



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services

# ***ImmTrac2***

**Texas Immunization Registry**

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**Schools Training:  
View Only Users**

Welcome to this webinar designed especially for schools. I'm Paul Spock in the ImmTrac group at DSHS and I'll present the first part of the webinar for ImmTrac2 view-only users. The second part will be on back-to-school vaccine requirements that Julie will be talking about. Our combined presentation should last about an hour, followed by a question and answer session.



The slide has a dark blue background. On the left side, there is a vertical graphic element with a yellow-to-blue gradient and a small circular logo at the top. The title "ImmTrac2 Schools Training – Our Agenda" is centered in white text. Below the title is a horizontal line. To the right of the line is a bulleted list of agenda items. At the bottom of the slide, there is footer text: "04/16/2019", "ImmTrac2 Schools Training – View Only Users", and the number "2".

## ImmTrac2 Schools Training – Our Agenda

- View a client (student) record and immunizations
- How to use the “Official Immunization Record” button on the client record
- How to use the “Reports” button on the client record
- How to print reports from a list of students

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Our agenda for ImmTrac2 today is that we'll cover:

- How to view a client (student) record and immunizations,
- How to use the “Official Immunization Record” button on the client record
- How to use the “Reports” button on the client record, and
- How to print reports from a list of students

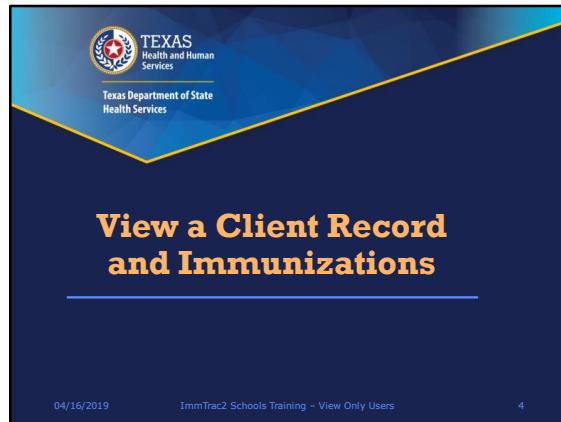
I'll be using the words client and student interchangeably in this webinar. They are students in the school and clients to the provider.

The screenshot shows a dark blue GoToWebinar control panel. On the left, there's a yellow arrow pointing right. To its right, the text "Webinar Details" is displayed in white. Below this, four numbered points are listed in white. At the bottom of the panel, there's a small logo for the Texas Department of State Health Services, followed by the text "04/16/2019", "ImmTrac2 Schools Training – View Only Users", and the number "3".

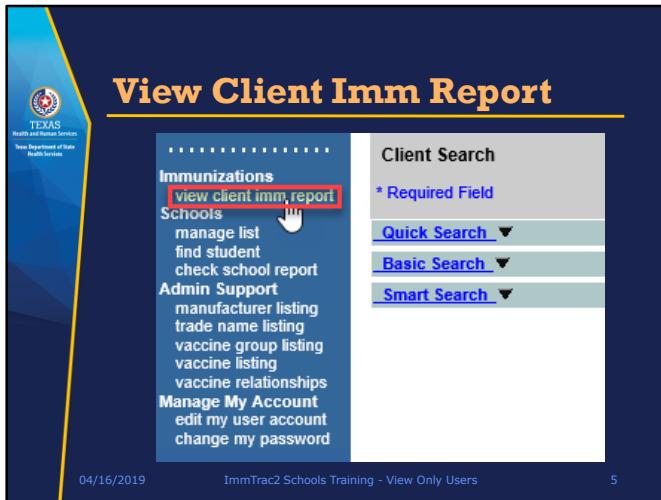
1. All attendees are muted.
2. Type your questions in the webinar panel at any time.
3. Q & A will conclude the presentation.
4. All screenshots are from the viewpoint of a "View Only" user.

Some webinar details are that:

1. All of you are muted to prevent background noise,
2. Your attendee control panel has a grab tab. You may click on the orange arrow to expand and collapse the panel. You may ask questions throughout the presentation and during question times by typing into the GoToWebinar "questions" box,
3. We will try to answer as many questions today as possible.
4. All screenshots are from the viewpoint of a "View Only" user in ImmTrac2.



The first section we're about to do will show you how to View a Client Record and Immunizations.



To access client immunization records, **View Only Non-Provider** users will see a menu panel option called “view client imm report” on the left menu panel.

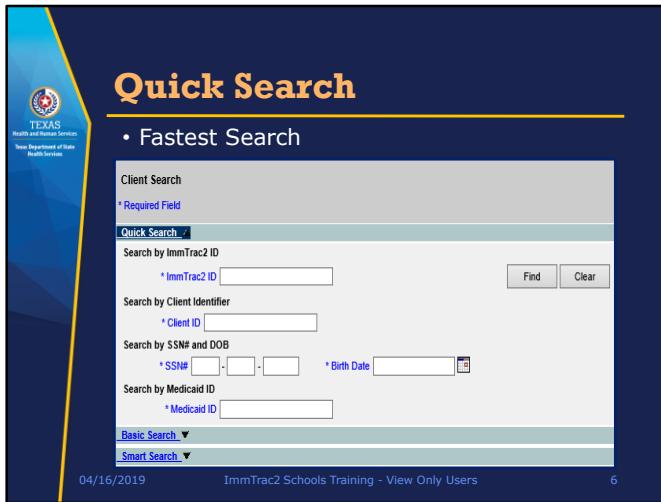
The “view client imm report” is designed to run reports on ONE client.

Selecting this option displays the Client Search screen where you have a choice of using the Quick Search, the Basic Search, or the Smart Search to find a client.

If your search results in multiple possible matches, a list of possible matches will be displayed for you to choose from.

If the search results in only one match, the client record will be displayed immediately.

We'll go over the three types of searches briefly now.



The image shows the ImmTrac2 Quick Search interface. At the top, there's a logo for the Texas Health and Human Services ImmTrac2 system. Below the logo, the title "Quick Search" is displayed in large, bold letters. A bullet point lists "• Fastest Search". The main search area is titled "Client Search" and includes a note "\* Required Field". It features four search methods: "Search by ImmTrac2 ID" (with an input field for "ImmTrac2 ID" and buttons for "Find" and "Clear"), "Search by Client Identifier" (with an input field for "Client ID"), "Search by SSN# and DOB" (with input fields for "SSN# [ ] - [ ] - [ ]" and "Birth Date [ ] [ ]"), and "Search by Medicaid ID" (with an input field for "Medicaid ID"). Below these search methods are two dropdown menus: "Basic Search" and "Smart Search". At the bottom of the search area, the date "04/16/2019" and the page number "6" are visible.

Of the three search methods, the Quick Search is the fastest!



## Basic Search

- Can use the wild card in date field
- Can use partial names

Client Search  
\* Required Field

Quick Search ▾

Basic Search ▾

* First Name <input type="text"/>	Gender <input type="button" value="▼"/>	Children Only <input type="checkbox"/>	Find <input type="button"/>
* Last Name <input type="text"/>	* Birth Date <input type="text"/> <input type="button"/> <input type="checkbox"/>	<input type="button"/> Clear	

Smart Search ▾

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The basic search requires a first name, last name, and birth date. The first and last names don't have to be filled in completely but it's a good idea to enter the information that you're sure of. The date field can use question marks as a wild card if you don't know the client's birthday. Of course, if you do know the full first and last names, and have a full birth date, use those. Partial information will widen the search.

The Smart Search interface is designed to find clients using various search criteria. It includes fields for the ImmTrac ID, First Name, Last Name, Middle Name, Birth Date, Gender, Mother's First Name, Mother's Maiden Name, Street Address, Other Address, PO Box, Zip, City, and State (TX). There are also buttons for Find and Clear.

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The smart search is the most complete search. It uses an algorithm, like doing a Google search, so that if your information is close but not completely right, it may still find the client. The first name, last name, birth date, gender, and street address are required. If you don't know the street address you can put in the numbers 1, 2, 3. If you know the mother's first name or maiden name, enter those as they can help find the client.

**Client Immunization Record**

**Client Information**

Client Name (First - MI - Last): John Doe  
DOB: 01/01/2010  
Gender: Male  
Tracking Schedule: ACIP  
Client ID: 0000000000000000

Provider (PCP): Not on file  
School: Not on file

Comments: 03/01/2019 - Refused to POOL MY OWN BLOOD  
03/01/2019 - Refused to POOL MY OWN BLOOD  
03/01/2019 - Refused to POOL MY OWN BLOOD

Current Age: 9 years, 3 months, 25 days

**Immunization Record**

Vaccine Group	Vaccine	Date Administered	Age At Admin	Dose	Vaccination Title	Dose Overall	Reaction/Result	Entered
HepB	030212010	07/28/2010	9Y 2M	1 of 2	HepB, NOS	Full	No	No
HepB	010102010	08/01/2010	0 days	1 of 3	HepB, NCS (HepB)	Full	No	No
	010202010	10/	10M	2 of 3	HepB, NCS (HepB)	Full	No	No
	010202010	10/28/2010	28D	2 of 3	HepB, NCS (HepB)	Full	No	No
	071502010	04/14/2011	8M 14D	3 of 3	HepB, NCS (HepB)	Full	No	No
Hib	030312011	08/28/2010	14M	1 of 2	Hib, NCS	Yes	Yes	Yes
HPV	030512010	07/28/2010	9Y 2M	1 of 2	HPV (Booster) NOS (8)	Yes	Yes	Yes
MMR	030802010	08/28/2010	14M	1 of 2	MMR (MMR II #8)	Full	No	No
Polio	030902010	08/28/2010	14M	1 of 2	MMR (MMR II #8)	Yes	Yes	Yes
Polio	030912010	08/28/2010	14M	2 of 2	Polio-Inject (Polio)	Full	No	No
	040502010	03/28/2011	3M	2 of 3	Polio-Inject (Polio)	Full	No	No
	040602010	07/28/2011	9Y 3M	3 of 3	Polio-Inject (Polio)	Full	No	No
Td/Varicella	032102012	07/28/2011	9Y 2M	1 of 4	Tdap (Boosters #8)	Yes	Yes	Yes
	032102012	07/28/2011	9Y 2M	2 of 4	Varicella (adult) NOS	Yes	Yes	Yes

**Vaccines Recommended by Selected Tracking Schedule**

Vaccine Group	Vaccine	Birthdate	Recommended Date	Last Dose Date
DTaP	DTaP-NOS	08/21/2019	Maximum Age Exceeded	10/21/2019
	DTaP	08/21/2019	Complete	
MMR	MMR-NOS	08/01/2019	Maximum Age Exceeded	04/01/2020
	MMR	08/01/2019	08/01/2019	04/01/2020

After the search, you'll see that the **Client Immunization Record** for view-only users displays three sections:

- The client information at the top,
- The record of immunizations received by the client below that, and
- At the bottom are the vaccines recommended by the selected tracking schedule.

