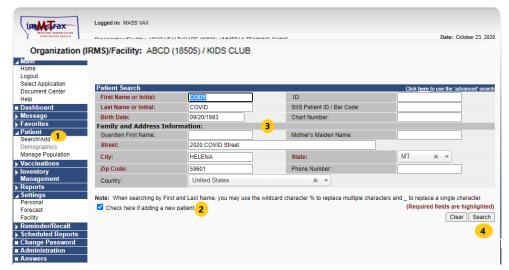# COVID-19 imMTrax Direct Data Entry Guide

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.

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.

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.*
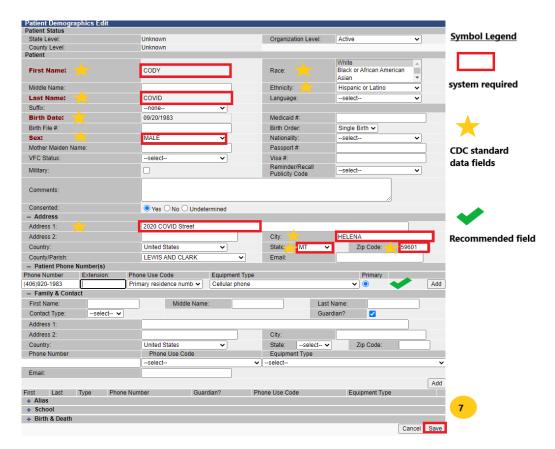   > *This record already exists in the database. An exact match has been found.*

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

<div align="center">

OR

</div>

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

7. Enter the patient information in the appropriate fields and click the **Save** button.
  - All fields marked with **red text** are system required fields.
    - **i.** 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.

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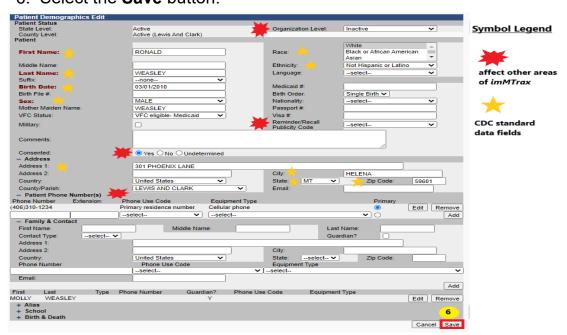- ➢ Patient Race
- ➢ Patient Last Name
- ➢ Patient Sex
- ➢ Patient Ethnicity
- ➢ Patient Address (including city, state, and zip code)

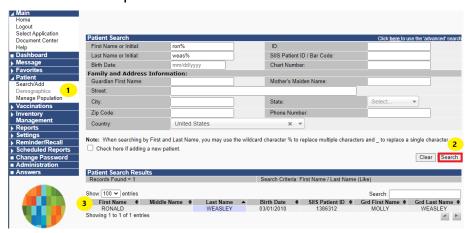**Note: Certain demographic fields impact other parts of the system if a certain value is selected.**

- ➢ **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.
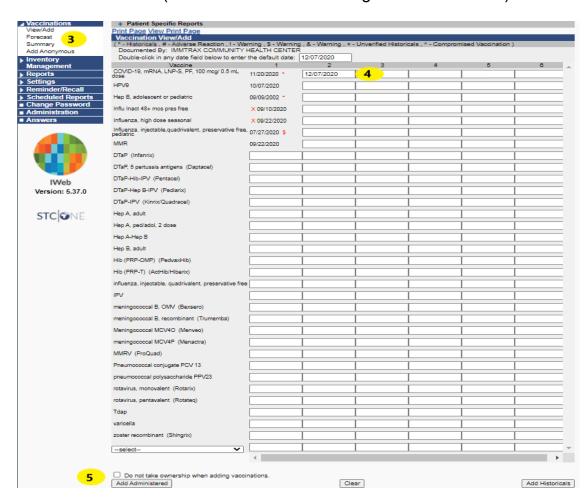
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6. Select the **Save** button.

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

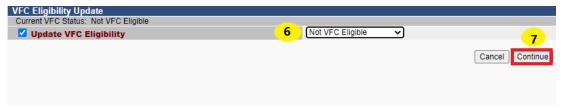# Add Administered COVID-19 Vaccine Steps to Follow:

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.

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