ImmTrac User Instruction Manual

Texas Department of State Health Services
Immunization Branch – ImmTrac Group

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ImmTrac Group – MC 1946
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Phone (800) 348-9158

www.ImmTrac.com

System Requirements

Internet Access (HTTPS)

- Microsoft Windows XP/Vista recommended; also Win95/98/ME/NT/2000 supported
- Internet Access (broadband recommended)
- Internet Explorer 7.0 or greater (most recent version recommended)
- Internet Explorer Security Settings set to default
- Internet Explorer Cookie Settings set to accept and retain cookie files
- Internet Explorer text set to "medium" or "small"
- Adobe Reader 7.0 or higher (most recent version recommended)
- E-Mail Address for site/access location Point of Contact (highly recommended)

*** Mozilla Firefox, Chrome, Netscape, Safari and all other browsers are not supported.*

Computer

- Monitor set at 800x600 resolution or greater
- CPU clock set to correct date/time
- Display Properties (DPI) set to "normal" (recommended)

Electronic Data Import Methods

Option 1: Web Import - HTTPS Internet Explorer 7.0 or greater

Option 2: FTP Import - FTP-AUTHSSL with 128-bit encryption

*** Macintosh, Linux/Unix and all other open-source software are not supported.*

NOTE: To view and print a **PDF** immunization record, report or form, you must have Adobe Acrobat Reader 4.05 or later installed. If you do not have Adobe Acrobat installed, you may download it free from www.adobe.com.

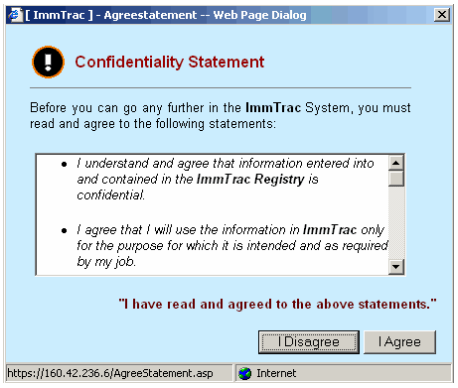
The Adobe Acrobat Reader software allows the user to e-mail documents from the application. However, HIPAA security standards prohibit the electronic transmission (e.g. e-mail) of individually identifiable health information without appropriate encryption or password security measures.

Accessing ImmTrac

1. Using Internet Explorer, access the ImmTrac application by typing or pasting the web address in the web browser's address bar: http://www.ImmTrac.tdh.state.tx.us. Bookmark the home page by clicking the "To bookmark our site, please click here" link located near the bottom of the page.

2. Click the blue **Logon** icon on the left hand side of the screen beneath the red menu bar.

3. The "Confidentiality Statement" pop-up box appears. Click the **I Agree** button to acknowledge you have read and agree to the confidentiality statement. The browser will take you to the ImmTrac Logon page.



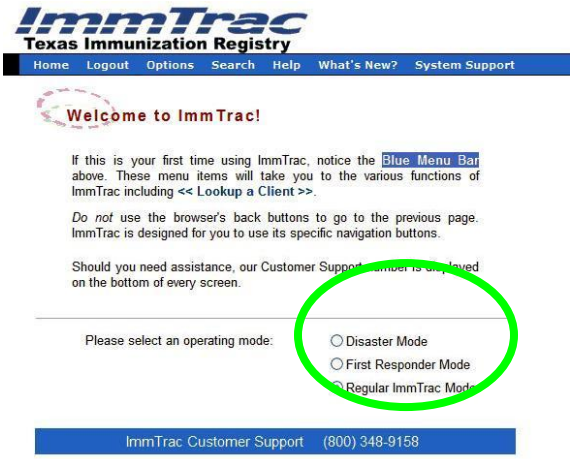
4. Enter your assigned user identification (ID), followed by your cAsE sEnSiTiVe password.

IMPORTANT NOTE: If this is your first time to logon to ImmTrac, you will be prompted to change your password from the temporary one provided when your account was created. You will use the temporary password the first time to logon and then create your own password. The first time you use Web ImmTrac on a particular computer you may also be prompted to enter an activation code after you click on the [I Agree] button. This code is displayed on your computer screen along with the instructions for using this activation code.

5. Click the blue **Logon** icon to continue logging into ImmTrac.

6. A broadcast message may display information on system updates or scheduled maintenance. Click the **OK** button to clear the message.

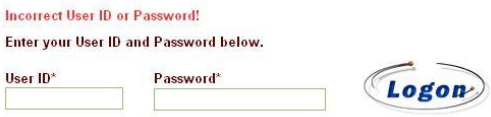
7. When the Welcome to ImmTrac page appears, the system defaults to **Regular** ImmTrac operating mode. **Disaster** mode is used in declared disasters. **First Responder** mode is a specialty mode used to add first responders and their adult family members to the Registry.



User-Initiated Login Unlock

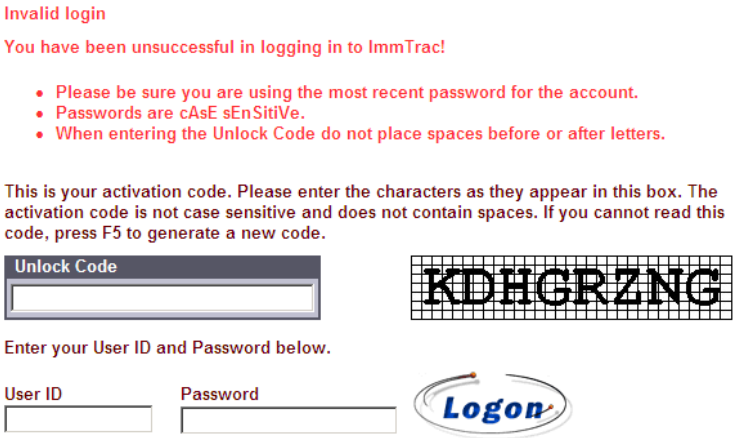
ImmTrac users who enter an incorrect password three times will be able to use the User Initiated Login Unlock functionality to gain additional password attempts.

1. If the user ID **or** password is incorrectly entered, the page displays the message "Incorrect User ID or Password!"



2. After three unsuccessful login attempts, the page displays the message "Invalid login" and an additional "Unlock Code" field is displayed.

3. After reading the displayed instructions, enter the unlock code displayed on the right in the "Unlock Code" field. Enter your user ID and password and click the blue **Logon** icon.



4. If you are still unsuccessful in entering the correct user ID and password, the page displays the new message "You have been locked out because of too many invalid logon attempts."

5. Your account is now locked and you will not be able to logon to ImmTrac. To regain access to your account, contact Customer Support at (800) 348-9158. **IMPORTANT NOTE:** Customer Support does not have access to users' passwords. If you have lost your password, the only way to regain access to your ImmTrac account is with a temporary password. Have your User ID/Logon ID ready when you contact ImmTrac Customer Service.

   Users should:
   - Use the most recent password for the account
   - Remember that passwords are cAsE sEnSiTiVe
   - Store recent passwords in a secure location with the date clearly indicated
   - Never use spaces before or after letters when entering the unlock code in the User-Initiated Login Unlock feature

***A Special Note:**
Have your user ID / Logon ID ready when you contact customer service.

Changing Your ImmTrac Password

1. From the blue ImmTrac menu bar, move your pointer over "Options." A dropdown list appears.

2. From this list, select "Change Password."

3. <u>Read the password rules carefully before creating a new password. The password:</u>

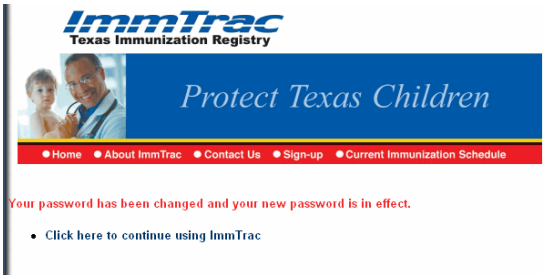
   - Can only include letters and numbers. Do not use spaces or special characters.
   - Is cAsE sEnSiTiVe.
   - Must include at least 2 numbers and 1 letter.
   - Length must be from 8 to 20 characters.
   - Cannot be the same as your temporary password or user ID.
   - Cannot be reused within 12 months.

4. Enter the old password in the "Old Password" field. This is the same password you used to logon. If you logged in with a **temporary password**, that becomes your old password.

5. Enter your new password, conforming to the password rules, in the "New Password" field.

6. Enter the new password again in the "Confirm New Password" field exactly as you typed it in the previous field.

7. Click the **OK** button located just below the "Confirm New Password" field followed by the "Click here to continue using ImmTrac" link to go to the Welcome to ImmTrac page.



Quick Searching for Registry Clients

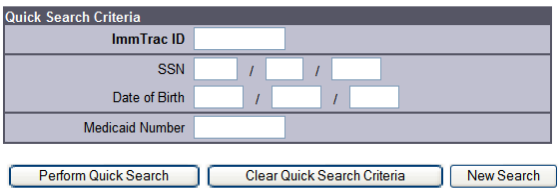
The *Quick Search* allows you to retrieve a client's ImmTrac record using a client's ImmTrac ID number **or** the Social Security number (SSN) **and** date of birth (DOB), or the Medicaid number. **If the client does not have an SSN or Medicaid number on file with ImmTrac, the client's record will not be found using those Quick Search criteria even though that person could be in the Registry.**

NOTE: The **Clear Quick Search Criteria** button will remove all information that you have entered into the "Quick Search Criteria" box, while the **New Search** button will clear all search fields on the Client Search page.

1. On the Welcome to ImmTrac page, select the **"Lookup a Client"** link near the middle of the screen.

2. You may also use the search option from the blue ImmTrac menu bar. Select "Search" and from the drop list, select "Client Search."

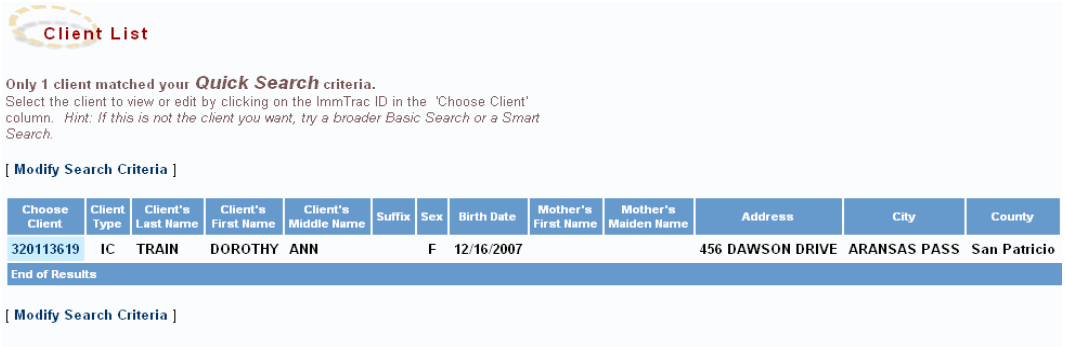
3. To perform a *Quick Search*, enter either the client's ImmTrac ID number, Social Security number (SSN) **and** date of birth, or the client's Medicaid number.



4. After entering the search criteria, click the **Perform Quick Search** button located beneath the "Quick Search Criteria" block to begin the search.

5. After you click the **Perform Quick Search** button, your search results display on the Client List page. If no clients were found, click the "Modify Search Criteria" link to return to the Client Search page and try a broader search for the client.

6. If a match was found, the client's information appears on the Client List page. If the correct client is listed, click on the client's ID number located under the "Choose Client" column.



Client List

Only 1 client matched your *Quick Search* criteria.
Select the client to view or edit by clicking on the ImmTrac ID in the 'Choose Client' column. *Hint: If this is not the client you want, try a broader Basic Search or a Smart Search.*

[Modify Search Criteria]

Choose Client	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Suffix	Sex	Birth Date	Mother's First Name	Mother's Maiden Name	Address	City	County
320113619	IC	TRAIN	DOROTHY	ANN		F	12/16/2007			456 DAWSON DRIVE	ARANSAS PASS	San Patricio

End of Results

[Modify Search Criteria]

7. The Client Detail page appears with the client's full record. From here you can view, add, or edit immunizations and client information. Navigate the client's record using the links on the left side of the page next to the small orange buttons.