From this screen, a user can print out an immunization record or run select reports.

**Section 1:  
Client Info**

- Report options
- Personal information
- Tracking schedule and Client ID
- Provider & School selections (optional)
- Comments

Client Information		Official Immunization Record	Reports	Cancel
Client Name (First - MI - Last) KEISHA PURPLE	DOB 01/01/2010	Gender F	Tracking Schedule ACIP	Client ID
Provider (PCP) Not on file	School Not on file	TX 10-12 2018-2019 TX 7th-8th 2017-2018 TX 7th-8th 2018-2019 TX 9-12 2017-2018 TX Child Care Reqs TX K-6 2017-2018 TX K-6 2018-2019		
Comments 01/01/2012 - Allergy to POLYMYXIN B 02/01/2019 - Refusal of Td/Tdap 03/21/2019 - History of varicella (chicken pox)				

Current Age: 9 years, 3 months, 25 days

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The first section displays basic identifying information from the client's demographic record:

- From the Client Information section you can print an Official Immunization Record and other reports.
- Personal information such as date of birth and gender are displayed.
- You can select an immunization tracking schedule that includes the standard ACIP schedule and school schedules. This schedule will affect the record you see if you click on the Official Immunization Record above it.
- The **Advisory Committee on Immunization Practices (ACIP)** is a group of medical and public health experts that develop recommendations on use of vaccines for adults and children in the United States. More information about the ACIP can be found on the Centers for Disease Control website.
- Client ID , Provider, and school selections are also displayed.
- Note that **Client Comments** are displayed in RED. If a Provider has entered an allergy, condition, reaction, or refusal, those are displayed in the Comments area for ALL USERS of the system. Some comments can affect the vaccine recommendations. Refusals will be displayed in the comments of this section but will not be displayed when you print an Official Immunization Record.

**Section 2:  
Immunization Record**

- Displays a separate row for each vaccine group, whether combo or single vaccine.
- Hyperlinks display Explanation of Dose Status and organization ownership.

Vaccine Group	Date Admin	Age At Immunization	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Disaster
HepB	<a href="#">01/05/2019</a>	19Y	1 of 3	DTaP-HepB-IPV [Pediarix ®]	Full	No			
	<a href="#">02/06/2019</a>	19Y 1M	2 of 3	HepB, NOS [HepB ®]	Full	No			
MMR	<a href="#">01/05/2019</a>	19Y	1 of 2	MMR [MMR II ®]		No		Yes	
Polio	<a href="#">01/05/2019</a>	19Y	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			
Td/Tdap	<a href="#">01/05/2019</a>	19Y	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full	No			

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The second section displays the client's **Immunization Record** of vaccines the client received. The rows represent each vaccine group covered by administered doses. Combination vaccines will list separate vaccines in the combo.

The hyperlinks in the **Date Administered column** will open a pop-up window of the **Explanation of Dose Status** which describes the appropriate client ages for the administration of shots.

The **Owned?** column displays information on which provider "owns" or administered the vaccine. If the word NO is displayed, the organization did not administer the vaccine. If the row in the Owned column is blank, then the organization did administer the vaccine and owns the immunization. In this example, the second HepB immunization is "owned" and the word "No" does not appear in the Owned column.

HISTORY denotes if the immunization was entered into ImmTrac2 by an organization that didn't administer the immunization, in which case the word "Yes" will display in the History Column. If a row is blank in the History column, then that immunization is not historical and was entered as a current immunization by the organization giving the shot.

**Section 3: Vaccines Recommended**

- A dynamic display based on the client's immunization record.
- Hyperlinks to display explanation of series recommendations.

Vaccines Recommended by Selected Tracking Schedule				
Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTaP	DTaP, NOS	09/21/2019	09/21/2019 Maximum Age Exceeded	10/21/2019
HepA	HepA, NOS		Complete	
HepB	HepB, NOS		Maximum Age Exceeded	
Hib	Hib, NOS		Maximum Age Exceeded	
HPV	HPV, NOS	08/01/2019	09/01/2019	04/01/2020
Influenza-seasonal	Flu NOS	01/01/2019	01/01/2019	01/01/2019
Meningo	MCV4, NOS	01/01/2020	01/01/2021	01/01/2023
MMR	MMR		Complete	
Polio	Polio, NOS		Complete	
Td/Tdap	Td (adult), NOS	04/02/2018	04/02/2018	11/02/2018
Varicella	Varicella		Contraindicated	

Hyperlinks

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The third section displays the client's **Vaccines Recommended by the Selected Tracking Schedule**. This is a dynamic display of the vaccines due based on the client's record of doses already received and the timing of when those doses were administered. The Selected Tracking Schedule is the schedule defined in the Client's demographic record, which is accessible only by Full-Access Providers.

Most Clients will have the ACIP schedule selected because it is the default option.

The hyperlinks for each vaccine group will open a pop-up window of the **Explanation of Dose Status**. The window displays a chart showing where the next recommended dose falls within the series and interval recommendations.



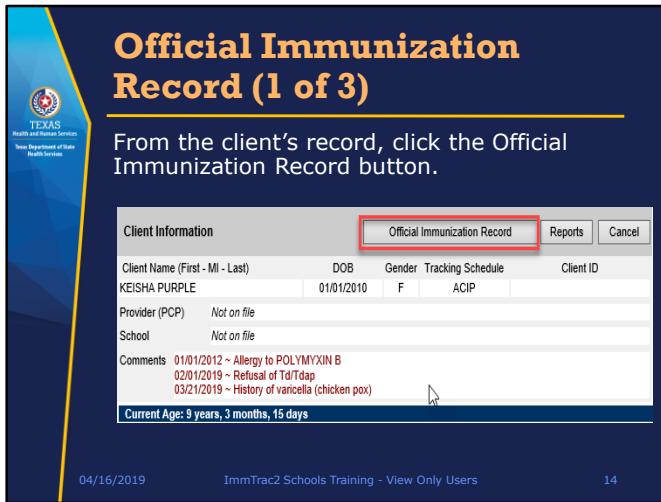
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## Using the Official Immunization Record Button on One Client

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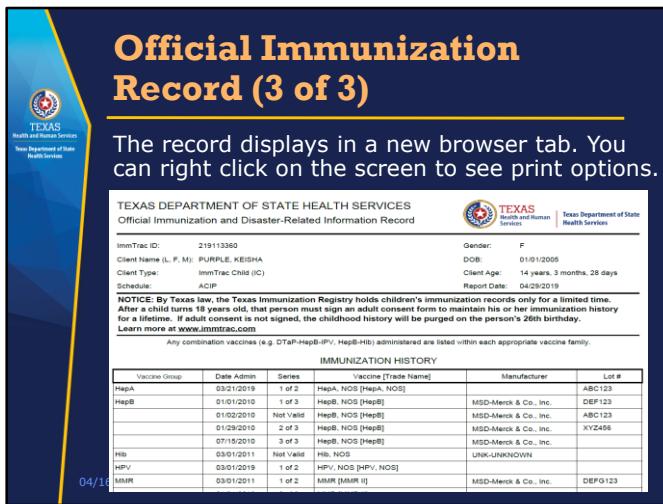
Using the Official Immunization Record button on one client is our next topic.



First, search for a student, or client, and then in the Client Information section, click the Official Immunization Record button.



A pop-up message displays, confirming that you have consent of the individual, parent, or guardian. Click OK to proceed.



The record displays in a new browser tab. You can right click on the screen to see print options.

**Example: Selecting the ACIP Schedule (1 of 2)**

Client Information			
		Official Immunization Record	Reports
Client Name (First - MI - Last)	DOB	Gender	Tracking Schedule
KEISHA PURPLE	01/01/2005	F	ACIP
Provider (PCP)	Not on file		
School	Not on file		
Comments	01/01/2012 ~ Allergy to POLYMYXIN B 02/01/2019 ~ Refusal of Td/Tdap 03/21/2019 ~ History of varicella (chicken pox)		
Current Age: 14 years, 3 months, 28 days			
Immunization Record			
Tracking Schedule: ACIP			

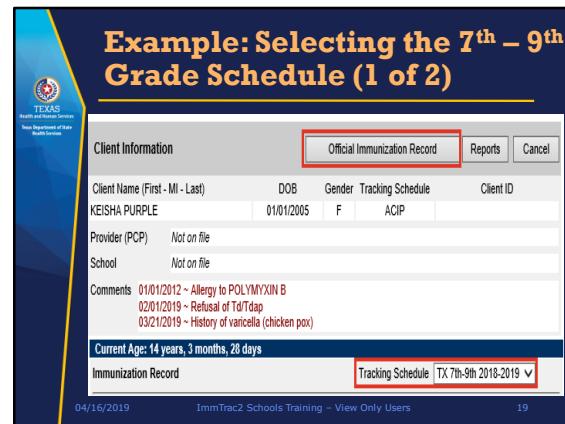
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The schedule selected can make a difference in the immunizations listed. Here I've selected the ACIP schedule at the bottom.

