imMTrax Provider Handbook

Revised 12/2015

The *imMTrax* Provider Handbook is intended to provide clear, step-by-step instructions for navigating commonly used *imMTrax* functions.

For VFC Providers, description and instruction on mandatory practices, restrictions, and/or correct field selections can be found in the VFC Provider Handbook.

The most current version of the VFC Provider Handbook can be found at:

http://dphhs.mt.gov/publichealth/Immunization/VaccinesforChildren.aspx

The following icons have been provided:

Additional *imMTrax* training documents available

(click to access the imMTrax Training webpage)

VFC-Specific Topic

(click to access the VFC webpage)

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1 ACCESSING imMTrax

1.1 Logging in to *imMTrax*

- Open your internet browser (Internet Explorer, Mozilla, Google Chrome, etc).
- Type in the *imMTrax* web address http://dphhs.mt.gov/publichealth/imMTrax.
- Click the link to the *imMTrax* login page: **Login to imMTrax**.
- Enter your login credentials:
  - **Organization Code**
  - **User ID (**Your state issued ID)
  - **Password***
- Select the **Login** button.

  *If logging in using a temporary password (new user accounts or following a password reset by *imMTrax* Staff), you will be required to change your password.
    - In the **New Password** field, enter your new password.
    - Reenter your new password into the **Confirm New Password** field.
    - Click the **Save P/W** button.

  Passwords are subject to the following rules:
    - Must be a minimum of 8 letters and number (minimum one letter and one number)
    - Must not contain any character symbols (# $ % &)
    - Passwords may not have repeated letters or numbers (i.e., zz or 11)
    - Common passwords cannot be used (i.e., abcd1234)
    - Previous 24 passwords may not be reused
    - Passwords will expire after 60 days

Notes:

1.2 Electing to change your *imMTrax* password*

- Login to *imMTrax* using your current login credentials.
- Once on the *imMTrax* home page, select the **change password** option displayed at the top of the page.
- In the **New Password** field, enter your new password.
- Reenter your new password into the **Confirm New Password** field.
- Click the **Save P/W** button.

imMTrax may prevent users from electing to change their password for 15 days following a password reset.

Passwords are subject to the following rules:

- Must be a minimum of 8 letters and number (minimum one letter and one number)
- Must not contain any character symbols (# $ % &)
- Passwords may not have repeated letters or numbers (i.e., zz or 11)
- Common passwords cannot be used (i.e., abcd1234)
- Previous 24 passwords may not be reused
- Passwords will expire after 60 days

Notes:

2 SITE CONTRACT

2.1 Complete Annual Site Contract VFC

Access Site Contract

- Select the **site contract** option located under **manage operations** in the left navigational menu.
- Select the **Create New** hyperlink.

Complete Annual Site Contract

- Enter information into the data fields on the **Provider Information** page and select the **Next** button.
- Enter information into the data fields on the **Provider Population** page and select the **Next** button. *Intergrated providers will see estimates populated, based on imMTrax entry up to the date the contract was started.*
- Verify the providers on the **Health Professionals Authorized to Prescribe/Administer Vaccines** page.
  - To add a provider, email the Montana Immunization Program (hhsiz@mt.gov) with the provider's full name, date of birth, and Montana License Number.
  - To remove a provider, email the Montana Immunization Program at (hhsiz@mt.gov) with the provider's name.
- Select the **Next** button.
- Enter information into the data fields on the **Medical Director and Vaccine Coordinators** page and select the **Next** button.
- Read the requirements provided on the **Provider Requirements** page and select the **Next** button.
- Enter information into the data fields on the **Provider Agreement Signatures** page and select the **Save and Submit** button.

Notes:

3 VACCINE STORAGE

3.1 Add a Cold Storage Unit VFC

Access Cold Storage

- Select the **manage cold chain** option located under **Inventory** in the left navigational menu.

Add a Storage Unit

- Select the **Add Unit** button.
- Enter a **Unit Name**.
- Select the **Type** drop-down box and select either **Refrigerator** or **Freezer.**
- Enter the **First Log Date.**
- Select the **Save** button.

3.2 Edit a Cold Storage Unit Name VFC

Access Cold Storage

- Select the **manage cold chain** option located under **Inventory** in the left navigational menu.

Edit Existing Cold Storage Unit Name

- Use the **Cold Storage Unit** drop-down options to select the unit to edit.
- Select the **Edit Unit** button.
- Edit the cold storage **Unit Name** and select the **Save** button.

Notes:

3.3 Delete a Cold Storage Unit VFC

Access Cold Storage

- Select the **manage cold chain** option located under **Inventory** in the left navigational menu.

Delete Existing Cold Storage Unit

- Use the **Cold Storage Unit** drop-down options to select the unit to delete.
- Select the **Edit Unit** button.
- Enter a **Final Log Date** and select the **Delete** button.

  NOTE: In order to enter a ***Final Log Date*** *and delete a storage unit* ***ALL*** *temperatures must be certified through the final date entered. See section 3.4.*
- To remove a cold storage unit from the drop-down options, contact the Montana Immunization Program at (406) 444-5580 or hhsiz@mt.gov.

Notes:

3.4 Certifying Temperatures

<u>Access Cold Storage</u>

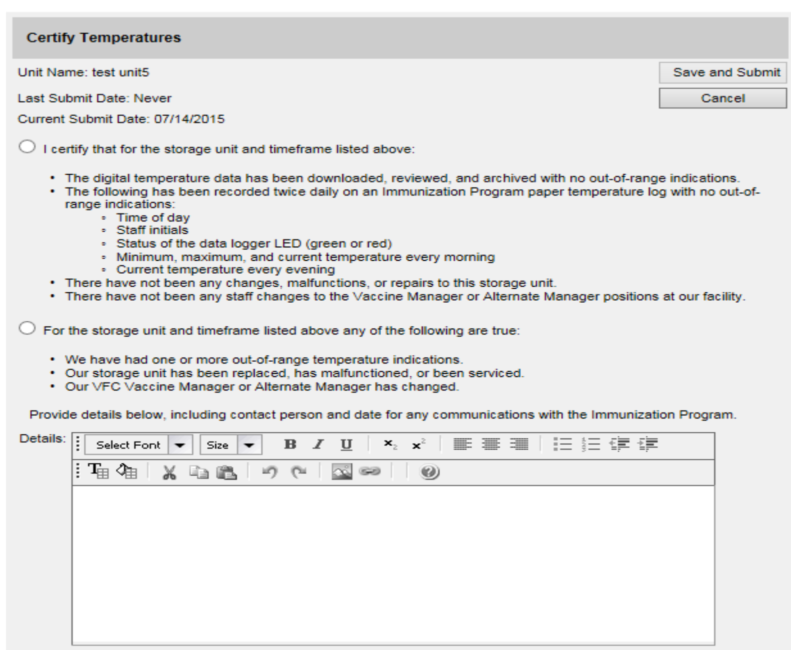
- Select the **manage cold chain** option located under **Inventory** in the left navigational menu.

<u>Certify Temperatures:</u>

- Use the **Cold Storage Unit** drop-down options to select the unit to certify temperatures.
- Click **Certify Temperatures**.
- Review and choose the appropriate radio button from the two options provided for the selected unit and certification timeframe. **See Figure 3-4.**
- If the second radio button is selected (temperature excursions, storage unit replaced, storage unit malfunction, storage unit service, or VFC Vaccine Manager or Alternate change), provide a description of the event in the **Details** text box provided. NOTE: *Submission is subject to approval of the Montana Immunization Program.* imMTrax *functions that require temperature certification be up-to-date will be restricted until approved.*
- Click **Save and Submit**.

Notes:

Figure 3-4



3.5 Cold Storage Certification Report VFC

Access Cold Storage

- Select the **manage cold chain** option located under **Inventory** in the left navigational menu.

Cold Storage Certification Report

- Select the **Certification Report** button.
- To run a Certification Report that **ONLY** includes instances designated as errors (i.e. temperatures outside the designated vaccine storage range) for the date range, select the **Report Errors Only** checkbox.
- Enter date range in the **Report Date Range** fields.
- Select the **Generate Report** button.
- Report generates as PDF and will be available to **Open or Save**, typically by selection that will appear as a pop-up on the bottom of the page.

Notes:

4 INVENTORY MANAGEMENT

4.1 Add Inventory

NOTE: You may only add your site's private vaccine inventory. Public (VFC) vaccine will be added to the site's active inventory once it is accepted/received. Exceptions are Influenza and Adult Program vaccines.