ImmTrac Client Detail

Name TRAIN, DOROTHY ANN
DOB 12/16/2007 Age 8 months
Sex F Race
ImmTrac ID 320113619 QM Status N
Client Type ImmTrac Child (IC)
Disaster Consent Granted? N

Client List · Modify Search Criteria · Edit Above Info · Help

Logout
Home
Client Info
Preparedness
Address
Guardian
Comments
Confidential
Immunizations
Imm Schedule

Preparedness Information
Edit Responder Status Not associated

Address
Address 456 DAWSON DRIVE
City ARANSAS PASS
State TX
Zip 78336
County San Patricio
Country US
Phone
OK to Contact? Y
Num of Recall Attempts 0

Edit Address Information

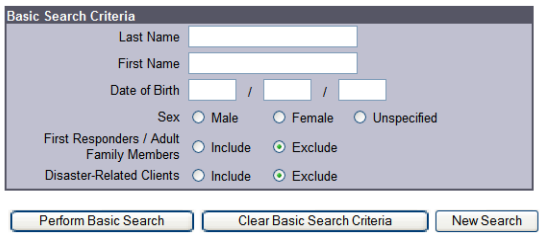
Guardian
Name
Relationship

Edit Guardian Information

Basic Searching for Registry Clients

The *Basic Search* allows you to conduct a broader search for a record using the client's last name, first name, date of birth, and sex or unspecified sex for both sexes.

1. Clicking the **Basic Search** button at the top of the page will advance your cursor to the first field of the "Basic Search Criteria" block.



2. To perform a *Basic Search*, enter the client's last name, first name, and date of birth in the "Basic Search Criteria" fields. Name fields are not case sensitive and the date of birth format should be mm/dd/yyyy. Then indicate if the child is male, female, or unspecified.

   NOTE: Only if you are a health-care provider and wish to include first responders, their immediate family members (over 18 years old), and disaster-related clients in your *Basic Search*, change "First Responders/Adult Family Members" and "Disaster-Related Clients" from "Exclude" to "Include." Other users will not see this option when conducting a *Basic Search*.

3. After entering the search criteria, click the **Perform Basic Search** button.

4. Your search results display on the Client List page. If no clients were found, click the "Modify Search Criteria" link to return to the Client Search page and try a *Smart Search*.

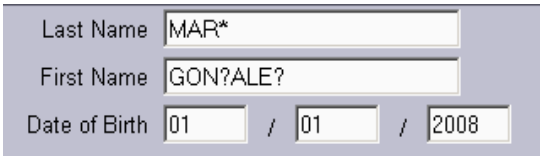
5. If any matches are found, the Client List page will only display the first 30 matches. If your client is not listed in the first 30 matches, try searching again with more restrictive data. You may also narrow the search results by selecting the "Filter by Your Site's County" link located above the client list.

6. If a match was found, the client's information appears on the Client List page. Click on the client's ID number located under the "Choose Client" column.

7. The Client Detail page appears with the client's full record. From here you may view, add, or update immunizations and/or client information.

Wild Carding

Wild carding is valuable for locating different spellings of names. This feature allows users to use the asterisk (*) or the question mark (?) characters as a placeholder for unknown letters in a name or date of birth when conducting a *Basic Search*.



When the asterisk (*) is used as the wild card character, the search returns all records that match everything coming after the wild card character. You must enter at least <u>three</u> letters of the first and last names before inserting a wild card character.

Example: If "Mar*" is entered as the first name, this search would match clients with first names such as Mark, Marque, Martin, or Markelle.

When the question mark (?) is used as the wild card character, the search uses the question mark (?) as a placeholder for one character.

Examples: If "Gon?ale?" is entered as the last name, this search would match clients with this last name spelled with different letters such as Gonzales, Gonsalez, Gonzalez, and Gonsales. Another example would be to use "?athy" in the given name field. This would return both Cathy and Kathy.

NOTE: Private providers are required to supply the entire birth date while public providers may wild card any part or all of the birth date.

County Filter

If there are more than 30 clients who matched your *Basic Search* criteria, then the "Filter by Your Site's County" link can show those clients whose residential county is the same as the county assigned to your PFS (Provider/Facility/Site) number.

Client List

More than 30 clients matched your **Basic Search** criteria.
Only 30 are displayed.
Select one of the clients to view or edit by clicking on the ImmTrac ID in the 'Choose Client' column. *Hint: Try a narrower search or a Smart Search. Please refer to the Client Lookup section in the User's Manual.*

[Modify Search Criteria] [Filter by Your Site's County]

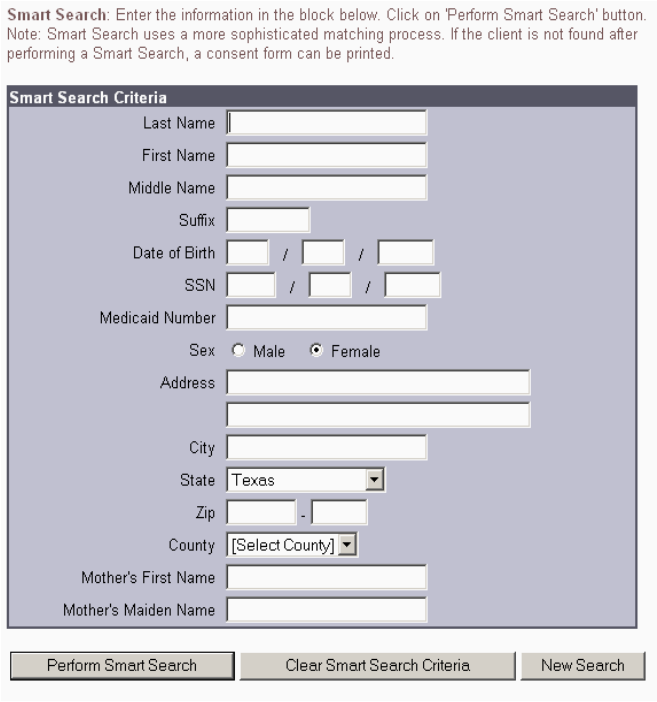
Choose Client	Client Type	Client's Last Name	Client's First Name	Client's Middle Name	Suffix	Sex	Birth Date	Mother's First Name	Mother's Maiden Name	Address	City	County
320113627	IC	SMITH	SALMA			F	05/03/2001			34 COOPER ST	ARLINGTON	Tarrant
320113639	FR	SMIRE	SALLY			F	02/05/1975			8934 DESSAU ROAD	ARLINGTON	Tarrant
320113633	IC	SMITE	SALLEE			F	12/05/2007			9876 KOENIG LANE	ARLINGTON	Tarrant
320113622	FR	SMITH	SALINA			F	06/27/1974			1107 N THORNBUSH CIR	AUSTIN	Travis
320113613	FR	SMITH	SALLY			F	06/21/1983			123 LAMAR ST	AUSTIN	Travis
320113620	IC	SMITHERS	SALMA			F	01/08/2006			123 MAIN ST	AUSTIN	Tyler
320113625	FM	SMITHS	SALLEE			F	02/05/1984			1602 BAURELE AVE	AUSTIN	Travis
320113623	IC	SMITHERS	SALLIE			F	12/26/2007			2504 JEWELL DR	AUSTIN	Travis

To toggle back to view the entire *Basic Search* results list, click the "Remove County Filter" link located above and below the client list and the original client list reappears.

Smart Searching for Registry Clients

If *Quick* and *Basic* searches do not find the client in ImmTrac, you can perform a more specific search by using the *Smart Search* feature. *Smart Search* is also the first step to adding someone to the Registry.

1. Clicking the **Smart Search** button at the top of the page will advance your cursor to the first field of the "Smart Search Criteria" block.



2. To perform a *Smart Search*, enter the information you know: the client's last name, first name, middle name, date of birth, Social Security number, Medicaid number, sex, address, city, state, zip code, county, mother's first name, and mother's maiden name. If you have already conducted a *Basic Search*, any information you entered is automatically populated into the "Smart Search Criteria" fields.

3. Click the **Perform Smart Search** button located beneath the "Smart Search Criteria" block to begin the search.

4. If any matches are found, the Client List displays any clients who closely match your *Smart Search* criteria. If your client is listed, click on the client's ID number located under the "Choose Client" column.

5. The Client Detail page appears with the client's full record. From here you may view, add, or update immunizations and/or client information.

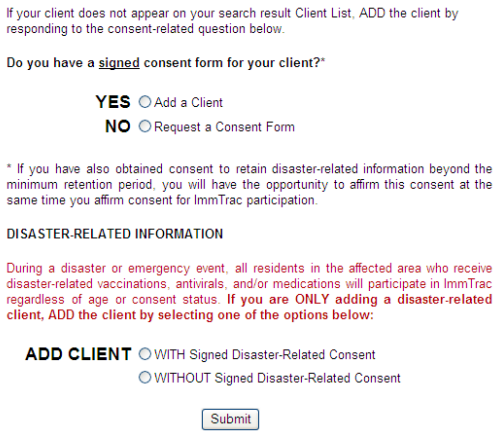
Affirming Consent for ImmTrac Participation

If a client is not found using the *Smart Search*, written consent has not been granted for the client to participate in ImmTrac. Health-care providers and other providers authorized to administer vaccines may "affirm" consent for ImmTrac participation for children (under 18 years of age), adults (age 18 and older), and first responders and their immediate family members (age 18 and older). Providers may also affirm consent for the retention of disaster-related information beyond the minimum retention period of five years.

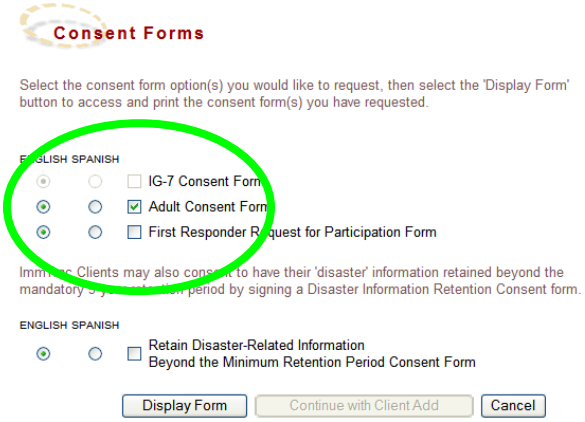
Adding a new client will prompt the question, "Do you have one of the following signed consent forms for your client?"

No Signed Consent Form

1. If you do not have a signed consent form for a client that has not been added to ImmTrac, select "**NO**" next to "Request a Consent Form" to display the pre-filled ImmTrac-generated consent form(s). Selecting this option will allow you to display the pre-filled ImmTrac-generated consent form(s) in PDF format. The form(s) will print with the client's name, date of birth, gender, and address pre-filled in the appropriate fields.

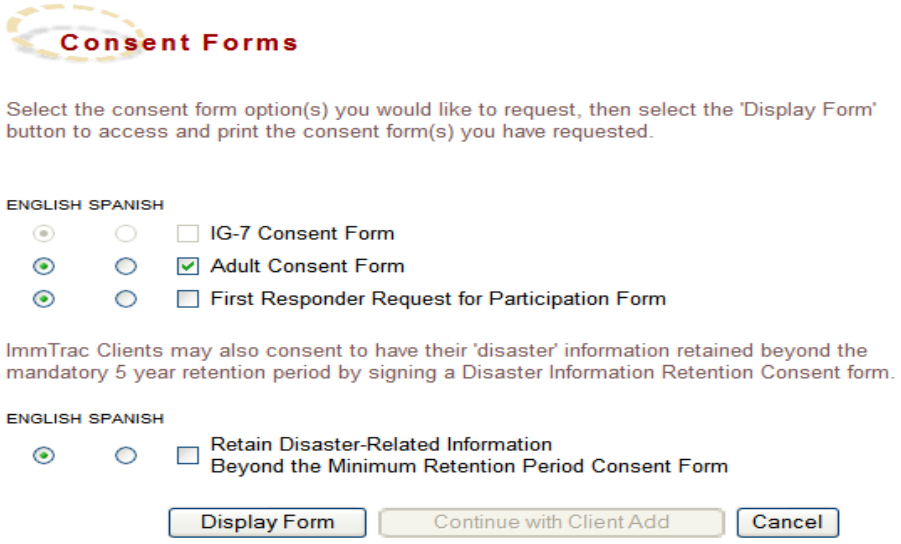


   a. Click the **Submit** button and the Consent Forms page appears.



