



TEXAS
Health and Human
Services

Texas Department of State
Health Services

The Texas Immunization Registry

Modernized Ad Hoc Report Guide

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Introduction

The Ad Hoc Count Report is a tool designed to generate detailed counts of client or immunization data based on customized criteria within the Texas Immunization Registry, ImmTrac2. It provides flexible data extraction, allowing users to refine results using various filters and grouping options. Filters include client status, client factors, and immunization factors, with the added option to group data by rows or columns. This flexibility lets users tailor the report to their specific needs by defining filters and selecting the sort order, making data extraction more customizable and efficient. This guide provides step-by-step instructions on producing and understanding the available filters and factors in the Ad Hoc Count Report.

Part 1: How to Access the Ad Hoc Count Report

Navigate to <https://IAMOnline.hhs.state.tx.us> and log in using your IAMOnline user credentials and password. Then select the ImmTrac2 application to log in.

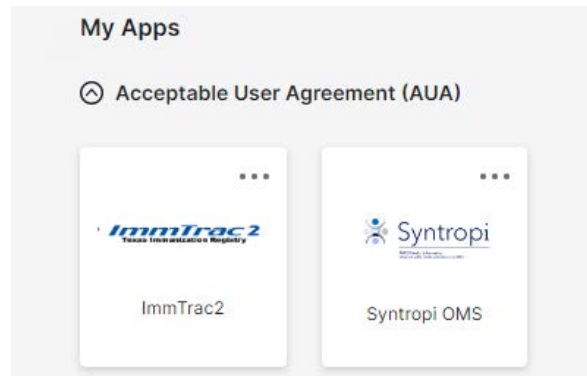


Figure 1: IAMOnline application page

Once logged into ImmTrac2, go to the Reports section and click on "modernized reports" in the menu bar on the left.

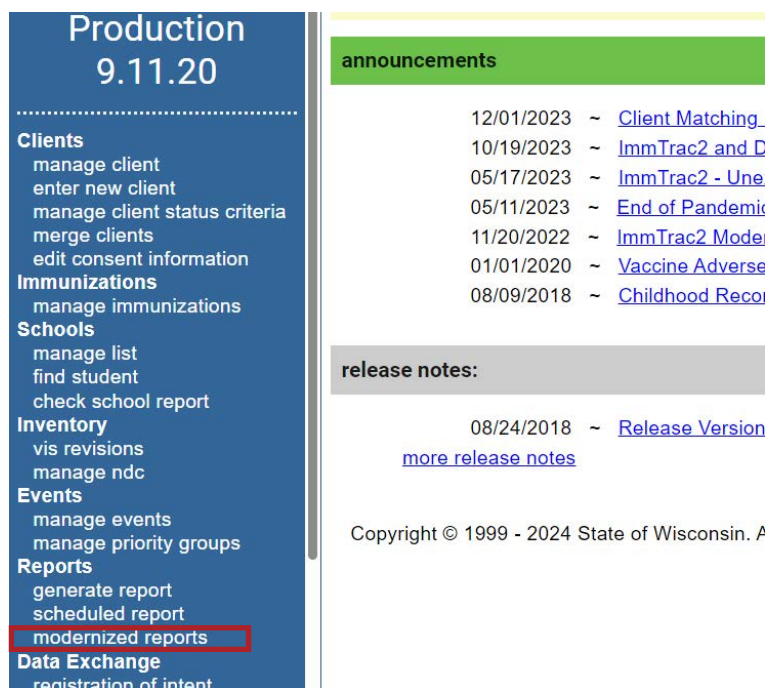


Figure 2: Modernized report

From the list of available modernized reports, select the Ad Hoc Count Report link.

	Generate Report	Description	Output
<ul style="list-style-type: none"> manage client enter new client manage client status criteria merge clients edit consent information 	18 Year Target Client List	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.	Status
<ul style="list-style-type: none"> manage immunizations 	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.	Status

Figure 3: Ad Hoc Count Report Link

Part 2: Setting the Initial Filters

The **1** Ad Hoc Counts Dashboard is displayed and includes the Header at the top of the screen and the **2** Side Menu Bar on the left side.

