Provider Activity Dashboard Script

November 12 and 14, 2024

Slide 1
(no narration on this slide)

Slide 2
Welcome to the Provider Activity Dashboard webinar. The expected implementation date for the Dashboard is November 22, 2024.

Slide 3
As a reminder:

- All participants are automatically muted by webinar administrators,
- Please type questions using the Question-and-Answer feature, and
- This webinar is being recorded for learning purposes.

Slide 4
Today we'll cover how to navigate to the Provider Activity Dashboard and then how to open and use its three reports: the TIPS report, the CARE report, and the PAR report. In whatever time we have left we'll have a question-and-answer session.

Slide 5
First let's talk about how to navigate to the Provider Activity Dashboard.

Slide 6
Go to https://IAMOnline.hhs.state.tx.us and log in, using your IAMOnline username and password. Then select the ImmTrac2 application.

Slide 7
Once logged into ImmTrac2:

- Click on the "Scheduled Report" link on the left side,
- Then click the link for the "Provider Activity Dashboard".

Slide 8
- In the top right corner, you can select the TIPS, CARE, or PAR reports or a Frequently Asked Questions report.
- The Provider Activity Dashboard defaults to the TIPS report landing page.

Slide 9

The first report we'll look at is the modernized Texas Immunization Provider Summary the TIPS report.

Slide 10

We'll first go over how to open the TIPS report.

Slide 11

After clicking the Provider Activity Dashboard link, the Dashboard opens up and in the upper right corner, you can select the TIPS, CARE, or PAR report or the Frequently Asked Question (FAQ) report. The TIPS report is selected by default.

Slide 12

The upper left corner of the TIPS report has what looks like a funnel and is a filter where you select the organization that the TIPS report applies to. Click the "Filters" icon.

Slide 13

By clicking the down arrow in the "Monthly Reporting Period" box you can choose a month and year for the TIPS reporting period. The default is the latest reporting period.

Slide 14

Click the down arrow in the field for the "Org Code and Provider Name".

Slide 15

Look carefully to see the magnifying glass and the word "Search", which is the search field. Enter the Org Code or organization name in the small search box and click on a selection box to the left of the organization you want. Responsible entities and parent organizations will see organizations that report to them. If you do not have any organizations that report to your organization, then you will only see your organization listed.

Slide 16

This is an example of selecting LHD Dallas County for the organization and using the latest reporting period.

Slide 17

Click on the "Close Filter Pane" label in the bottom right corner of the Filters box to close the filter pane.

Slide 18

In the TIPS report at the top of the screen are the organization's:

- TVFC PIN Number
- Texas IIS ID
- Org Code
- Point of Contact Name
- Provider Name
- Point of Contact Email Address
- Site Agreement Expiration date, and the
- TIPS Rating.

Slide 19

Near the top center of the TIPS report, the month and year that you selected for the reporting period is displayed. On the left side of the dashboard three tabs are displayed vertically:

- The User Activity Summary Tab,
- The Online Activity Tab, and
- The Data Exchange Activity Tab.

Slide 20

The next section is the User Activity Summary.

Slide 21

Click the first tab on the left to display the User Activity Summary.

Slide 22

The headings at the top of the User Activity Summary include:

- The **Active Clients Served**, meaning how many clients were active in this organization at the time of the reporting period,
- The **Online Clients Served**, which is how many client records were opened through the online ImmTrac2 application, and,
- The **Total User Logins** for how many times users in this organization logged into the ImmTrac2 online application for this reporting period.

Slide 23

The side headings of the User Activity Summary are:

- The Number of Total Users, which denotes how many users the organization had in this reporting period that could have logged into the ImmTrac2 application, and,
- The Number of Active Users which is the number of users in the organization who in fact did log into the ImmTrac2 application at least once in the reporting period, and
- The Goal for Active Users which is 75 percent. In this example that goal was exceeded.