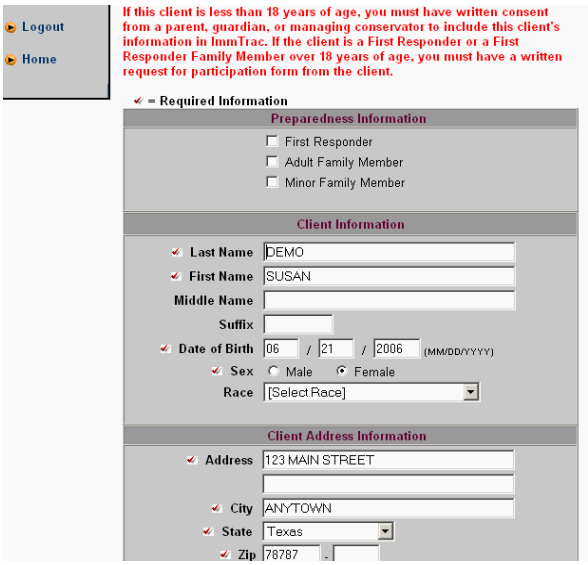
b. Select the consent form(s) you would like to print by checking the box next to the appropriate form(s). You may request a Spanish version of the consent form(s) by changing "English" to "Spanish."

c. Select the **Display Form** button to display the selected PDF consent form(s). **Important Note:** Most of the form may be below the line so be sure to scroll down if necessary to completely display it.

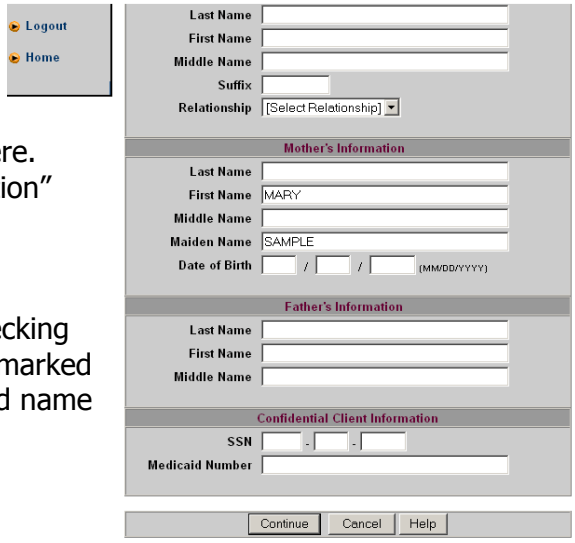


d. To print the consent form(s), click the printer icon then click the **OK** button on the printer confirmation box.

e. Offer the form(s) to the parent or client (age 18 and over) for signature and select the **Continue** button **after** the consent form(s) is signed.

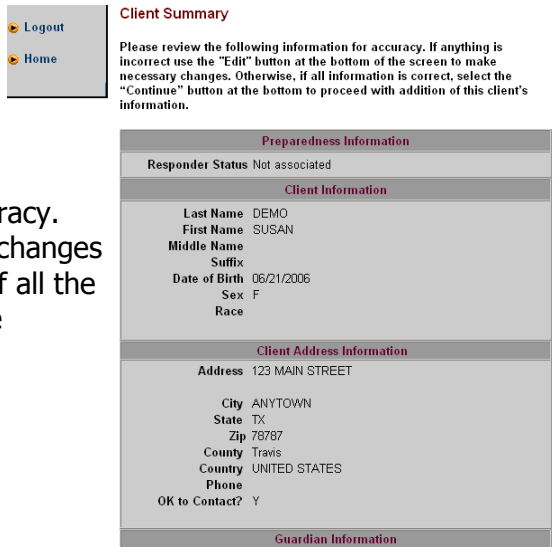


f. Add or edit any information here. Under "Preparedness Information" indicate if the client is a "First Responder," "Adult Family Member" or "Minor Family Member" by checking the appropriate box. All fields marked with one checkmark in the field name must be entered.

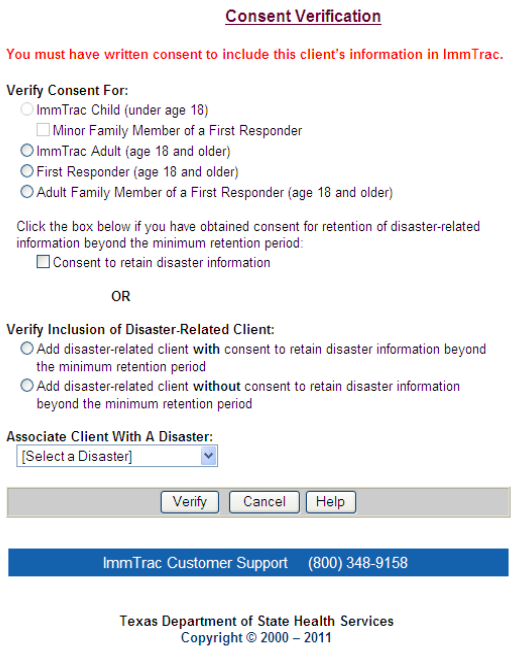


g. Select the **Continue** button to move to the Client Summary page.

h. Review the information for accuracy. Select the **Edit** button to make changes or add additional information. If all the information is correct, select the **Continue** button.



i. The Consent Affirmation page appears. If you are adding a child to ImmTrac, "ImmTrac Child (under age 18)" is pre-selected under the "Affirm Consent For" option. If you are adding an adult, **select** "ImmTrac Adult (age 18 and over)". If you are adding a first responder or first responder family member over 18 years of age, **select** "First Responder (age 18 and older)" or an "Adult Family Member of First Responder (age 18 and older)."



NOTE: Check the box "Consent to retain disaster information" if consent has been obtained to retain disaster-related information beyond the minimum retention period of five years.

j. Selecting the **Affirm** button displays the new client's information, including the ImmTrac ID number, and the user site's information.

k. Click the **OK** button. This takes you to the new client's Client Detail page where immunization information may be added.

l. Report any immunizations you have administered to ImmTrac by adding the immunizations to the client's record. If you have records of historical immunizations, add these to the record as well.

m. Retain the signed consent form in the client's medical record. **DO NOT** fax completed consent forms to ImmTrac.

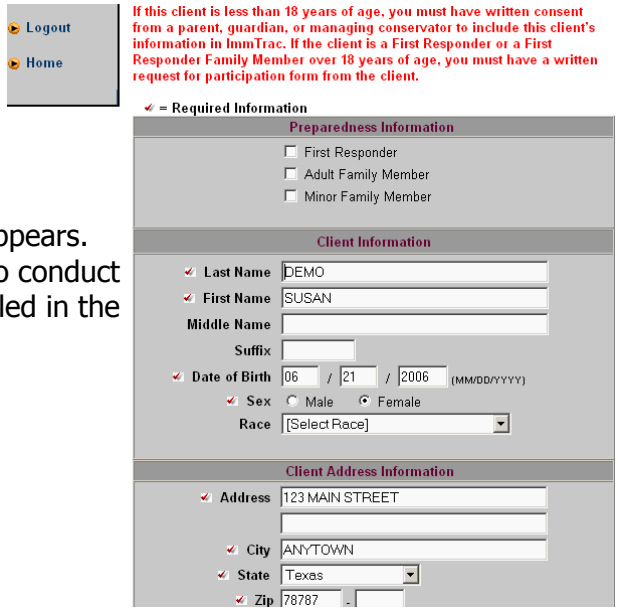
n.

Previously Signed Consent Form

2. If you already have a signed consent form, select the radio button **"YES, Add a Client."**

   a. Scroll down and click the **Submit** button.

   b. The **Add a Client** page appears. Any information entered to conduct the *Smart Search* is pre-filled in the appropriate fields.



   c. Add or edit any information here.

d. Select the **Continue** button to move to the Client Summary page.

e. Review the information for accuracy.

Logout
Home

Client Summary

Please review the following information for accuracy. If anything is incorrect use the "Edit" button at the bottom of the screen to make necessary changes. Otherwise, if all information is correct, select the "Continue" button at the bottom to proceed with addition of this client's information.

Preparedness Information

Responder Status Not associated

Client Information

Last Name DEMO
First Name SUSAN
Middle Name
Suffix
Date of Birth 06/21/2006
Sex F
Race

Client Address Information

Address 123 MAIN STREET
City ANYTOWN
State TX
Zip 78787
County Travis
Country UNITED STATES
Phone
OK to Contact? Y

Guardian Information

f. Once the Consent Affirmation page appears, select the **Affirm** button to affirm consent for ImmTrac participation and to add the client to the Registry.

NOTE: Check the box "Consent to retain disaster information" if consent has been obtained to retain disaster-related information beyond the minimum retention period of five years.

Consent Affirmation

You must have written consent to include this client's information in ImmTrac.

Affirm Consent For:
- ImmTrac Child (under age 18)
  - Minor Family Member of a First Responder
- ImmTrac Adult (age 18 and older)
- First Responder (age 18 and older)
- Adult Family Member of a First Responder (age 18 and older)

Click the box below if you have obtained consent for retention of disaster-related information beyond the minimum retention period:
- Consent to retain disaster information

OR

Affirm Inclusion of Disaster-Related Client:
- Add disaster-related client **with** consent to retain disaster information beyond the minimum retention period
- Add disaster-related client **without** consent to retain disaster information beyond the minimum retention period

Associate Client With A Disaster:
[Select a Disaster]

Affirm | Cancel | Help

g. The Consent Affirmation Confirmation page appears. This page displays the new client's information, including the ImmTrac ID number, and the user site's information.

Logout
Home

Consent Affirmation Confirmation

A record for the following client has been successfully **added**:

Immtrac record ID: 320113662
Name: DEMO, SUSAN
DOB: 06/21/2006

The following Immtrac user has **affirmed** "ImmTrac Child" consent for ImmTrac participation on 8/21/2008 11:09:37 AM:

Site Name: Austin-Travis Cnty Clinic
Site Address: 15 Waller St. Austin 78702
Site Phone: (512) 444-5555
User ID: LLEBRUN
PFS Number: 1100190007

Provider site should retain the signed consent form(s) in the client's medical record. Please **DO NOT** fax consent form(s) to ImmTrac.

OK

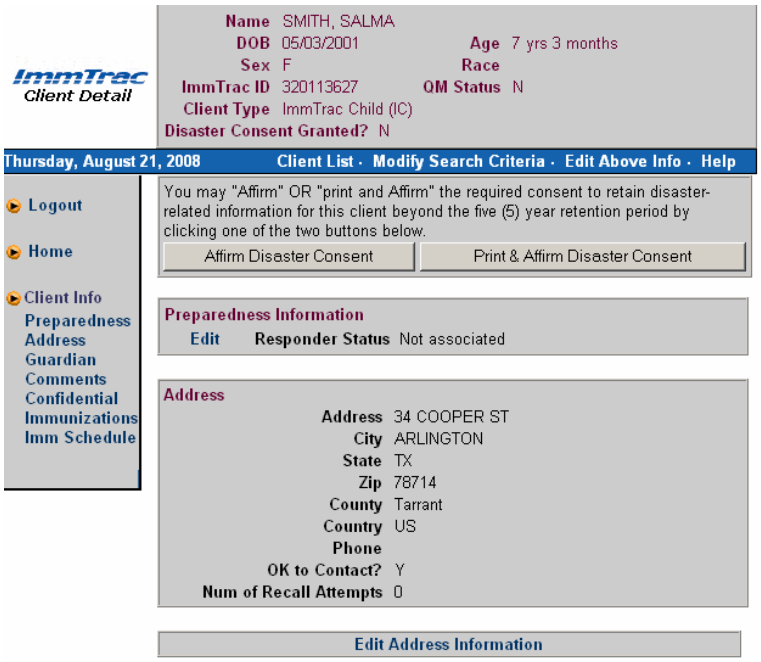
h. Click the **OK** button. This takes you to the Client Detail page where immunization information may be added.

i. Report any immunizations you have administered to ImmTrac by simply adding the immunizations to the client's record. If you have records of historical immunizations, add these to the record as well.

j. Retain the signed consent form in the client's medical record. **DO NOT** fax completed consent forms to ImmTrac.

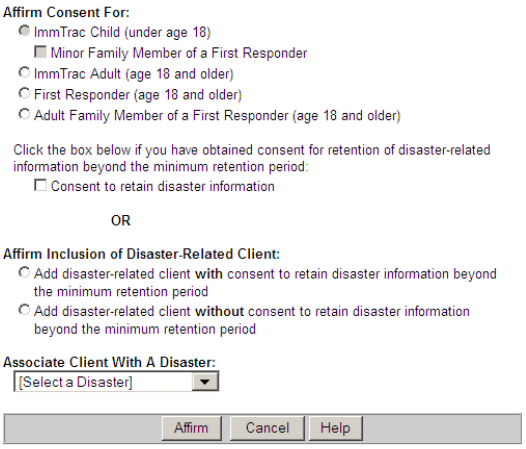
Retention of Disaster-Related Information

If consent to retain disaster-related information beyond the minimum retention period of five years has not been granted, a box will display at the top of the Client Detail page. This message "You may 'Affirm' OR 'Print and Affirm' the required consent to retain disaster-related information for this client beyond the five (5) year retention period by clicking one of the two buttons below."



