TEXAS Health and Human Services | Texas Department of State Health Services

The Texas Immunization Registry

Guide to the Modernized Client Benchmark Report

Texas Department of State Health Services
Immunizations Section

Stock # 11-16877
Rev 02/25

Table of Contents

Introduction **1**

Getting to the Report **1**

Benchmark Filters **2**

How Benchmark Filters Are Used **3**

Generate Report **3**

Client Benchmark Dashboard **5**

Header Section 6

List Filter 7

Focus Mode 7

More Option 8

Filter Report by TX IIS ID Section 10

Summary Section 11

Benchmark Percentages Section 11

Client Details Section 11

Client Demographics on the Left Side 11

Vaccine Benchmarks on the Right Side 12

Clients Who Did Not Meet All Benchmarks **12**

Clients Who Met All Benchmarks **13**

Download the Client Benchmark Report **14**

Introduction

The Client Benchmark Report allows ImmTrac2 users to retrieve a list and count of clients who have or have not met an immunization benchmark. The resulting report can be exported as a text file, spreadsheet, or PDF file. The following sections explain how to access and view the report.

Getting to the Report

Navigate to iamonline.hhs.state.tx.us/ and log in using your IAMOnline user credentials and password. Then select the **ImmTrac2** application to log in.

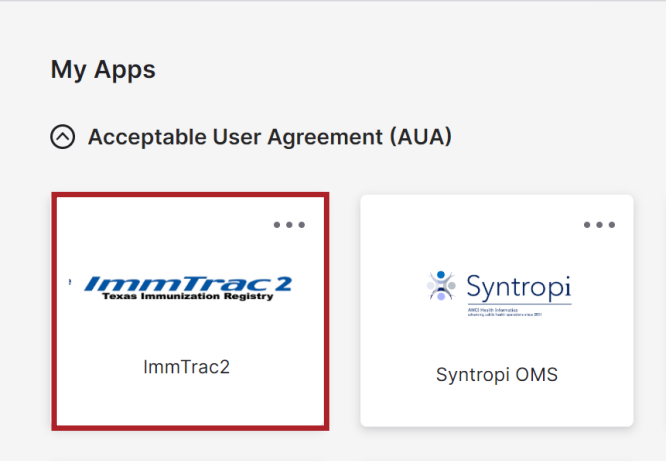


Figure 1: IAMOnline Application Page

Once logged into ImmTrac2, navigate to the Reports section, and click “modernized reports”.

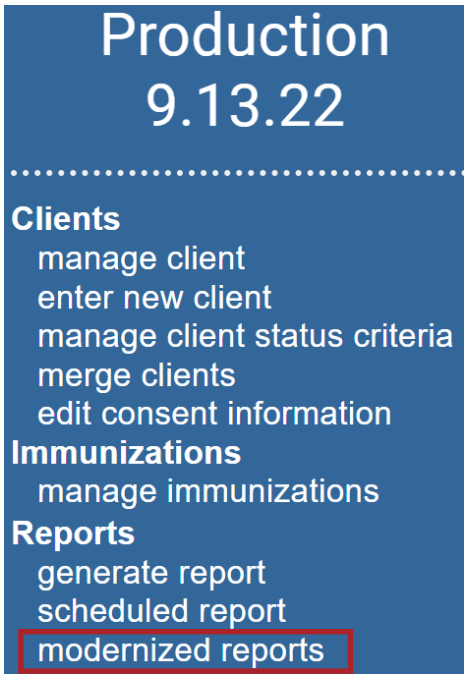


Figure 2: Modernized Reports Link

From the list of available reports, select the Client Benchmark Report link.

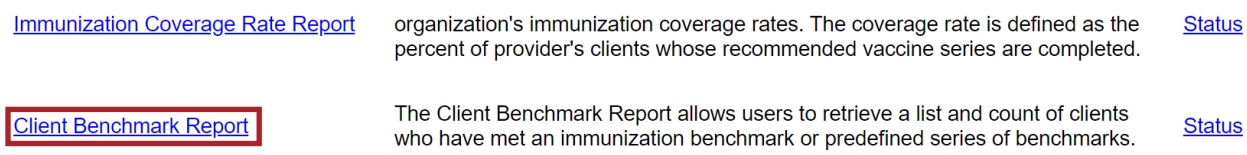


Figure 3: Client Benchmark Report Link

Benchmark Filters

1. **Options for Benchmarking** – There is only one choice, Standard Assessment, which will return a benchmark report based on clients who have or have not met the selected benchmark requirements.
2. **Select Benchmark** – From the drop-down menu, select the benchmark by age in months. This will be the age of the client when the benchmark is taken. It can be two, four, six, 12, 15, 18, 21, 36, or 72 months of age.
3. **Age Range in Months** – An age range for clients to be selected for the report is entered. The age range can be from zero up to 72 months old. For example, if an age range of 24 to 35 months were entered, then only clients who were between 24 to 35 months as of the evaluation date would be included in the report.
4. **Evaluation Date** – The evaluation date is used in combination with the age range. For example, if an evaluation date of 1/1/2024 was entered and an age range of six to 12 months was entered, then clients must have been six to 12 months old as of 1/1/24 to be included in the report. Enter the date in MM/DD/YYYY format or use the date icon.