**Example: Selecting the ACIP Schedule (2 of 2)**

 <b>TEXAS</b> Texas Department of State Health Services	ImmTrac ID: 219113360 Client Name (L. F. M): PURPLE, KEISHA Client Type: ImmTrac Child (IC) Schedule: <b>ACIP</b>																																																												
Gender: F DOB: 01/01/2005 Client Age: 14 years, 3 months, 28 days Report Date: 04/29/2019																																																													
<small>NOTICE: By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday.</small> <small>Learn more at <a href="http://www.immtrac.com">www.immtrac.com</a></small>																																																													
<small>Any combination vaccines (e.g. DTaP-HepB-IPV, HepB-Hib) administered are listed within each appropriate vaccine family.</small>																																																													
<b>IMMUNIZATION HISTORY</b>																																																													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Vaccine Group</th> <th>Date Admin</th> <th>Series</th> <th>Vaccine [Trade Name]</th> <th>Manufacturer</th> <th>Lot #</th> </tr> </thead> <tbody> <tr> <td>HepA</td> <td>03/21/2019</td> <td>1 of 2</td> <td>HepA, NOS [HepA, NOS]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td>ABC123</td> </tr> <tr> <td>HepB</td> <td>01/01/2010</td> <td>1 of 3</td> <td>HepB, NOS [HepB]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td>DEF123</td> </tr> <tr> <td></td> <td>01/02/2010</td> <td>Not Valid</td> <td>HepB, NOS [HepB]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td>ABC123</td> </tr> <tr> <td></td> <td>01/29/2010</td> <td>2 of 3</td> <td>HepB, NOS [HepB]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td>XYZ456</td> </tr> <tr> <td></td> <td>07/15/2010</td> <td>3 of 3</td> <td>HepB, NOS [HepB]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td></td> </tr> <tr> <td>Hib</td> <td>03/01/2011</td> <td>Not Valid</td> <td>Hib, NOS</td> <td></td> <td>UNN-UNKNOWN</td> </tr> <tr> <td>HPV</td> <td>03/01/2019</td> <td><b>1 of 2</b></td> <td>HPV, NOS [HPV, NOS]</td> <td></td> <td></td> </tr> <tr> <td>MMR</td> <td>03/01/2011</td> <td>1 of 2</td> <td>MMR [MMR II]</td> <td>MSD-Merck &amp; Co., Inc.</td> <td>DEFG123</td> </tr> <tr> <td></td> <td>01/01/2012</td> <td>2 of 2</td> <td>MMR [MMR II]</td> <td></td> <td></td> </tr> </tbody> </table>		Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Manufacturer	Lot #	HepA	03/21/2019	1 of 2	HepA, NOS [HepA, NOS]	MSD-Merck & Co., Inc.	ABC123	HepB	01/01/2010	1 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	DEF123		01/02/2010	Not Valid	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	ABC123		01/29/2010	2 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	XYZ456		07/15/2010	3 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.		Hib	03/01/2011	Not Valid	Hib, NOS		UNN-UNKNOWN	HPV	03/01/2019	<b>1 of 2</b>	HPV, NOS [HPV, NOS]			MMR	03/01/2011	1 of 2	MMR [MMR II]	MSD-Merck & Co., Inc.	DEFG123		01/01/2012	2 of 2	MMR [MMR II]		
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Manufacturer	Lot #																																																								
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Using the ACIP schedule in this example of the Official Immunization Record, the Hib shot is “not valid” because the client’s age exceeded the maximum date range for Hib, and the HPV shot is listed as “1 of 2”.



For that same client, we now select the Texas 7<sup>th</sup> to 9<sup>th</sup> grade 2018 to 2019 schedule.

**Example: Selecting the 7<sup>th</sup> – 9<sup>th</sup> Grade Schedule (2 of 2)**

ImmTrac ID:	219113360	Gender:	F
Client Name (L, F, M):	PURPLE, KEISHA	DOB:	01/01/2005
Client Type:	ImmTrac Child (C)	Client Age:	14 years, 3 months, 28 days
Schedule:	TX 7th-9th 2016-2019	Report Date:	04/29/2019

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday.

Learn more at [www.immtrac.com](http://www.immtrac.com).

Any combination vaccines (e.g. DTaP-HepB-IPV, HepB-HB) administered are listed within each appropriate vaccine family.

**IMMUNIZATION HISTORY**

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Manufacturer	Lot #
DTPIgR	03/21/2017	1 of 3	Tdap [Boostrix]	SKB-GlaxoSmithKline	
	10/02/2017	2 of 3	Td (adult), NOS		
HepA	03/21/2019	1 of 2	HepA, NOS [HepA, NOS]		ABC123
	01/01/2019	1 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	DEP123
HepB	01/02/2019	2 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	ABC123
	01/29/2019	Not valid	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	XV2456
Hib	07/15/2019	3 of 3	HepB, NOS [HepB]	MSD-Merck & Co., Inc.	
	03/01/2011	Hib, NOS		LINK-UNKNOWN	
HPV	03/01/2019	HPV, NOS [HPV, NOS]			
	03/01/2011	MMR (MMR II)	MSD-Merck & Co., Inc.	DEP123	
04					

Under the 7<sup>th</sup> to 9<sup>th</sup> grade student schedule on the Official Immunization Record, the Hib shot no longer states “Not Valid” and the HPV series no longer states “1 of 2” because it is not required on the school schedule. The ACIP schedule is more strict than the Texas school schedules.



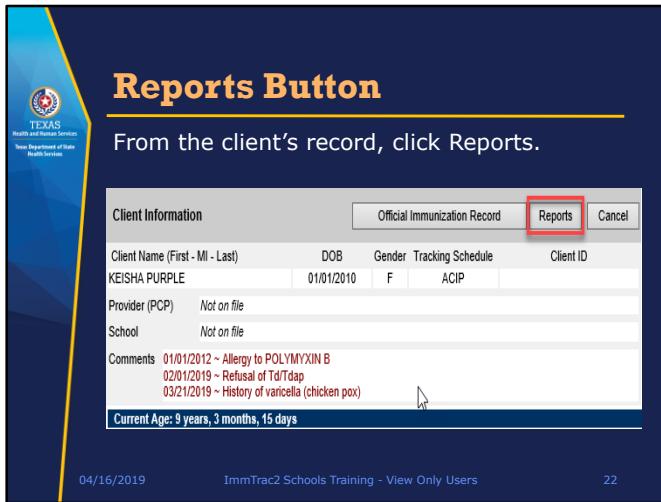
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## Using the Reports Button for One Client

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How to use the Reports button is our next topic.



First, search for a student, or client, and then in the Client Information section, click the Reports button.



From here you can print the Official Immunization Record, Immunizations Needed, or a Recall Letter for ONE CLIENT.

Note again that multiple schedules are available, including the ACIP and school schedules, for the Official Immunization Record and the Immunizations Needed reports.

Let's look at these three reports, starting with the Official Immunization Record.



If you clicked on the Official Immunization Report link, a message pops up reminding you that you need to have the consent of the individual to print his or her record.

**Official Immunization Record**

 <b>TEXAS</b> State Health Services Texas Department of State Health Services		 <b>TEXAS</b> Health and Human Services Texas Department of State Health Services			
<b>TEXAS DEPARTMENT OF STATE HEALTH SERVICES</b> Official Immunization and Disaster-Related Information Record					
<small>Immunization ID: 219113M0            Client Name (L, F, M): PURPLE, KEISHA            Client Type: CHILD            Client Status: Active</small>					
<small>Gender: F            DOB: 01/01/2010            Client Age: 9 years, 3 months, 15 days            Immunization History</small>					
<small>NOTICE: By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After age 18, the childhood history will be purged from the system and no longer available for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 26th birthday.  <a href="#">Learn more &gt;</a></small>					
<small>Any combination vaccines (e.g. DTaP-Hib-IPV, HepB-Hi) administered are listed within each appropriate vaccine entry.</small>					
<b>IMMUNIZATION HISTORY</b>					
Vaccine (name)	Date Admin	Series	Vaccine (Trade Name)	Manufacturer	Lot #
Mump (MMR) Hib	01/01/2010	1 of 2	MMR, Hib (MMR/Hib)	MSD-Merck & Co., Inc.	DEP123
	01/02/2010	Not Valid	Hib, NOS (HepB)	MSD-Merck & Co., Inc.	ABC123
	01/03/2010	2 of 2	Hib, NOS (HepB)	MSD-Merck & Co., Inc.	XV2456
	01/16/2010	3 of 3	Hib, NOS (HepB)	MSD-Merck & Co., Inc.	
MMR	03/01/2011	1 of 2	Hib, NOS	UNK-UNKNOWN	
	03/02/2011	2 of 2	MMR, Hib (MMR/Hib)	MSD-Merck & Co., Inc.	DEP123
MMR	03/01/2011	1 of 2	MMR (MMR II)	MSD-Merck & Co., Inc.	DEP123
	01/01/2012	2 of 2	MMR (MMR II)	MSD-Merck & Co., Inc.	DEP123
Diph	03/01/2012	1 of 2	Diph (DPT)	GME-Green Laboratories	
Polio	03/01/2012	1 of 3	Polio-Inject (PoliO)	PMC-Sanofi Pasteur Inc.	ABC
	04/01/2012	2 of 3	Polio-Inject (PoliO)	PMC-Sanofi Pasteur Inc.	LOT NO
	05/01/2012	3 of 3	Polio-Inject (PoliO)	PMC-Sanofi Pasteur Inc.	ABC123
Tet/Hib	03/01/2012	1 of 4	Tet (Boostrix)	GSK-SmithKline	
	10/02/2012	2 of 4	Tet (Boostrix), NOS	GSK-SmithKline	
<small>Clear Comment: Services            History of varicella (chicken pox)            Allergy to POLY(VINYL)ICD: B</small>			<small>Start Date: 03/21/2010            End Date: 03/01/2012</small>		
<small>04/16/2012</small>			<small>Texas Department of State            Health and Human Services</small>		

After clicking okay, the Official Immunization Record is displayed.