Slide 24

In the center of the User Activity Summary there is a summary of the last 12-month reporting periods for this organization. The headings for this table include:

- The Monthly Reporting Period, which is listed in a month and year format,
- The TIPS rating for each month, which can be Exceeds Expectations, Meets Expectations, or Not Rated (which means did not meet expectations),
- The Percent Active Users for each month, which would be the number of active users divided by the number of total users, then multiplied by 100 to give a percent,
- The Number of Active Users, who are users in the organization that actually logged into the ImmTrac2 online application during that month and year,
- The Number of Online Client Searches for the month and year, which is how many times all the active users in the organization performed a client search in the online ImmTrac2 application, and
- The number of User Logins, which is how many times in the month and year all the active users logged into the ImmTrac2 application.

Slide 25

The second tab is the Online Activity Tab.

Slide 26

Click the second tab on the left to display the Online Activity.

Slide 27

In the Online Activity display:

- The very top of the display gives the month and year of the report, which is relevant to the headings on the top and the left side.
- The **headings on the top** of the display are the Immunizations Added, Clients Added, and the Average Entry Latency (in days). The totals are for the month and year at the top.
- The **headings on the left side** of the display are the number of Adult Clients Added, the number of Minor Clients Added, the Number of Adult Immunizations Added, and the Number of Minor Immunizations Added. Again, these totals are for the month and year displayed at the top.
- The graph in the center of the display gives the number of immunizations added and the number of clients added for the previous twelve months. In this example the month and year to be displayed is December of 2023.

Slide 28

The third tab is the Data Exchange Activity.

Slide 29

Click the third tab on the left to display the Data Exchange Activity.

Slide 30

The total number of files submitted and the Average Entry Latency are displayed on the left side. At the top of the display the number of clients submitted via data exchange and the number of immunizations submitted are listed.

In the center of the circle on the left, the percent of clients accepted is displayed, with a goal of at least 90 percent of clients accepted. Just below this circle is the number of clients submitted.

In the center of the circle on the right, the percent of immunizations accepted is displayed, with a goal of at least 90 percent of immunizations accepted. Just below this circle is the number of immunizations submitted.

Slide 31

The next section is on the six focus areas of the TIPS report.

Slide 32

The Percent of Active Users is calculated by dividing the Number of Active Users by the Number of Total Users and multiplying by 100 to get a percentage. The goal is to have at least 75 percent active users.

Slide 33

The number of logins per active user is calculated by dividing the Total User Logins by the Number of Active Users. The goal is that each active user should log into ImmTrac2 online at least twice per month.

Slide 34

The Number of Online Client Searches per Active User is calculated by dividing the Number of Online Client Searches by the Number of Active Users.

Slide 35

The Number of Immunizations Added per Active Client requires finding three numbers. The first tab on the left, the User Activity Summary, displays the number of Active Clients Served.

Slide 36

The second tab on the left, Online Activity, displays the number of Online Immunizations Added.

Slide 37

The third tab on the left, Data Exchange Activity, displays the Immunizations accepted.

Slide 38

To calculate the Number of Immunizations Added per Active Client, add the Number of Online Immunizations Added (found on the Online Activity Tab) to the Number of Data Exchange Immunizations Accepted (found on the Data Exchange Activity Tab) and divide that total by the Number of Active Clients Served (found on the User Activity Tab).

Slide 39

The Average Latency is the time between when an immunization was administered and when it was reported to DSHS. To calculate the average Latency, first find the Average Entry Latency (found on the Online Activity Tab).

Slide 40

Then add to that the Data Exchange Average Entry Latency (found on the Data Exchange Activity tab). And divide that total by two to get the Average Latency.

Slide 41

To calculate the Data Exchange Acceptance Rate, on the Data Exchange Activity tab add the Percent of Clients Accepted and the Percent of Immunizations Accepted, and then divide that total by two.

Slide 42

The next report is the Consent Acceptance Rate Evaluation report, known as the CARE report.

