas.gov at your convenience.