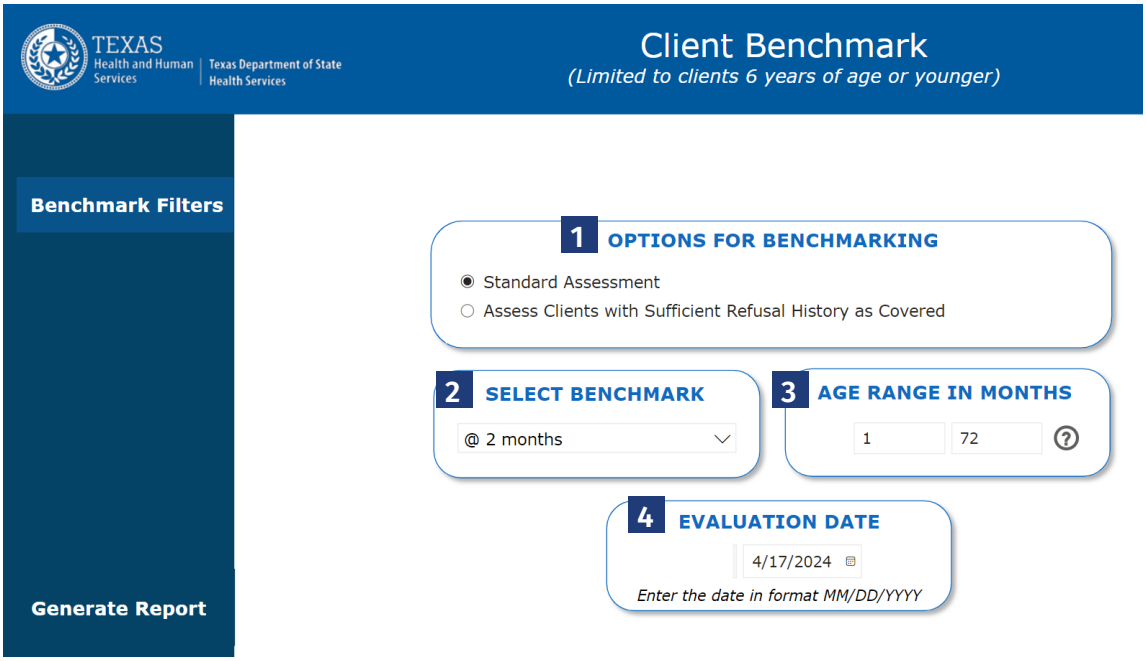


Figure 4: Benchmark Filters

How Benchmark Filters Are Used

- First, the **Evaluation Date** and the **Age Range** are used to select a pool of clients. Clients are selected if they are within the age range specified on the evaluation date entered.
- Then, the **Benchmark** selected is used to evaluate if the clients have received the given number of immunizations for each vaccine for that benchmark age.
- For example, if the **Evaluation Date** is 7/1/2024, and the **Age Range** is 24 to 35 months, and the **Benchmark** selected is 24 months, then the report will select clients who are active in that organization and are between 24 and 35 months old as of the evaluation date of 7/1/2024. To be up to date, the client must have received all the immunizations appropriate for the 24-month benchmark before reaching 24 months old.

Generate Report

Once all the benchmark filters are selected click the “Generate Report” button on the left side of the screen, then select the “Confirm and Generate Report” button.

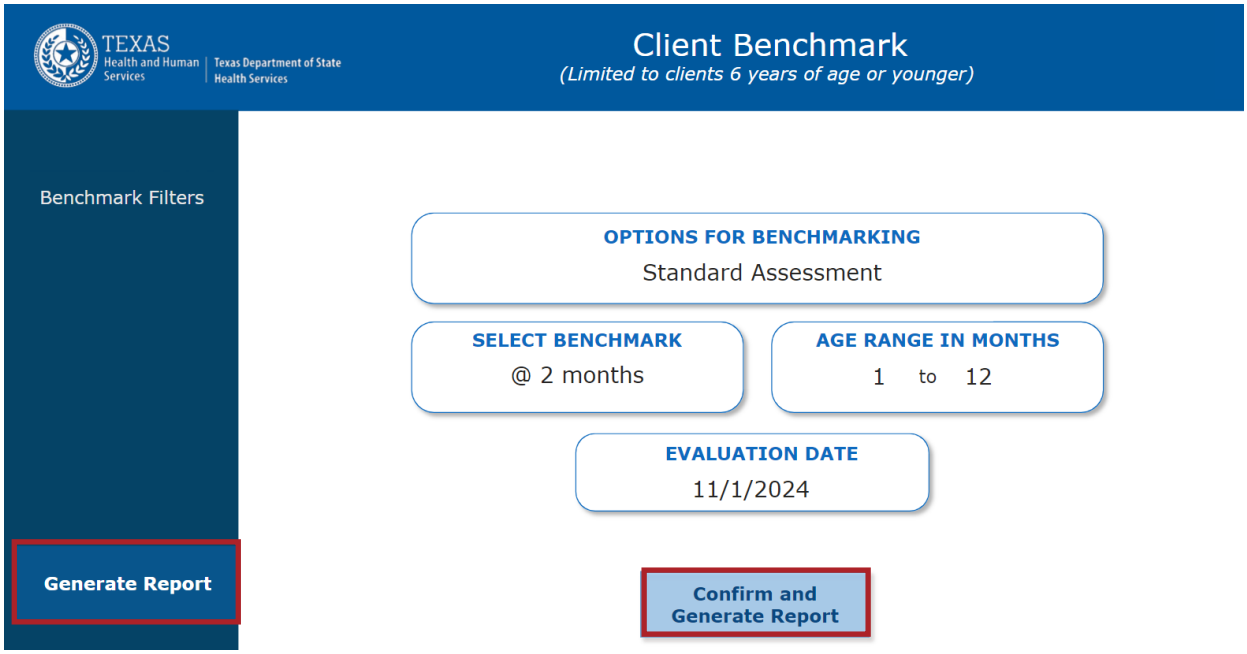


Figure 5: Client Benchmark Confirm and Generate Report

The Client Benchmark Report Status screen displays. Click the “Refresh” button until the status is “Done”.

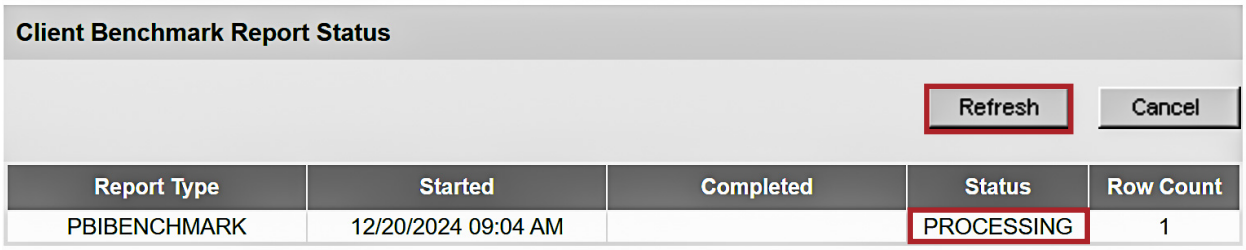


Figure 6: Client Benchmark Report Status

Once the status goes from “Processing” to “Done”, the Report Type will turn into a hyperlink. Click the Report Type hyperlink to review the report.