TEXAS  
State Immunization Registry  
Texas Department of State  
Health Services

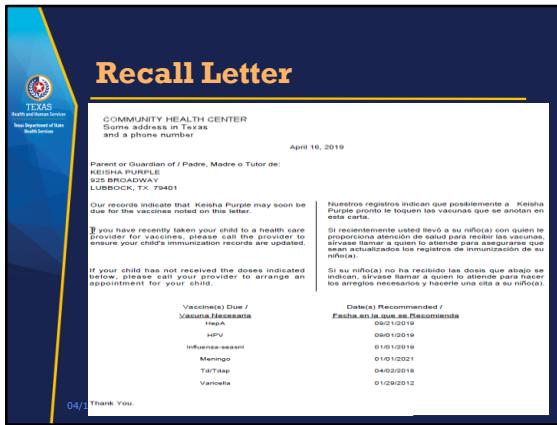
## Immunizations Needed

ImmTrac2, the Texas Immunization Registry Immunization Record			
Client ID:	Race:	Tracking Schedule: ACIP	
Client Name: B, F, M	PURPLE, KELLY	Ethnicity:	
Birth Date: 01/01/2010	Gender: F		
Age: 8 years, 3 months, 15 days			
Client Comments: History of varicella (chicken pox) Allergy to PCV13/MenHib B		Start Date:	End Date:
		03/02/2019	03/02/2019
		01/01/2012	
Immunization Record			
Vaccine Group	Date Admin	Dose	Vaccine (Trade Name)
HepA	03/01/2019	1 of 2	HepA, NOS
HepB	01/01/2010	1 of 3	HepB, NOS
HepB	01/01/2010	Not Valid	HepB, NOS
HepB	01/01/2010	2 of 3	HepB, NOS
HepB	07/15/2010	3 of 3	HepB, NOS
Hib	03/01/2019	1 of 2	Hib, NOS
HPV	03/01/2019	1 of 2	HPV, NOS
MMR	03/01/2011	1 of 2	MMR
MMR	03/01/2012	2 of 2	MMR
Plague	03/01/2017		Plague
Polio	03/01/2010	1 of 3	Polio-Oral
Polio	04/01/2010	2 of 3	Polio-Inject
Polio	04/01/2010	3 of 3	Polio-Inject
TetDip	03/01/2017	1 of 4	Tetap
TetDip	04/01/2017	2 of 4	Td (adult), NOS

Immunizations Due Record	
Vaccine	Date Needed
HepA	06/01/2019
Influenza-seasonal	01/01/2019
Meningo	01/01/2021
TetDip	04/01/2018

04/1

If you clicked on the Immunizations Needed link, that report is displayed, showing the immunizations already received, AND below, the immunizations that are due.



If you clicked on the Recall Letter link, that letter is displayed in both English and Spanish.



TEXAS  
Health and Human  
Services

Texas Department of State  
Health Services

## Print Reports from a List of Students (multiple clients)

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The last section that we'll talk about is how to print reports from a list of students involving multiple clients.

The screenshot shows a dark blue-themed application window. In the top left corner, there is a vertical bar with the Texas Health and Human Services logo and text. The main title "School Lists (1 of 2)" is centered at the top in a yellow font. Below the title, a descriptive text states: "Schools" let you organize students into groups (lists) to print reports for all students on a list. A menu panel on the right side contains several options: "Immunizations" (with a link to "view client imm report"), "Schools" (with three sub-options: "manage list", "find student", and "check school report" highlighted with a red box), "Admin Support" (with links to "manufacturer listing", "trade name listing", "vaccine group listing", "vaccine listing", and "vaccine relationships"), and "Manage My Account" (with links to "edit my user account" and "change my password"). At the bottom of the window, the date "04/16/2019", the title "ImmTrac2 Schools Training - View Only Users", and the page number "29" are visible.

The *Schools* options on the menu panel allows users (for example schools and child care facilities) to organize their students into groups for reporting immunization information on all students on the list.



## School Lists (2 of 2)

You can:

- Create, edit, or delete school lists
- Find students, to add or remove them from a list
- Access pre-configured School List Reports
- Assess students by a Texas school compliance vaccine schedule

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The functions available for schools allow users to :

- Create, edit, or delete school lists.
- Search for students to add or remove them from a list.
- Access pre-configured School List Reports.
- And you can also choose to assess students by the ACIP schedule or by a Texas school compliance vaccine schedule.

School Lists were designed mainly for the convenience of View Only – Non Provider users.

The screenshot shows a series of four interface snapshots illustrating the process of creating reports from school lists:

- Step 1: A screenshot of the ImmTrac2 Schools Training - View Only Users interface. The "Schools" menu is open, and the "manage list" option is highlighted with a red box.
- Step 2: A screenshot showing the "Schools" menu again, but now the "find student" option is highlighted with a red box.
- Step 3: A screenshot where both the "manage list" and "find student" options are highlighted with red boxes.
- Step 4: A screenshot where all three options—"manage list", "find student", and "check school report"—are highlighted with red boxes.

On the right side of the slide, corresponding numbered steps are listed:

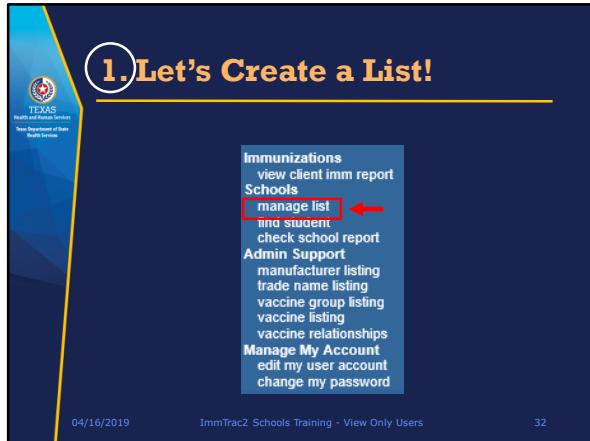
1. Click Manage List to create a new student list
2. Click Find Student to add students to the list
3. Click Manage List again to run reports from the list
4. Click School Report to view reports you've run.

At the bottom of the slide, the date "04/16/2019", the title "ImmTrac2 Schools Training - View Only Users", and the page number "31" are visible.

To create reports from school lists,

1. First, click on **Manage List** to create a new student list or access an existing one. At this point the list is empty and has no students in it.
2. Next, click **Find Student**, to search for & add students to the list.
3. Then, click **Manage List** again to run reports on all the students on the list.
4. Finally, you can click **Check School Report** to view reports you've already run.

Let's take a look at these steps.



First, let's create a list of students! Click “manage list” from the menu bar on the left side of the screen.



**Create a School List**

Enter a New List Name and Click Save.  
Your list isn't functional until you add students, or clients, to it.

The list has been created successfully.

Manage List				
New List Name				
<input type="button" value="Save"/>				
<input type="text" value="New List Name"/>	<input type="button" value="Save"/>			

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
2017-2018 7th graders	07/07/2017	0	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>
2017 Kinder Registration	05/04/2017	1	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>
Master List	03/22/2017	9	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>

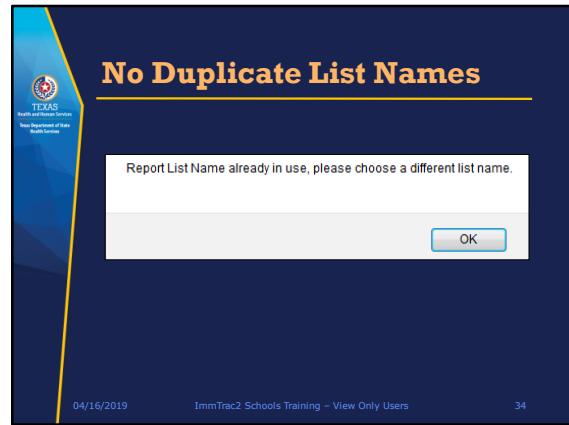
04/16/2019      ImmTrac2 Schools Training - View Only Users      33

Enter a New List Name, and click Save.

Note that the list is not functional until students have been added to it. The list starts out with a student count of zero (0).

There's no limit to the number of lists that can be created.

Lists are shared and viewable by all users in your organization.



List names cannot be duplicated. If they are, a message dialog box will display stating that the Report List Name is already in use, and to please choose a different name.

The screenshot shows a web-based application for managing school lists. At the top, there's a header with the Texas Department of State Health Services logo and the title "Change the Name of a School List (1 of 2)". Below the header, a bullet point says: "Click the Edit button on the row of the School List you want to rename." A red box highlights the "Edit" button in the "Report List" table for the row "Youpon Elementary".

Manage List

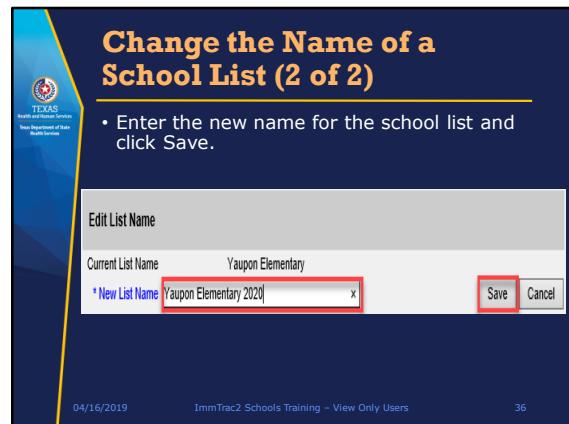
\* New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
Youpon Elementary	04/15/2019	2	Delete	Edit

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If you want to change the name of a School List, click the Edit button on the row of the List Name you want to change. One use for this might be when students advance in grades.



Then enter the new List Name and click Save.



## Delete a School List (1 of 2)

Click the Delete button.

Manage List

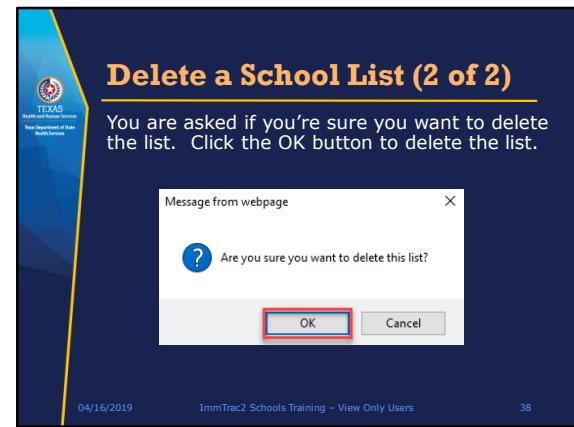
*New List Name	<input type="text"/>	Save
----------------	----------------------	------

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
Yaupon Elementary	04/15/2019	2	<input type="button" value="Delete"/> <span style="border: 1px solid red; padding: 2px;">Delete</span>	Edit

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If you want to delete a School List, click the Delete button on the row of the List Name you want to delete.



