

TEXAS Health and Human Services

Texas Department of State Health Services

Texas Immunization Registry

Best Practices

Lisa Marie Pawelczak IIS Program Specialist V Immunizations Section Texas Department of State Health Services



Texas Immunization Registry (ImmTrac2) topics will include:

- ImmTrac2 Forms and Guides
- Add or Remove ImmTrac2 Users
- Consents and Data Entry
- Closing Organizations
- Syntropi vs. ImmTrac2
- Modernized Immunization Coverage Rate Report
- Modernized Client Benchmark Report

Objectives

Attendees will be able to:

- Find ImmTrac2 forms and guides on the DSHS website
- Identify how to add or remove ImmTrac2 users in their organization
- Identify best practices for consents and data entry
- Identify best practices for closing organizations
- Identify when to use Syntropi versus ImmTrac2
- Identify how to use the Modernized Immunization Coverage Rate Report
- Identify how to use the Modernized Client Benchmark Report

ImmTrac2 Forms and Guides



Texas Department of State Health Services

Webpage for Forms

• For ImmTrac2 forms, go to <u>DSHS Forms</u>.

Stock #	Title	Revision Date
F11-12956	Texas Immunization Registry (ImmTrac2) Disaster Information Retention Consent Form	01/2024
F11-11406	Immunization Registry (ImmTrac2) Authorization to Release Official Immunization History 🕑 (Bilingual)	02/2024
F11-11936	Texas Immunization Registry (ImmTrac2) Newborn Registration Form	01/2024
F11-13366	Immunization Registry (ImmTrac2) - Adult Consent Form 🔀 (Bilingual)	02/2022
C-7	Immunization Registry (ImmTrac2) - Minor Consent Form 🖪 (Bilingual)	02/2024
C-8	Texas Immunization Registry (ImmTrac2) Withdrawal of Consent and Confirmation Form	01/2023

Consent Forms

• Minor (Child) Consent:

dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/C-7.pdf

• Adult Consent:

<u>dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/</u> <u>F11-13366.pdf</u>

• Disaster Consent:

<u>dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/</u> F11-12956.pdf

History Request and Withdrawal

- Request for Immunization Record: <u>dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/</u> <u>F11-11406.pdf</u>
- Request for Withdrawal: <u>dshs.texas.gov/sites/default/files/LIDS-Immunizations/pdf/pdf_stock/C-8.pdf</u>



Written Guides

- Go to Providers: Materials <u>dshs.texas.gov/immunizations/providers/materials</u>
 - Under Forms: ImmTrac2, look for "Data Exchange Resources"
 - Under Manuals: ImmTrac2, look for "Other Written Guides"

Recorded Webinars

- Go to Providers: Training <u>dshs.texas.gov/immunizations/providers/training</u>
 - Under Videos: IIS (ImmTrac2), look for "Recorded Webinars"



Add or Remove Users



Texas Department of State Health Services

Adding or Removing One or Two Users

If you are adding or removing only one or two users, then the organization point of contact (POC) can call our Customer Service line at 800-348-9158, or email <u>ImmTrac2@dshs.texas.gov</u>.

Adding or Removing Three to Five Users

If you are adding or removing three to five users, then email <u>ImmTrac2@dshs.texas.gov</u> and include the users':

- First name
- Last name
- Unique email address
- Job title
- Phone number
- If a clinician or nurse, include their license number
- Indicate which users you are adding
- Indicate which users you are removing

When to File Site Renewal

- Adding or removing more than five users
- Changing the organization name but not their address
- Changing the:
 - Responsible medical provider (RMP)
 - Prescribing provider
 - Organization POC
 - Primary registry contact (PRC)

When to File Site Registration

- The organization has not previously registered with the Texas Immunization Registry.
- The organization is changing their name and address and will be seeing a different population of clients.

Consents and Data Entry



Texas Department of State Health Services

Standard Consents (Non-Disaster)

- The most common reason why DSHS rejects client records from ImmTrac2 is due to no consent on file.
- Adults must complete the ImmTrac2 adult consent form.
- To store standard immunization records in ImmTrac2, the parent, legal guardian, or managing conservator must complete an ImmTrac2 minor consent form for their child.
- Find these forms online at <u>dshs.texas.gov/immunizations/public/forms</u> under the "ImmTrac2" drop-down menu.