The screenshot shows the 'Counts Dashboard' interface. At the top, there is a blue header with the Texas Department of State Health Services logo and the text 'Counts Dashboard' and 'Clients and Immunizations'. On the left, a dark blue side menu bar contains the text 'Ad-Hoc Counts Filters' and 'Generate Report'. The main content area features three filter sections: 'VACCINATION DATE' with two date input fields (6/7/2022 and 6/7/2024) and a note 'Enter Date in Format MM/DD/YYYY *Data available for rolling 2 years'; 'COUNT TYPE' with a dropdown menu set to 'Clients'; and 'IMMUNIZATIONS ADMINISTERED BY ORGANIZATION' with an unchecked checkbox.

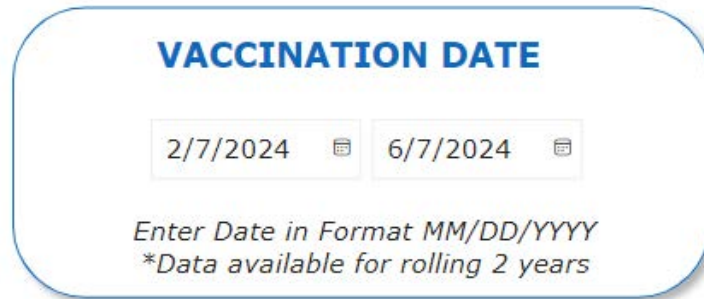
Figure 4: Ad Hoc Count Dashboard and side menu

The Side Menu Bar consists of two tabs: the Ad-Hoc Counts Filters (the default page) and the “Generate Report” tab. The Ad Hoc Count Filters is the default page that appears once the Ad Hoc Count Report link is selected. In this stage you can set the:

- Vaccination Date Filter,
- Count Type Filter, and the
- Immunization Administered by Organization checkbox.

Vaccination Date Filter

The Vaccination Date filter narrows the search for client or immunization counts. Dates can be entered using the calendar icon or typed manually.

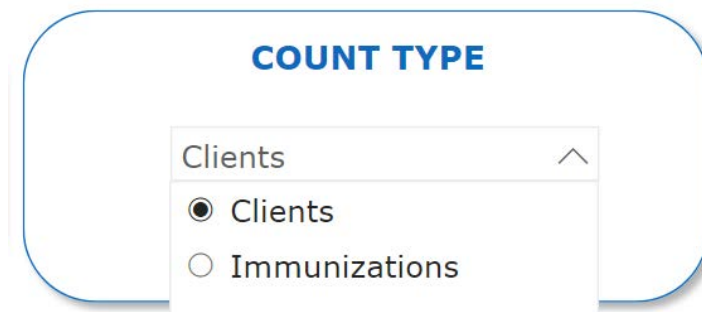


The screenshot shows a rounded rectangular box with a blue border. At the top, the text "VACCINATION DATE" is displayed in blue. Below this, there are two input fields, each containing a date "2/7/2024" and "6/7/2024" respectively, with a small calendar icon to the right of each date. Underneath the input fields, the text "Enter Date in Format MM/DD/YYYY" is shown, followed by a note: "*Data available for rolling 2 years".

Figure 7: Vaccination Date Filter

Count Type Filter

The Count Type filter allows users to choose between the two options of counting clients or immunizations.



The screenshot shows a rounded rectangular box with a blue border. At the top, the text "COUNT TYPE" is displayed in blue. Below this, there is a dropdown menu. The dropdown is currently open, showing two options: "Clients" with a radio button that is selected (indicated by a filled circle), and "Immunizations" with an unselected radio button (indicated by an empty circle). There is an upward-pointing arrow icon to the right of the "Clients" option.

Figure 8:Count Type Filters

Immunization Administered by Organization Filter

When this filter is checked:

- If the count type is set to "Immunizations", the report will include only immunizations administered by your organization, rather than immunizations administered to your clients by all organizations.
- If the count type is set to "Clients", the report includes only clients who received immunizations administered by your organization.