A message will ask you if you're sure you want to delete the list. To continue with deleting the list, click the OK button.

**2. Let's Add Students to the List!**

Click "Find Student" to look up a student or client, then do a search for the student.

Training Region 4.0.0

Student Search Criteria

\* Required Field

Quick Search ▾

Basic Search ▾

Smart Search ▾

Immunizations  
view client imm report

Schools  
student list  
find student **highlighted**  
schools report

Admin Support  
manufacturers listing  
trade name listing  
vaccine group listing  
vaccine listing  
vaccine relationships

Manage My Account  
edit my user account  
change my password

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Now that we have a Student List, we need to add students to it. Click “Find Student” in the menu on the left to look up a student, or client.

The three search options will display and you can search for a client.

The screenshot shows the ImmTrac2 Schools Training - View Only Users interface. At the top, there's a navigation bar with the Texas Health and Human Services logo and a search bar. Below it, a large title "Find Student" is displayed in yellow. A sub-instruction "On the client record, add the student to the list." is shown in white. On the left, a sidebar lists various immunization-related functions like "view client imm report", "Schools", "manage list", "find student", etc. The main content area has tabs for "Student Information" (selected), "ImmTrac2 ID: 219113740", "Official Immunization Record", and "Cancel". Under "Student Information", details are listed: "Student Name (First - Mi - Last)" is KARL GREEN; "DOB" is 01/01/2004; "Gender" is M; "Tracking Schedule" is ACIP. Below this, "Current Age: 15 years, 3 months, 14 days" is shown. A "Reports" section contains a red box around the "Add this Student to a Report List" button and a dropdown menu with "Please Pick a Report List" and "Yaugon Elementary". At the bottom, there are links for "Current Report Lists", "Immunization Record", and footer information: "04/16/2019", "ImmTrac2 Schools Training - View Only Users", and "40".

When the client record is displayed, use the drop down box to pick a Report List, then click on “Add this Student to a Report List”. You can add the student to one or more lists, by selecting and adding one at a time.



### 3. Let's Print Some Reports from a List!

Click Manage List again to access reports and student details.

- Immunizations
  - view client imm report
- Schools
  - manage list **←**
  - find student
  - check school report
- Admin Support
  - manufacturer listing
  - trade name listing
  - vaccine group listing
  - vaccine listing
  - vaccine relationships
- Manage My Account
  - edit my user account
  - change my password

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Now that we have a student list, and we have students in the list, hopefully more than one, we're ready to print reports from the student list.

Click "Manage List" again to access reports and student details.

**Print Reports (1 of 5)**

Select the list you want to print from.

home | registration/renewal | manage access/account | forms | related links | logout | contact us | ?

organization COMMUNITY HEALTH CENTER OF LUBBOCK PEDIATRIC CLINIC • user PAUL SPOCK • role View Only Non-Providers noRDE

Manage List

\* New List Name  Save

Report List

List Name	Last Updated Date	Student Count	Delete	Edit
Lagoon Elementary	04/15/2019	1	<a href="#">Delete</a>	<a href="#">Edit</a>

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Click the list of students that you want to run reports from.

The report options display.

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Official Immunization History List	Displays the official immunization history for each student on the list sorted alphabetically by last name.
History List	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.
Immunizations Due	Displays the name and date of birth for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: ACIP

Client List for: Yaupon Elementary				
Delete	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	AARON	PABLO		01/01/2000
<input type="checkbox"/>	GREEN	KARL		01/01/2004

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There are three report options to run and the report will pertain to all the students on the list you've selected.

When we earlier clicked on “View client Imm” report, that was for one student and the report that we could print was an Official Immunization Record, Immunizations Needed, or a Recall Letter.

When we clicked now on “Manage List”, that involves printing reports for multiple students from a list we created.

The reports we can generate now are:

- The **Student List** link produces a basic report that displays the ImmTrac2 ID, Name, and Date of Birth for each student.
- The **Official Immunization History List** allows you to produce the Official Immunization History for each student in a batch report.
- The **Immunizations Due** report produces a listing of all immunizations and what shots are due or past due for each student.



## Print Reports (3 of 5)

Select ACIP or the appropriate Texas school vaccine schedule.

Reports Available for: Yaupon Elementary

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Official Immunization History List	Displays the official immunization history for each student on the list sorted alphabetically by last name.
Immunizations Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: TX 10-12 2018-2019

TX 7B-8B 2017-2018  
TX 8B-9B 2017-2018  
TX 9-12 2017-2018  
TX K-12 2017-2018  
TX K-4 2017-2018  
TX K-4 2018-2019

Delete	Add	First Name	Middle Name	Birth Date
<input type="checkbox"/>	<input checked="" type="checkbox"/> ADD	PABLO		01/01/2000
<input type="checkbox"/>	<input checked="" type="checkbox"/> GREEN	KARL		01/01/2004

04/16/2019      ImmTrac2 Schools Training - Full Access Users      44

Note the Tracking Schedule option below the report names. With the Tracking Schedule option, you can select which tracking schedule you want to use when you run any of the three reports. From the drop-down box for Tracking Schedule, you can select the standard ACIP tracking schedule, or any of several school tracking schedules used in Texas.

Select the appropriate schedule for evaluating students BEFORE you run your report.



## Print Reports (4 of 5) Delete Student from List

Click the box of the student you want to delete from the list, then click Delete button.

Reports Available for: Yaupon Elementary

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Official Immunization History List	Displays the official immunization history for each student on the list sorted alphabetically by last name.
Vaccines Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: ACIP

Client List for: Yaupon Elementary

Delete	Last Name	First Name	Middle Name	Birth Date
<input checked="" type="checkbox"/>	AARON	PABLO		01/01/2000
<input type="checkbox"/>	GREEN	KARL		01/01/2004

**Delete** **Cancel**

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Below the Tracking Schedule is the list of students and a delete box on each row. If you want to delete a student from the list, click the Delete box on the row for that student, then click the Delete button.



## Print Reports (5 of 5)

Click a report link to run a report.

Reports Available for: Yaupon Elementary

Report Name	Description
<a href="#">Student List</a>	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
<a href="#">Official Immunization History List</a>	Displays the official immunization history for each student on the list sorted alphabetically by last name.
<a href="#">Immunizations Due</a>	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule: ACIP

Client List for: Yaupon Elementary

Delete	Last Name	First Name	Middle Name	Birth Date
<input type="checkbox"/>	AARON	PABLO		01/01/2000
<input type="checkbox"/>	GREEN	KARL		01/01/2004

04/16/2019      ImmTrac2 Schools Training - Full Access Users      46

Finally, click one of the three report links to run a report.

Let's take a look at the output of the three report options.

The screenshot shows a report titled "Student List" from the ImmTrac2 system. The report header includes the Texas state logo and the text "ImmTrac2, the Texas Immunization Registry". Below the header is a section titled "Student Listing" with a timestamp "Report run on: 04/17/2019". A table displays student information with columns for ImmTrac2 ID, Last Name, First Name, Middle Name, and Birth Date. Two rows of data are shown:

ImmTrac2 ID	Last Name	First Name	Middle Name	Birth Date
219112820	AARON	PABLO		01/01/2000
219113740	GREEN	KARL		01/01/2004

At the bottom of the report, there are three footer items: "04/16/2019", "ImmTrac2 Schools Training - Full Access Users", and "47".

The Student List displays the ImmTrac2 ID, Last Name, First Name, and Birth Date for each student.

The screenshot shows a software interface titled "Official Immunization History List". At the top left is the Texas Department of State Health Services logo. Below it is a table titled "Official Immunization Report Job Status" with columns: Report Name, Started, Completed, Status, and Students. There are six rows in the table. The first row, "Yapon Elementary", has its entire row highlighted with a red border and a red arrow points to the "Report Name" column. The other five rows are standard table rows. At the bottom of the screen, there is footer text: "04/16/2019", "ImmTrac2 Schools Training - Full Access Users", and "48".

Official Immunization Report Job Status				
			Refresh	Cancel
Report Name	Started	Completed	Status	Students
Yapon Elementary	2019-04-25 16:36:29.0	2019-04-25 16:36:30.0	100%	2
Yapon Elementary	2019-04-25 16:34:56.0	2019-04-25 16:34:57.0	100%	2
Yapon Elementary	2019-04-25 07:25:39.0	2019-04-25 07:25:41.0	100%	2
Yapon Elementary	2019-04-17 10:20:36.0	2019-04-17 10:20:36.0	100%	2
Yapon Elementary	2019-04-17 10:20:12.0	2019-04-17 10:20:14.0	100%	2

When you click the link for the Official Immunization History List, you will see a list of the times you've run the History List. If the status on the topmost list is less than 100 percent, click the refresh button to check the progress of creating the report. When the status is 100 percent complete, click the Report Name and the immunization report for each of the students on the list will be displayed.

**Official Immunization Reports (for all on the list)**

TEXAS DEPARTMENT OF STATE HEALTH SERVICES  
Official Immunization and Disaster-Related Information Record

ImmTrac ID: 319112800	Gender: M
Client Name (L, F, M): AARON, PABLO	DOB: 01/01/2000
Client Type: ImmTrac Adult (A)	Client Age: 19 years, 3 months, 16 days
Schedule: ACIP	Report Date: 04/17/2019

**NOTICE:** By Texas law, the Texas Immunization Registry holds children's immunization records only for a limited time. After a child turns 18 years old, that person must sign an adult consent form to maintain his or her immunization history for a lifetime. If adult consent is not signed, the childhood history will be purged on the person's 28th birthday. Learn more at [www.immtrac.com](http://www.immtrac.com).

Any combination vaccines (e.g. DTaP-HepB-IPV, HepB-Hib) administered are listed within each appropriate vaccine family.