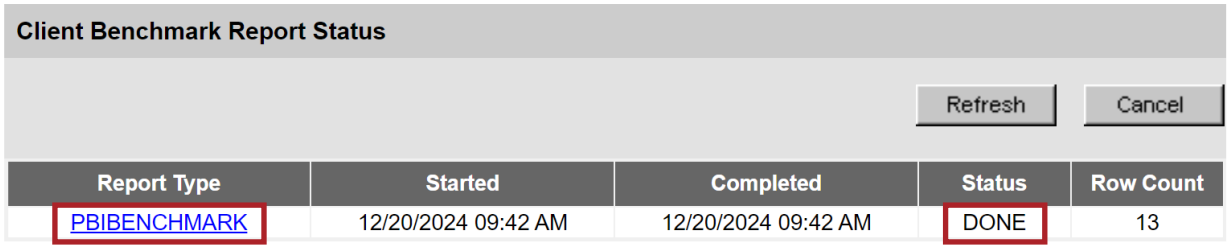


Figure 7: Report Type Hyperlink

Client Benchmark Dashboard

The benchmark report lists all clients who met or did not meet the filter criteria.
The client dashboard consists of five sections:

1. Header
2. Filter by TX IIS ID
3. Client Totals
4. Benchmark Percentages by Vaccine
5. Client and Vaccine Information

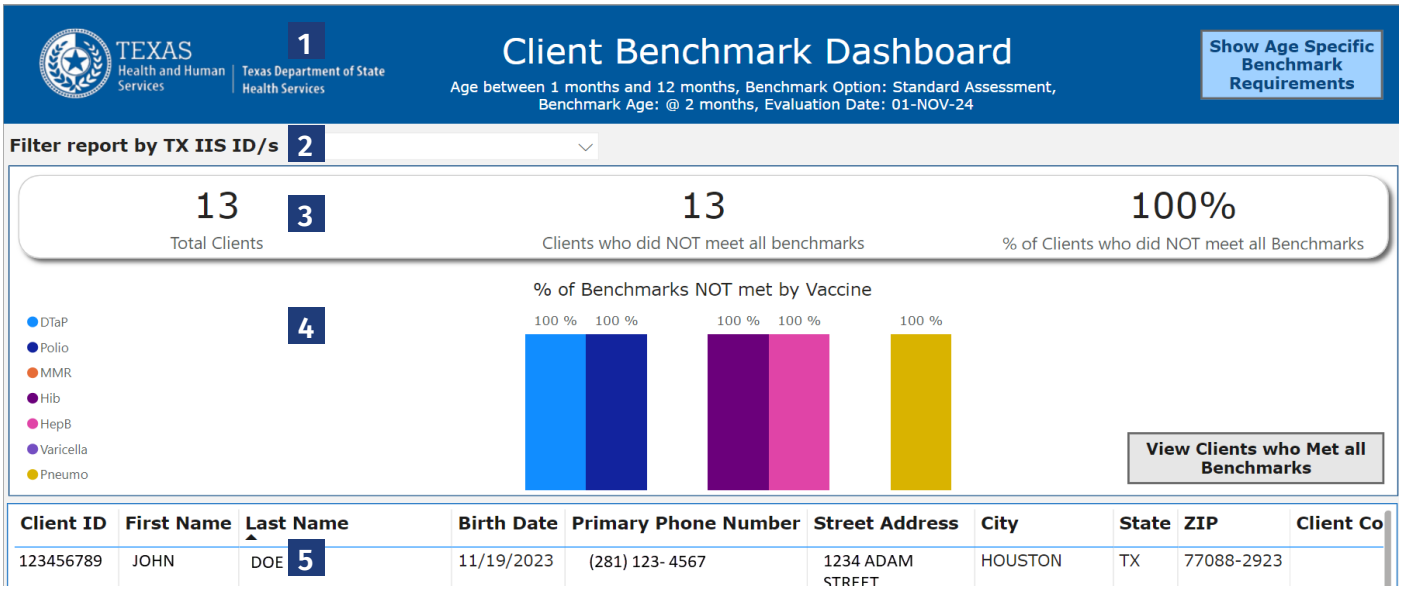


Figure 8: Client Benchmark Dashboard

Header Section

In the Header Section, the filter options previously selected are displayed. Note the button "Show Age Specific Benchmark Requirements" on the right side. This button toggles to either display a table that shows what the benchmark requirements are, or to hide that table.

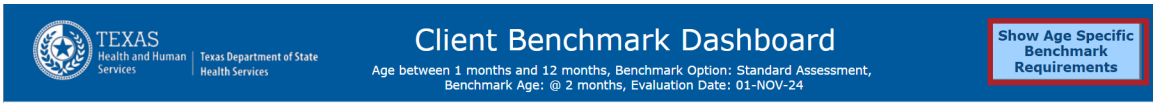
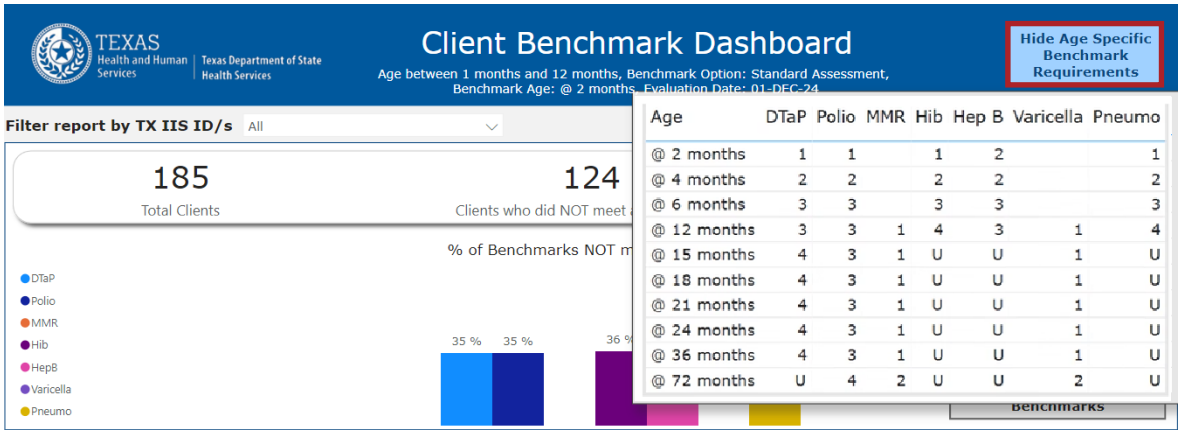


Figure 9: Header "Show Age Specific Benchmark Requirements"

Below is an example of what the benchmark requirements table looks like when it is displayed. If a "U" is displayed, that means "up to date" for the vaccine that age.