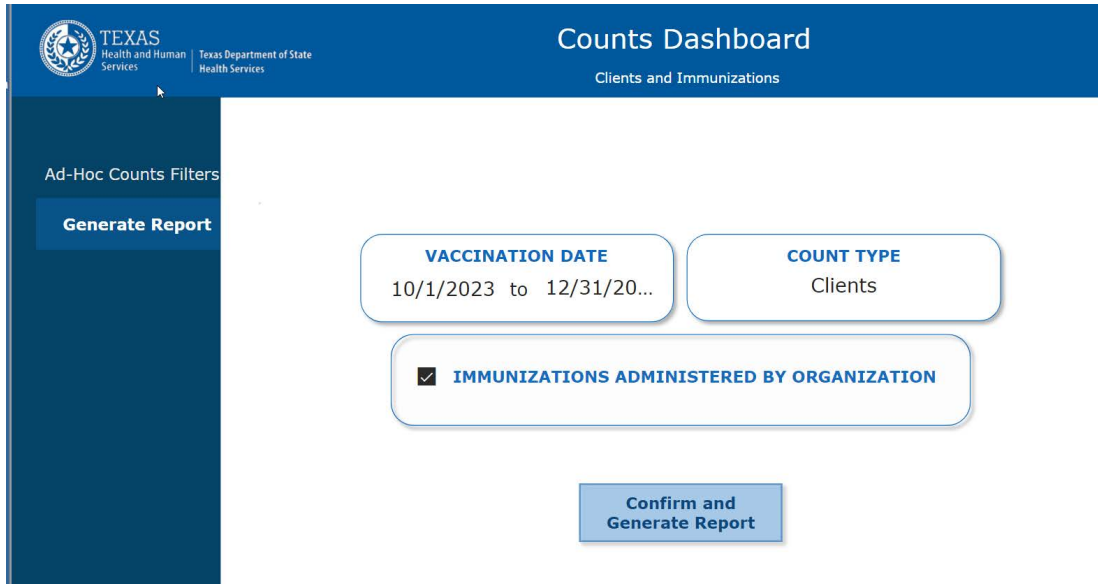


The screenshot shows a rounded rectangular box with a blue border. On the left side, there is a checked checkbox (a square with a white checkmark). To the right of the checkbox, the text "IMMUNIZATIONS ADMINISTERED BY ORGANIZATION" is displayed in blue.

Figure 9:Immunizations Administered by Organization Checkbox

Part 3: Generate Report

The "Confirm and Generate Report" button allows you to review and confirm your filter selections before generating the report.



The screenshot shows the 'Counts Dashboard' for 'Clients and Immunizations'. On the left, there is a sidebar with 'Ad-Hoc Counts Filters' and a 'Generate Report' button. The main area contains three filter boxes: 'VACCINATION DATE' (10/1/2023 to 12/31/20...), 'COUNT TYPE' (Clients), and 'IMMUNIZATIONS ADMINISTERED BY ORGANIZATION' (checked). A 'Confirm and Generate Report' button is located below the filters.

Figure 10: Generate Report Tab

Refresh

The "Refresh" button updates the report status until it reaches "COMPLETE".

Refresh	
Started	Completed
08/13/2024 09:07:04 PM	08/13/2024 09:07:36 PM

Figure 11: Refresh Tab

When the status shows complete, click the report link "Clients Count" or "Immunization Count" to view the report.

Ad Hoc Report Status				
			Refresh	Cancel
Report Type	Started	Completed	Status	
Clients Count	09/18/2024 02:14:22 PM		PROCESSING	


Figure 12: Clients Count link processing

Ad Hoc Report Status				
			Refresh	Cancel
Report Type	Started	Completed	Status	
Immunizations Count	09/18/2024 03:32:23 PM	09/18/2024 03:33:04 PM	COMPLETE	

Figure 13: Immunizations Count link and Complete Status

Initial Display of Report

The Clients or Immunizations Count result is displayed.



TEXAS
Health and Human Services

Texas Department of State Health Services

Counts Dashboard

Clients and Immunizations

Vaccination Date between 2/7/2024 to 6/7/2024, for Clients Count

FILTERS

Client Status

Client Factors

Immunization Factors

Select Row Grouping
Ctrl + Click to multiselect

Ethnicity ▼

Select Column Grouping

Sex ▼

**Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".*

Ethnicity	FEMALE	MALE	Total
Hispanic or Latino	633	391	1024
Not Hispanic or Latino	528	377	905
Total	1161	768	1929

Figure 14: Client Counts Displayed

Part 4: Grouping Data for the Report

The Counts Dashboard appears when a report is generated. It shows the type of report and provides additional grouping options for users to further customize their results. The page is divided into sections:

- 1 Report Header
- 2 Row and Column Grouping Options
- 3 Results Display
- 4 Filters

Birth County	FEMALE	MALE	Total
	113	80	193
CHEROKEE	1		1
NACOGDOCHES		1	1
POTTER	1		1
SMITH	2	2	4
Total	117	83	200

Figure 16: Report Dashboard

Report Header

1 The Header section displays the title "Counts Dashboard" and identifies the report as focusing on Clients and Immunizations. It also specifies the date range for the data (in this example 10/1/2023 to 12/21/2023), noting the vaccination date range for a count of clients. This section provides key context for the report being viewed.