Disaster Consents

- Disaster consents only affect disaster immunizations.
- Health care providers who administer an antiviral, immunization, or medication (AIM) during a disaster must report it to DSHS within 30 days, with or without a consent.
- Without a disaster consent, the registry can only keep a disaster AIM for up to five years after the declared end of the disaster, at which time the registry will purge the AIM.
- Disaster consents allow the registry to keep disaster AIMs up to age 18 for minors and for a lifetime for adults.
- Clients do not need to be in a disaster to sign a disaster consent.

Texas Administrative Code Disaster Immunizations

• Link to the Texas Administrative Code, <u>Title 25, §100.7</u>.



Facts About Consents

- If clients consented as a minor, at the age of 18, they would need to sign the adult consent forms.
- If clients do not sign the adult consent forms before the age of 26, ImmTrac2 will delete the standard AIMs they received as a minor.
- Standard (non-disaster) consents only affect standard AIMs.
- Disaster consents only affect disaster AIMs.

Best Practice for Consents

- Offer clients the opportunity to sign both a standard (non-disaster) consent and a disaster consent.
- Remember, there does not have to be an ongoing disaster for clients to sign a disaster consent.





Best Practice for Data Entry

When entering new clients into ImmTrac2, if possible, enter their:

- Personal email address
- Complete phone number with area code
- Mother's first name
- Mother's maiden name

Sure, there may be many John Smiths, but how many have a mother whose first name is Matilda?

Inactivate Clients

Manage inactivate clients you no longer see or immunize with the "Manage Client Status Criteria" function in ImmTrac2.

Production 9.12.21 Clients manage client enter new client manage client status criteria merge clients edit consent information

For FTP Data Exchange Check TIPS Report for Rejections

Data Exchange Activity:

Displays counts of clients, immunizations added, and reporting latency for data exchange activity.

Total Files Submitted:	23							
Clients Submitted:	2,882	76%	120/	0**				
Clients Accepted:	2,179	Client Accept	4∠70	Average Entry				
Clients Rejected:	663	Rate	Accept Rate	Latency				
Immunizations Submitted:	2,879							
Imms Accepted:	1,196							
Imms Rejected:	778							
	** Average En	** Average Entry Latency: In days, the amount of time taken to report immunizations via Data Exchange						

For FTP Data Exchange Provider Activity Dashboard: TIPS: DX Activity



For Rejections Check Your Data Exchange Activity

- For bidirectional data exchange (BiDX) messages, check your message responses.
- The TIPS report does not reflect errors in BiDX messages.

Closing Organizations



Texas Department of State Health Services

Closing Organizations In ImmTrac2

Only DSHS Central Office should close organizations. To request a closure:

- Send an email to <u>ImmTrac2@dshs.texas.gov</u>, ATTN: REG/REN
- In the subject line, put "Site Closure Request."
- The organization POC must make the request in writing (email).

Closing an organization incorrectly causes problems.

Requesting Site Closures When to Request

Request a site closure if:

- The site is no longer in business or operating, including schools permanently closed.
- The site moved to another city with a different demographic of clients.

Do not request a site closure if:

- A site is open and operating.
- A site has only moved and updated address in a site renewal.
- If the organization does not answer the phone.
 - First, check to see if they simply change the phone number.
- The organization is changing the organization name but not their address and they still see the same clients.

If a Site is Incorrectly Closed

- The organization will lose all its clients assigned in ImmTrac2.
- The organization must request, in writing, that DSHS reopen its site, explaining the reason for the closure or why it should reopen.
- This process involves a lot of paperwork.
- After the site reopens, the organization must file a site renewal to reestablish all the information connected to that site (e.g., users, clients, providers, etc.).

Syntropi vs. ImmTrac2



Texas Department of State Health Services

When to Use Syntropi

Providers doing a site registration or renewal should use Syntropi if they:

- Are currently registered in Syntropi
- Are in TVFC or ASN (they administer immunizations using state supplied vaccines)
- Are currently using or signing up for BiDx

Otherwise, providers should use ImmTrac2 to file a site registration or renewal.