<u>Access Inventory:</u>

- Select the **manage inventory** option located under **Inventory** in the left navigational menu.
- Select the **Show Inventory** button.

<u>Add Inventory</u>

- Select the **Add Inventory** button.
- Using the **Trade Name / NDC** drop-down provided, select the appropriate vaccine to be added.
- Enter the following fields:
  - **Lot Number**
  - **Dose (size)**
  - **Expiration Date**
  - **Quantity on Hand**
- Leave **Lot Active** field set to **Yes.**
- Review your entry for accuracy.
- Select the **Save** button.
- Your changes are saved and confirmed via the red message stating **Inventory was inserted successfully.**

Notes:

4.2 Edit Vaccine Inventory

NOTE: You may only edit your site's private vaccine inventory. Once received and electronically entered into a site's inventory, public vaccine details are available for viewing only. Edits made to certain fields (Lot Number, Dose, Expiration Date, Trade Name / NDC) will impact any previous doses administered and recorded in imMTrax by Integrated Sites. <u>A site should make all efforts to ensure private inventory is initially entered correctly.</u>

<u>Access Inventory:</u>

- Select the **manage inventory** option located under **Inventory** in the left navigational menu.
- Select the **Show Inventory** button.

<u>Edit Inventory:</u>

- Locate the vaccine lot to be edited.
- Click the blue hyperlinked **Trade Name**.
- Edit fields as needed.
- Select the **Save** button.
- Your changes are saved and confirmed via the red message stating **Inventory was updated successfully.**

Notes:

4.3 Inactivate Vaccine Inventory

NOTE: You may only inactivate your site's private vaccine inventory.

Access Inventory:

- Select the **manage inventory** option located under **Inventory** in the left navigational menu.
- Select the **Show Inventory** button.

Inactivate Vaccine Inventory:

- Locate the vaccine lot to be inactivated.
- Select the blue hyperlinked **Trade Name**.
- In the **Lot Status** section, click the **Lot Active** drop-down and select **No.**
- Enter any information into the **Invalid Due To** field.

  Leave Blank- Removes lot from active inventory. Does not impact previously administered doses.

  Recalled- Removes lot from active inventory. All previously administered doses from the lot are designated RECALLED within the client record.

  Spoilage-NonColdChain- Removes lot from active inventory. If Spoilage Date Range is left blank, all previously administered doses are designated COLD CHAIN within the client record. If the Spoilage Date Range is populated, only administered doses between the dates provided will be designated COLD CHAIN within the client record.

- Select the **Save** button.
- Your changes are saved and confirmed via the red message stating **Inventory was updated successfully.**

Notes:

4.4 Ordering Public (VFC) Vaccine

NOTE: Prior to ordering vaccine, temperature certifications (see section 3.4) and reconciliation (see section 4.7) must be up-to-date.

<ins>Access Ordering:</ins>

- Select the **manage orders** option located under **Inventory** in the left navigational menu.
- Select the **Create New Order** button.

<ins>Order Public Vaccine:</ins>

- Vaccines available for ordering will display under the **Vaccines from State** section. Locate the vaccine(s) to be ordered.
- In the **Order Requested** column enter the number of doses requested. *Order vaccine by the dose, not by the package. Dose amounts ordered must be divisible by the package size.* **See Figure 4-4.**
- Click **Submit Order**.

Figure 4-4

Create Order for Anaconda-Deer Lodge Co. Health Dept.

Order vaccine by the dose, not by the package.
Dose amounts ordered must be divisible by the package size.
Orders should not exceed a three months' supply including current inventory.
Allow 2 weeks for delivery.

Save Order
Submit Order
Cancel

Vaccines from State

Vaccine	Trade Name / NDC	Packaging	Manufacturer	Order Recommended	Order Requested
DTaP	Infanrix / 58160-0810-52	10 pack - 1 dose syringe	GlaxoSmithKline		10
DTAP-IPV	KINRIX / 58160-0812-52	10 pack - 1 dose syringe	GlaxoSmithKline		
DTAP-IPV-HIB	Pentacel / 49281-0510-05	5 pack - 1 dose vials	Sanofi-Pasteur		10
DTAP/Polio/Hep B	Pediarix / 58160-0811-52	10 pack - 1 dose syringe	GlaxoSmithKline		

Notes:

4.5 Transfer Vaccine VFC

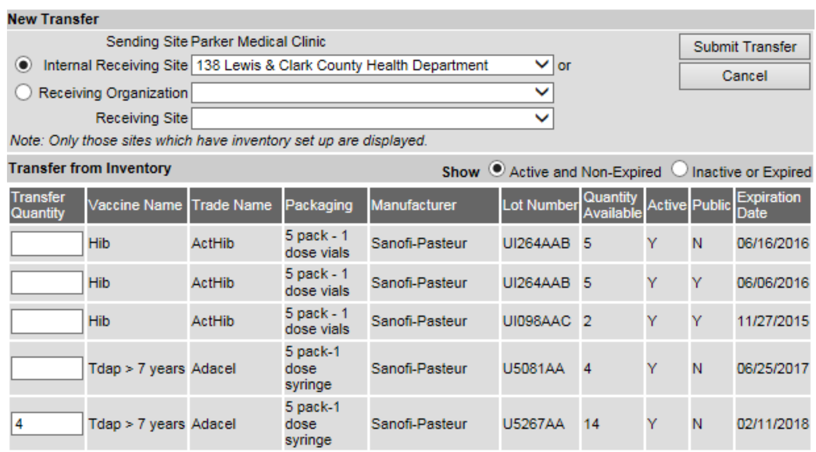
<u>Access Manage Orders:</u>

- Select the **manage transfers** option located under **Inventory** in the left navigational menu.

<u>Transfer Vaccine:</u>

- Under the **New Transfer** section, choose the radio button that matches your vaccine transfer destination:
  - **Internal Receiving Site** (another site in your organization)
  - **Receiving Organization and Receiving Site** (site outside your organization)
- All active inventory will display. Locate the vaccine(s) to be transferred.
- In the **Transfer Quantity** column, enter the amount of the specified vaccine to be transferred. See **Figure 4-5**.
- Click **Submit Transfer**.

Figure 4-5


New Transfer
Sending Site Parker Medical Clinic
Internal Receiving Site 138 Lewis & Clark County Health Department or
Receiving Organization
Receiving Site
Submit Transfer
Cancel
Note: Only those sites which have inventory set up are displayed.

Transfer from Inventory
Show Active and Non-Expired Inactive or Expired

Transfer Quantity	Vaccine Name	Trade Name	Packaging	Manufacturer	Lot Number	Quantity Available	Active	Public	Expiration Date
	Hib	ActHib	5 pack - 1 dose vials	Sanofi-Pasteur	UI264AAB	5	Y	N	06/16/2016
	Hib	ActHib	5 pack - 1 dose vials	Sanofi-Pasteur	UI264AAB	5	Y	Y	06/06/2016
	Hib	ActHib	5 pack - 1 dose vials	Sanofi-Pasteur	UI098AAC	2	Y	Y	11/27/2015
	Tdap > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U5081AA	4	Y	N	06/25/2017
4	Tdap > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U5267AA	14	Y	N	02/11/2018

Notes:

4.6 Receive Vaccine

Access Manage Orders:

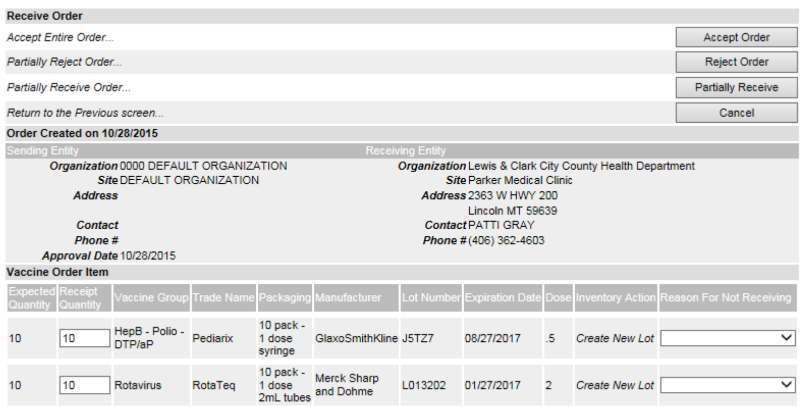
- Select the **manage orders** option located under **Inventory** in the left navigational menu.