Grouping Options

Now that the clients or immunizations option (depending on which you selected earlier) has been selected, the Grouping Options allow you to customize how you want to see the data grouped by row and column.

Row Grouping

“Select Row Grouping” has a drop down option that provides filters to narrow the report or customize it. To select multiple filters users should point to the filter of choice and press “ctrl” and click.

When multiple filters or "all" is selected in the Select Row grouping, a Fork icon appears, enabling users to expand the report and view more details in the order the filters were chosen. Additionally, an upward arrow allows users to reverse the selected filter options for further customization.



Figure 18: Fork Icon

Column Grouping

The "Select Column Grouping" applies selected filters to the report column. The filters are found under the drop-down option and users can use them to narrow their report or customize it. Multi-selection of filters is not available for this option.

Department of State Services
Clients and Immunizations
Vaccination Date between 10/1/2023 to 12/21/2023, for Clients Count

Select Row Grouping
Ctrl + Click to multiselect

Select Column Grouping

All Sex

*Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".

Figure 19: Grouping Options

When a fork icon is used to reveal the result of a filter report, it is shown on the displayed section of the dashboard.

TEXAS Health and Human Services
Texas Department of State Health Services

Counts Dashboard
Clients and Immunizations
Vaccination Date between 2/7/2024 to 6/7/2024, for Clients Count

Select Row Grouping
Ctrl + Click to multiselect

Select Column Grouping

*Second selection under Y-Axis will not automatically appear when selected. You must hover over the table and select the forked arrow that reads "Expand all down one level in the hierarchy".

Birth Date	Birth County	Ethnicity	First Responder TType	Asian	Black	White	Total
02-MAY-20		Not Hispanic or Latino	N	1			1
			Total	1			1
			Total	1			1
06-JUL-20	HARRIS	Not Hispanic or Latino	N			1	1
			Total			1	1
			Total			1	1
07-JUN-10		Not Hispanic or Latino	N			1	1
			Total			1	1
			Total			1	1
11-FEB-20	HARRIS	Hispanic or Latino	N			1	1
			Total			1	1
			Total			1	1

*Totals for clients will be a distinct count of all clients in a category. Totals for immunizations will be a sum of the count of all immunizations.

Figure 20: Example of filter Report using the fork icon

Display of Client Count or Immunization Count

This section displays the total count of the report type (Client or Immunization) that were generated.

Birth County	FEMALE	MALE	Total
	113	80	193
CHEROKEE	1		1
NACOGDOCHES		1	1
POTTER	1		1
SMITH	2	2	4
Total	117	83	200

Figure 21: Example of Client Count Grouped by Birth County and Gender

Ethnicity	FEMALE	MALE	Total
	110	84	194
Hispanic or Latino	507	349	856
Not Hispanic or Latino	932	657	1589
Recipient Refused	9	5	14
Total	1558	1095	2653

Figure 22: Example of Immunization Count Grouped by Ethnicity and Gender

Report Filters

The side menu on the Counts Dashboard features several report filters, including Client Status, Client Factors, and Immunization Factors. These filters enable users to tailor the report by selecting specific criteria, ensuring the generated data aligns with their reporting needs.

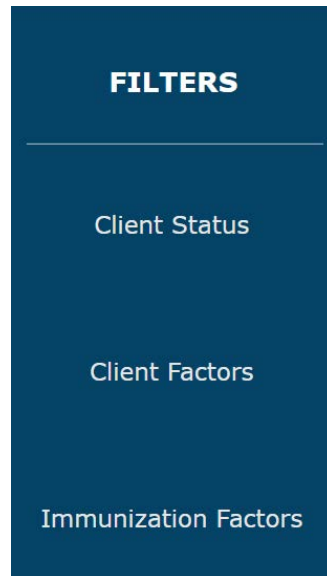


Figure 23: Filters

Client Status

The Client Status drop down allows users to filter active clients in the Immunization Counts report. For the Client Count report it offers additional filter options such as Blank, Active, Inactive, and “No Longer a Patient” to refine the data in the Total Clients report.