**IMMUNIZATION HISTORY**

Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Manufacturer	Lot #
HepB	01/05/2019	1 of 3	DTaP-HepB-IPV [Pediatric]	SKB-GlaxoSmithKline	TEST123
MMR	01/05/2019	1 of 2	MMR [MMR II]		
Polio	01/05/2019	1 of 4	DTaP-HepB-IPV [Pediatric]	SKB-GlaxoSmithKline	TEST123
Td/Tdap	01/05/2019	1 of 4	DTaP-HepB-IPV [Pediatric]	SKB-GlaxoSmithKline	TEST123

**Client Comments:**  
Allergy to latex (anaphylactic)

**Start Date:** 01/01/2019    **End Date:**

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Here's a sample of the Official Immunization Report.

The screenshot shows the 'School Immunization Due List Request' section of the ImmTrac2 application. It includes the following fields:

- Select the Vaccine Group To Report on ...**:
  - Use All Vaccine Groups
  - Use Vaccine Groups Selected
- Vaccine Selection Area**: A list box containing "Adeno" and "Amantadine". Above the list box are "Add" and "Remove" buttons, and below it are up and down arrow buttons.
- Enter the Date Criteria ...**:
  - Target Date Range
- Date Range Fields**: "From" and "To" date pickers, both highlighted with a red box.
- Note**: "NOTE: If Target Date is blank, today's date will be used."
- Buttons**: "Generate" (highlighted with a red box) and "Cancel".

At the bottom of the window, the date "04/16/2019" and the title "ImmTrac2 Schools Training - View Only Users" are visible, along with a page number "50".

If you clicked the “Immunizations Due” report, you are given options to select which vaccines to check on and the target date range for when those vaccines might have been due.

For Vaccine Groups you can choose to “Use All Vaccine Groups”, or to “Use Vaccine Groups Selected” and then select vaccines by clicking on a vaccine and then clicking the Add button, or double-clicking on the vaccine you wish to add to the list.

If you do not select a target date range, the current date will be used.

After selecting a group of vaccines and a target date range, click the “Generate” button.

The screenshot shows a software application window titled "Immunizations Due (2 of 3)". At the top left is the Texas Department of State Health Services logo. Below it is a table titled "Immunization Due Report Job Status" with columns: Started, Completed, Status, Students, Target From, and Target To. The data in the table is as follows:

Started	Completed	Status	Students	Target From	Target To
04/17/2019 10:35 AM	04/17/2019 10:35 AM	100 %	2	04/17/2019	04/17/2019

Below this is a section titled "School Report Status" with a table:

Name	Type	Requested	Started	Completed	Status
Due Report 04-17-2019 10:35:39	Imm. Due	04/17/2019 10:35 AM	04/17/2019 10:35 AM	04/17/2019 10:35 AM	Ready
Due Report 04-15-2019 12:29:37	Imm. Due	04/15/2019 12:29 PM	04/15/2019 12:29 PM	04/15/2019 12:29 PM	Ready

At the bottom of the window, there are three buttons: "Refresh", "Cancel", and "Print". The footer of the window displays the date "04/16/2019", the title "ImmTrac2 Schools Training - View Only Users", and the page number "51".

The report job status appears next, displaying a list of the school reports you have run. You can click the “Refresh” button in the upper right corner to see the current status of the report you are running. When the status is “Ready”, click the name of the report to see it.



**Immunizations Due (3 of 3)**

Report run on: 04/17/2019 Student Immunization Due List		
Student Name (L, F, M): PABLO AARON V 01/01/2000		Tracking Schedule: ACIP
Vaccine	Immunizations Due	Immunization Dates
DTP/Hib	Max Age Exceeded	1) 01/05/2019
HepB	02/05/2019	
HPV	01/01/2011	
Influenza-seasnl	07/01/2018	
Meningo	01/01/2016	
MMR	03/05/2019	1) 01/05/2019
Polio	03/05/2019	1) 01/05/2019
Td/Tdap	03/05/2019	1) 01/05/2019

KARL GREEN - 01/01/2004 Tracking Schedule: ACIP		
Vaccine	Immunizations Due	Immunization Dates
HepA	01/01/2008	
HepB	01/01/2004	
HPV	01/01/2015	
Influenza-seasnl	07/01/2018	
Meningo	01/01/2015	
MMR	01/01/2008	
Polio	03/01/2004	
Td/Tdap	01/01/2011	
Vaccine	01/01/2017	

This is an example of the Immunizations Due report, which will be generated for each student on your report list. It gives the name of the student, the date of birth, a list of vaccines due, and the dates vaccines were given.

This report is slightly different from the Immunizations Needed report we did for one student earlier, but both have dates that immunizations given were due and dates that immunizations were given.

The screenshot shows a dark-themed application window. In the top left corner, there's a logo for the Texas Health and Human Services Department of State Health Services. The main title "4. Check School Report Shows Completed Reports" is displayed in a large, bold, yellow font. Below the title, a sub-instruction reads "Click Check School Reports to access the reports you've run." A sidebar on the left contains links for "Immunizations", "view client imm report", "Schools", "manage list", "find student", and "check school report". The "check school report" link is highlighted with a red oval. The central area is titled "Check School Report Status" and displays two report entries in a table:

Report Name	Description	Output
Official Immunization History List	Displays the official immunization history for each student on the list sorted alphabetically by last name.	<a href="#">Status</a>
Immunizations Due	Displays the name, date of birth and all immunization information for immunization due for each student on the list sorted alphabetically by last name.	<a href="#">Status</a>

At the bottom of the window, the date "04/16/2019" and the page number "53" are visible.

You can click Check School Report in the left-side menu panel to access reports.

Click the Status hyperlink to see the status of reports that are running or to see reports you've previously run.



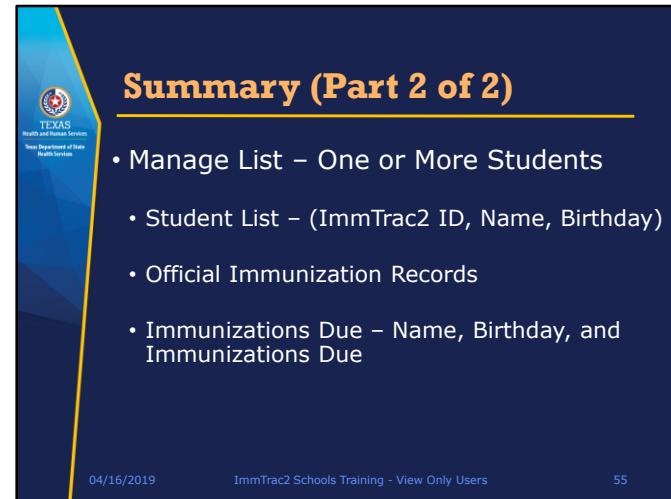
## Summary (Part 1 of 2)

- View Client Imm Report – One Student
  - Official Immunization Record
  - Immunizations Needed (Imms given & due)
  - Recall Letter (lists past due immunizations in English and Spanish)

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In summary, the View Client Imm Report link lets you print reports for one student at a time, giving you a choice of:

- The Official Immunization Record, or
- Immunizations Needed, which covers immunizations given and immunizations due, or
- A Recall Letter, which lists past due immunizations in English and Spanish.



The slide features a dark blue background with a yellow vertical bar on the left side containing the Texas Health and Human Services logo. The title "Summary (Part 2 of 2)" is centered at the top in a yellow font. Below the title is a bulleted list of four items under the heading "Manage List – One or More Students". At the bottom of the slide, there is a footer with the date "04/16/2019", the title "ImmTrac2 Schools Training - View Only Users", and the page number "55".

## Summary (Part 2 of 2)

- Manage List – One or More Students
  - Student List – (ImmTrac2 ID, Name, Birthday)
  - Official Immunization Records
  - Immunizations Due – Name, Birthday, and Immunizations Due

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The Manage List link lets you print reports for one or more students where you can select:

- A student list displaying the ImmTrac2 ID, Name, and Birthday, or
- Official Immunization Records, or
- Immunizations Due, which displays name, birthday, and immunizations due.



The next part of our webinar will be on back-to-school vaccine requirements, and at the end of this webinar we'll answer questions.



Texas Department of State  
Health Services

## Back-To-School Vaccine Requirements

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**School Compliance Team  
(DSHS Immunization  
Assessment, Compliance, &  
Evaluation Group)**

## Topics



- Vaccine Requirements
- Doses vs Intervals
- Provisional Enrollment
- Conscientious Exemptions
- Valid Vaccine Record
- Tracking Immunization Records
- Resources
- Records Retention

On today's webinar, a brief overview will be provided on the following topics:

- Vaccine requirements for students enrolled in K-12
- Provisional Enrollment
- Conscientious Exemptions
- Valid immunization record
- Tracking immunization records
- Available resources that will make your lives easier
- Records Retention

Examples will be used throughout the presentation

Finally, we will answer any questions at the end of the presentation

## TAC Rule §97.63



- The required vaccines and number of doses for individuals attending childcare facilities, Pre-K programs, elementary schools, and secondary schools.
- [https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pg=1&p\\_tac=&ti=25&pt=1&ch=97&rl=63](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=25&pt=1&ch=97&rl=63)

- Texas Administrative Code Rule 97.63 goes into detail regarding the vaccines and number of doses for individuals enrolled in childcare facilities, Pre-K programs, elementary schools, and secondary schools.



# Texas Minimum State Vaccine Requirements

**2019 - 2020 Texas Minimum State Vaccine Requirements for Students Grades K - 12**

This chart summarizes the vaccine requirements contained in the Texas Administrative Code (TAC), Title 25 Health Services, Chapter 97. This document is not intended as a substitute for the TAC, which has other provisions and details. The Department of State Health Services (DSHS) is granted authority to set immunization requirements by the Texas Education Code, Chapter 8.

A student shall show acceptable evidence of vaccination prior to entry, enrollment, or transfer to a public or private elementary or secondary school in Texas.

