



COVID-19 imMTrax Direct Data Entry Guide



Note: This document was created as a tool to assist facilities as they prepare for COVID-19 vaccination data reporting. As part of the CDC COVID-19 Vaccination Program Provider Agreement, participating facilities are required to report information within 24 hours of administering a dose of COVID-19 vaccine.

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Steps to Follow to Add a New Patient:

1. Click **Search/Add**, located under the **Patient** menu.
2. Enter the patient's First Name, Last Name, and DOB then click the **Search** button. If after searching for a patient and no matching records are found, check the box that says "Check here if adding a new patient."
 - **Search tip:** The percent % symbol functions as a wildcard that will allow you to search for a patient if you do not know the exact spelling of the patient's name. The percent symbol must be typed in both name fields to utilize this fuzzy matching search tool.
3. Enter all of the **required** patient information (**highlighted in red**).
 - For patients 18 years of age or younger, Mother's Maiden Name is highlighted in red but is **not required**.
4. Click the **Search** button.

imMTRax
Logged in: MASS VAX
Organization (IRMS)/Facility: ABCD (18505) / KIDS CLUB
Date: October 23, 2020

Patient Search [Click here to use the 'advanced' search](#)

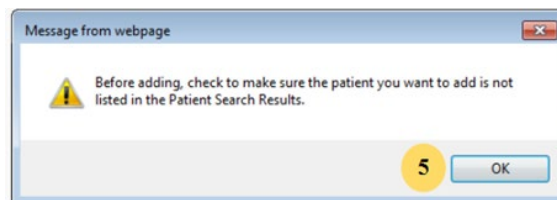
First Name or Initial:	<input type="text" value="CODY"/>	ID:	<input type="text"/>
Last Name or Initial:	<input type="text" value="COVID"/>	SIIS Patient ID / Bar Code:	<input type="text"/>
Birth Date:	<input type="text" value="09/20/1983"/>	Chart Number:	<input type="text"/>

Family and Address Information:

Guardian First Name:	<input type="text"/>	Mother's Maiden Name:	<input type="text"/>
Street:	<input type="text" value="2020 COVID Street"/>		
City:	<input type="text" value="HELENA"/>	State:	<input type="text" value="MT"/>
Zip Code:	<input type="text" value="59601"/>	Phone Number:	<input type="text"/>
Country:	<input type="text" value="United States"/>		

Note: When searching by First and Last Name, you may use the wildcard character % to replace multiple characters and _ to replace a single character.
 Check here if adding a new patient
(Required fields are highlighted)

5. After clicking the Search button, a message appears with one of the following messages. Click the **OK** button.
 - *Before adding, make sure the patient you want to add is not listed in the Patient Search Results.*
 - *This record already exists in the database. An exact match has been found.*



- If a match is found, select the patient. If the system finds a match, you cannot add a new patient record.

OR

If no record match is found, click the **Add Patient** button.

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- Enter the patient information in the appropriate fields and click the **Save** button.
 - All fields marked with **red text** are system required fields.
 - For patients 18 years of age and younger, at least one Guardian First Name is required. **You must select the Add button before clicking Save to include Guardian First Name in the record.**
 - All fields marked below with a star are the CDC standard data elements: **patient first name, patient last name, DOB, Sex, Race, Ethnicity, Address (street address, city, state, zip code)**
 - All fields marked with a checkmark are additional recommended fields.

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Steps to Follow to Edit Patient Demographics:

1. Click **Search/Add**, located under the Patient menu.
2. Search for the patient using the appropriate search fields and select the **Search** button at the bottom of the screen.
3. Click the patient name to open the demographics section.
 - a. If the patient search result displays in red, the patient has either consent denied or undetermined status. Consent must be obtained and documented for vaccine information to be added to the patient record.

4. Select the **Edit** button at the bottom of the patient demographics screen.

5. Edit or update information.

- Note: Double-check to ensure all CDC standard data elements have been entered into the patient's record.



CDC Standard Data Elements:

- Patient First Name
- Patient Last Name
- Patient DOB
- Patient Sex
- Patient Race
- Patient Ethnicity
- Patient Address (including city, state, and zip code)

Note: Certain demographic fields impact other parts of the system if a certain value is selected.

- **Consented:** If patient consent status is “undetermined” or “no”, patients may not appear in various Reminder/Recall output, Patient Lists, and Reports.
- **Patient Phone Number:** One listed phone number must be designated “Primary” to be an available contact method for Reminder/Recall outputs. **It's best practice to capture the patient's phone number.**
- **Organizational Level:** If the patient status is set to Inactive, the patient will not be automatically included in Reminder/Recall outputs or Reports run by ownership.
- **Reminder/Recall Publicity Code:** To include patients in reminder/recall output, select “Reminder/Recall- any method” or leave as “—select—”. If other values are selected for the R/R Publicity Code field, the patient will not be included in the Reminder/Recall outputs.

6. Select the **Save** button.

Symbol Legend

affect other areas of imMTrax

CDC standard data fields

Note: Expand or collapse fields on the demographics screen using these buttons.



Add Administered COVID-19 Vaccine Steps to Follow:

1. Click **Search/Add**, located under the **Patient** menu.
2. Select a patient record.

3. Click **View/Add**, located under the **Vaccinations** menu.
4. Enter the date the vaccine was given in the date column in the row for the correct vaccine (direct enter or select using the calendar tool).

5. Select the **Add Administered** button at the bottom of the screen.
6. Verify VFC Eligibility (for patients 18 years of age or younger).
7. Click the **Continue** button.

VFC Eligibility Update
 Current VFC Status: Not VFC Eligible
 Update VFC Eligibility 6 Not VFC Eligible 7
Cancel **Continue**

8. Enter in the required vaccine-specific details (**text in red**).
9. Click the **Save** button at the bottom of the screen.

Patient
 Name: DUSTIN STRANGER THINGS | SIIS Patient ID: 1386271
 Date of Birth: 09/08/2002 | Age: 18 yrs
 Guardian: | Organization Level Status: Inactive

Vaccination Detail Add
Vaccine 1: COVID-19, mRNA, LNP-S, PF, 100 mcg/ 0.5 mL dose
Date Administered: 12/07/2020
Historical: YES NO 8
 Manufacturer: [Click to select](#)
Lot Number:
 Lot Facility:
 Funding Source:
 Facility: IMMTRAX COMMUNITY HEALTH CENTER
Vaccinator: VACCINATOR, MONTANA NURSE A x
Anatomical Site: Left Arm x
Anatomical Route: Intramuscular x
 Dose Size: Full
 Volume (CC):
 VFC Status: Not VFC Eligible
 'VFC Status' will be ignored if lot number is not VFC eligible.
 District/Region:
 VIS Publications Dates: 1. 2. 3. 4.
 Date VIS Form Given: 12/07/2020
 Ordering Provider: Sel...
 Comments:

imMTrax-Select Lot Number - Google Chrome
 immtraxtest.org/iweb/selectLotNumber.do?siis_vaccine_code=208...
Select Lot Number

Select	Manufacturer	Lot Number	Facility	Funding Source	Expiration Date	Doses Available
<input checked="" type="checkbox"/>	MODERNA US, INC.	COVID19M122020	IMMTRAX COMMUNITY HEALTH	PAN	12/01/2021	93.0

Cancel **Save** 9