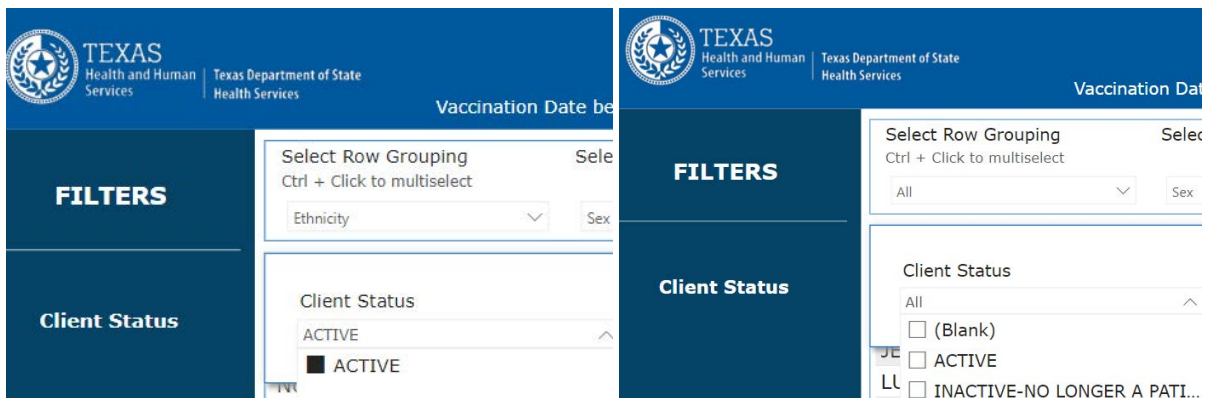


Figure 24: Client Status for Immunization and Client Count Report

Client Factors

The Client Factors section offers filters that allow users to further customize data by categories in their reports. The list of available Client factors includes: Birth County, Birth Date, City, Client Type, Death Indicator, DIR Attribute, Ethnicity, First Responder Type, Language Preferences, Phone Number, Primary Address Indicator, Primary Care Physician, Race, Sex, State, and Zip Code.

Birth County	Birth Date	City
All	All	All
Client Type	Death Indicator	DIR Attribute
All	All	All
Ethnicity	First Responder Type	Language Preference
All	All	All
Phone Number	Phone Number	Primary Address Indicator
All	All	All
Primary Care Physician	Race	Sex
All	All	All
State	Zip Code	
All	All	

Figure 25: Client Factors

Immunization Factors

The Immunization Factors section provides users with filters related to immunizations, allowing users to include or highlight specific data in their report based on the initial immunization count. The list of available Immunization factors includes: Display Inadvertent Vaccine Group, From Inventory, Prescribing Clinician, Trade Name, Vaccination Date, Vaccine Group, and Vaccine Lot.

Display Inadvertent Vaccine Group	From Inventory	Prescribing Clinician
All	All	All
Trade Name	Vaccination Date	Vaccine Group
All	All	All
Vaccine Lot		
All		

Figure 26: Immunization Factor

Part 5: Downloading the Ad Hoc Count Report

The Ad Hoc Count report can be downloaded either as-is (uncustomized) or customized using filters. Follow these steps to download the report:

- Access the Export Options: Hover your mouse over the far-right corner of the dashboard to reveal the "More Options" icon. Click on it to see additional actions.
- Select Export Data: From the drop down menu, select "Export Data" to begin the download process.

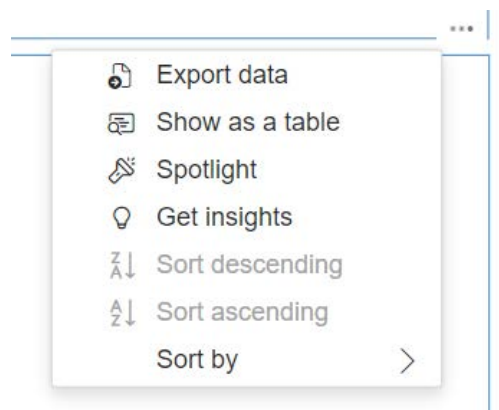


Figure 27: More Option

Choose Export Format

These formats are available for download in either Excel or CSV file types.

You can choose between two formats: **1** Data with Current Layout and Summarized Data.

Download the Report


Once you've selected the export format, click **2** "Export" at the bottom of the page to download and save the report to your device.


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](#)

1


Data with current layout
Export this data in the same layout you see now, but without any icons, colors, or other formatting you added.


Summarized data
Export the summarized data used to create your visual (for example, sums, averages, and medians).


Underlying data

The report author turned off this option

File format:

.xlsx (Excel 150,000-row max) ▾

2

Export

Cancel

Figure 28: Export option "Data with Current layout"



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