Vaccine Required (Attachment to note and footnote)	IMMUNIZATION REQUIREMENTS					Notes
	Grade K, 9th and younger	Grade 7th	Grade 10th	Grade 12th	Notes	
	N   1   2   3   4   5	N   1   2   3   4   5	N   1   2   3   4   5	N   1   2   3   4   5		
Diphtheria, Tetanus, Pertussis <sup>a</sup> (DTaP/DTb/DTP/Td/Tdap)	5 doses or 4 doses:	3 dose series and 1 dose of Tdap or Td within 1 year of age or within 3 years of the last dose	3 dose series and 1 dose of Tdap or Td within 1 year of age or within 3 years of the last dose	3 dose series and 1 dose of Tdap or Td within 1 year of age or within 3 years of the last dose	For K - 6 <sup>c</sup> grade: 5 doses of diphtheria-tetanus-pertussis vaccine; 1 dose must be received on or after the 4th birthday. However, if the 1st dose was received on or after the 4th birthday, 3 doses must be received on or after the 4th birthday. For students aged 7 years and older, 3 doses must be received on or after the 4th birthday. For 7 <sup>b</sup> grade: 1 dose of Tdap or Td if at least 5 years have passed since the last dose of Td or Tdap. For 8 <sup>b</sup> - 12 <sup>b</sup> grade: 1 dose of Tdap or Td if at least 10 years have passed since the last dose of Td or Tdap.	*Tdap is acceptable in place of Td if a medical contraindication to pertussis vaccine exists.
Polio <sup>d</sup>	4 doses or 3 doses				For K - 12 <sup>b</sup> grade: 4 doses of polio; 1 dose must be received on or after the 4 <sup>th</sup> birthday. However, 3 doses meet the requirement if the 3 <sup>rd</sup> dose was received on or after the 4 <sup>th</sup> birthday.	
Mumps, Measles, and Rubella <sup>e</sup> (MMR)		2 doses			For K - 12 <sup>b</sup> grade: 2 doses are required, with the 1 <sup>st</sup> dose received on or after the 1 <sup>st</sup> birthday and the 2 <sup>nd</sup> dose received on or after the 4 <sup>th</sup> birthday. For 7 <sup>b</sup> grade: 1 dose of measles and one dose each of mumps and rubella within this requirement.	
Hepatitis B <sup>f</sup>		3 doses			For students aged 11 - 15 years, 3 doses meet the requirement of adult hepatitis B vaccine (20 µg / 0.5 mL). For students aged 16 years and older, 1 dose of hepatitis B vaccine (10 µg / 0.5 mL) and type of vaccine (Recombivax®) must be clearly documented. If Recombivax® was used the vaccine received, a 3-dose series is required.	
Vaccine <sup>g,h,i</sup>		2 doses			For K - 12 <sup>b</sup> grade: 2 doses are required with the 1 <sup>st</sup> dose received on or after the 1 <sup>st</sup> birthday.	
Meningococcal <sup>j</sup> (MCV4)		1 dose			For 7 <sup>b</sup> - 12 <sup>b</sup> grade, 1 dose of quadrivalent meningococcal conjugate vaccine (MCV4) is required. For students aged 11 years and older, if a student received the vaccine at 10 years of age, this will satisfy the requirement.	
Hepatitis A <sup>k,l</sup>		2 doses			For K - 10 <sup>b</sup> grade: 2 doses are required, with the 1 <sup>st</sup> dose received on or after the 1 <sup>st</sup> birthday.	

NOTE: Shaded area indicates that the vaccine is not required for the respective grade.  
<sup>a</sup> Notes on the back page, please turn over.  
<sup>b</sup> Notes on the back page, please turn over.  
<sup>c</sup> Ram 03/2019

<https://www.dshs.texas.gov/immunize/school/default.shtm>

- Even though TAC Rule 97.63 explains the requirements, it's sometimes more convenient to have the information in chart form.
- Hep A is the only update to the school requirements for the 2019-2020 school year. During the 2018-2019 school year, 2 doses of hep A were required for students enrolled in K-9<sup>th</sup> grade. For the 2019-2020 school year, 2 doses of hep A will be required for students enrolled in K-10<sup>th</sup> grade.
- The 2019-2020 vaccine requirements are posted on the School & Childcare Facility Immunization Requirements website. If you are interested in printing the requirements or would like to access the requirements at a later date, the website can be accessed using the link located at the bottom of the slide.

## Doses vs. Intervals



- State of Texas vaccine requirements are based on the number of doses.
- ACIP recommendations are based on interval of doses.
- Some vaccine doses are required to be received on or after a specific birthday.

- State of Texas vaccine requirements for individuals enrolled in childcare, Pre-K, primary, and secondary schools are based on the number of doses.
- The Advisory Committee on Immunization Practices or ACIP recommendations are based on interval of doses.
- Students would ideally receive the required vaccines at the ACIP recommended intervals, but that doesn't always happen.
- If a student has received all of the required # of doses, the doses should count, and s/he should be allowed to enroll in school. There are some exceptions of course, as some vaccines are required to be received on or after a specific birthday.
- For example, if a student received the 2<sup>nd</sup> dose of Hep A four months after receiving the 1<sup>st</sup> dose, s/he would be in compliance because they received two doses of Hep A.
- Whereas, a child who received 5 doses of DTaP before their 4<sup>th</sup> birthday would be required to receive an additional dose in order to meet State of Texas minimum vaccine requirements.

## Doses vs Intervals Example 1



Shayla is moving from Arkansas and her parents want to enroll her in 3<sup>rd</sup> grade at Smith Elementary School. When Nurse Bee was reviewing Shayla's immunization record, she noticed that Shayla received the 2<sup>nd</sup> dose of MMR when she was 3½ .

Nurse Bee isn't sure if Shayla should be allowed to enroll since Shayla received the 2<sup>nd</sup> dose of MMR earlier than the ACIP recommendations.

Is Shayla allowed to enroll at Smith Elementary School?

## Doses vs Intervals Example Answer



Yes, Shayla should be allowed to enroll at Smith Elementary School.

Since Shayla received two doses of MMR, she meets the State of Texas Minimum Vaccine Requirements.

## Doses vs. Intervals Example 2



Tyrus needs to enroll in Jones elementary as a 5<sup>th</sup> grade student. He received both doses of varicella two weeks apart when he was two years old.

Does Tyrus need an additional dose?

## Doses vs. Intervals Example 2 Answer



No, Tyrus does not need an additional dose of varicella in order to be in compliance with State of Texas Minimum Vaccine Requirements because he received the right number of doses.

It is recommended that Tyrus should receive another dose of varicella vaccine since the two doses were given too close together.

- Although it is recommended for children to receive the 2<sup>nd</sup> dose of varicella between four and six years of age, Tyrus does not need an additional dose in order to be in compliance with Texas State Minimum Vaccine Requirements.

## Provisional Enrollment



### Students Who Qualify

- Texas Transfer Student
- Homeless Student
- Active Duty Dependents
- Children in Foster Care
- Students In-Progress

### Initial # of Days

- 30 days

- There are five reasons a student would qualify for provisional enrollment. A student would qualify for provisional enrollment if he or she is transferring from one Texas public or private school to another Texas school. Please remember students moving from out-of-state must either be up-to-date, have a valid vaccine exemption, or be in-progress for receiving the required vaccines.
- Students who are identified as homeless according to the federal McKinney-Vento Act, 42 U.S.C. §11302. If you aren't sure if the student qualifies as homeless, please reach out to your McKinney-Vento liaison
- Active duty dependents are students who are dependents of active duty service members and are waiting on the transfer of their immunization records.
- Students who are in foster care and are waiting on the transfer of their immunization record.
- Finally, students who are in-progress of receiving the required vaccines. For these provisionally enrolled student, the school nurse or school staff are required to review the student's immunization record every 30 days to ensure they are on track to receiving subsequent doses as fast as medically feasible.
- It's 30 calendar days, not 30 school days.
- If a student qualifies for provisional enrollment, they have 30 days from the date of enrollment to either produce a valid up-to-date shot record or a valid vaccine exemption. If there isn't a valid shot record or vaccine exemption after 30 days, the student is not allowed to be enrolled in school.

## Provisional Enrollment & Catch-Up Schedule



- DSHS Provisional Enrollment Vaccine Dosing Schedule:  
<https://www.dshs.texas.gov/immunize/school/publications.aspx>
- ACIP Catch-Up Schedule:  
<https://www.cdc.gov/vaccines/schedules/hcp/imz-catchup.html>

- Students provisionally enrolled are required to receive subsequent doses of vaccine as fast as medically feasible.
- If a student is provisionally enrolled, s/he would need to follow the ACIP Catch-Up Schedule
- Based on feedback, we created a K-12 Provisional Enrollment Vaccine Dosing Schedule. The tool is intended to help take the guess work out of when the subsequent vaccine should be given in a series.
- The spacing of doses on the provisional enrollment dosing schedule only applies to doses received after the student's provisional enrollment begins.
- We have also been asked to create a provisional enrollment dosing schedule for children enrolled in Pre-K and childcare, but one is not available at this time.

## **Provisional Enrollment Transfer Student Example**



Texas Department of State  
Health Services

Liam and his family are moving from Florida to Texas and he will be enrolled in 8<sup>th</sup> grade. Due to the differences in state vaccine requirements, Liam has not received two doses of Hep A or one dose of meningococcal.

Would Liam qualify for provisional enrollment since he will be transferring middle schools?

## Provisional Enrollment Transfer Student Example Answer



Liam's immunization record is delinquent by State of Texas standards.

If Liam receives one dose of Hep A and the required dose of MCV4, Liam is able to provisionally enroll in 8<sup>th</sup> grade because he has started all vaccine series.

- The answer could be no or yes. If a student moves from out of state and does not meet State of Texas vaccine requirements or is willing to receive the missing vaccines, s/he is only allowed to enroll if they have a valid medical or conscientious vaccine exemption.
- If a student moves to Texas and starts receiving required doses of the missing vaccine(s), s/he would be eligible for provisional enrollment.
- In this example, Liam should receive the 2<sup>nd</sup> dose of Hep A 6 months after he receives the 1<sup>st</sup> dose since 6 months is as fast as medically feasible for receiving the subsequent dose of Hep A.