Slide 43

Let's talk about the layout of the CARE report.

Slide 44

The dashboard is divided into three sections: The Header, Search Filters, and Specific header and column sections.

Slide 45

On the Provider Activity Dashboard, in the top right corner, select "CARE".

Slide 46

In the **Search Filter** section of the CARE report, each category has a drop-down menu for user selection. The list of search filters includes the following options:

- Org Code & Provider Name,
- Responsible Entity,
- TVFC Indicator,
- Organization Type,
- Last Site Agreement Date, and
- Monthly Reporting Period

Slide 47

The "Org Code and Provider Name" filter enables users to search for organizations by finding their name or org code. It allows for partial searches, meaning users can input incomplete words or phrases to find relevant organizations. This feature supports smart search functionality by recognizing related words. Responsible entities and parent organizations will see organizations that report to them. If you do not have any organizations that report to your organization, then you will only see your organization listed.

Slide 48

The "Responsible Entity filter allows you to search for one local health department at a time. Please note while using this option, if you are a single responsible entity or provider, you can disregard this filter.

Slide 49

The TVFC filter identifies organizations registered with Texas Vaccine for Children (the TVFC) program.

Slide 50

The Organization Type filter categorizes Public Health Regions and local health departments sites into categories such as Childcare, College/University, etc.

Slide 51

The Last Site Agreement Date filter displays dates related to site agreements for the organizations listed, including the last dates of site registrations and renewals.

Slide 52

The Monthly Reporting Period filter displays the months and years of the current and previous year's report records for organizations.

Slide 53

How to Download the CARE report.

Slide 54

Each column header in the report features an upward-pointing arrow, allowing users to sort the data in an ascending chronological order. Clicking on it again will reverse the sorting order to a descending order. You can hover over the column header area to make the "More Options" icon visible.

Slide 55

The **More Options** icon consists of three horizontal dots and is situated in the far-right corner of this section and becomes visible only when hovered over. The additional options it provides include:

- Export data
- Sort descending
- Sort ascending, and
- Sort by, etc

The 'Sort by' option offers column categories for sorting, such as TX IIS ID or TVFC Pin.

Slide 56

From the list of options select "Export Data".

Slide 57

Choose your preferred format of download layout by selecting either "Data with current layout" or "Summarized data". The "Data with current layout" option will export a simple Excel spreadsheet. The "Summarized data" option exports an Excel table with filters on each column. Then click the "Export" button at the bottom of the page.

Slide 58

A pop-up window confirming a "successful export" will appear. You can then proceed to save the downloaded report.

Slide 59

The columns of the CARE report include demographic information about the provider and most importantly, the number of data exchange files submitted, data exchange clients submitted, data exchange clients accepted, and the percentage of data exchange clients accepted.

Slide 60

The next report is the Provider Activity Report, known as the PAR.

Slide 61

How to access the PAR.

Slide 62

On the upper right corner of the Provider Activity Dashboard, select "**PAR"** to search for and view a Provider Activity Report.

Slide 63

We'll next cover the layout of the PAR, including filters and tabs.

Slide 64

The PAR is divided into three sections:

1. The header
2. Search filters, and a
3. Column header section

Slide 65

The **Header** section features the reporting month and year near the center of the header, and the types of reports to view: **TIPS, CARE, PAR**, and **FAQ** located on the far right.

Slide 66

The next section is the **Search Filters** section, and it has two main tabs on the left side: **View Summary** and **Open Definitions**.

It features a set of filters equipped with dropdown menus for user selections. The list of search filters includes the following options:

- Org Code & Provider Name,
- Responsible Entity,
- TVFC Indicator,
- Organization Type,
- Last Site Agreement Date, and
- Monthly Reporting Period.

Slide 67

The Detailed View shows the detailed provider report after filters have been applied. Responsible entities and parent organizations will see organizations that report to them. If you do not have any organizations that report to your organization, then you will only see your organization listed.