Sites Registered in ImmTrac2

- More than 11,300 sites registered in Syntropi
- More than 33,400 sites registered only in ImmTrac2
- More than 44,700 registered sites in ImmTrac2



When to File a Site Renewal

Providers should file a site renewal when:

- They are within 90 days of their site expiring.
 - Allow up to 14 business days for processing.
- They are changing their:
 - Organization POC
 - PRC
 - RMP or prescribing provider
 - Texas licensed medical professional: APRN, MD, PA, DO, NP, CNM, CPM, PharmD, RPh, DPM, RN, or LVN
- They are adding or disassociating more than 10 users.

Immunization Coverage Rate Modernized Report



Texas Department of State Health Services

Step 1 Report Selection

 Select "Modernized Reports" then "Immunization Coverage Rate Report."

Events

manage events manage priority groups **Reports** generate report scheduled report Modernized reports **Data Exchange**

Reports Available	
Generate Report	Description
<u>18 Year Target Client List</u>	The 18 Year Old Target Client Report is scheduled for clients who turned 18 years old in the last 2 months from the report date or are going to turn 18 years within the next 2 months of the report date. This report runs on the 1st of every even month.
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.
Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.
Client Benchmark Report	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.
Clients and Immunization Count by Organization	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.
Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.

Step 2 Enter Coverage Rate Filters

• Enter coverage rate filters, then select "Generate Report."

TEXAS Health and Human Texas Department of State Services Health Services	Immunization Coverage Rate Report (Limited to clients 6 years of age or younger)
Coverage Rate Filters	
Generate Report	OPTIONS FOR BENCHMARKING Standard Assessment Assess Clients with Sufficient Refusal History as Covered AGE RANGE IN MONTHS 24 35 I1/1/2024 I1/1/2024 Enter date in the format MM/DD/YYY

Step 3 Confirm and Generate Report



Step 4 Generating the Coverage Rate Report

- 1. Continue to select "Refresh" button.
- 2. Status will change to "COMPLETE."
- 3. Then, select link under "Job name."



Benchmarks

TEX Health Service	AS and Human Texas Departme s Health Services	ent of State Age	MUNIZ	ation nonths and 35 Evalu	Coverage months, Benchmark Jation Date: 01-NOV	e Rate R Option: Standard A /-24	eport Assessment,	≡
		Tot	al Clients	Ac	tive Clients	Missed Oppo	rtunities	
			79		79	26 32.9%	/o	
	Assessm	ent of Clie	nts Meetin	ng Age Sp	ecific Benchı	marks (i)		Drop Off %
Benchmarks	DTaP	НерВ	Hib	MMR	Polio	Prevnar	Varicella	0.0%
@ 3 months	75.9%	73.4%	74.7%		74.7%	74.7%		12 - 23 months
@ 5 months	65.8%	55.7%	64.6%		65.8%	64.6%		24.1%
@ 7 months	53.2%	68.4%	73.4%		74.7%	74.7%		24 - 35 months
@ 9 months	59.5%	73.4%	75.9%		77.2%	77.2%		0.0%
@ 12 months	68.4%	75.9%	78.5%		78.5%	81.0%		36 - 47 months
@ 16 months	31.6%	51.9%	72.2%	82.3%	72.2%	74.7%	79.7%	0.0%
@ 19 months	51.9%	53.2%	74.7%	86.1%	74.7%	75.9%	83.5%	48 - 59 months
@ 21 months	55.7%	53.2%	75.9%	87.3%	75.9%	77.2%	84.8%	0.0%
@ 24 months	59.5%	53.2%	75.9%	88.6%	75.9%	77.2%	86.1%	60 - 72 months
@ 72 months	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
		In	nmunizat	ion Statu	5			Late Start %
	Up to Da	ite			Late Asse	ssement		0.0%
Age Group	UTD %		Age	Group	Late Assessment %			12 - 23 months
< 12 months	0.00%		< :	12 months	0.00%			40.5%
12 - 23 months	0.00%		12	- 23 months	0.00%			24 - 25 months
24 - 35 months	75.90%		24	- 35 months	55.70%			0.0%
36 - 72 months	0.00%		36	- 72 months	0.00%			36 - 72 months

Benchmark Reference Table

Selecting the "i" symbol in the benchmarks header brings up the benchmark reference table.