## Conscientious Exemptions



- TAC Rule, Subchapter B, §97.62:  
[https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pq=1&p\\_tac=&ti=25&pt=1&ch=97&rl=62](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pq=1&p_tac=&ti=25&pt=1&ch=97&rl=62)
- DSHS School Exemptions FAQs:  
<https://www.dshs.texas.gov/immunize/school/exemption-faq.aspx>
- Conscientious exemptions include exemptions for religious & personal beliefs.
- Some students may have a conscientious exemption on file for some vaccines, but not all vaccines.
- If the exemption is not for all vaccines, a valid shot record must also be included with the student's file.

- More Information regarding conscientious exemptions can be found in TAC Rule §97.62, as well as on the DSHS School Exemptions FAQs page. TAC Rule §97.62 and the DSHS School Exemptions FAQs can be accessed by using the links on the screen.
- Individuals cite various reasons why they do not want their children immunized, but unless there is a medical contraindication that has been verified by a MD or DO, the parent would need to submit a conscientious exemption request.
- Some parents/ guardians may want their child to receive some vaccines, but not all vaccines. If this is the case, the student will present a conscientious exemption affidavit with boxes checked for some vaccines, but not for others.

## Conscientious Exemptions Cont.



- Request via fax, online, or mail
- Printed on special paper
- Sent via USPS
- Valid two years after notarized
- Must be notarized by a notary public for the State of Texas
- No grace period

- The conscientious exemption affidavit is printed on special paper that is mailed from DSHS state headquarters in Austin. DSHS mails all affidavits via USPS and the recipient should receive the document 7-10 business days after the request has been processed. Requests are processed in the order received. If it is a busy time of year, a person may submit their exemption request on a Monday afternoon, but it may not get processed until Wednesday morning due to the number of requests that were received prior to the individual's.
- After the parent/guardian receives the conscientious exemption affidavit in the mail, s/he must get the document notarized by a notary public for the State of Texas. This document remains valid for two years after the date notarized.
- There is no grace period which means once the exemption expires, the student should not be allowed to return to school until they have either started the vaccine series or has a valid conscientious exemption affidavit.

## Conscientious Exemption Affidavit Paper Update



Difference	Old Affidavit Exemption Paper	New Affidavit Exemption Paper
Weight/thickness	<ul style="list-style-type: none"><li>• Heavier, thicker paper</li><li>• Feels more like an index card or cardstock</li></ul>	<ul style="list-style-type: none"><li>• Lighter, thinner paper</li><li>• Feels more like computer paper</li></ul>

- On April 15<sup>th</sup>, DSHS started using new paper for the conscientious exemption affidavits.
- A lot of the same features on the old paper remain the same on the new paper. These features include: Number in upper right corner in red ink, DSHS logo in upper left corner; State seal watermark,; Color of paper is light blue, but slightly different tint; When copied, the copy will show the word "void"; Blank back page, but when held to the light the repeated words "Kan't Kopy" appear.
- There are some differences between the types of paper, which include the weight and thickness.
- A school should accept a valid vaccine exemption that is printed on either the new or old affidavit paper.
- Since DSHS started using the new paper, an insert with information on the updated paper has been included with each vaccine exemption affidavit packet that is mailed.
- Information regarding the update has also been placed on DSHS Immunization Unit website.

## Transferring Schools Example



Mai Ling has a conscientious exemption on file at her current middle school. Mai Ling's family will be moving from Waco to Houston.

When her mom went to withdraw Mai Ling from school, her mom intended on taking her daughter's original conscientious exemption affidavit since it would still be valid for one more year.

The school registrar stated the original affidavit must remain at the school, but Mai Ling's mom disagrees. Who is correct?

## Transferring Schools Example Answer



Mai Ling's mom is correct. When a student withdraws from a school, the original conscientious exemption affidavit should be returned to the parent/guardian.

The school does not need to keep the original for record retention purposes.

- Per the Records Retention Schedule, affidavits of conscience-based exclusions should be retained for 2 years after the date notarized or date of withdrawal, whichever sooner.

## **Obtaining a Conscientious Exemption Affidavit Example**



Texas Department of State  
Health Services

Shannon attends Washington High School, which is part of Dallas ISD. It is August 15<sup>th</sup> and school starts August 19<sup>th</sup>. Shannon's father realizes her conscientious exemption affidavit has expired.

Which one is **NOT** an option for obtaining a conscientious exemption affidavit?

- A. Drive to Austin and obtain in person
- B. Submit a request via fax
- C. Submit a request via online
- D. Submit a request via mail

## Obtaining a Conscientious Exemption Affidavit Example Answer



A. Drive to Austin and obtain the document in person.

Conscientious exemption affidavit requests are not processed in person, although the request form can be dropped off.

Conscientious exemption affidavit requests are processed year round.

- People do have the option to drive to the state health department and submit a request, but their request will not be processed in-person.
- We value vaccinations and education, but due to the limited size of our staff, we don't process conscientious exemption requests in person.
- By law, students are required to either be up-to-date or have a valid vaccine exemption in order to attend school. If a student does not have an up-to-date vaccine record, is in the process of receiving the required vaccines, or have a valid vaccine exemption; s/he should not be allowed to attend the first day of school.
- We do process conscientious exemption requests daily all year long and we generally process requests within 3 business days of receiving the request. We know parents/guardians may wait until the last minute before school starts, but back-to-school is our busiest time of year. Additional staff is hired during the back-to-school season in order to help process conscientious exemption requests. Additionally, it may take 7-10 business days after the request has been processed for the parent/guardian to receive the affidavit in the mail.

## Valid Vaccine Record



- Validated by a physician or public health personnel
- Month, day, and year of when vaccination was received
- Clinic contact information & the provider's signature/stamp if generated from an electronic health record
- Official immunization record from a state or local health authority (e.g. ImmTrac2)
- Official record from school officials, including a record from another state
- TAC Rule §97.68:  
[https://texreg.sos.state.tx.us/public/readtac\\$ext.TacPage?sl=R&app=9&p\\_dir=&p\\_rloc=&p\\_tloc=&p\\_ploc=&pg=1&p\\_tac=&ti=25&pt=1&ch=97&rl=68](https://texreg.sos.state.tx.us/public/readtac$ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=25&pt=1&ch=97&rl=68)

- Immunization records come in a variety of forms and as long as the record has been validated by a physician or public health personnel and the month, day, and year of when the vaccination was received is on the record; it's valid.
- It does not matter if the same ink was used when indicating the date and vaccine type received.
- If the record has been printed off from an EHR, it must contain the clinic's stamp & provider's signature or stamp
- Immunization records are also acceptable if they come from a local or state health authority
- Records from ImmTrac2 are acceptable
- Official records from school officials are also acceptable
- If the immunization record is from another country and contains all of the required information; the record is valid.

# Tracking Immunization Records



- ImmTrac2
- School immunization tracking software
- Change schedule from ACIP recommendations to State of Texas requirements
- Student's immunization records

- School nurses wear many hats and it can be challenging making sure students are up-to-date and in compliance.
- All schools have access to ImmTrac2 and some schools use school immunization tracking software to track their students' immunization status.
- ImmTrac2 is automatically set to the ACIP Recommendations and as a result, a student may appear as delinquent, when in reality s/he is up-to-date.
- Immunization tracking software varies. If you or a school staff have a question about your tracking software, please contact the vendor. If you aren't sure who to contact, check their website.
- If the tracking software indicates the student is delinquent and you can't figure out why, review the dates when the doses were received on the student's immunization record. When reviewing the student's record, compare it to the State of Texas Minimum Vaccine Requirements. The software may be indicating the student is delinquent if the student received a dose of a specific vaccine before a required birthday. If for example, the student received four doses of polio before their 4<sup>th</sup> birthday, the software would flag the student as not being up-to-date per State of Texas Minimum State Vaccine Requirements and the student should receive another dose of polio.

## School Immunization Tracking Software Error Message Example



RN Fisher's school immunization tracking software provides a report when immunizations are due. According to the school immunization tracking software, Shelby a kindergartner, is due for a final dose of DTaP.

RN Fisher is confused because Shelby has received five doses of DTaP. What should RN Fisher do?

- A. Check ImmTrac2
- B. Review Shelby's immunization record
- C. A and B are correct

## School Immunization Tracking Software Error Message Example Answer



A & B are correct

ImmTrac2 is a great place to start.

- If you guessed C, that A (Check ImmTrac2) and B (Review Shelby's immunization record) is the answer, you are correct.
- ImmTrac2 is a great place to start. If Shelby is not in ImmTrac2, RN Fisher should review Shelby's immunization record.
- Even though Shelby received 5 doses of DTaP, all were received before age four.
- After RN Fisher notices that Shelby received all 5 doses of DTaP before age four, RN Fisher will need to notify the parent/guardian that Shelby needs an additional dose of DTaP in order to be in compliance.

## Records Retention



- A records retention schedule provides guidance on the length of time an entity is required to keep documents.
- Public School District Record Retention Schedule:  
<https://www.tsl.texas.gov/slrn/localretention#SD>
- Part 5: Student Health Records

- You may wonder why a slide pertaining to records retention is included in this presentation.
- A records retention schedule provides guidance on the length of time an entity is required to keep documents.
- Some school RNs have contacted the school compliance team and inquired how long they should keep certain documents.
- If you have questions regarding how long you should keep certain documents such as immunization records, health screening documentation, vaccine exemptions, the records retention guide will make your life easier.
- The guide can be accessed by clicking on the link and the records retention schedule for student health records is located in part 5.

## Immunization Resources



Texas Department of State  
Health Services

- ACIP Catch-Up Schedule:  
[https://www.cdc.gov/vaccines/schedules/hcp/imz/catc\\_hup.html](https://www.cdc.gov/vaccines/schedules/hcp/imz/catc_hup.html)
- DSHS School & Childcare Immunization Website:  
<https://www.dshs.texas.gov/immunize/>
- ImmTrac2:  
<https://immtrac.dshs.texas.gov/TXPRD/portalHeader.do>

- Some helpful school immunization resources are listed on the slide.



Texas Department of State  
Health Services

**Thank you from the Assessment,  
Compliance, & Evaluation Group**

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**[schoolimm@dshs.texas.gov](mailto:schoolimm@dshs.texas.gov)**

**1-800-252-9152**