Order Public Vaccine:

- Under **Inbound Orders** or **Inbound Transfers**, select radio button of the order to be received into inventory.
- Click **Receive/Modify**.
- Review and verify the **Vaccine Order Item** section contents. **See Figure 4-6**.
- Click the corresponding receiving button to continue:
  - **Accept Order** – order has been received and is correct
  - **Reject Order** – reject order, consult the Immunization Program before selecting. Requires selection in **Reason For Not Receiving** drop down.
  - **Partially Receive** – partial order received, Varicella or ProQuad is included in order but has not arrived yet.

Notes:

Figure 4-6


Receive Order

Accept Entire Order... Accept Order

Partially Reject Order... Reject Order

Partially Receive Order... Partially Receive

Return to the Previous screen... Cancel

Order Created on 10/28/2015

Sending Entity		Receiving Entity	
Organization	0000 DEFAULT ORGANIZATION	***Organization***	Lewis & Clark City County Health Department
Site	DEFAULT ORGANIZATION	***Site***	Parker Medical Clinic
Address		***Address***	2363 W HWY 200 Lincoln MT 59639
Contact		***Contact***	PATTI GRAY
Phone #		***Phone #***	(406) 362-4603
Approval Date	10/28/2015		

Vaccine Order Item

Expected Quantity	Receipt Quantity	Vaccine Group	Trade Name	Packaging	Manufacturer	Lot Number	Expiration Date	Dose	Inventory Action	Reason For Not Receiving
10	10	HepB - Polio - DTP/aP	Pediarix	10 pack - 1 dose syringe	GlaxoSmithKline	J5TZ7	08/27/2017	.5	*Create New Lot*	
10	10	Rotavirus	RotaTeq	10 pack - 1 dose 2mL tubes	Merck Sharp and Dohme	L013202	01/27/2017	2	*Create New Lot*	

4.7a Reconciliation- Integrated Sites VFC

NOTE: Integrated Sites are those that manually enter immunizations into imMTrax, with each dose administered deducting from their imMTrax-managed inventory upon entry. If you are unsure about your site's designation, please contact the Montana Immunization Program before proceeding, (406) 444-5580.

NOTE: Inventory reconciliation requires up-to-date entry of administered immunizations and cold chain temperature certification.

Access Reconcile Inventory:

- Select the **reconcile inventory** option located under **Inventory** in the left navigational menu.

Reconcile Inventory:

- Confirm the **Inv On Hand** (inventory on hand) matches your site's physical inventory on each vaccine lot displayed. Your site's physical inventory is to be confirmed or edited in the **Refrigerator Count** field. See **Figure 2-1**.

Figure 2-1

Vaccine Name	TradeName	Packaging	Manufacturer	Lot Number	Public	Inv On Hand	Refrigerator Count	Adjustment (+/-)	Adjustment %	Reason
TdaP > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U4963AA	Y	4.0	4.0		0	
TdaP > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U5095AA	Y	4.0	4.0		0	

- If **Inv On Hand** and **Refrigerator Count** are not the same, identify and indicate a reason from the **Reason** drop-down box (**Figure 2-2**). *NOTE: This option may only be used if the site has made all efforts to locate and correct the discrepancy. A log of transactions should be investigated for each vaccine lot that affected.*

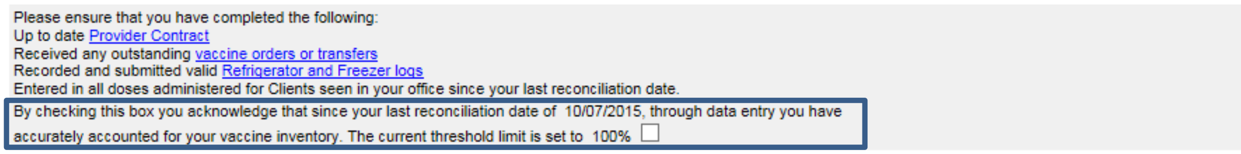
Figure 2-2

Vaccine Name	TradeName	Packaging	Manufacturer	Lot Number	Public	Inv On Hand	Refrigerator Count	Adjustment (+/-)	Adjustment %	Reason
TdaP > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U4963AA	Y	4.0	4.0		0	
TdaP > 7 years	Adacel	5 pack-1 dose syringe	Sanofi-Pasteur	U5095AA	Y	4.0	3.0	-1	25	
DTaP	Infanrix	10 pack - 1 dose syringe	GlaxoSmithKline	2M52Z	Y	1.0	1.0		0	
DTAP-IPV	KINRIX	10 pack - 1 dose syringe	GlaxoSmithKline	3ZL2Y	Y	2.0	2.0		0	
DTAP-IPV	KINRIX	10 pack - 1 dose syringe	GlaxoSmithKline	TZ434	Y	4.0	4.0		0	

Spoilage reported by Provider
Expiration reported by Provider
Vaccine Spoiled in Transit
Failure to store properly upon receipt by Provider
Refrigeration failure reported by Provider
Lost or unaccounted for in Provider inventory
Other - Not Usable, reported by Provider
Accumulated doses by vial
Immunization was deleted
Wrong Lot Number Used

- **Check the box** indicating that *By checking this box you acknowledge that since your last reconciliation of MM/DD/YYYY, through data entry you have accurately accounted for your vaccine inventory*. *The current threshold limit is set to 100%.* ***See Figure 2-3****.*

Figure 2-3



- Select the **Save and Submit** button.
- To save entries and return later to submit, select the **Save and Finish Later** button.

Notes:

4.7b Reconciliation- Aggregate Sites VFC

NOTE: Aggregate Sites are those that track doses administered outside imMTrax. Aggregate sites reconcile inventory using doses administered by lot number and age cohort. Patient immunization records may be entered through use of an electronic data feed or by manual entry as historical immunizations. If you are unsure about your site's designation, please contact the Montana Immunization Program before proceeding, (406) 444-5580.

NOTE: Inventory reconciliation requires up-to-date cold chain temperature certification.

<u>Access Reconcile Inventory:</u>

- Select the **reconcile inventory** option located under **Inventory** in the left navigational menu.

<u>Reconcile Inventory:</u>

- For each publically funded vaccine (by lot number), enter the number of doses given in each age cohort. As you enter the number of doses given, **IOH** (Inventory on Hand) and **Rgf Cnt** (Refrigerator Count) will update accordingly. See **Figures 3-1** and **3-2**.

Figure 3-1

Vaccine Group	Trade Name	Lot #	Dose #	<1	1	2	3-4	5	6-9	10-14	15-18	19-24	25-44	45-64	65+	Given	IOH	Rfg Cnt	Adj (+/-)	Adj %	Reason
MMR/VAR	ProQuad	L010141	1													0	8.0	8.0	0	0	
															Total Given of Lot #:	0					
MMR/VAR	ProQuad	L024123	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
MMR/VAR	ProQuad	L031600	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
															Total Number of Vaccine Group Given:	0					

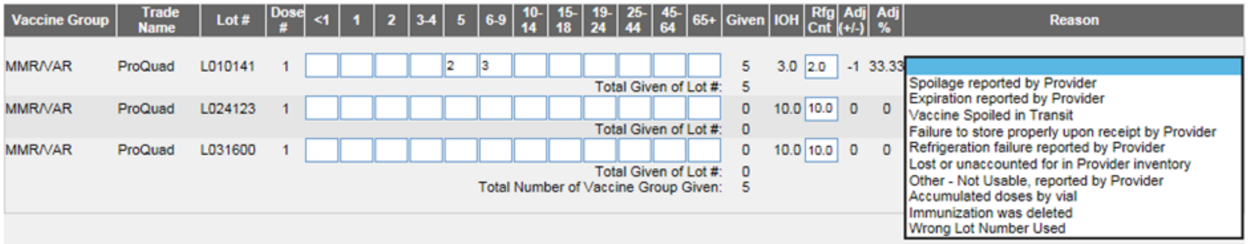
Figure 3-2

Vaccine Group	Trade Name	Lot #	Dose #	<1	1	2	3-4	5	6-9	10-14	15-18	19-24	25-44	45-64	65+	Given	IOH	Rfg Cnt	Adj (+/-)	Adj %	Reason
MMR/VAR	ProQuad	L010141	1					2	3							5	3.0	3.0	0	0	
															Total Given of Lot #:	5					
MMR/VAR	ProQuad	L024123	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
MMR/VAR	ProQuad	L031600	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
															Total Number of Vaccine Group Given:	5					

- Confirm the **IOH** (Inventory on Hand) matches your site's physical inventory, for the date counted, for each vaccine lot displayed. Your site's physical inventory is to be confirmed or edited in the **Rfg Cnt** (Refrigerator Count) field.