Slide 68

The "Open Definitions" tab provides definitions of column headers for whichever view is currently displayed: the Summary View or the Detailed View. Displayed here are the definitions for the Detailed View.

Slide 69

To access the Summary View, click the 'View Summary' tab. This tab toggles between the Detailed view and the Summary view.

Slide 70

The Summary View displays a summary of the provider report. To undo this action, click the View Details tab, changing it to the Detailed View.

Slide 71

The "Open Definitions" tab provides definitions for the headings of whatever view is being displayed. Here, it displays definitions for the column headers displayed on the "Summary View".

Slide 72

The Org Code and Provider Name filter enables users to search for organizations using their names or codes.

- It allows for partial searches, meaning users can input incomplete words or phrases to find relevant organizations.
- This feature supports smart search functionality by recognizing related words.
- Responsible entities and parent organizations will see organizations that report to them. If you do not have any organizations that report to your organization, then you will only see your organization listed.

Slide 73

The Responsible Entity filter uses a radio button feature that allows users to search for one local health department (an LHD) or public health region (a PHR). It displays a comprehensive list of local health departments or public health regions contracted with ImmTrac2, as for example, LHD Dallas County or the Austin HHS Division.

Slide 74

The TVFC indicator filter identifies organizations registered with the Texas Vaccine for Children (TVFC) program**.**

Slide 75

The Organization Type filter categorizes Public Health Regions and Local Health department sites into categories such as: Childcare, Correctional Facilities, Dialysis Centers, etc. It lists the organization types of the organizations listed.

Slide 76

The Last Site Agreement Date filter displays the dates of the last site agreement for the organizations listed.

Slide 77

The Monthly Reporting Period filter displays the months and years of the current and previous year’s 12-month report records for organizations.

Slide 78

The **Question mark** icon when selected states "If you are a single Responsible Entity or Provider viewing this report, please disregard this filter.

Slide 79

- The **More Options** icon is situated in the far-right corner of the Search Filter section.
- The additional options it provides include:
  - Export data (shown as a table),
  - Spotlight,
  - Get insights,
  - Sort descending,
  - Sort ascending, and
  - Sort by

The 'Sort by' option offers column categories for sorting, such as TX IIS ID or TVFC Pin.

Slide 80

The third section is the Column Header section.

- Each column header in the report features an upward or downward pointing arrow, allowing users to sort the data in ascending or descending order.
- Clicking on an arrow again reverses the sorting order.

Slide 81

At the bottom of the PAR is a scroll bar that enables navigation across all columns.

Slide 82

The PAR has many columns that are grouped into color-coded sections:

- Organization Information
- User
- Online Activity
- Data Exchange
- Consents and TIPS Rating

Slide 83

We’ll now talk about how to download the PAR.

Slide 84

Hover over the column header area to make the “More options” icon visible and then select the three horizontal dots on the right side of the screen to view additional options.

Slide 85

From the list of options select "Export Data" to download the PAR for the desired month.

Slide 86

Choose your preferred format of download layout by selecting either "Data with current layout" or "Summarized data" (Excel or CSV files). Then click the "Export" button at the bottom of the page.

Slide 87

A pop-up window confirming a "successful export" will appear. You can then proceed to save the downloaded report.

Slide 88

The PAR columns include data that identifies the organization and gives the number of clients and immunizations added online and through data exchange. It also gives the TIPS rating for each organization.

Slide 89

If you need assistance, call ImmTrac2 Customer Support at 800-348-9158 Monday through Friday 8:00 a.m. to 4:30 p.m. You can also email ImmTrac2@dshs.texas.gov, or for data exchange questions email **ImmTracMU@dshs.texas.gov**.

Slide 90

We now begin the "Question and Answer" section. Please enter any questions you have in the question box.

Slide 91

Thank you from the Texas Immunization Registry, ImmTrac2. Again, you can email us at ImmTrac2@dshs.texas.gov.

(End of presentation)