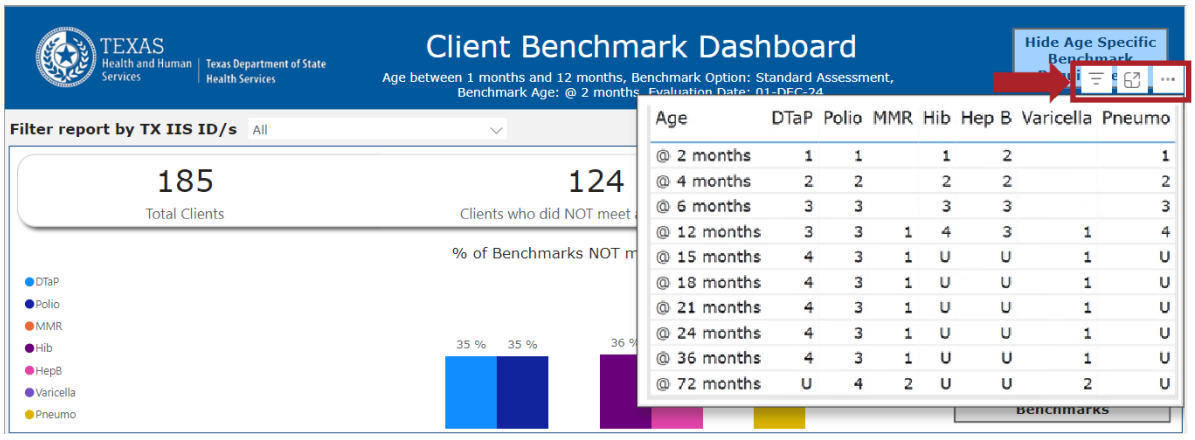


Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 2 months	1	1		1	2		1
@ 4 months	2	2		2	2		2
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 72 months	U	4	2	U	U	2	U

Figure 10: Header "Hide Age Specific Benchmark Requirements"

Selecting the Hide Age-Specific Benchmark Requirements button closes this screen.

Hovering anywhere on the Age Specific Benchmark Requirements Table brings up three additional options: List filters, Focus Mode, and More. All three icons are only associated with the table; they don't apply to other sections of this report.



Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 2 months	1	1		1	2		1
@ 4 months	2	2		2	2		2
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 72 months	U	4	2	U	U	2	U

Figure 11: Additional Options for the Age Specific Benchmark Requirements table

List Filter

The List filter displays a list of selected filters applied from the “Filter report by TX IIS ID/s” dropdown. If no filters are added it states that “no filters are affecting the visuals”.

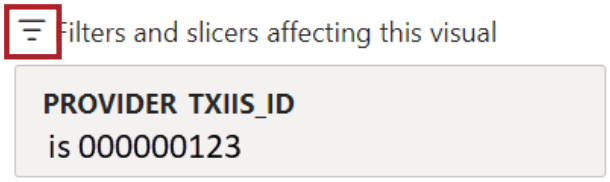


Figure 12: List Filter

Focus Mode

Selecting the Focus Mode icon below displays the age specific benchmark requirement table on a larger scale, drawing focus to the benchmark information. To exit this page, select the “Back to Report” tab.

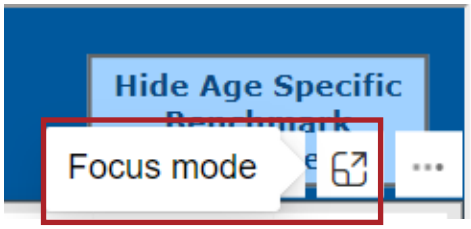
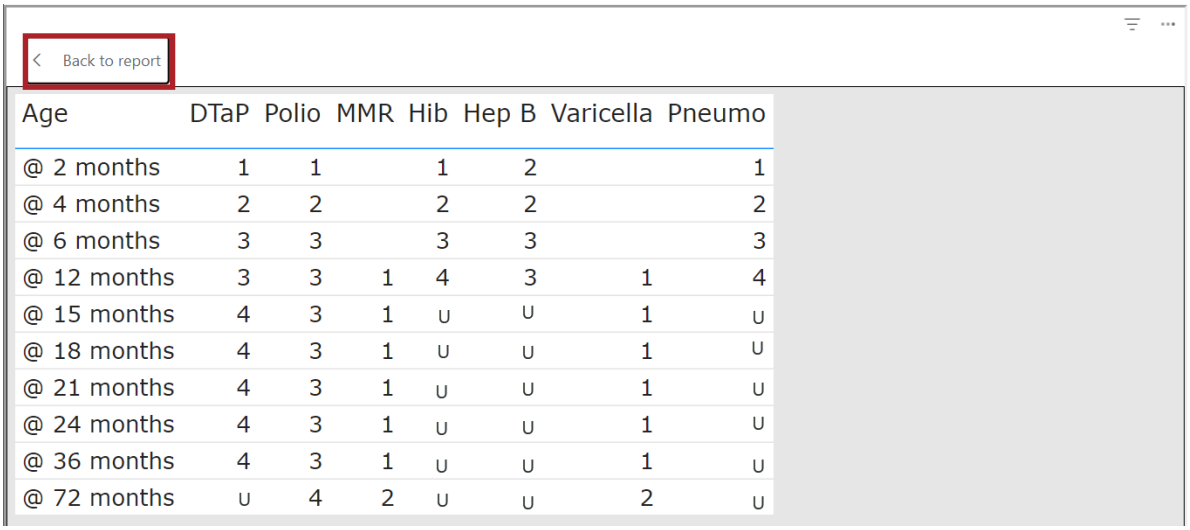


Figure 13: Focus Mode

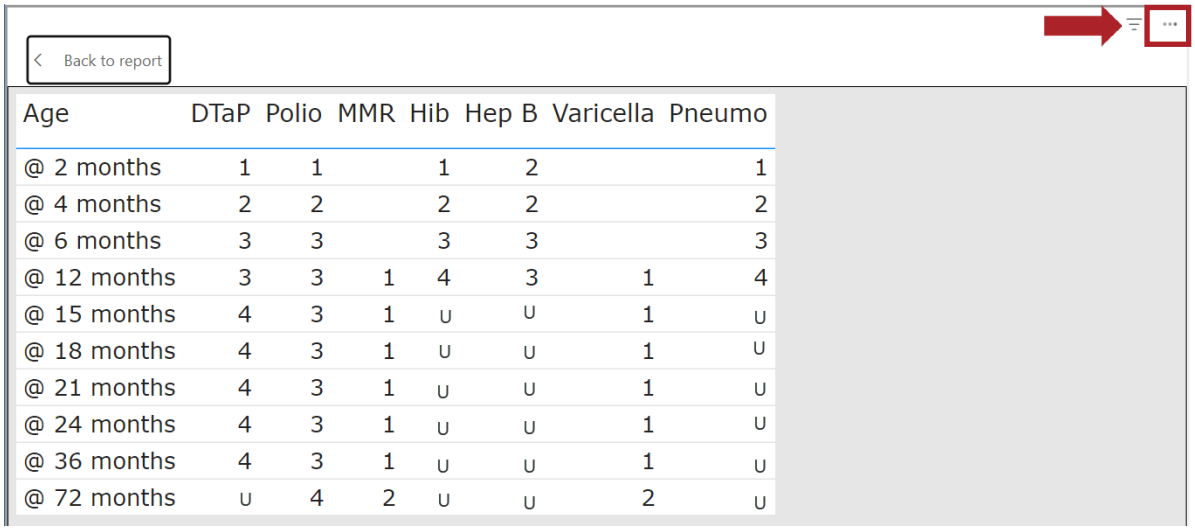


Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 2 months	1	1		1	2		1
@ 4 months	2	2		2	2		2
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 72 months	U	4	2	U	U	2	U