- If **IOH** (Inventory on Hand) and **Rfg Cnt** (Refrigerator Count) are <u>not</u> the same, identify and indicate a reason from the **Reason** drop-down box (**Figure 3-3**). *NOTE: This option may only be used if the site has made all efforts to locate and correct the discrepancy.*

Figure 3-3

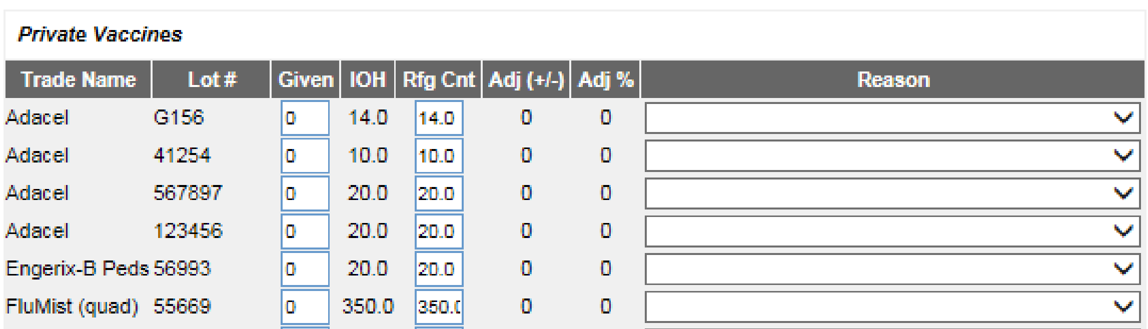


Vaccine Group	Trade Name	Lot #	Dose #	<1	1	2	3-4	5	6-9	10-14	15-18	19-24	25-44	45-64	65+	Given	IOH	Rfg Cnt	Adj (+/-)	Adj %	Reason
MMR/VAR	ProQuad	L010141	1					2	3							5	3.0	2.0	-1	33.33	
															Total Given of Lot #:	5					
MMR/VAR	ProQuad	L024123	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
MMR/VAR	ProQuad	L031600	1													0	10.0	10.0	0	0	
															Total Given of Lot #:	0					
															Total Number of Vaccine Group Given:	5					

*NOTE: If an Aggregate Site chooses to enter and manage their private vaccine inventory within imMTrax, all private doses eligible for reconciliation will display collectively in a section following the publicly funded vaccine reconciliation section. See **Figure 3-4**.*

- *For each Vaccine and Lot Number displayed, enter the total doses given (all ages) for the reconciliation period in the **Given** field.*
- *The **Rfg Cnt** (refrigerator count) and **IOH** (inventory on hand) will adjust automatically as the user moves to the next field or clicks away from the Given field.*
- *Confirm the **IOH** matches your site's physical inventory on each vaccine lot displayed. Your site's physical inventory is to be confirmed or edited in the **Rfg Cnt** field.*
- *If **IOH** and **Rfg Cnt** are <u>not</u> the same, identify and indicate a reason from the **Reason** drop-down box.*

Figure 3-4

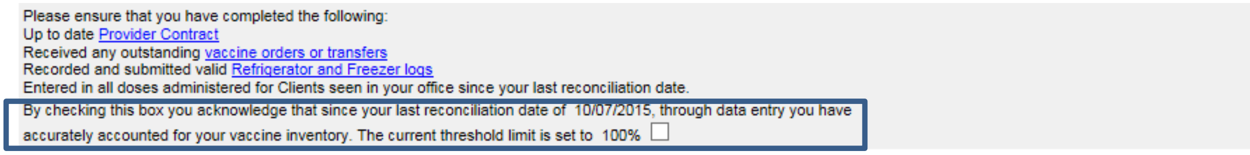


Private Vaccines

Trade Name	Lot #	Given	IOH	Rfg Cnt	Adj (+/-)	Adj %	Reason
Adacel	G156	0	14.0	14.0	0	0	
Adacel	41254	0	10.0	10.0	0	0	
Adacel	567897	0	20.0	20.0	0	0	
Adacel	123456	0	20.0	20.0	0	0	
Engerix-B Peds	56993	0	20.0	20.0	0	0	
FluMist (quad)	55669	0	350.0	350.(	0	0	

- **Check the box** indicating that *By checking this box you acknowledge that since your last reconciliation of MM/DD/YYYY, through data entry you have accurately accounted for your vaccine inventory. The current threshold limit is set to 100%.* See **Figure 3-5**.

Figure 3-5



- Select the **Save and Submit** button

Notes:

4.8 Vaccine Transactions

Note: A Vaccine Transaction is an event that is both processed within imMTrax and impacts a site's imMTrax-managed inventory. Vaccine Transactions include recording an administered dose to a client record, receiving vaccine, transferring vaccine, adjustments during reconciliation, etc.

Access Vaccine Transactions

- Select the **manage inventory** option located under **Inventory** in the left navigational menu.
- Select the **Show Transactions** button.

Vaccine Transactions:

- Enter a date range for vaccine transactions. Use **Date Entered**, **Date shot was given**, or both.
  - **Date Entered** will search all transactions based on dates they were entered or applied within *imMTrax*.
  - **Date shot was given** will search only doses administered transactions based on the date of administration.

    *NOTE: Using this search criteria, alone or in combination with **Date Entered**, will restrict output to only transactions of doses administered.*
- Additional search options are available, but not required:
  - User Name – search transactions processed by *imMTrax* User ID
  - Transaction Type – search by one transaction type (ex. Doses Received)
  - Site Name – where applicable, limit search to transactions processed by one of multiple sites under a user's organization
  - Trade Name/Lot Number – search transactions by one trade name/lot number combination
- If needed, adjust the **Display Last [200] Records** box by increasing the number of records to display.
- Select the **View** button. Vaccine transactions that match the search criteria will display.

Notes:

5 CLIENT ACTIVITIES

5.1 Search for a Client 

Access Client Search

- Select the **manage client** option located under **Clients** in the left navigational menu.

Search for a Client:

- Enter client search criteria. Recommended search:
    - Search using only the first three letters of the First and Last Name.
        - (Ex: Smith, John → Smi, Joh)
    - Search using only the Birth Date.
- Select the **Find** button.

If ***only one*** client matches the search criteria:

- If the client record has consent established, you will automatically be redirected to the **Personal Information** page.
- If the client record does not have consent established, single match result will display.

If ***multiple*** clients match the search criteria:

- Multiple matches will display.

If ***no*** clients match your search:

- Search result displays **No clients were found for the requested search criteria.**
- See section 6.3 *Add a New Client* for instructions.

Notes:

5.2 Consent and Client Search Results

Note: Montana has a voluntary inclusion or "opt-in" policy requiring client consent for imMTrax participation. Changing client consent without authorization is in violation of state confidentiality laws and may violate HIPAA.

Upon searching for a client record, if a record exists but does not have consent previously established, the search results will display with an additional message designating a record as either *consent undetermined* (see **Figure 5-2a**) or *consent denied* (see **Figure 5-2b**).

Figure 5-2a

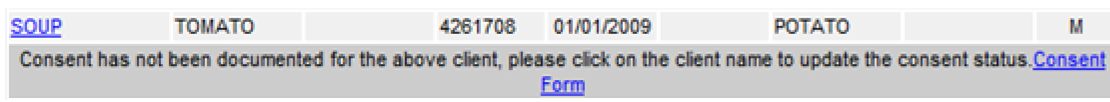
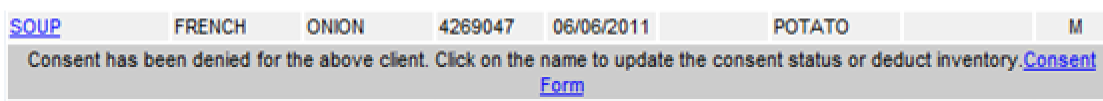


Figure 5-2b



<u>Update Consent- Client Search Results</u>

- Select the hyperlinked blue **Last Name** of the client record to be updated.
- A pop-up box will appear displaying the available options based on consent status.
  - <u>Consent Undetermined (see **Figure 5-2c**):</u>
    - **Consent Obtained**- site has obtained consent. Screen will redirect to **Personal Information** page (see section 5.4).
    - **Consent Denied & Deduct Inventory**- (Integrated Sites Only) consent to be updated from undetermined to denied. Vaccine from inventory was administered and needs to be recorded/deducted. Screen will redirect to vaccine entry screen (see section 5.10).
    - **Consent Denied**- site has received notice denying consent.