1. If you already have a signed *Immunization Registry (ImmTrac) Disaster Information Retention Consent Form (ImmTrac DC)*, select the **Affirm Disaster Consent** button.

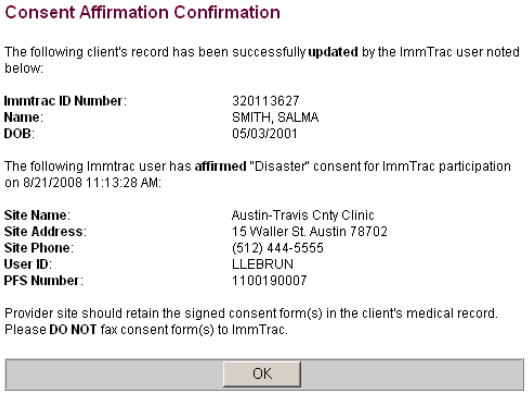
a. On the Consent Affirmation page,
check the box "Consent to retain disaster information."



b. Select the **Affirm** button to affirm consent for retention of disaster-related information beyond the minimum retention period of 5 years.

c. The Consent Affirmation Confirmation page appears. This page displays that the client's information was updated and the user site's information.

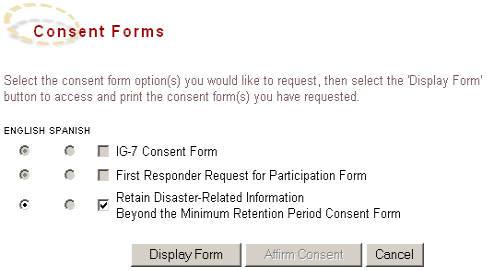
d. Click the **OK** button. This takes you to the client's Client Detail page where the immunization record can be updated.



e. Retain the signed consent form in the client's medical record. **<u>DO NOT</u>** fax completed consent forms to ImmTrac.

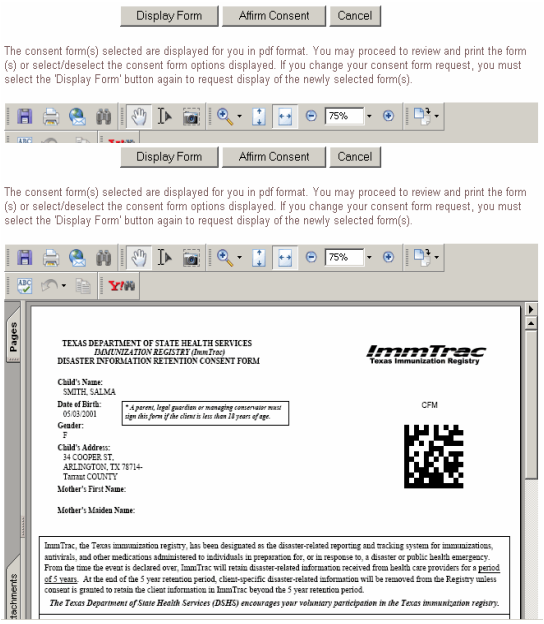
2. If you **<u>do not</u>** already have a signed *Immunization Registry (ImmTrac) Disaster Information Retention Consent Form (ImmTrac DC)*, select the **Print & Affirm Disaster Consent** button.

a. The Consent Forms page appears. Check the box next to "Retain Disaster-Related Information Beyond the Minimum Retention Period Consent Form." You may request a Spanish version of the consent form by changing "English" to "Spanish."



b. Select the **Display Form** button to display the selected PDF consent form.

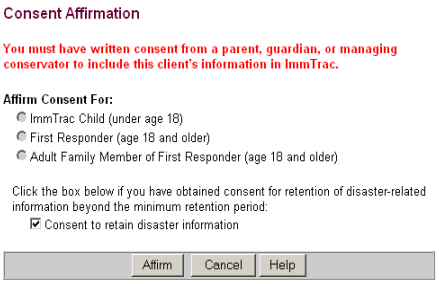
c. To print the form, click the printer icon and the **OK** button on the printer confirmation box.



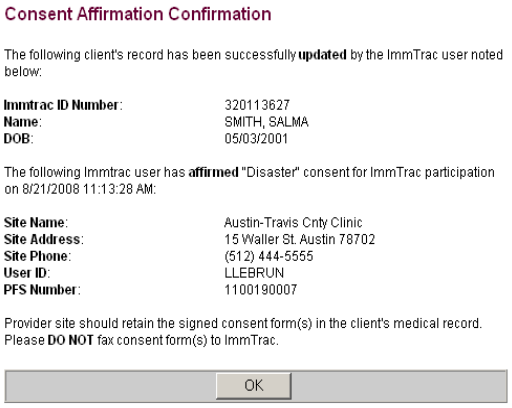
d. Offer the printed consent form to the adult client or child's parent for their signature.

e. Select the **Affirm Consent** button after the consent form is signed.

f. On the Consent Affirmation page, check the box "Consent to retain disaster information" and click the **Affirm** button to affirm consent for retention of disaster-related information beyond the minimum retention period.



g. On the Consent Affirmation Confirmation page, click the **OK** button. This takes you to the client's Client Detail page where immunization information may be added.



h. Retain the signed consent form in the client's medical record. **<u>DO NOT</u>** fax completed consent forms to ImmTrac.

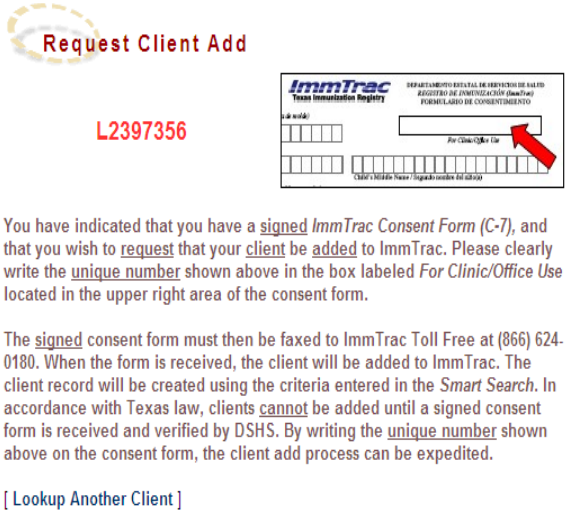
Request Client Add Process for Adding Clients

Only authorized health care providers may "affirm" consent for ImmTrac and add persons directly to the Registry. Other users can add clients by faxing the signed consent forms to ImmTrac.

If you conduct a *Smart Search* and do not find the individual you are searching for, you can request a consent form so the person may participate in ImmTrac.

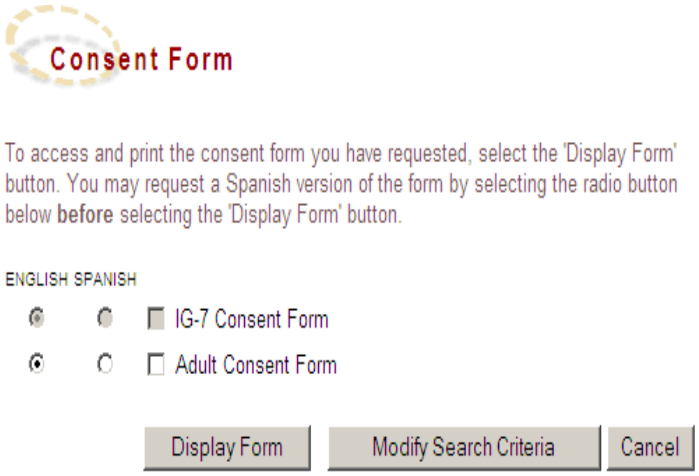
1. The page will ask: "Do you have a signed *ImmTrac Consent Form* (C-7) for your client?"

2. If you already have a signed consent form, select the "YES [Request Client Add]" link to generate a unique search number for the form. Clearly write the unique number shown in the box labeled For Clinic/Office Use located in the upper right area of the consent form.



3. If you **<u>do not</u>** have a signed consent form, select the "NO [Request Consent Form]" link to display a pre-filled ImmTrac-generated consent form. Click on the **"Display Form"** button to show the pre-filled ImmTrac-generated *Immunization Registry (ImmTrac) Consent Form (#IG-7)* or *Adult Consent Form* in PDF format. A unique search number and barcode is displayed on the form. This form prints with the person's name, date of birth, gender, and address pre-filled in the appropriate fields.

4. You may request a Spanish version of the consent form by changing "English" to "Spanish."



5. Select the **Display Form** button to show the selected PDF consent form.

6. To print the consent form, click the printer icon then click the **OK** button on the printer confirmation box.

7. Offer the consent form to the adult client, child's parent, legal guardian, or managing conservator for their signature.

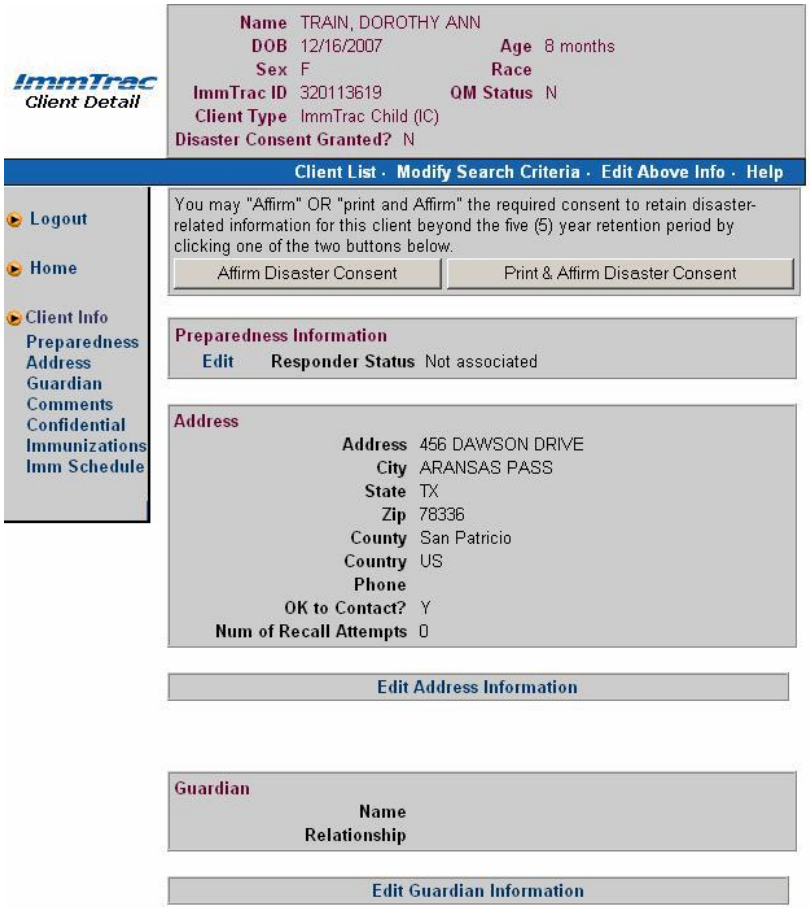
8. Fax **<u>signed, legible</u>** consent forms to the ImmTrac toll free consent fax number (866) 624-0180. This number is only for faxing <u>signed</u> ImmTrac consent forms.

9. **If the client already participates in ImmTrac - <u>DO NOT</u>** send ImmTrac a consent form. For those not in the Registry, we must have a signed consent form from the adult client, child's parent, legal guardian, or managing conservator to add a client to ImmTrac.

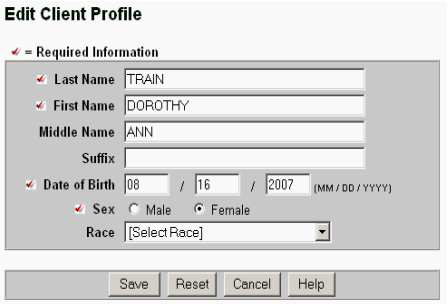
   NOTE: At the bottom of the #C-7, #IG-7, and *adult* consent forms you will see the following statement: *"Vaccine Providers Registered with ImmTrac – Please enter client information in ImmTrac and affirm that consent has been granted. DO NOT fax to ImmTrac. Retain this form in your client's records."* **<u>Please disregard this statement if you are not a health care provider</u>.** You **<u>MUST</u>** fax this form to the phone number provided to add someone to ImmTrac.