Figure 14: Focus Mode Enlarged Display

More Option

To print the Age Specific Benchmark Requirements Table, select the “More” option at the far right of the display page. Select “Export data” from the options listed.



Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 2 months	1	1		1	2		1
@ 4 months	2	2		2	2		2
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 72 months	U	4	2	U	U	2	U

Figure 15: More Options

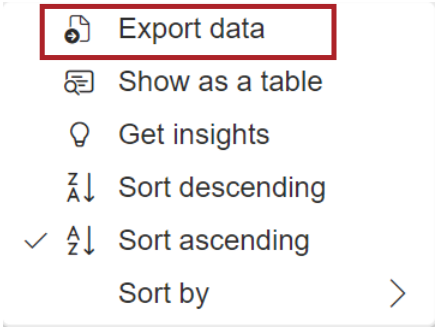


Figure 16: Export Data

To export the data, select the export format, either the “Data with current layout” option or the “Summarized data” option. Then select “Export” at the bottom of the page to download the benchmark.

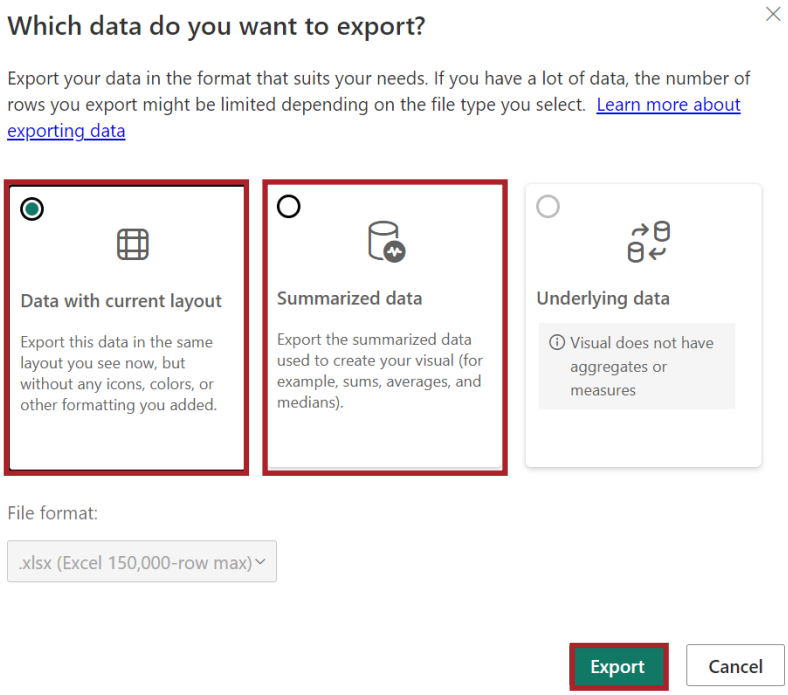


Figure 17: Export Data Format

After choosing a preferred export option for the report, a pop-up window confirming a “successful export” will appear. Proceed to save the downloaded report.

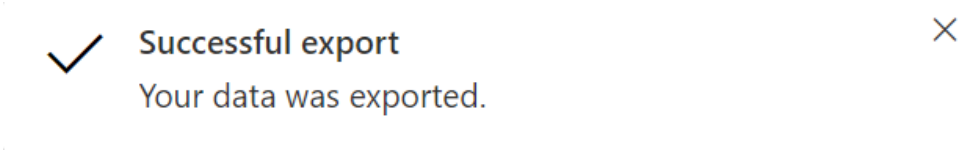


Figure 18: Successful Export

If “Data with current layout” was chosen as the export format, the data is exported as an Excel spreadsheet.

A	B	C	D	E	F	G	H
Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 2 months	1	1		1	2		1
@ 4 months	2	2		2	2		2
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 72 months	U	4	2	U	U	2	U
No filters applied							

Figure 19: Data with current layout Format

If “Summarized data” was chosen as the export format, the data is exported as a table in Excel with filters applied to the columns.

Age	DTaP	Polio	MMR	Hib	Hep B	Varicella	Pneumo
@ 72 months	5	4	2	4	3	2	4
@ 6 months	3	3		3	3		3
@ 12 months	3	3	1	4	3	1	4
@ 15 months	4	3	1	U	U	1	U
@ 18 months	4	3	1	U	U	1	U
@ 21 months	4	3	1	U	U	1	U
@ 24 months	4	3	1	U	U	1	U
@ 36 months	4	3	1	U	U	1	U
@ 4 months	2	2		U	U		U
@ 2 months	U	1		U	U		U

Figure 20: Summarized Data Format

Filter Report by TX IIS ID Section

This section lets users filter the report by specific TX IIS ID/s in the client detail section using a drop-down menu.

Figure 21: Filter Report by TX IIS ID/s

Summary Section

This section displays the following information:

- Total number of clients
- Clients who did not meet all benchmarks (default view) or clients who met all benchmarks, depending on which view was chosen with the “View Clients who Met all Benchmarks”/ “View Clients who Did NOT Meet all Benchmarks” button. See the sections “Clients Who Did Not Meet All Benchmarks” and “Clients Who Met All Benchmarks”.
- Percentage of clients who did not meet all benchmarks.

Figure 22: Summary

Benchmark Percentages Section

This section displays the percentages of benchmarks not met or met for each specific vaccine, depending on which view was chosen: to view clients who met all benchmarks, or clients who did not meet all benchmarks. Each vaccine type is color-coded, showing the percentage of clients who have not met the benchmark for that vaccine.