Figure 5-2c

- <u>Consent Denied (see **Figure 5-2d**):</u>
    - **Consent Obtained**- site has obtained consent. Screen will redirect to **Personal Information** page (see section 5.4).
    - **Deduct Inventory**- (Integrated Sites Only) consent remains denied. Vaccine from inventory was administered and needs to be recorded/deducted. Screen will redirect to vaccine entry screen (see section 5.10).

Figure 5-2d

Notes:

5.3 Add a New Client

Access Client Search

- Select the **manage client** option located under **Clients** in the left navigational menu.

Add Client Record

- Enter client search criteria. Recommended search:
    - Search using only the first three letters of the First and Last Name.
- (Ex: Smith, John → Smi, Joh)
    - Search using only the Birth Date.
- Select the **Find** button.
- Verify no potential matches or duplicates are found.
- If confident a record does not exist for the client, enter the following search criteria:
    - Last Name (complete)
    - First Name (complete)
    - Birth Date
- Select the **Find** button. The **Add** button will appear under the **Find** button.
- Select the **Add** button.
- User will be redirected to the **Personal Information** page, see section 5.4.

Notes:

5.4 Client Information

Access Client Record- Personal Information Page:

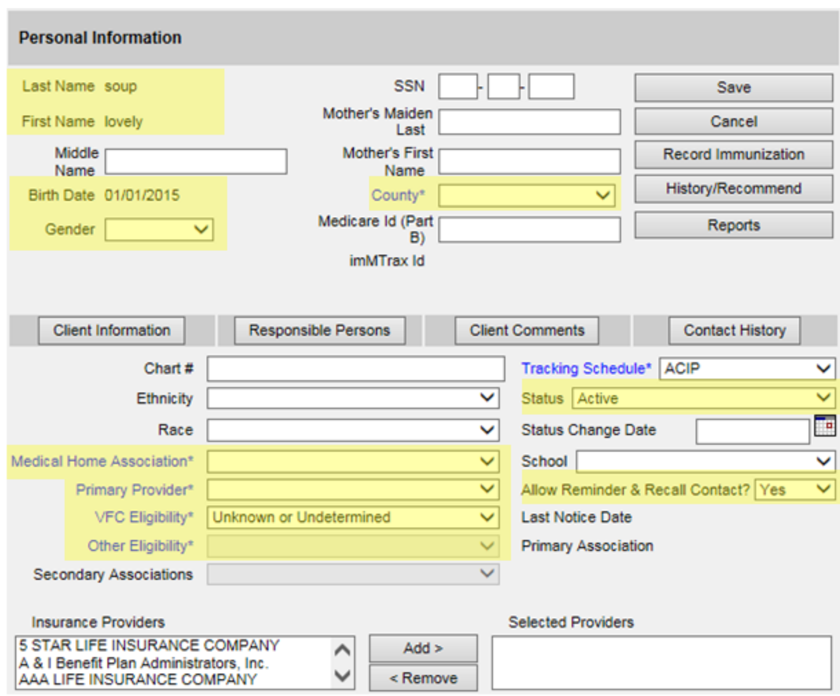
- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Update Client Information

- Enter or update into the fields provided. Mandatory fields are highlighted in **Figure 5-4**.

  Note: SSN is no longer used in imMTrax. Do not enter information into SSN.

Figure 5-4



- **Medical Home Association** Field used to capture the association between the client and the site accessing or contributing to the client record. Medical Home Association is used in site-specific *imMTrax* coverage reports, reminder and recall functions, etc and established a client's eligibility to be included in a site's output/results.
  - **Primary Care** – client receives most or all immunization services from the site
  - **Secondary Care** – client receives some immunization services from the site
  - **Not Associated** – client is not currently an established patient

- **Mass Immunization** – default setting for immunizations recorded using the Mass Immunization module
    - **School (non- SBHC)** – designation available for school personnel, may also use *Not Associated*. Does not apply to School Based Health Clinics.
    - **WIC** – designation available for WIC personnel, may also use Not Associated.
- **Primary Provider** Field used to capture the primary provider name for Medical Home Associations set to **Primary** or **Secondary Care.**
- **VFC Eligibility and Other Eligibility** For assistance in determining VFC Eligibility, please reference the current VFC Provider Handbook on the Montana Immunization Program website.
- **Status** Contains multiple client record designations:
    - Client Consent (system-wide designation)
        - Active – Client Consent Obtained
        - Inactive – Consent Denied
        - Inactive – Consent Undetermined

          Note: Montana has a voluntary inclusion or "opt-in" policy requiring client consent for imMTrax participation. Changing client consent without authorization is in violation of state confidentiality laws and may violate HIPAA.

          - Previous Client, Moved or Gone Elsewhere (site-specific designation)
              - Inactive – Moved or Gone Elsewhere
          - Client Vital Status- Deceased (system-wide designation)
              - Permanently Inactive – Deceased

          Note: Application of the Inactive – Consent Denied *or* Permanently Inactive-Deceased *status will remove all Medical Home Associations. Application of the* Inactive – Moved or Gone Elsewhere *status will remove the Medical Home Association of the site making the status change.*
- Select **Save**.

Notes:

5.5 Add a Responsible Person

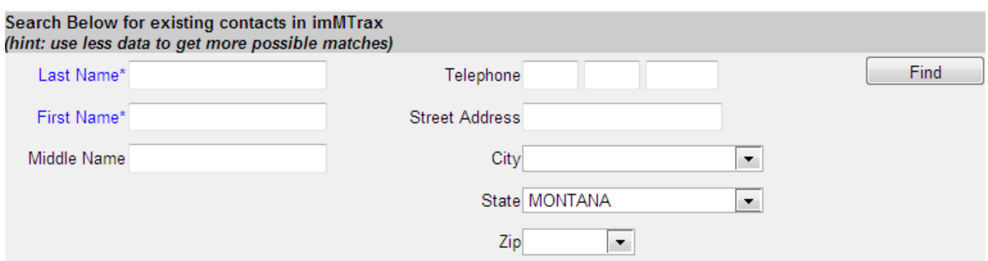
Access Responsible Persons:

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Add a Responsible Person:

- From the Personal Information Page, select the **Responsible Person** button.
- If there is one or more Responsible Person present in the record, click the **New Person** button to add a new entry.
- Enter a **Last Name** and **First Name** for the responsible person being added. **See Figure 5-5a**.

Figure 5-5

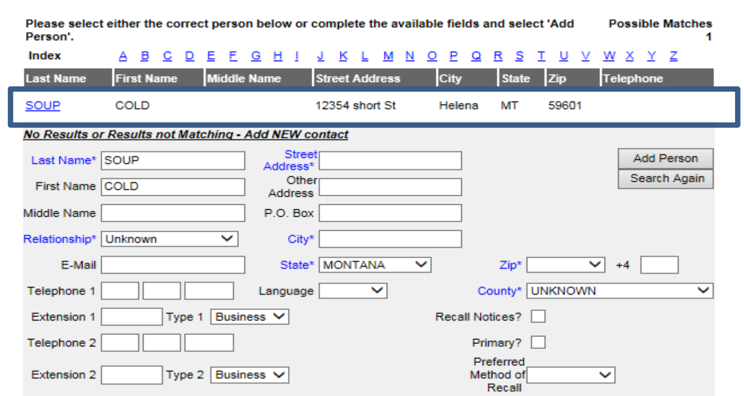


- Select the **Find** button

  If a ***match*** is identified:

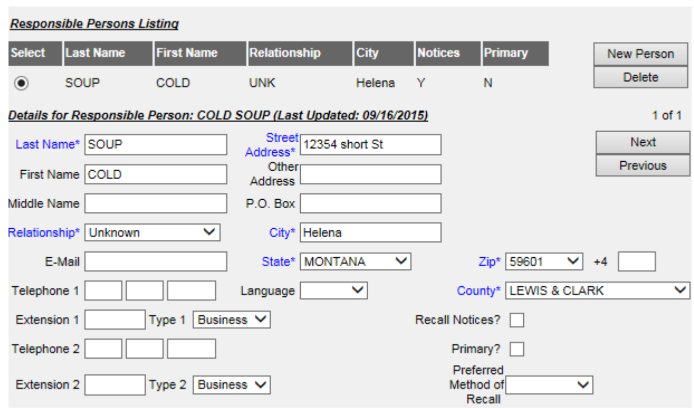
  - Possible matches will display, see **Figure 5-5b**.

Figure 5-5b



- If the possible match results include the responsible person being added, select the hyperlinked last name. <u>If the possible match results do **not** include the responsible person being added, proceed to the next section.</u>
- The screen will refresh with the **Responsible Person** listed next to a radio button. Details for Responsible Person will be populated with contact information currently available. See **Figure 5-5c**.