	Assessm	ent of Clier	nts Meetir	ng Age Spe	ecific Benchm	arks 🛈	
Benchmarks	DTaP	НерВ	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	75.9%	73.4%	74.7%		74.7%	74.7%	
@ 5 months	65.8%	55.7%	64.6%		65.8%	64.6%	
@ 7 months	53.2%	68.4%	73.4%		74.7%	74.7%	
@ 9 months	59.5%	73.4%	75.9%		77.2%	77.2%	
@ 12 months	68.4%	75.9%	78.5%		78.5%	81.0%	
@ 16 months	31.6%	51.9%	72.2%	82.3%	72.2%	74.7%	79.7%
@ 19 months	51.9%	53.2%	74.7%	86.1%	74.7%	75.9%	83.5%
@ 21 months	55.7%	53.2%	75.9%	87.3%	75.9%	77.2%	84.8%
@ 24 months	59.5%	53.2%	75.9%	88.6%	75.9%	77.2%	86.1%
@ 72 months	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Benchmark Reference Table Example

Age	DTaP	Polio	MMR	Hib	Hep B	Prevnar	Varicella
@ 3 months	1	1		1	2	1	
@ 5 months	2	2		2	2	2	
@ 7 months	3	3		3	3	2	
@ 9 months	3	3	1	4	3	2	1
@ 12 months	4	3	1	4	3	2	1
@ 16 months	4	3	1	4	3	2	1
@ 19 months	4	3	1	4	3	2	1
@ 21 months	4	3	1	4	3	2	1
@ 24 months	4	3	1	4	3	2	1
@ 72 months	5	4	2	4	3	2	2

Heading Details

The heading lists:

- Selected options
- Summary of total clients, active clients, and the percentage of missed opportunities

ate Immunizat Age between 24 month	Immunization Coverage Rate Report Age between 24 months and 35 months, Benchmark Option: Standard Assessment, Evaluation Date: 01-NOV-24						
Total Clients	Active Clients	Missed Opportunities					
79	79	26 32.9%					

Percentages Up to Date and Late Assessment

The report lists up-to-date and late assessment percentages by age groups.

	k In	Immunization Status					
	Up to Date		Late Assessement				
Age Group	UTD %	Age Group	Late Assessment %				
< 12 months	0.00%	< 12 months	0.00%				
12 - 23 months	0.00%	12 - 23 months	0.00%				
24 - 35 months	75.90%	24 - 35 months	55.70%				
36 - 72 months	0.00%	36 - 72 months	0.00%				

Late Start Percentage

The report lists the percentage of clients who got a late start by age groups.



Hamburger Option More Reports

Select the "hamburger" icon in the upper right corner to see three reports.

Age between 24 month	s and 35 months, Benchmark Evaluation Date: 01-NOV	e Rate Report Option: Standard Assessment, -24
Total Clients	Active Clients	Missed Opportunities
79	79	26 32.9%

Three Reports Available

- Immunization Coverage Rate Report
- Missed Opportunity Client Listing
- Age Range Client Listing



Additional Report Missed Opportunities Client Listing

For every missed opportunity of each client, the report lists the client's:

- First name, middle name, last name
- Birth date
- Phone number
- Street address
- City, state, and zip code
- Vaccine that was missed
- Immunization date

	А	В	С	D	E	F	G	Н	I
1	First Name	Middle Nam	Last Name	Birth Date	Phone Number	Address	City/State/Zip	Vaccine	Immunization Date
2	KEVIN	JOHN	KLEIN	03/01/2022	(405) 123-4567	100 MAIN ST	LUBBOCK, TX 79123-1234	DTP/aP	08/01/2022

Age Range Client Listing

Select an age range and each client will show:

- First name, middle name, last name
- Phone number
- Street address, city, state, zip code

TEXAS Health and Human Services	Texas Department of State Health Services	Age Range Client Listing Age between 24 months and 35 months, Benchmark Option: Standard Assessment, Evaluation Date: 01-NOV-24							
Age Range Ctrl + Click to multi-select	Client Name (F M L) -	Birth Date	Phone Number	Address	City	State	ZIP	[

Client Benchmark Modernized Report



Texas Department of State Health Services

Step 1 Report Selection

 Select "Modernized Reports" then "Client Benchmark Report."