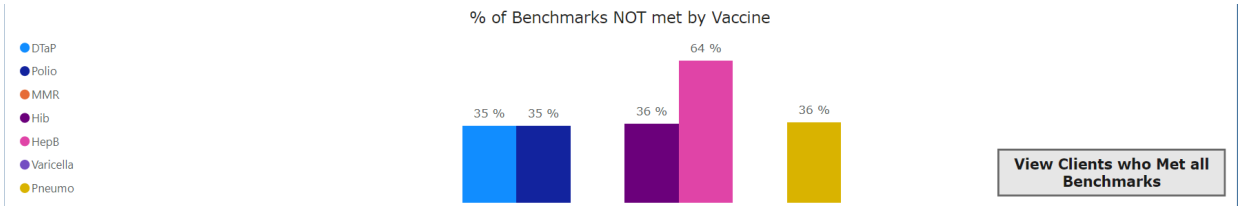


Figure 23: Percent of Benchmarks Not Met by Vaccine

Client Details Section

Client Demographics On The Left Side

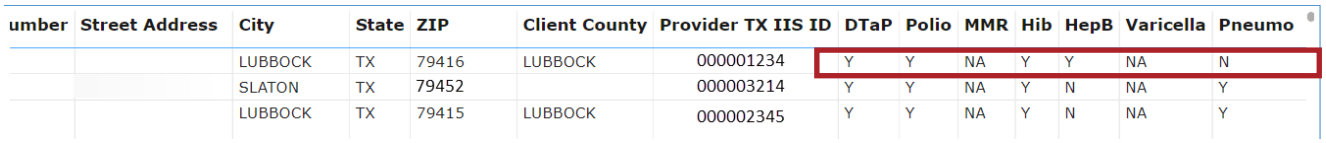
This section lists the client demographics on both views: clients who have not met the benchmark and clients who have met the benchmark. It lists clients by first and last name, date of birth, phone number, and address. Data for those clients will be displayed as below.

Client ID	First Name	Last Name	Birth Date	Primary Phone Number	Street Address	City	State	ZIP	Client Count
000000001	JOHN	DOE	02/06/2024	(817) 000-1234		LUBBOCK	TX	79416	LUBBOCK
000000002	JANE	BROWN	12/09/2023	(231) 123-0000		SLATON	TX	79364-3606	
000000003	PETER	DOE	08/19/2024	(817)123-0000		LUBBOCK	TX	79415	LUBBOCK

Figure 24: Client Demographics

Vaccine Benchmarks On The Right Side

The left side of the client detail table is the client vaccine section. The Y and N indicate whether the client met the criteria for that vaccine benchmark age. This is found in clients who have not met the benchmark and clients who have met the benchmark dashboard.

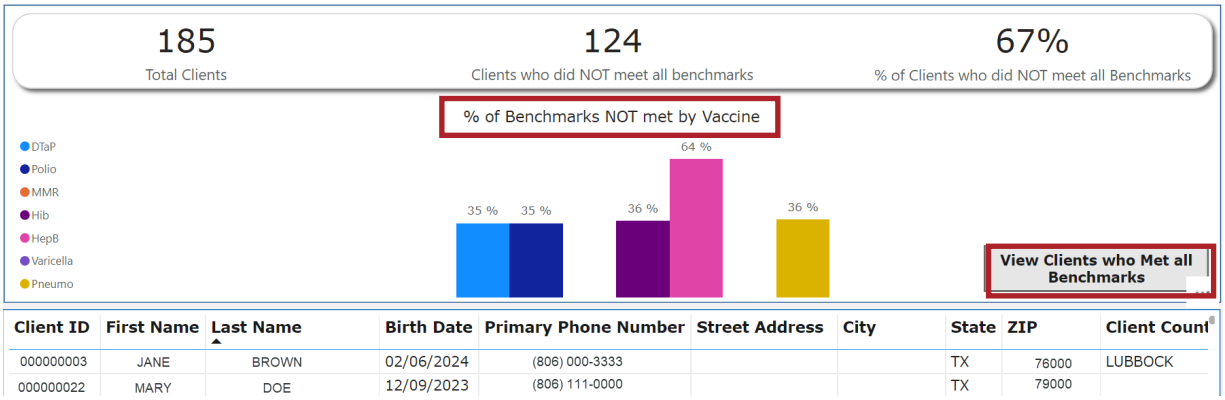


umber	Street Address	City	State	ZIP	Client County	Provider TX IIS ID	DTaP	Polio	MMR	Hib	HepB	Varicella	Pneumo
		LUBBOCK	TX	79416	LUBBOCK	000001234	Y	Y	NA	Y	Y	NA	N
		SLATON	TX	79452		000003214	Y	Y	NA	Y	N	NA	Y
		LUBBOCK	TX	79415	LUBBOCK	000002345	Y	Y	NA	Y	N	NA	Y

Figure 25: Individual Vaccine Information

Clients Who Did Not Meet All Benchmarks

Clients who did not meet all benchmarks are shown by default, on the dashboard.
Selecting the “View Clients who Met all Benchmarks” button changes the dashboard to display client demographics and benchmark data for clients who met all benchmarks.

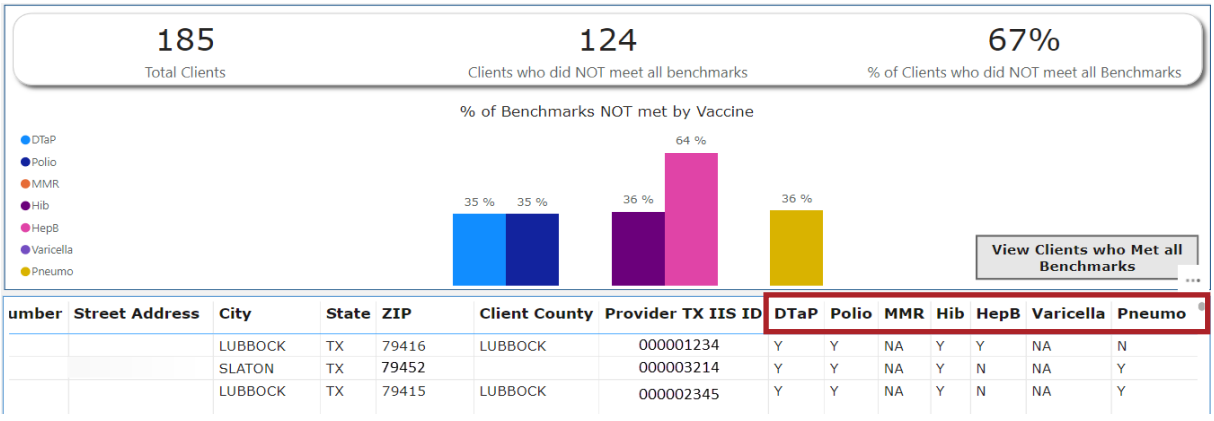


Client ID	First Name	Last Name	Birth Date	Primary Phone Number	Street Address	City	State	ZIP	Client Count
000000003	JANE	BROWN	02/06/2024	(806) 000-3333			TX	76000	LUBBOCK
000000022	MARY	DOE	12/09/2023	(806) 111-0000			TX	79000	

Figure 26: Clients Who Did Not Meet All Benchmarks

Client Details- Individual- Vaccines Highlighted

This is the right side of the report, which provides yes or no information for Clients Who Did Not Meet All Benchmarks for the listed vaccines.