Figure 5-5c



- Review the Responsible Person Details. Update as needed (address, phone number, email, etc). Required fields are seen in blue.
- Make appropriate selections for supplemental fields:
  - **Recall Notices?** – Mark checkbox if the Responsible Person is appropriate as a contact for immunization Reminders or Recall.
  - **Primary?** – Mark checkbox if the Responsible Person is the 'primary' contact for the client. One Primary Responsible Person is required.
  - **Preferred Method of Recall** – If the checkbox for *Recall Notices?* is marked, preferred (delivery) method is required.
- Select the **Save** button at the top of the page

<u>If ***no*** match is identified:</u>

- Enter the Responsible Person information in the fields provided (address, phone number, email, etc). Required fields are seen in blue.
- Select **Add Person.**
- The screen will refresh with the **Responsible Person** listed next to a radio button.

- Make appropriate selections for supplemental fields. When a Responsible Person is added, some defaulted selections may be present, in which case review for accuracy.
  - **Recall Notices?** – Mark checkbox if the Responsible Person is appropriate as a contact for immunization Reminders or Recall.
  - **Primary?** – Mark checkbox if the Responsible Person is the 'primary' contact for the client. One Primary Responsible Person is required.
  - **Preferred Method of Recall** – If the checkbox for *Recall Notices?* is marked, preferred (delivery) method is required.

- Select the **Save** button.

Notes:

5.6 Edit a Responsible Person

<u>Access Responsible Persons:</u>

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

<u>Edit Existing Responsible Person:</u>

- From the Personal Information Page, select the **Responsible Person** button.
  - If more than one Responsible Person is present, select the appropriate radio button for the responsible person to be edited. See **Figure 5-6**.

Figure 5-6

<u>Responsible Persons Listing</u>

Select	Last Name	First Name	Relationship	City	Notices	Primary
○	SOUP	POTATO	MTH	Helena	Y	
◉	SOUP	VIRGINIA	GRD	Billings	Y	Y
○	SOUP	MICHAEL	OAD	Helena	Y	

New Person

Delete

  - The screen will refresh with the selected individual's **Details for Responsible Person** fields displayed. For field descriptions and requirements, see section 5.5.
- Review and make necessary updates or additions.
- Select the **Save** button.

Notes:

5.7 Delete a Responsible Person

Access Responsible Persons:

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Delete a Responsible Person:

- From the Personal Information Page, select the **Responsible Person** button.
  - If more than one Responsible Person is present, select the appropriate radio button for the responsible person to be deleted.
  - Select the **Delete** button.
  - The screen will refresh with the selected **individual no longer displayed** among the Responsible Persons listed.
  - Select the **Save** button.

Notes:

5.8 Add Client Comments, Contraindications, Events

Note: Client comments are not site-specific and may be viewed by any user accessing a client record.

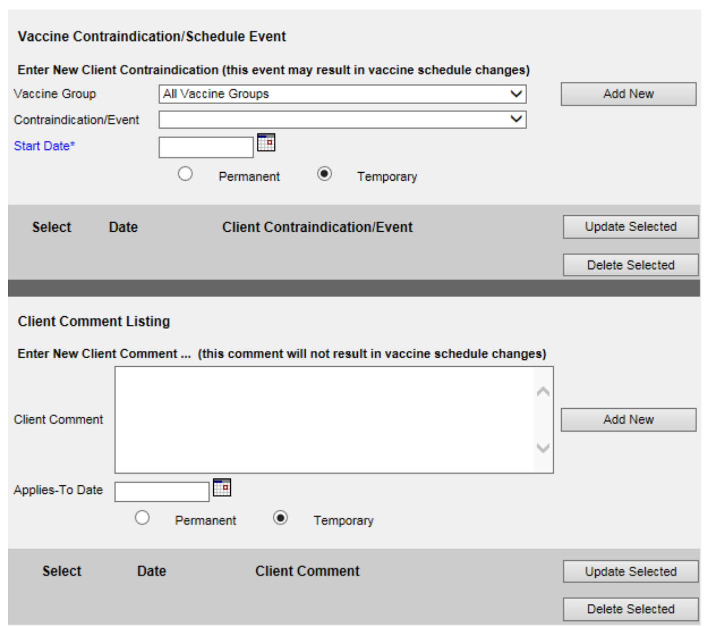
Access Client Comments:

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Add a Client Comment, Contraindication, Event

- From the Personal Information Page, select the **Client Comments** button.
- Clients Comments provides two options, see **Figure 5-8**.
  - Add **Vaccine Contraindication/Schedule Event**
  - Add **Client Comment Listing**

Figure 5-8



Add a Contraindication/Event by Vaccine Group

Note: Contraindication/Event options are available by selection only and are not available for edits. Applied entries may or may not affect immunizations forecasted and should be reviewed by the user after entry.

- Select the appropriate **Vaccine Group.**

- Page will refresh. Available contraindications/events for the selected vaccine group will display in the **Contraindication/Event** drop-down.
- Enter a **Start Date** that applies to the selection made.
- Select the **Permanent** or **Temporary** radio button.
- Select the **Add New** button.
- Select the **Save** button.

Add a Comment

- In the **Client Comment Listing** portion, type the comment to be included in the client record into the free text box provided.
- Enter an **Applies-To Date** for the comment to be added.
- Select the **Permanent** or **Temporary** radio button.
- Select the **Add New** button.
- Select the **Save** button.

5.9 View Client Immunization History and Forecast

Access Client Immunization History

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

View Client Immunization History and Forecast:

- From the Personal Information Page, select the **History/Recommend** button.
- Client immunization history and an immunization forecaster will display and are provided for review.

Notes:

5.10 Record Immunizations By Deducting from *imMTrax*-Managed Inventory (Integrated Sites Only)

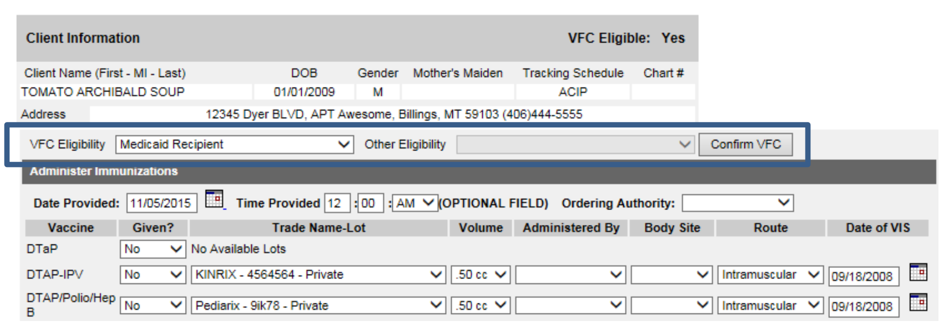
<u>Access Record Immunization</u>

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

<u>Record Immunizations from *imMTrax*-Inventory</u>

- From the Personal Information Page, select the **Record Immunization** button. The user can also access from the History/Recommend page by selecting **Add Immunization**.
- Under the **Administer Immunization** section, available vaccine will display by vaccine group.
  - Review the **VFC Eligibility** and **Other Eligibility** fields. Make adjustments as needed. See **Figure 5-10**.
- Select the **Confirm VFC** button.

Figure 5-10



- **Date Provided** defaults to the current day. Make adjustments as needed. *Time Provided and Ordering Authority do not require attention.*
- Locate the vaccine group given. Change the corresponding **Given?** drop-down to **Yes**.

- Confirm, adjust, or populate the remaining fields for your selection:
    - Trade Name- Lot
    - Volume
    - Administered By
    - Body Site
    - Route
    - Date of VIS
- Select Save.

Note: If the intended vaccine group does not display, all inventory and lots are included in the final, unnamed drop-down.

Notes:

5.11 Add Historical Immunizations

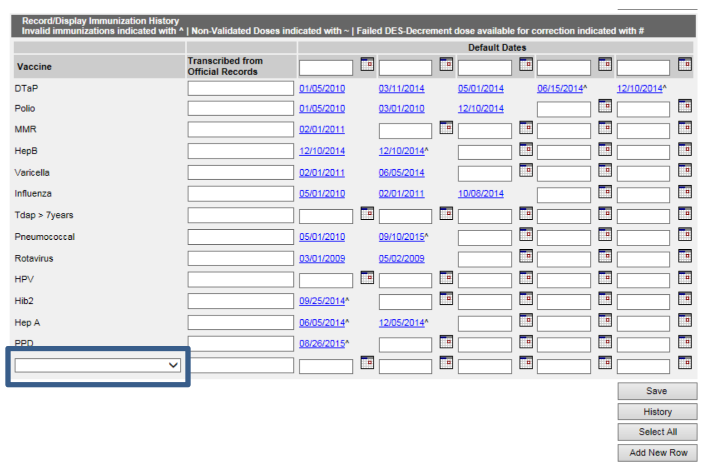
Access Record Immunization

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Add Historical Immunization

- From the Personal Information Page, select the **Record Immunization** button. The user can also access from the History/Recommend page by selecting **Add Immunization**.
- Under the **Record/Display Immunization History** section, preset vaccine groups will display. All others can be found on the drop-down provided. See **Figure 5-11**.