Editing Data on a Registry Client

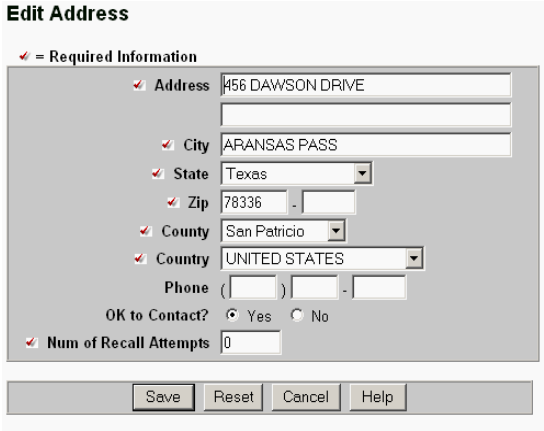
After conducting a *Quick, Basic,* or *Smart Search*, the Client Detail page appears. From this page, you may view and edit the client's demographic information, guardian information, confidential information, immunization history, and next recommended immunizations. To save any changes, click the **Save** button and it will return to the Client Detail page. The updated information appears. To reset any information you may have changed to the original information, select the **Reset** button before saving. Click the **Cancel** button to cancel any changes and return to the Client Detail page. You may also print an *official* copy of the client's ImmTrac immunization record.



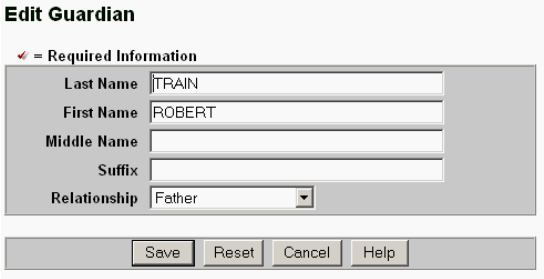
Client Info: Click the "Edit Above Info" link located on the blue menu bar to view the "Edit Client Profile" page. Here, the client's last name, first name, middle name, suffix (if applicable), date of birth, sex, and race can be edited.



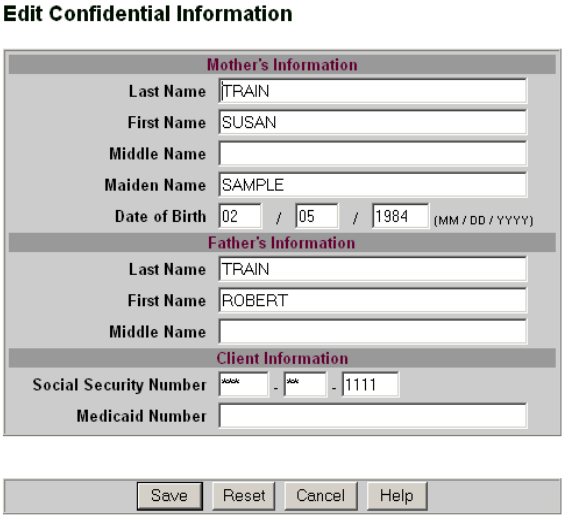
Address: Click the "Edit Address Information" link located below the block to show the Edit Address page. The client's street address, city, state, zip code, county, country, and phone number can be edited here. You may also indicate if it is OK to contact this client by selecting "Yes" or "No." If any attempts have been made to recall the client for overdue immunizations, the number of attempts will display in the "Num of Recall Attempts" field.



Guardian: Click the "Edit Guardian Information" link located below the block to view the Edit Guardian page. Here, the guardian's last name, first name, middle name, suffix (if applicable), and the guardian's relationship to the child can be edited from the dropdown menu.



Confidential Information: Click the "Edit Confidential Information" link located below the block to view the "Edit Confidential Information" page. The mother's last name, first name, middle name, maiden name, and date of birth can be edited. Below the "Father's Information" section, edit the father's last name, first name, and middle name. In the "Client Information" section, edit the client's Social Security and Medicaid numbers.



NOTE: If the mother's date of birth is entered under the "Mother's Information" section, the mother's age at the child's birth automatically displays. The "Most Recent PFS Information" also automatically displays in the "Confidential Information" block. However, neither of these fields may be edited.

Immunizations:

1. To edit information in the "Immunizations" block, click the "Edit" link next to the immunization you wish to edit.

Description Only CPT Code & Description

Edit Imm	Vaccine	Immunization Date	Age at Immunization	PFS	Lot Number	
Edit	HepB, 3 dose series, ped/adol	01/08/2010	0 week 1 day	1133170002	1022Y	Merck & Co., Inc.
Edit	HepB, 3 dose series, ped/adol	03/11/2010	2 months 4 days	1138160003	AHBVB708BA	GlaxoSmithKline (includes
Edit	HepB, 3 dose series, ped/adol	08/05/2010	6 months 29 days	1138160003	0320Z	Aventis Behring L.L.C. (inc
Edit	HepB, 3 dose series, ped/adol	01/07/2011	1 year	1138160003	AHAVB427AA	Merck & Co., Inc.
Edit	MMR	01/07/2011	1 year	1138160003	9104510025	Merck & Co., Inc.
Edit	Varicella (VAR)	01/07/2011	1 year	1138160003	9724309016	Merck & Co., Inc.
Edit	Pneumococcal (PCV7)	05/20/2010	4 months 13 days	1138160003	E46122-05	Wyeth [USE: other Wyeth
Edit	Pneumococcal (PCV7)	08/05/2010	6 months 29 days	1138160003	E49133	Wyeth [USE: other Wyeth
Edit	Pneumococcal (PCV7)	10/08/2010	9 months 1 day			
Edit	Rotavirus (RV5), 3 dose series	03/11/2010	2 months 4 days	1138160003	1211X	Merck & Co., Inc.
Edit	Rotavirus (RV5), 3 dose series	05/20/2010	4 months 13 days	1138160003	1633Y	Merck & Co., Inc.
Edit	Rotavirus (RV5), 3 dose series	08/02/2010	6 months 26 days	1138160003	0593Z	Merck & Co., Inc.
Edit	Hib, PRP-T	05/20/2010	4 months 13 days	1138160003	UF877AA	Sanofi Pasteur (formerly A
Edit	DTaP-IPV/Hib	03/11/2010	2 months 4 days	1138160003	C3286AB	GlaxoSmithKline (includes
Edit	DTaP-IPV/Hib	08/05/2010	6 months 29 days	1138160003	C3622AA	Sanofi Pasteur (formerly A
Edit	DTaP-HepB-IPV	05/20/2010	4 months 13 days	1138160003	AC21B20BA	GlaxoSmithKline (includes

2. The Edit Client Immunizations page appears. To edit the vaccine type, choose the appropriate vaccine from the dropdown menu. (NOTE: Click the word "Vaccine" when hyperlinked in blue to view the Vaccine Code and Description Table.) Edit the Vaccine type and immunization date if necessary. This information is required for **all** immunizations. If known, edit the PFS number and lot number and select the manufacturer from the dropdown menu. This information is required for **current** immunizations. Also, if known, indicate the client's Vaccines For Children (VFC) Status from the dropdown menu. Lastly, indicate if the immunization is a current dose by selecting "Y" (for "yes") or "N" (for "no") from the dropdown menu. To save any changes, click the **Save** button and it will return to the Client Detail page. The updated information appears. To reset any information you may have changed to the original information, select the **Reset** button before saving. Click the **Cancel** button to cancel any changes and return to the Client Detail page.

Edit Client Immunizations

Legend
Required for All Immunizations
Required for Current Immunizati
** No ACIP schedule recommenda
* Adult Formulation

Click here for a list of ImmTrac vaccine codes and their descriptions.

CPT Code / Vaccine Description: 90744 HepB, 3 dose series, ped/adol..... 90744
(Click here to view the vaccine table)
Immunization Date: 09 / 02 / 2008 (MM / DD / YYYY)
PFS Number
Lot Number
Manufacturer: [Select Manufacturer]
VFC Status: [Select VFC Status]

Save Reset Cancel Delete Help

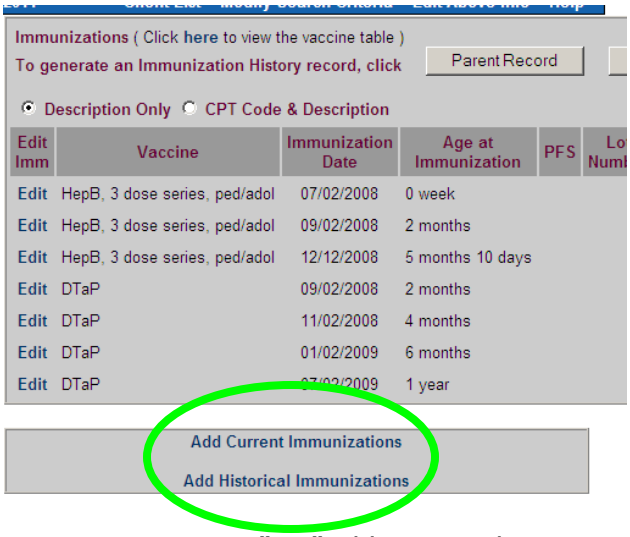
IMPORTANT NOTE: Do not edit any immunizations that your clinic did not enter unless you have a valid, medically-verifiable immunization record available. You cannot delete immunizations after they are saved. If you have entered and saved incorrect data or found an incorrect immunization, please contact ImmTrac Customer Support at (800) 348-9158 to verify the information and ImmTrac Customer Support staff will delete the immunization.

Adding Immunizations on a Registry Client

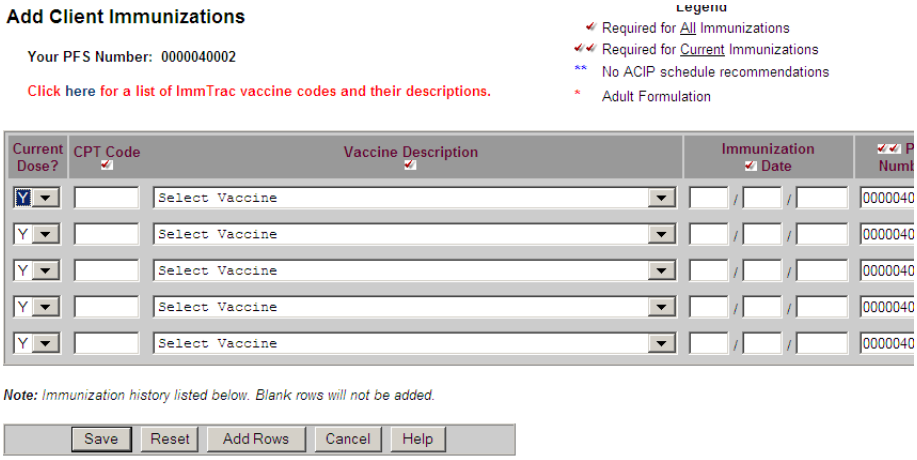
If you have been given editing rights as an ImmTrac user, you may also add current and/or historical immunizations to existing ImmTrac clients' records.

NOTE: The ImmTrac 'shot scheduler' bases its reminder/recall reports on ACIP (Advisory Committee for Immunization Practices) recommendations. If live parenteral (injected) vaccines (MMR, VAR, MMRV, zoster, and/or yellow fever) and LAIV (Nasal-Spray Flu Vaccine) are not administered during the same visit, they should be separated by 28 days or more. If a live vaccine is administered within that 4 week timeframe, the scheduler will consider that immunization 'invalid' and recommend re-administration of that vaccine.

1. Open client's full record after conducting a search. On the Client Detail page, scroll down to view the "Immunizations" block or select the "Immunizations" link in the menu located on the left hand side of the page.



2. To begin entering one or more immunizations, click the "Add Current Immunizations" or "Add Historical Immunizations" button located below the "Immunizations" block to display the Add Client Immunizations page.



NOTE: All fields marked with one checkmark in the field name must be entered for **all** immunizations. All fields marked with two checkmarks in the field name must be entered for **current** immunizations. A **current** immunization is one that was administered within the last 28 days.

3. Above the client's information, your PFS number displays as well as a link that states "Click here for a list of ImmTrac vaccine codes and their descriptions." Click this link to view the Vaccine Code and Description Table.

Entering Immunizations

IMPORTANT NOTE: If you are entering a historical immunization, you are not required to enter the PFS number, lot number or manufacturer.

1. The cursor starts in the "Current Dose" column. If you are adding a current immunization, you must fill out all fields with two checkmarks.