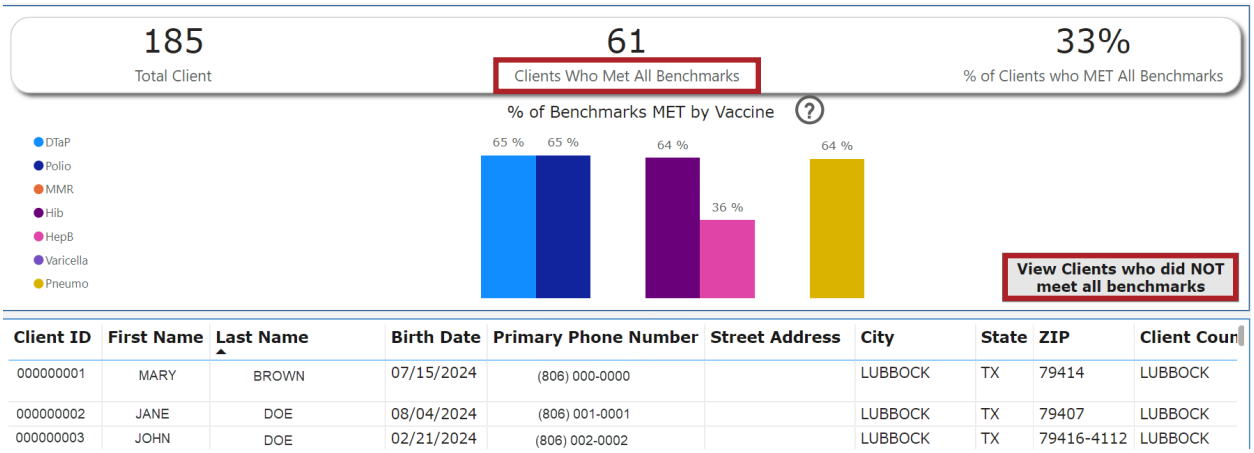


umber	Street Address	City	State	ZIP	Client County	Provider TX IIS ID	DTaP	Polio	MMR	Hib	HepB	Varicella	Pneumo
		LUBBOCK	TX	79416	LUBBOCK	000001234	Y	Y	NA	Y	Y	NA	N
		SLATON	TX	79452		000003214	Y	Y	NA	Y	N	NA	Y
		LUBBOCK	TX	79415	LUBBOCK	000002345	Y	Y	NA	Y	N	NA	Y

Figure 27: Clients Who Did Not Meet All Benchmarks Y/N Vaccine section.

Clients Who Met All Benchmarks

Clients who met all benchmarks are shown on the dashboard. Selecting the “View Clients who did NOT meet all Benchmarks” button changes the dashboard to display client demographics and benchmark data for clients who did not meet all benchmarks.

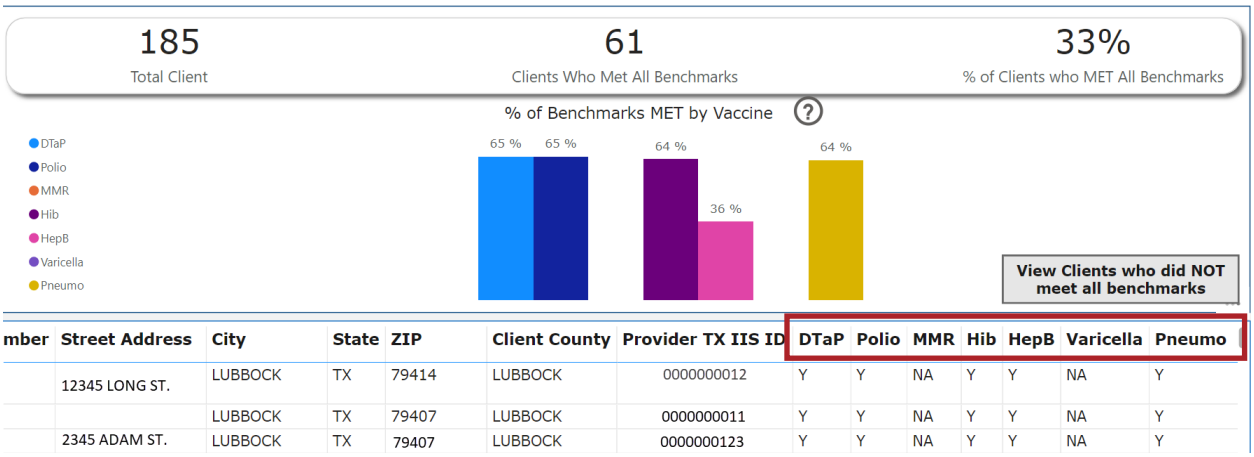


Client ID	First Name	Last Name	Birth Date	Primary Phone Number	Street Address	City	State	ZIP	Client Coun
000000001	MARY	BROWN	07/15/2024	(806) 000-0000		LUBBOCK	TX	79414	LUBBOCK
000000002	JANE	DOE	08/04/2024	(806) 001-0001		LUBBOCK	TX	79407	LUBBOCK
000000003	JOHN	DOE	02/21/2024	(806) 002-0002		LUBBOCK	TX	79416-4112	LUBBOCK

Figure 28: Clients Who Met All Benchmarks.

Client Details-Page - Individual Vaccines Highlighted

This is the right side of the report, which provides yes or no information for Clients Who Met All Benchmarks for the listed vaccines.



mber	Street Address	City	State	ZIP	Client County	Provider TX IIS ID	DTaP	Polio	MMR	Hib	HepB	Varicella	Pneumo
	12345 LONG ST.	LUBBOCK	TX	79414	LUBBOCK	0000000012	Y	Y	NA	Y	Y	NA	Y
		LUBBOCK	TX	79407	LUBBOCK	0000000011	Y	Y	NA	Y	Y	NA	Y
	2345 ADAM ST.	LUBBOCK	TX	79407	LUBBOCK	0000000123	Y	Y	NA	Y	Y	NA	Y

Figure 29: Clients Who Met All Benchmark Y/N Vaccine section.