Figure 5-11



- Locate (or select from drop-down) the vaccine group to record an immunization.
- Going across, find and enter the administered date into an available date field.
- If applicable, enter text into the **Transcribed from Official Records** field provided.
- Select **Save**.

*Note: If no date fields are available for the intended vaccine group, a new row can be added by choosing the vaccine group from the drop-down. If the drop-down has a vaccine group already selected, a new drop-down can be used by selecting **Add New Row**.*

5.12 Edit Immunizations

NOTE: Immunizations entered and deducted from site inventory may only be edited by that site.

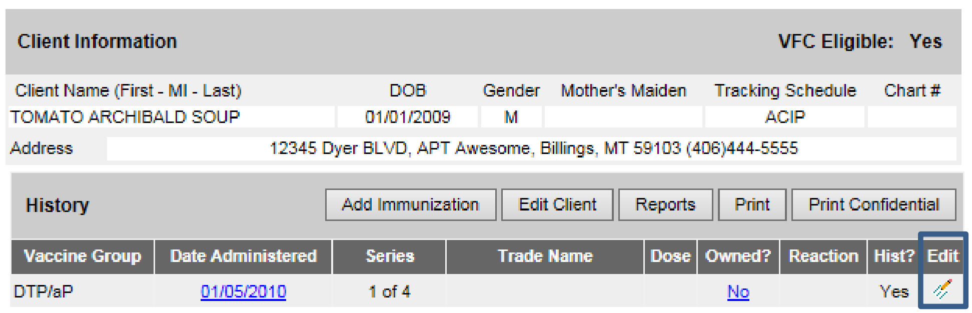
<u>Access Record Immunization</u>

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

<u>Edit an Immunization</u>

- From the Personal Information Page, select the **History/Recommend** button.
- Locate the immunization to be edited by vaccine group in the **History** section.
- Under the **Edit** column, select the corresponding **Edit Pencil**. See **Figure 5-12**.

Figure 5-12



- Edit the immunization information. Fields available for editing will be see either as text boxes or drop-down lists.
- Select the **Save** button.

Notes:

5.13 Enter Reactions

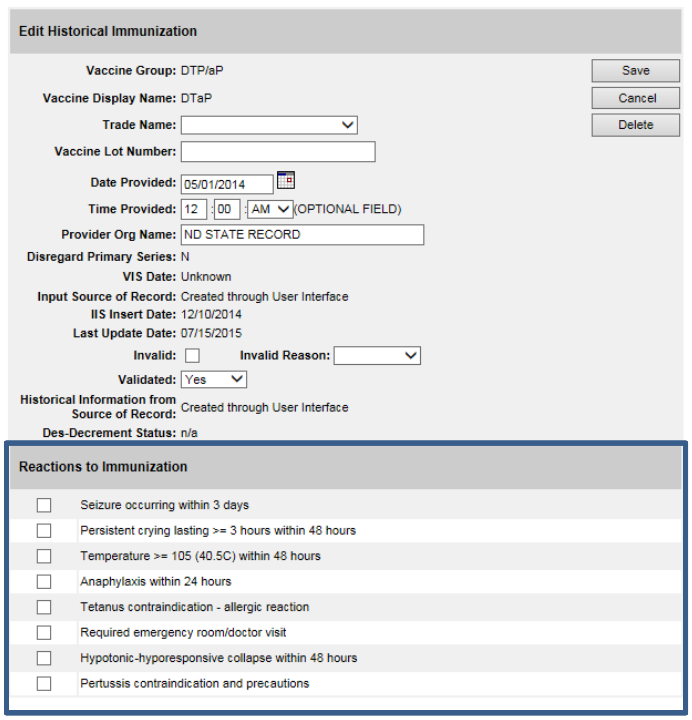
Access Record Immunization

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Add Reaction by Vaccine

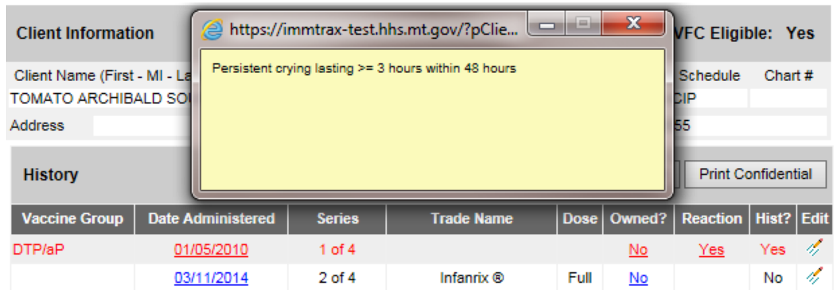
- From the Personal Information Page, select the **History/Recommend** button.
- Locate the immunization affected by vaccine group in the **History** section.
- Under the **Edit** column, select the corresponding **Edit Pencil**.
- Select one or more appropriate checkboxes in the **Reactions to Immunization** section. See **Figure 5-13a**.

Figure 5-13a



- Select the **Save** button
- The vaccine will display in red. Under the Reaction column a hyperlinked Yes will display. Selecting the link will produce a pop-up box displaying the selected reaction. See **Figure 5-13b**.

Figure 5-13b



Notes:

5.14 Enter TB Results

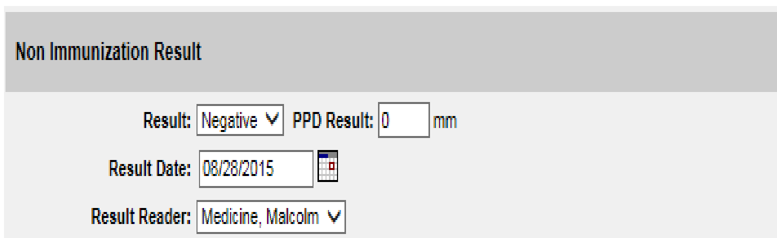
<u>Access Record Immunization</u>

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

<u>Enter TB (PPD) Results</u>

- From the Personal Information Page, select the **History/Recommend** button.
- Locate the PPD to be updated in the **History** section. If the PPD is not found, it must be recorded.
- Under the **Edit** column, select the corresponding **Edit Pencil**.
    - In the **Non Immunization Result** section, choose the appropriate **Result** from the drop-down menu. See **Figure 5-14**.
        - No Take
        - Positive
        - Negative

Figure 5-14



    - Enter the TB skin test result (mm) into the **PPD Result** field.
    - Enter **Result Date**.
    - Select the **Result Reader** from the drop-down provided.
- Select the **Save** button

Notes:

5.15 Delete Immunizations

NOTE: You cannot delete immunizations administered from inventory by another clinic. Deleting an immunization administered from your site's inventory will result in the dose being added back to the Inventory on Hand.

Access Record Immunization

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

Delete an Immunization:

- From the Personal Information Page, select the **History/Recommend** button.
- Locate the immunization to be deleted by vaccine group in the **History** section.
- Under the **Edit** column, select the corresponding **Edit Pencil**.
- Select the Delete button.
- A pop-up window will appear, **Are you sure you want to delete this immunization?**
- Select the **OK** button.

Notes:

5.16 Print Client Reports

Access Client Record

- Select the **manage client** option located under **Clients** in the left navigational menu.
- Enter search criteria.
- Locate and select the hyperlinked **Last Name** of the intended client record.

View or Print Client Reports

- From the Personal Information Page, select the **Reports** button.
- **Four** reports can be generated:
    - **Vaccine Administration**
    - **Complete Immunization** (PDF)
    - **Immunizations Needed**
    - **School Entry From** (PDF)
- Select the hyperlinked name of the report needed.
- Based on the selection, the report will be display within *imMTrax* or create a separate PDF. PDF reports will require the user to select Open or Save via pop-up at the bottom of the page.