2. If the immunization was administered within the last 28 days, leave the "Current Dose" column "Y" (for "yes"). If the immunization was administered more than 28 days ago and/or at another site, change this option to "N" (for "no").

3. Select the type of vaccine administered from the dropdown menu in the "Vaccine" column.

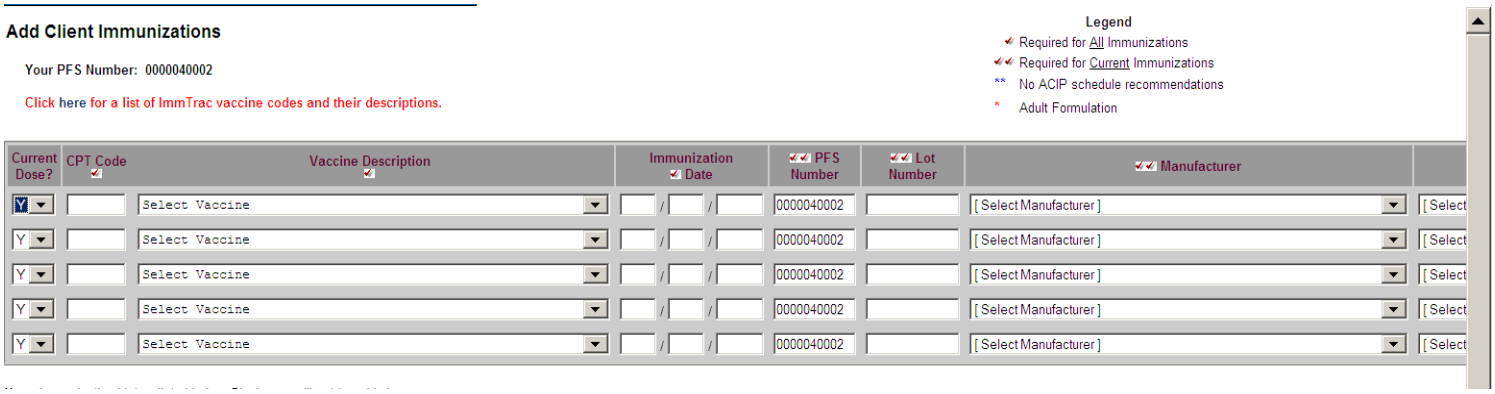
4. Enter the date of administration in the "Immunization Date" field.

5. If you are entering a current immunization, your site's PFS number automatically displays in the "PFS Number" field.

6. Enter the lot number in the "Lot Number" field, if current or known.

7. Select the manufacturer from the drop-down menu in the "Manufacturer" column, if current or known.

8. If applicable, scroll over to the right and indicate the VFC status from the drop-down menu in the "VFC Status" column.



NOTE: Always review your entries for accuracy before saving.

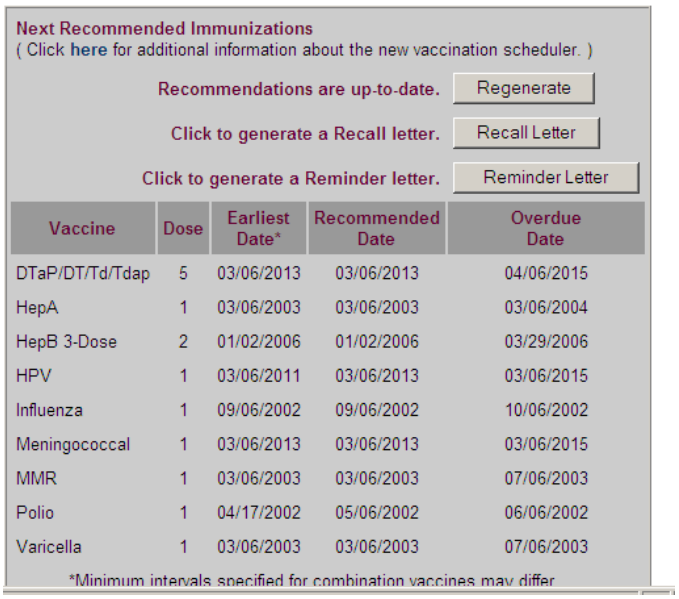
9. To save the newly entered immunizations, click the **Save** button and you will return to the Client Detail page. The updated information appears in the "Immunizations" block. To clear any information you may have entered, select the **Reset** button to clear all the fields. Click the **Cancel** button to cancel any changes and return to the Client Detail page.

Next Recommended Immunizations

After adding immunizations to the client's record, check the next recommended immunizations for the client. These recommended immunizations are calculated from the client's immunization record in ImmTrac.

1. Advance to the "Next Recommended Immunizations" block below the "Immunizations" section.

2. Click the "Regenerate" button to generate a new schedule of recommended future immunizations for the client. You can also create an individual recall or reminder record for this client by using the appropriate button in this block.



Next Recommended Immunizations
(Click **here** for additional information about the new vaccination scheduler.)

Recommendations are up-to-date. Regenerate

Click to generate a Recall letter. Recall Letter

Click to generate a Reminder letter. Reminder Letter

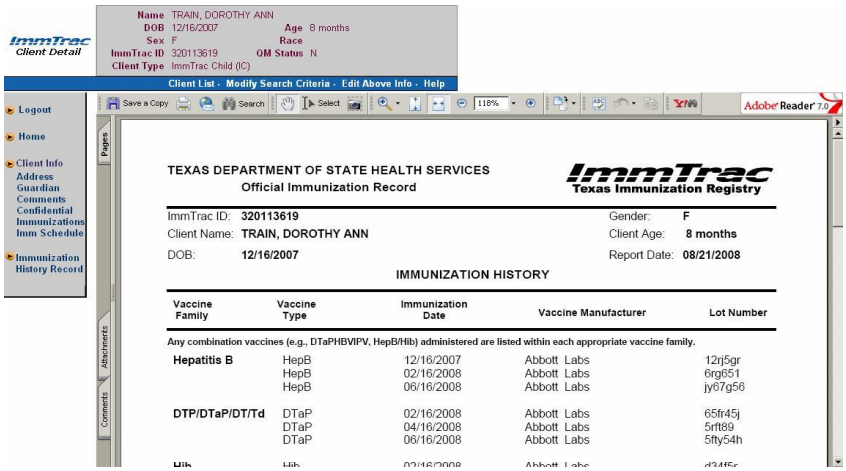
Vaccine	Dose	Earliest Date*	Recommended Date	Overdue Date
DTaP/DT/Td/Tdap	5	03/06/2013	03/06/2013	04/06/2015
HepA	1	03/06/2003	03/06/2003	03/06/2004
HepB 3-Dose	2	01/02/2006	01/02/2006	03/29/2006
HPV	1	03/06/2011	03/06/2013	03/06/2015
Influenza	1	09/06/2002	09/06/2002	10/06/2002
Meningococcal	1	03/06/2013	03/06/2013	03/06/2015
MMR	1	03/06/2003	03/06/2003	07/06/2003
Polio	1	04/17/2002	05/06/2002	06/06/2002
Varicella	1	03/06/2003	03/06/2003	07/06/2003

*Minimum intervals specified for combination vaccines may differ.

Printing an ImmTrac Immunization Record

1. After conducting a search, open the client's full record. The Client Detail page appears. From the menu on the left hand side of the page, select the link for either a Clinician or Parent Immunization History Record. The Clinician Record includes lot numbers and manufacturers for the immunizations. You can also print the same records from the block showing the client's immunizations. This "Official Immunization and Disaster-Related Information Record" opens as a PDF document and can be printed using the printer icon.

2. To print the *Official Immunization Record* PDF file, click the printer icon then click the **OK** button on the printer confirmation box. If your printer icon is not visible, simply right click anywhere on the record and select Print from the drop down menu.

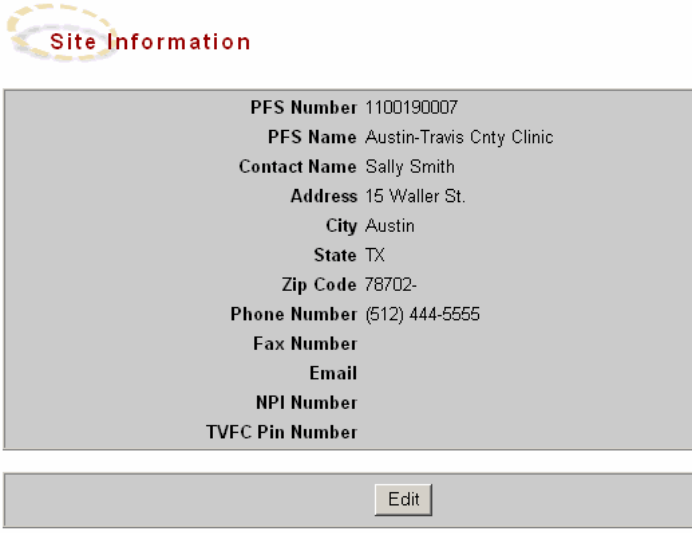


3. After the immunization record prints, sign and date it at the bottom. **This record is considered an official immunization record.**

Viewing and Editing Your Site Information

1. From the blue ImmTrac menu bar, move your pointer over "Options." Select "Edit Site Information" from the drop down menu.

2. The Site Information page appears.



3. Select the **Edit** button below the "Site Information" block.

   NOTE: If the **Edit** button does not appear below the "Site Information" block, you do not have the appropriate rights to edit your site's information. To change any of your site's information, contact ImmTrac Customer Support at (800) 348-9158.

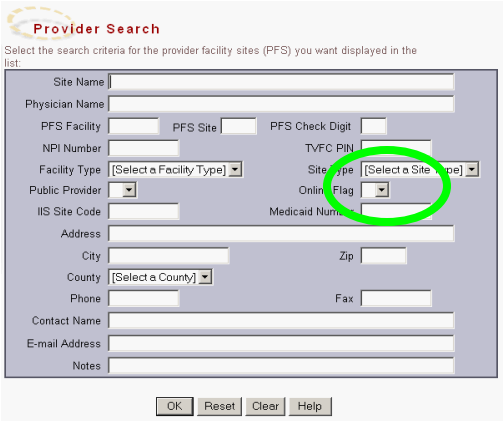
4. Edit and save your site's contact person, fax numbers, e-mail address, National Provider Identifier (NPI) or, if applicable, the Texas Vaccines for Children (TVFC) pin number. If necessary, click the **Cancel** button to cancel any changes and return to the Site Information page.

Locating Other Providers

You may search for providers and other entities, such as schools and child-care facilities, who are registered ImmTrac users.

1. From the blue ImmTrac menu bar, choose "Search" and select "Provider Search."

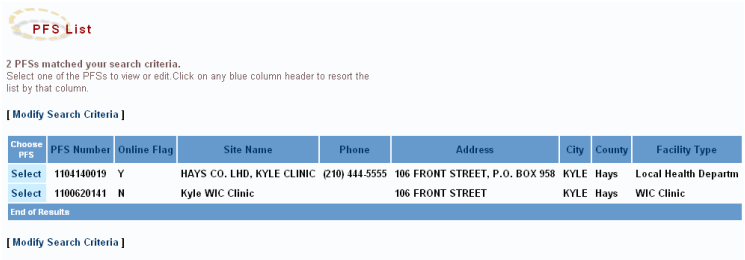
2. On the Provider Search page, enter the search criteria you want to use in the appropriate fields. You can also use the wildcard character * to stand in for one or more characters. Also, if you just want to pull up providers with Internet access, select "Y" from the Online Flag drop down box. After entering the search criteria, click the **OK** button.



3. Below the search criteria block are sorting and display options you may select for your search results. You may choose up to three different sorting selections and select the order in which you want the results displayed in the list.

   You may also select which columns you want displayed in the list. The Site Name, PFS Number, Facility Type, Online Flag, Address, City, County, and Phone columns are pre-selected. You may select any additional columns you want displayed or deselect any columns you do not want displayed individually. You may also select all options by clicking the **Select All** button or clearing all options by clicking the **Deselect All** button.

4. ImmTrac displays a listing of providers that match the criteria specified. Providers that have an ImmTrac user ID assigned will have "Y" (for "yes") in the "Online Flag" column. Click on any blue column header to sort the list by that column.



5. Click the "Select" link to the left of the provider's PFS number to view the Provider/Facility/Site Information**. Note:** Place your pointer directly over a PFS number in the "Immunization History" and "Most Recent Provider" sections of a client's record. The contact information for that site displays in a hovering box.

ImmTrac Customized Reports Overview

In addition to individual immunization histories, ImmTrac offers customized reports to its users. Private providers may run reports only on their own PFS number, while public health providers may run reports by county or zip code.