Download the Client Benchmark Report

The next step is to download the report, which offers a detailed summary of client demographics and benchmark data.

Hover the cursor in the table heading around the “Client County” area and three horizontal dots will appear above the heading. Click on the three dots and a list of options is displayed.

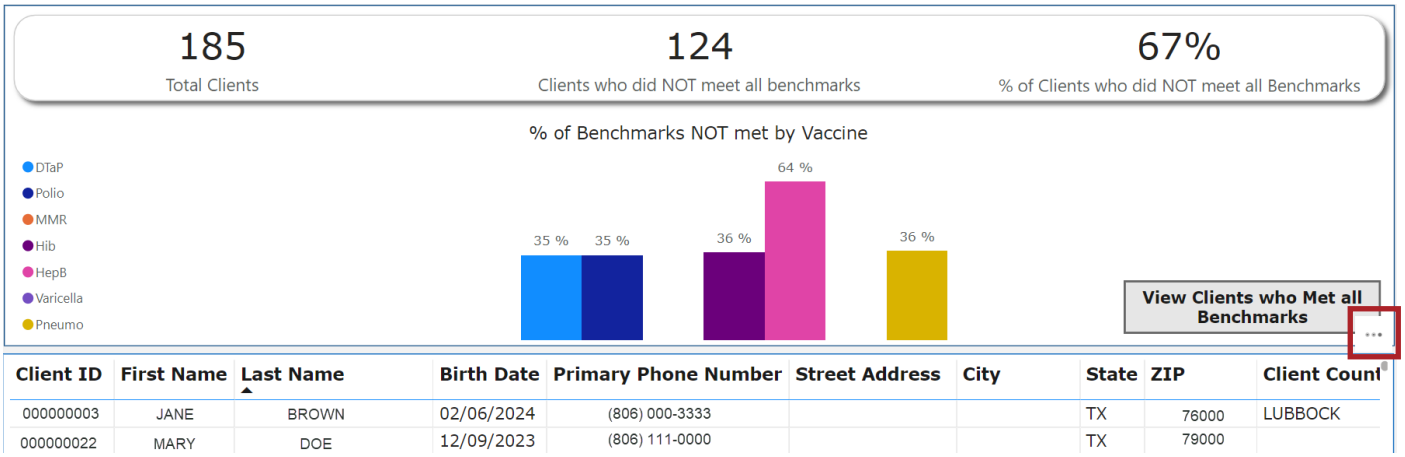


Figure 30: More Options Icon

From the list of options, select “Export Data”.

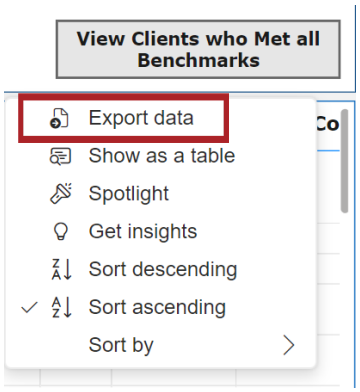


Figure 31: Export Data

When selected, two options for exporting the data will appear. Select the “Data with current layout” option or the “Summarized data” option from the export formats. Then click “Export” at the bottom of the page.

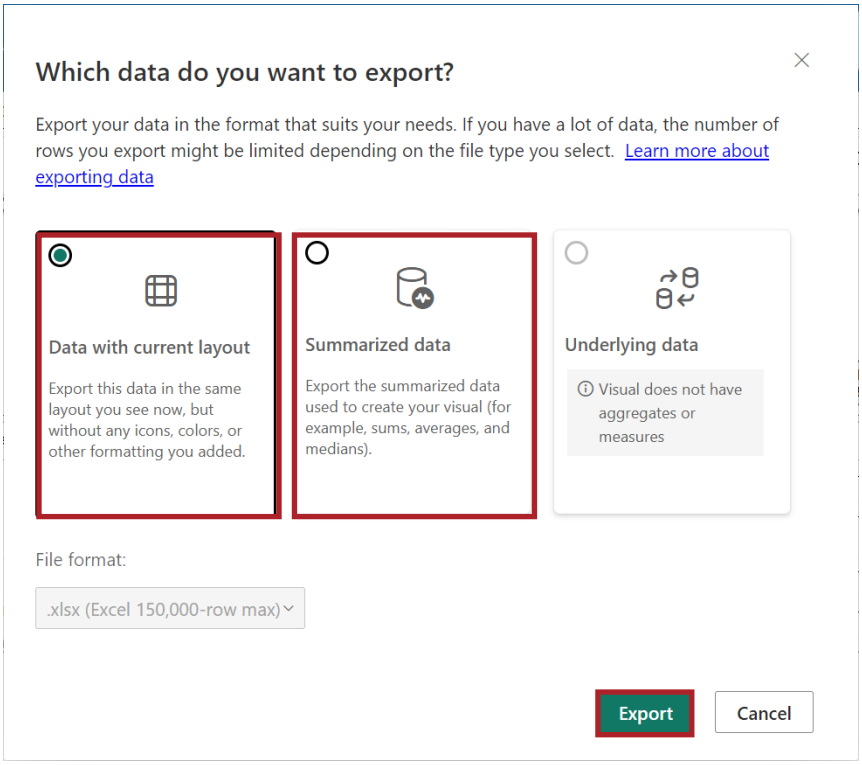


Figure 32: Export Options

After choosing a preferred export option for the report, a pop-up window confirming a “successful export” will appear. Proceed to save the downloaded report.

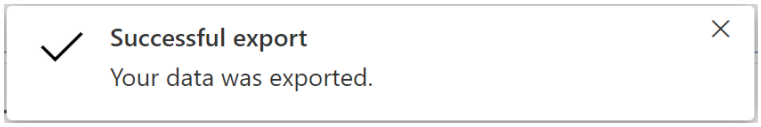


Figure 33: Successful Export

If “Data with current layout” is chosen as the export format, the data is exported as an Excel spreadsheet.

	A	B	C	D	E	F	G	H	I	J
1	Client ID	First Name	Last Name	Birth Date	Primary Phone	Street Address	City	State	ZIP	Client County

Figure 34: Heading for the “Data with Current Layout” Format

If “Summarized data” is chosen as the export format, the data is exported as a table in Excel with filters applied to the columns.

Figure 35: Heading for the “Summarized Data” Format

Texas Department of State Health Services
Immunizations Section

Stock # 11-16877
Rev 02/25