S

EVEILS
manage events
manage priority group
Reports
generate report
scheduled report
modernized reports
Data Exchange

Evonte

Reports Available

Generate Report	Description	Output
<u>18 Year Target Client List</u>	The 18 Year Old Target Client Report is scheduled for clients who turned 18 years old in the last 2 months from the report date or are going to turn 18 years within the next 2 months of the report date. This report runs on the 1st of every even month.	<u>Status</u>
Ad Hoc Count Report	The Ad Hoc Count Report offers a user-defined report and counts results. User can select the fields to include and can define filters and choose the sort order.	<u>Status</u>
Immunization Coverage Rate Report	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	<u>Status</u>
<u>Client Benchmark Report</u>	The Client Benchmark Report allows users to retrieve a list and count of clients who have met an immunization benchmark or predefined series of benchmarks.	<u>Status</u>
<u>Clients and Immunization Count by</u> <u>Organization</u>	Clients and Immunization Count by Organization report displays the number of unique clients that received a dose and total number of doses administered by an organization in a specified time period.	<u>Status</u>
Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	<u>Status</u>
Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	<u>Status</u>
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.	<u>Status</u>

Select Options

- Select options, benchmark, age range, evaluation date.
- Select "Generate Report."

TEXAS Health and Human Texas Department of State Services Health Services	Client Benchmark (Limited to clients 6 years of age or younger)				
Benchmark Filters	OPTIONS FOR BENCHMARKING Standard Assessment Assess Clients with Sufficient Refusal History as Covered SELECT BENCHMARK Q 24 months AGE RANGE IN MONTHS 24 35 ②				
Generate Report	EVALUATION DATE				

Step 3 Confirm and Generate Report

• Select "Confirm and Generate Report."

TEXAS Health and Human Texas Department of State Services Health Services	Client Benchmark (Limited to clients 6 years of age or younger)
Benchmark Filters	OPTIONS FOR BENCHMARKING Standard Assessment SELECT BENCHMARK @ 24 months 24 to 35
Generate Report	EVALUATION DATE 11/1/2024
	Generate Report

Client Demographic Data



Up to Date or Not

TEXAS Health and Human Services	Texas Department of State Health Services	Client Benchmark Dashboard Age between 24 months and 35 months, Benchmark Option: Standard Assessment, Benchmark Age: @ 24 months, Evaluation Date: 01-NOV-24				Show Age Specific Benchmark Requirements	
Filter report by TX IIS	ID/s All	\sim					
282		119				42%	
Total Clier	t	Clients Who Met All Benchmarks			% of Clients	% of Clients who MET All Benchmarks	
		% of Benchm	arks MET by Vaccine	0			
 DTaP Polio MMR Hib 		83 % 85 62 %	% 80 % 85 %	54 %			
 HepB Varicella Pneumo 					View	/ Clients who did NOT eet all benchmarks	
umber Street Address	City Sta	te ZIP Client County	Provider TX IIS ID	DTaP Polio	MMR Hib HepB	Varicella Pneumo	

Summary and Detailed Data

The top section of the screen lists summary data on all clients:

- Number of total clients
- Number and percentage of clients who did or did not meet all benchmarks

The graph in the middle displays the percentage of clients who did or did not meet all benchmarks for each vaccine.

The bottom section lists detailed data for each client:

- Demographic client data on the left side
- A "Y" or "N" for each vaccine on the right side indicating whether the client is up to date for the vaccine

Small Dot Options Menu

• Select the small gray dot on the right side to bring up an options menu.



Available Options



Export Choices for Benchmark

Which data do you want to export?

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. Learn more about exporting data



File format:

.xlsx (Excel 150,000-row max) ~

 \times

Need Assistance?

Call ImmTrac2 Customer Support at 800-348-9158, Monday through Friday, between 8:00 a.m. and 4:30 p.m. or email <u>ImmTrac2@dshs.texas.gov</u>.

For data exchange questions, email <u>ImmTracMU@dshs.texas.gov</u>.



• Share your questions.



Thank You

Texas Immunization Registry

ImmTrac2@dshs.texas.gov