NOTE: Due to the size of the ImmTrac database, customized reports may take some time to run on the server before they are available for viewing. Most reports will not run and appear instantly like a single immunization record. After submitting a request for a report, allow time for the report to run and retrieve it later. The time it takes for a report to run will vary depending on system usage.

The ImmTrac application offers the following reports:

Client Address Validation Report

The *Client Address Validation* report lists the available demographic information for all clients (matching the specified criteria) for whom a complete address is unavailable. This report was designed to help users correct missing or erroneous data. It is important for users to run this report prior to generating *Reminder* or *Recall* letters or labels because while clients without full addresses will appear on the *Reminder* and *Recall* reports, they will not appear on the letters or labels.

Recall Report/Letters/Labels

The *Recall* report lists demographic information for all clients (matching the specified criteria) for the purpose of notifying them that an immunization is overdue. This report includes clients for whom an immunization "Overdue Date" falls within the specified report date range.

Reminder Report/Letters/Labels

The *Reminder* report lists demographic information for all clients (matching the specified criteria) for the purpose of reminding them that an immunization due date is approaching. This report includes clients for whom an immunization "Recommended Date" falls within the specified report date range.

NOTE: The *Reminder* and *Recall* reports will include a client only if that site is listed as the client's "most recent provider" (i.e. gave them their last vaccination). The reports can also be generated in bilingual letter or mailing label format.

- For users who request Reminder/Recall labels, data will be formatted to fit on standard Avery 5160 2 5/8" x 1" label size.
- Users can now request Reminder/Recall reports, letters, and label data to be sorted by zip code and city in addition to sorting by last name/first name/date of birth. The default sort will remain last name/first name/date of birth.
- Users can now choose to receive Batch Reminder/Recall Reports in Comma Separated Values (CSV) File Format. With information generated in CSV format, users

can create reports, letters and labels using their own templates. The CSV file format is a simple text file that is compatible with most spreadsheet and clinical software applications.

Newborn Status Report

The *Newborn Status* report supplies demographic information about newborns and their mothers, and indicates the newborn's Hepatitis B immunization status at birth. Authority to create this report is limited to public health providers with approved security clearance.

PFS Status Report

The *PFS Status* report lists the number of clients, vaccinations administered, and visits for any provider matching the selection criteria. All providers may create this report. However, private providers are only authorized to run this report on their own ImmTrac PFS number.

Total Doses Administered by PFS Report

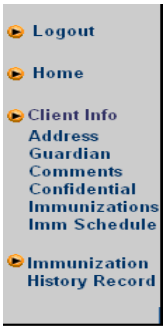
The *Total Doses Administered by PFS* report displays the total number of immunizations administered by a provider.

Total Number of Clients Immunized by PFS Report

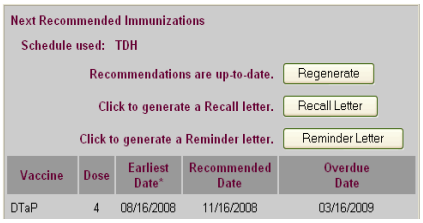
The *Total Number of Clients Immunized by PFS Report* displays an unduplicated count, by month, of children immunized by a provider. Children receiving more than one vaccination from a provider are only counted once.

Personal Reminder and Recall Letters

The Personal *Reminder* and *Recall* Letter function allows users to generate a single *Reminder* or *Recall* letter directly from the Client Detail page.



1. After conducting a search, open the client's full record.
2. From the menu on the left hand side of the page, select the "Imm Schedule" link.



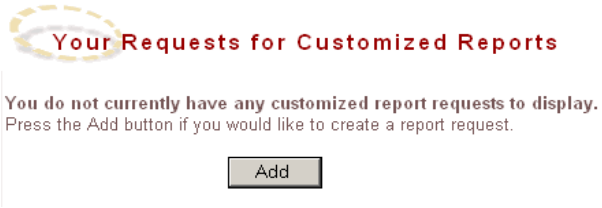
3. From the "Next Recommended Immunizations" block, select the **Recall Letter** or **Reminder Letter** button to view a personal, single PDF letter for the client you are viewing.
4. To print the PDF file, click the printer icon then click the **OK** button on the printer confirmation box. If your printer icon is not visible, simply right click anywhere on the record and select Print from the drop down menu.

Creating New Customized Reports

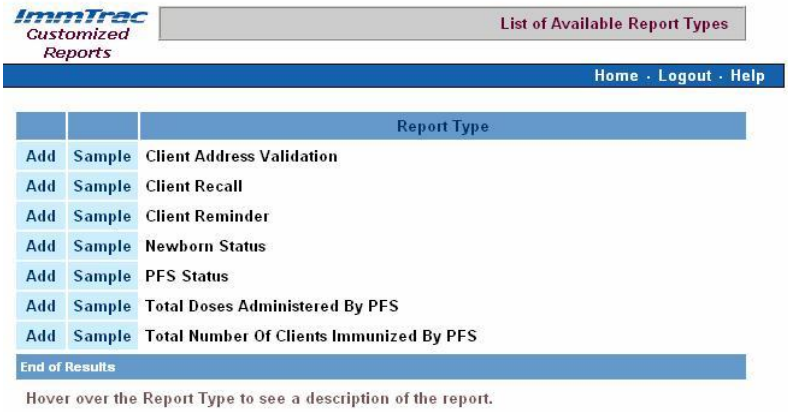
1. From the blue ImmTrac menu bar, select "Options," followed by "Create Customized Reports."

NOTE: If you have not previously requested any reports, the page displays the notice "You do not currently have any customized report requests to display."

2. Click the **Add** button to create a report request.

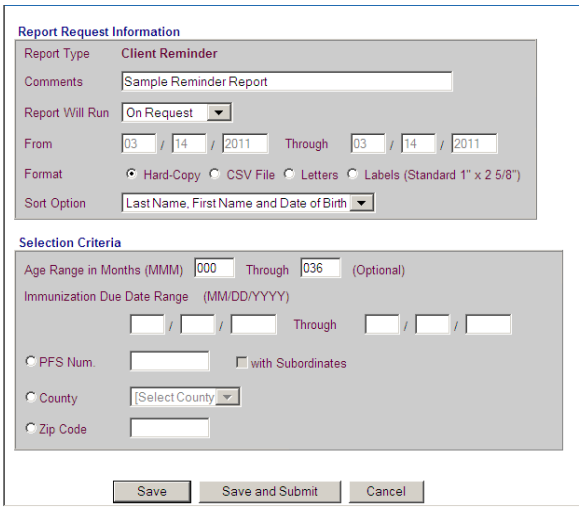


3. On the List of Available Report Types page, select the "Add" link next to the List of Available Report Types you wish to request. If "Please Request Authority" appears next to a report type, that report option is not available to your site.



IMPORTANT NOTE: Hover over the Report Type to see a description of the report. You may also click the "Sample" link next to the report type to see an example of what the report will look like when printed.

4. After selecting the report option, name the report in the "Comments" box. Select the report run frequency from the "Report Will Run" dropdown menu and select the report "Format" in the "Report Request Information" section.



5. Under the "Selection Criteria" section, enter the client selection criteria for the report, including the "Age Range in Months" and the "Immunization Due Date Range." When the "PFS number" is selected, the site's PFS number automatically appears.

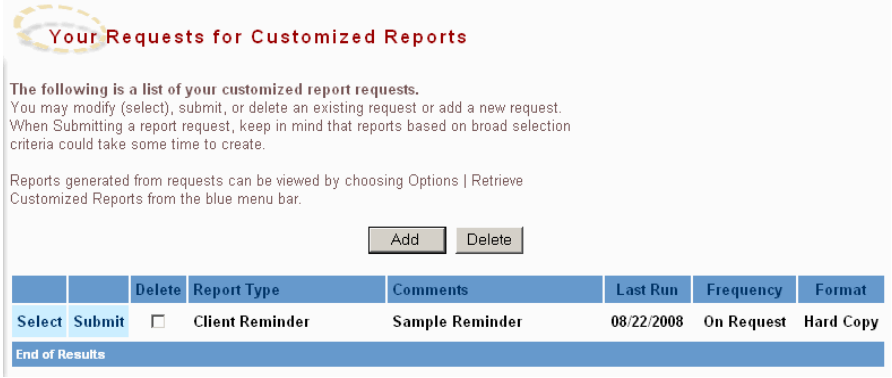
6. Click the **Save and Submit** button to save and run the report request and return to the Your Requests for Customized Reports page. The list of stored report requests appears. From this list you may choose to **Add** another report, **Delete** a report, **Select** a report for editing or **Submit** the report request, if it has not already been submitted. You may request to **Submit** a report as the final step in the creation stage of a report.

   NOTE: Part of the "Selection Criteria" for the client *Reminder* and *Recall* reports requires that a date range be entered for the "Immunization Due Date Range" and "Immunization Overdue Date Range" fields. The "Immunization Due Date Range" that you enter for the client *Reminder* report cannot contain start and end dates that are more than **100 days** apart. The "Immunization Overdue Date Range" you enter for the client *Recall* report cannot contain start and end dates that are more than **150 days** apart. The time frames you choose for the date ranges will automatically update according to the report frequency.

Accessing Stored Customized Report Requests

1. From the blue ImmTrac menu bar, select "Options," followed by "Create Customized Reports" to view Your Requests for Customized Reports page.

2. From a list of any previous customized report requests, you may modify, submit or delete an existing report request or add a new report request.



3. To review and/or edit the selection criteria for a stored report request, choose "Select." If you have modified the selection criteria, click the **Save** button to save your changes and return to the Your Requests for Customized Reports page or click the **Save and Submit** button to run the report immediately.

4. To submit a stored report request, click the "Submit" link next to the report request you want to run. A confirmation box will appear. Click the **OK** button to run the report. You must allow time for the report to run before retrieving it.

5. To delete a report request, select the box under the "Delete" column next to the report request you want to delete and click the **Delete** button. A confirmation box will appear. Click the **OK** button to delete the report request.

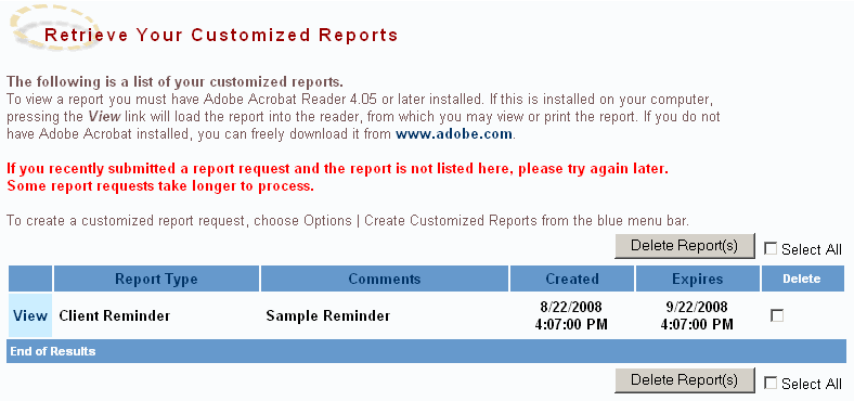
Retrieving and Printing Customized Reports after Submission

Reports may be retrieved and displayed after they have had time to run on the server.

1. From the blue ImmTrac menu bar, select "Options," followed by "Retrieve Customized Reports" to view the Retrieve Your Customized Reports page.

   NOTE: If the report is not ready for download, a notification stating "You do not currently have any customized reports to retrieve" appears.

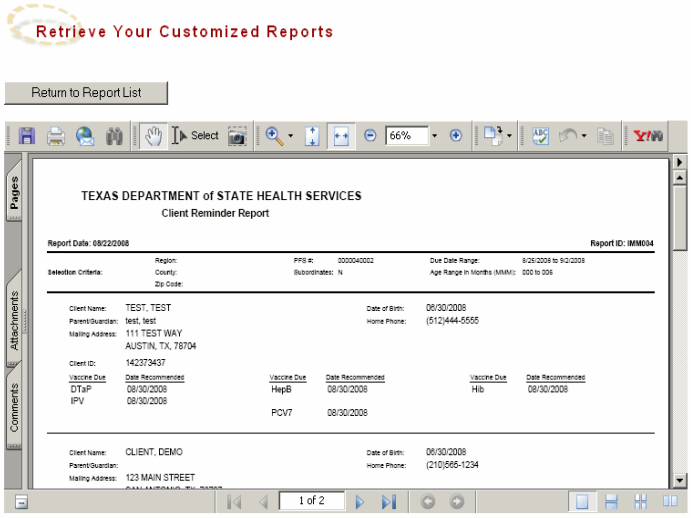
2. The ImmTrac application displays a list of reports ready for viewing and printing.



3. To view the report, select the "View" link next to the report you want to view. The report displays on your computer as a PDF file.

4. To print the report, click the printer icon then click the **OK** button on the printer confirmation box.

5. After viewing or printing the report, select the **Return to Report List** button to return to the Retrieve Your Customized Reports page.



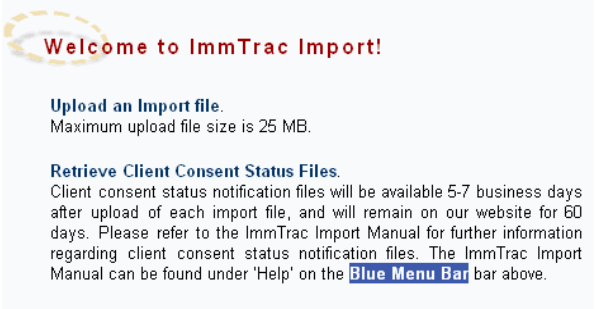
Electronically Reporting to ImmTrac

ImmTrac incorporates electronic data translation (EDT) capability, which allows ImmTrac to receive a variety of file formats and converts electronic data files into a format that can be imported into ImmTrac. ImmTrac provides two secure methods to transmit data files in a confidential manner: encrypted File Transfer Protocol (FTP) or direct upload from the ImmTrac Internet application.

Providers also have the option to electronically import immunization data to ImmTrac from electronic medical records (EMR) software. Some EMR software can create an extract file for ImmTrac electronic import. The ImmTrac Group's staff works with the provider or EMR vendor to ensure data files meet ImmTrac specifications. Provider sites must be registered for ImmTrac access in order to electronically report immunization information via EMR systems.

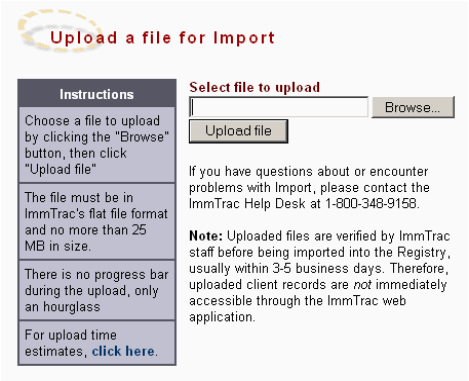
NOTE: ImmTrac cannot provide users with technical assistance relating to commercial EMR products. ImmTrac users utilizing or considering the purchase of an EMR product should contact the EMR vendor to determine if their system has the capability to generate a data extract file. Users should also contact their EMR vendor to determine the procedure for defining and creating a file template or generating a data extract file from their EMR system. Users may need to request training from the EMR vendor on how to generate the data extract file.

1. From the blue ImmTrac menu bar, select "Options," followed by "Import Options" to view the Welcome to ImmTrac Import page.

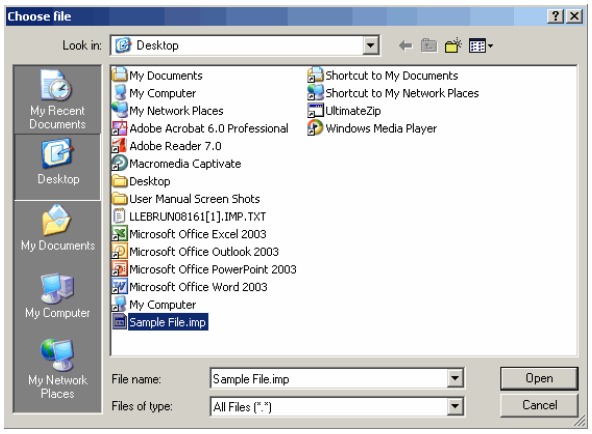


2. Select the "Upload an Import file" link. to view the Upload a File for Import page.

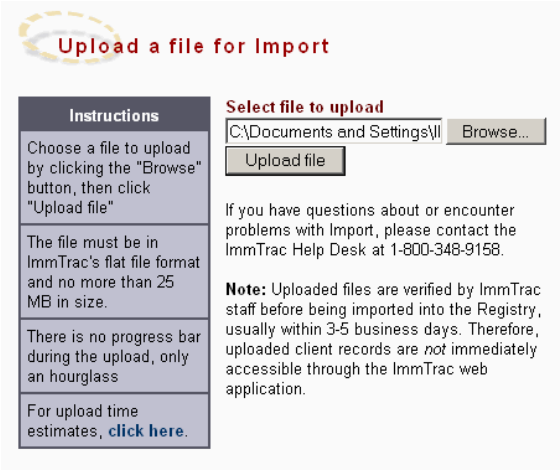
3. The Upload A File For Import page appears.



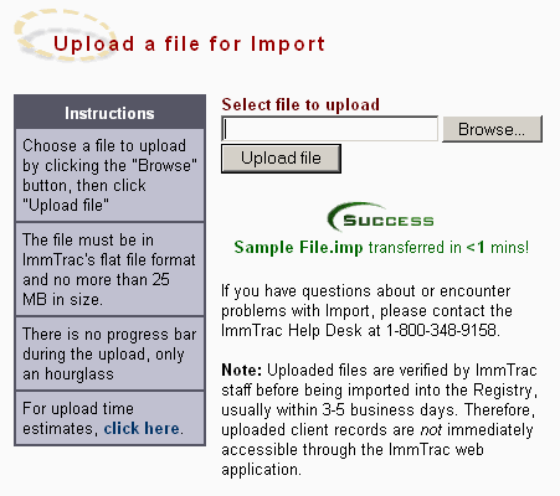
4. Click the **Browse** button then select the file to upload and select the **Open** button.



5. Click the **Upload File** button. If the upload was successful, you will see a message that states "Success" and the file's name and the amount of time it took to transfer.



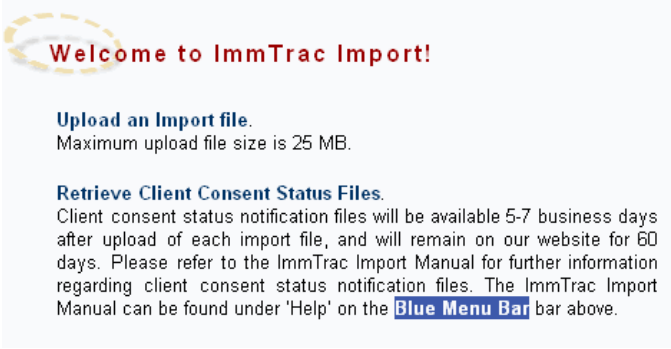
NOTE: Files must be in ImmTrac's flat file format and no more than 25 MB in size.



Client Consent Status Files

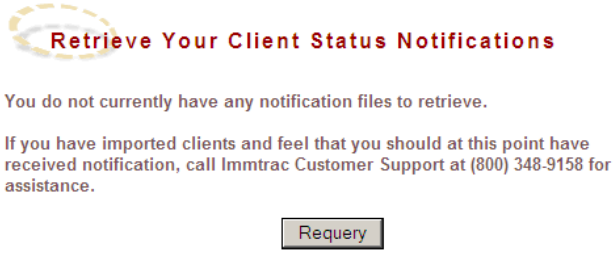
After providers report immunizations via electronic import, the ImmTrac Group provides an electronic notification file informing providers of clients for whom consent cannot be verified. The notification file also instructs providers on how to obtain parental consent for those clients who do not already participate in ImmTrac. It is the provider's responsibility to retrieve the electronic notification file from the ImmTrac application.

1. From the blue ImmTrac menu bar, select "Options," followed by "Import Options" to view the Welcome to ImmTrac Import page.

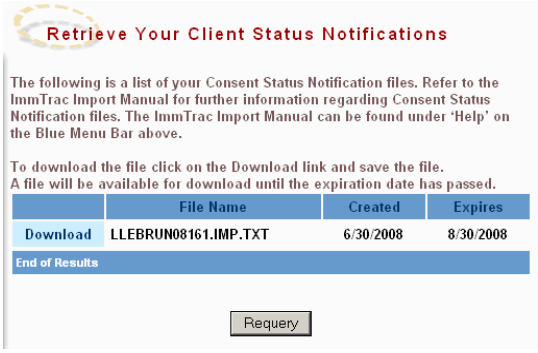


2. Select the "Retrieve Client Consent Status Files" link. The Retrieve Your Client Status Notifications page appears.

   NOTE: If there are no files to retrieve the page states "You do not currently have any notification files to retrieve." Click the **Requery** button.

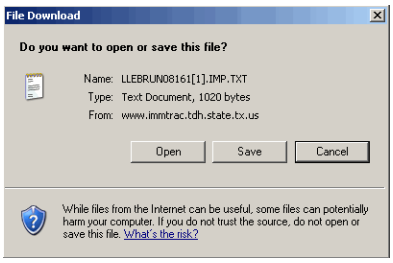


3. If there is a file(s) to retrieve, a list appears with your Consent Status Notification files.

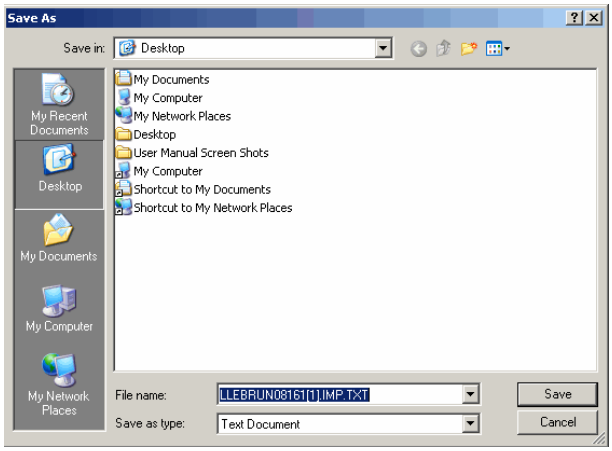


4. Click the "Download" link next to the "File Name" of the file you wish to download.

5. A File Download dialog box will open. Select the **Save** button to save the file.



6. Choose the location where you wish to save the file and select the **Save** button.



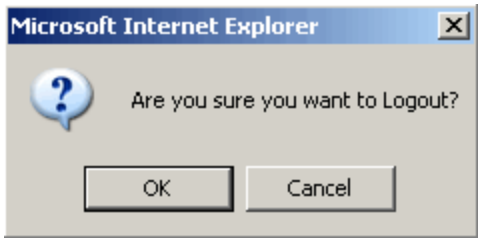
7. You will then be able to open the Consent Status Notification file from where it is saved on your computer.

   NOTE: A file is available for download until the expiration date has passed.

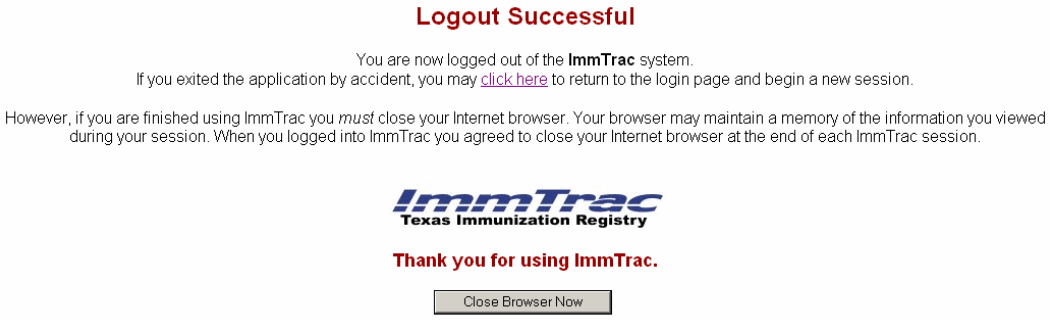
Logging Out of ImmTrac

1. From the blue ImmTrac menu bar, select "Logout." If you are on a Client Detail page, select the "Logout" link from the menu on the left hand side of the page.

2. After you select "Logout," a dialog box asks you "Are you sure you want to logout?" Click the **OK** button if you want to logout or click the **Cancel** button if you wish to continue using ImmTrac.



3. After clicking **OK**, the Logout Successful page appears. If you have exited the ImmTrac application by mistake, select the "click here" link to return to the ImmTrac logon page. If you are finished with your ImmTrac session, click the **Close Browser Now** button.



4. Another dialog box asks you, "The web page you are viewing is trying to close the window. Do you want to close this window?" Select the **Yes** button to close the browser and finish your ImmTrac session.