Notes:

6 QUALITY ASSURANCE

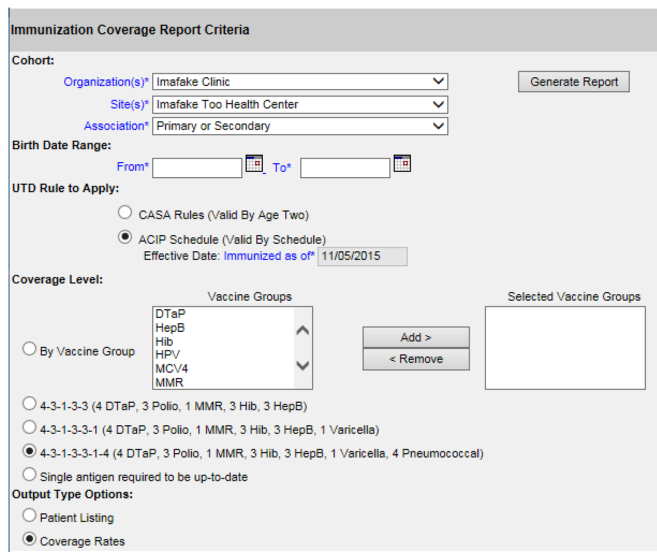
6.1 Site Coverage Report

Access Immunization Coverage Report

- Select the **request imm coverage** option located under **Reports-Coverage** in the left navigational menu.

Generate Immunization Coverage Report

Figure 6-1



- Review and make adjustments (if needed) to the **Organization(s)** and **Site(s)** fields.
- Select the desired Medical Home **Association**:
  - Primary
  - Secondary
  - Primary and Secondary *(preferred)*
- Specify the Birth Date Range using the **From** and **To** fields.
- Specify the **UTD Rule to Apply**:
  - CASA Rules (Valid By Age Two)
  - ACIP Schedule (Valid By Schedule) *(preferred)*

- Use the radio buttons provided to select vaccine(s) to be factored into the coverage report:
  - Report on a **Vaccine Group**(s)- Requires user to select and **Add >** vaccine selections.
  - Report on the **4-3-1-3-3 (4DTap, 3 Polio, 1 MMR, 3 Hib, 3 HepB)** series
  - Report on the **4-3-1-3-3-1 (4DTap, 3 Polio, 1 MMR, 3 Hib, 3 HepB, 1 Varicella)** series
  - Report on the **4-3-1-3-3-1-4 (4DTap, 3 Polio, 1 MMR, 3 Hib, 3 HepB, 1 Varicella, 4 Pneumococcal)** series
  - **Single antigen required to be up-to-date**
- Select preferred **output type**:
  - Patient Listing
    - Displays the Name, Birth Date, Responsible Person and Phone for each overdue patient, as well as a list of Vaccines that are Overdue and their corresponding Date Due
  - Coverage Rates
    - Displays the total number of Total Clients assessed, the Number Up-to-Date, the Number Off Schedule, the Percent Up-to Date, and the Percent Off Schedule
    - A bar graph visually displaying the Percent Off Schedule and Percent Up-to-Date
- Click on the **Generate Report** button.
- The Immunization Coverage Report Listing page now displays with your most recent report displaying with a Percent Complete.
- Refresh your webpage to display the final report. This may take a few minutes. The user may navigate to other *imMTrax* functions and return later by using the **check imm rpt** status option from the left navigational menu.
- Once complete, choose a report version (PDF or the CSV) by clicking on the **blue hyperlink** that corresponds with the day and time the report was generated.

Notes:

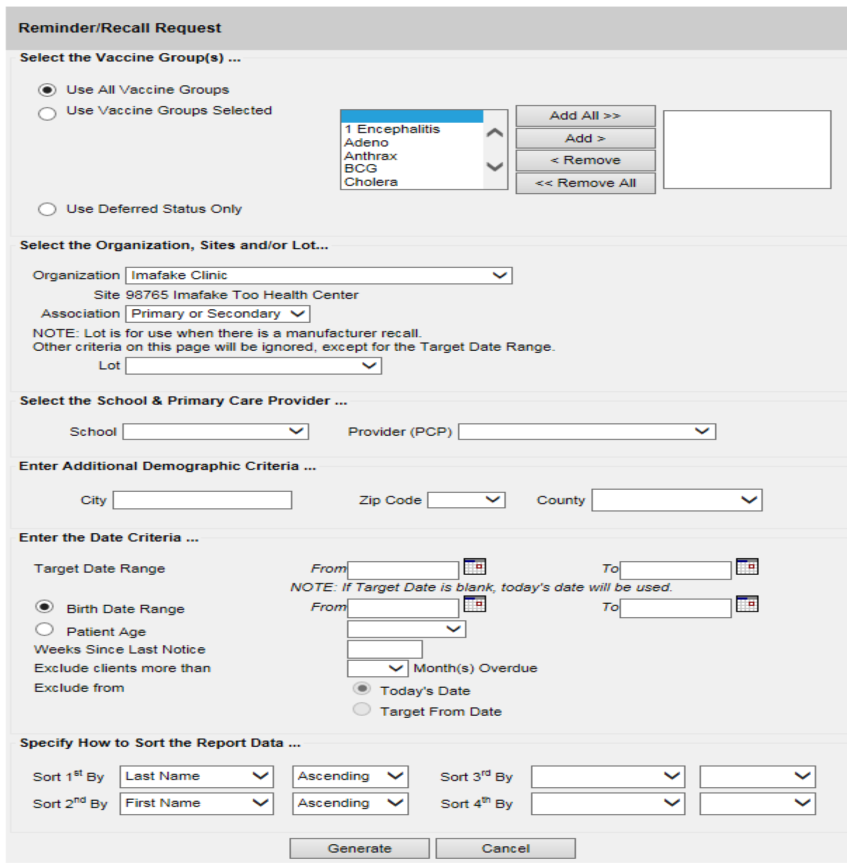
6.2 Reminder Recall Notices

Access Reminder Recall

- Select the **request reminder** option located under **Reports R/R** in the left navigational menu.

Generate a Reminder or Recall Notice or Report

Figure 6.2a



- Select the **request reminder** option located under **Reports- R/R** in the left navigational menu
- Select **Vaccine Group(s)** to be used:
  - **All Vaccine Groups**
  - **Vaccine Groups Selected** Requires user to select and **Add >** vaccine selections.
  - **Deferred Status Only**
- Review and make adjustments (if needed) to the **Organization** and **Site** fields.

- Select the desired Medical Home **Association**:
    - Primary
    - Secondary
    - Primary and Secondary *(preferred)*
- Select and enter any desired **Date Criteria**
    - Target Date Range – based on your vaccine selections, will target immunizations that are both overdue and coming due during this date range.
    - Birth Date Range
    - Patient Age (preset drop down age groups)
    - Weeks Since Last Notice – if populated, excludes persons who have been on another Reminder/Recall output within X weeks.
    - Exclude clients more than __ Month(s) Overdue
- If desired, adjust sort settings under **Specify How to Sort the Report Data.**
- Select the **Generate** button.
- Results will display under Reminder Request Status.
- Select the **Refresh** button to update the status of the **Reminder/Recall** request. The user may navigate to other *imMTrax* functions and return later by using the **check reminder status** option from the left navigational menu.
- Once complete, click on the hyperlinked date and time provided. The **Reminder Request Process Summary** will display, displaying the results of your request.
- Add any text or specifications into **Additional Input**.
- Under the output section, select a format or extract by selecting the blue hyperlinked name. **See figure 6-2b**.

Figure 6-2b

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name Free Text: Schedule your appointment today Phone # 406-444-4444
Reminder Card	Standard Reminder Card (4x5).	Report Name Free Text Phone #
Mailing Labels	Avery Mailing Labels.	Report Name
Client Query Listing	A list of clients based on the report criteria.	Report Name
Reminder/Recall Extract	Reminder Recall extract file	Report Name

- Your selection will generate and display under the Reminder Output Status section.
- Select the blue hyperlinked name to open/print, see Figure 6-2c.

Figure 6-2c

Reminder Request Status

Refresh

Cancel

Started	Completed	Status	Clients	Target From	Target To
02/05/2014 01:03 PM	02/05/2014 01:04 PM	100	2	02/05/2014	02/05/2014

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Mailing Labels	Mailing Labels	Wed Feb 05 13:10:23 MST 2014	Wed Feb 05 13:10:24 MST 2014	Wed Feb 05 13:10:24 MST 2014	Ready
Reminder Letter	Reminder Letter	Wed Feb 05 13:10:11 MST 2014	Wed Feb 05 13:10:12 MST 2014	Wed Feb 05 13:10:13 MST 2014	Ready

Notes: