

CONSENT GUIDELINES for PROVIDERS

WHEN to Obtain Consent for ImmTrac Participation

Providers need ONLY obtain written parental consent or adult consent for Registry participation IF the client is not already enrolled in ImmTrac. *Performing a "Smart Search" in ImmTrac will help determine if the client is currently participating in ImmTrac.*

- Adults, 18 years and older, and/or parents must provide written consent for their child, younger than 18 years, to participate in ImmTrac. Written consent for participation is required **one time** only. Clients may withdraw consent and request removal of their record from ImmTrac at any time.

Acceptable Consent Documents: (Only the following documents serve as legally acceptable forms of consent for ImmTrac participation.)

An ImmTrac-generated Immunization Registry (ImmTrac) Consent Form **is a** generated pre-filled document from ImmTrac using the criteria entered by the user to conduct a *Smart Search*. This official ImmTrac consent form is the preferred method for obtaining consent.

- **Immunization Registry (ImmTrac) Consent Form (Stock # IG-7)** – This form should be used for children age younger than 18 years old.
- **Immunization Registry (ImmTrac) First Responder/Family Member Request Form (Stock # IG-FR/FM)** – This form should be used for First Responders or Immediate Family Members of First Responders age 18 years or older.
- **Immunization Registry (ImmTrac) Disaster Information Retention Consent Form (Stock # IG-DC)** – This form should be used for anyone consenting to retain disaster-related information beyond the five (5) year retention period.
- **Immunization Registry (ImmTrac) Adult Consent Form (Stock # F11-13366)** – This form should be used for adults age 18 and older,
- **Immunization Registry (ImmTrac) Consent Form**, Stock # C-7 – This form is manually completed and signed by the parent, legal guardian or managing conservator for children younger than 18 years of age.
- Hand-written request from a parent, legal guardian or managing conservator (must contain all necessary information, be legible and signed).
- **Immunization Registry (ImmTrac) First Responder/Family Member Request Form (ImmTrac FR/FM)**, Stock # F11-12955 – This form is manually completed and signed by First Responders or Immediate Family Members of First Responders over 18 years of age who wish to have their immunization information maintained in ImmTrac.
- **Immunization Registry (ImmTrac) Disaster Information Retention Consent Form (ImmTrac DC)**, Stock # F11-12956 – This form is manually completed and signed by anyone consenting to retain disaster-related information beyond the five (5) year retention period.
- **Immunization Registry (ImmTrac) Adult Consent Form**, Stock # F11-13366 – This form is manually completed and signed by an adult 18 years or older.

NOTES:

- The majority of Texas newborns are enrolled in ImmTrac during the birth registration process.
- *A parent, legal guardian or managing conservator must sign all forms for children younger than 18 years of age.*
- *The ImmTrac consent option has been removed from several previously accepted forms. If you are currently using a supply of any form that is not listed above, yet offers the ImmTrac consent option, please discontinue its use as a means for obtaining consent for Registry participation. Such forms are no longer acceptable forms of Registry consent.*

Texas Department of State Health Services, ImmTrac Group – MC 1946,
P.O. Box 149347, Austin, TX 78714-9347 (512) 348-9158

Children (younger than 18 years of age) and ImmTrac Adult (age 18 and older)

HOW to OBTAIN and AFFIRM Consent for ImmTrac Participation (Varies depending on how reporting immunizations to ImmTrac)

Direct Internet Access: When reporting immunizations to ImmTrac using the ImmTrac Internet application method:

- Conduct an ImmTrac *Basic Search* for the record.
- If the record is found, consent for participation has been granted and is not necessary; update the immunization record by adding any immunizations administered.
- If the record is not found via the *Basic Search*, conduct a *Smart Search*.
 - If the record is still not found, ImmTrac will display a message informing you that no clients matched the *Smart Search* criteria entered and ask “Do you have one of the following signed consent forms for your client?” with the responses “YES [Signed C-7 or IG-7 ImmTrac consent form]” or “NO [Request Consent Form].” Select “NO [Request Consent Form]” to print the ImmTrac-generated consent form pre-filled with the information you have entered into the *Smart Search* fields. After the consent form is printed choose “Continue with Client Add.”
 - Offer the form to the client, parent, legal guardian or managing conservator for signature.
- If the client or client’s parent consents to Registry participation, select “YES [Signed C-7 or IG-7 ImmTrac consent form]” and click the “Submit” button.
- You are now at the “Client Add” screen which contains the information you entered to conduct the *Smart Search*. Add or edit information here and choose “Continue” to move to the next screen. Review information for accuracy, choose “Edit” to go back and make changes or add additional information, and choose “Continue” to move to the next screen.
- This is the “Consent Affirmation” screen. “ImmTrac Child (under age 18)” is pre-selected, or if the client is not an ImmTrac Child you may at this time affirm consent for ImmTrac Adult, First Responder (age 18 or older) and Adult Family Member of a First Responder (age 18 and older). Click on the “Affirm” button without changing anything.
- The “Consent Affirmation Confirmation” screen is displayed with the client’s information and user site’s information. Click “OK” to be taken to the “Client Detail” screen for newly added clients where immunization information may be added.
- You may then report that client’s immunizations by simply adding the immunizations you have administered to the record.
- The provider site should retain the signed consent form(s) in the client’s medical record,
- Please **DO NOT** fax the completed consent form(s) to ImmTrac.

Electronic Data Transfer (Import): If reporting immunizations to ImmTrac via electronic data transfer, you will be notified electronically by DSHS if consent cannot be verified for a child on whom you have reported immunizations. You will be provided with instructions on how you may obtain consent. You may obtain consent for Registry participation by offering parents a blank copy of the [Immunization \(ImmTrac\) Registry Consent Form, \(#C-7\)](#) for completion and signature or by performing a *Smart Search* in ImmTrac and following the steps above to produce a pre-filled *Immunization Registry (ImmTrac) Consent Form, (#G-7)* to offer to the client or parent of client for signature. Continue following the steps above to “affirm” consent and add the client to the Registry. Once the client has been added to the Registry, data sent to ImmTrac via electronic data transfer will be added to the client’s record.

Blank copies of the [Immunization \(ImmTrac\) Registry Consent Form, \(#C-7\)](#) may be printed from the Registry application or downloaded for photocopying from www.ImmTrac.com (from the *Information for Providers* section). A supply may also be ordered by clicking on the “ImmTrac Educational Materials” link, then selecting “Online Order Form” to view a listing of all literature available for request.

Texas Department of State Health Services, ImmTrac Group – MC 1946,
P.O. Box 149347, Austin, TX 78714-9347 (512) 348-9158

First Responders and Family Members (18 years of age and older)

HOW to OBTAIN and AFFIRM Consent for ImmTrac Participation

Direct Internet Access: Reporting immunizations to ImmTrac using the ImmTrac Internet application method:

- Conduct an ImmTrac *Basic Search* for the client's record. Be sure to choose the "Include" button for "First Responders/Adult Family Members."
- If the client's record is found, consent for participation has been granted and is not necessary; update the client's immunization record by adding any immunizations administered.
- If the client's record is not found via the *Basic Search*, conduct a *Smart Search*.
 - If the record is still not found, ImmTrac will display a message informing you that no clients matched the *Smart Search* criteria entered and asks "Do you have one of the following signed consent forms for your client?" with the responses "YES [Signed Request Form from a First Responder or Family Member (age 18 and over)]" or "NO [Request Consent Form]." Select "NO [Request Consent Form]" to print the ImmTrac-generated request form pre-filled with the information you have entered into the *Smart Search* fields. The consent form for retention of disaster-related information beyond the minimum retention period can also be printed from this screen. After the consent form(s) is printed choose "Continue with Client Add."
 - Offer the form(s) to the client for signature.
- If the client consents to Registry participation select "YES [Signed Request Form from a First Responder or Family Member (age 18 and older)]" and click the "Submit" button.
- You are now at the "Client Add" screen which contains the information you entered to conduct the *Smart Search*. Add or edit information here and choose "Continue" to move to the next screen. Review information for accuracy, choose "Edit" to go back and make changes or add additional information, and choose "Continue" to move to the next screen.
- This is the "Consent Affirmation" screen. Select to affirm consent for either a "First Responder (age 18 and older)" or "Adult Family Member of First Responder (age 18 and older)" by selecting the appropriate button. Click the box "Consent to retain disaster information" if consent has been obtained to retain disaster-related information beyond the minimum retention period. Click on the "Affirm" button.
- The "Consent Affirmation Confirmation" screen is displayed with the client's information and user site's information. Click "OK" to be taken to the "Client Detail" screen for newly added clients where immunization information may be added.
- You may then report that client's immunizations by simply adding the immunizations you have administered to the record.
- The provider site should retain the signed consent form(s) in the client's medical record.
- Please **DO NOT** fax the completed consent form(s) to ImmTrac.

Blank copies of the [Immunization Registry \(ImmTrac\) First Responder/Family Member Request Form \(ImmTrac FR/FM\)](#), stock #EF11-12955 and [Immunization Registry \(ImmTrac\) Disaster Information Retention Consent Form \(ImmTrac DC\)](#), stock #EF11-12956 may be downloaded for photocopying from www.ImmTrac.com (from the *Information for First Responders* section). A supply may also be ordered by clicking on the "ImmTrac Educational Materials" link, then selecting "Online Order Form" to view a listing of all literature available for request.

If you have any questions regarding consent for a client's participation in ImmTrac, please contact ImmTrac Customer Support at (800) 252-9152.