



imMTrax Advanced Demographics and Reports

Montana Immunization Program

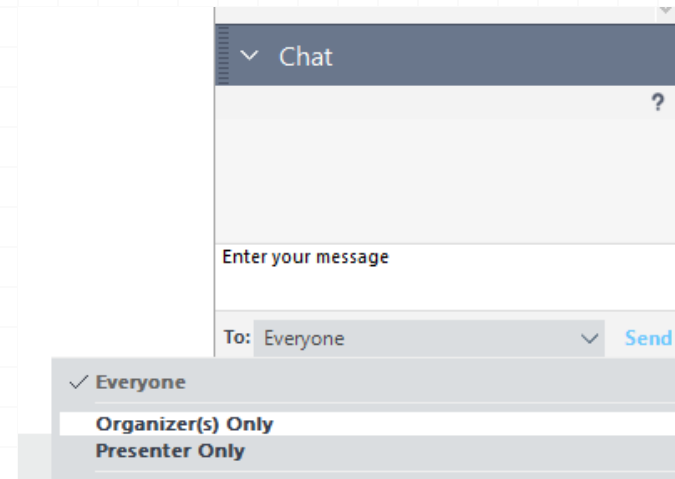
Last revised 5/2020

Housekeeping

- All participants are muted upon entering the presentation. Please do not put the line on hold.

To ask a question:

1. Send the host a message through the “Chat” function.



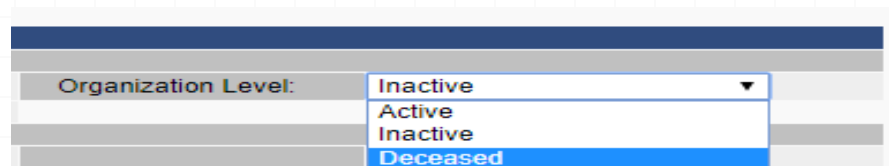
Webinar Objectives

- Discuss Facility ownership and patient active/inactive status
- Review new Jurisdictional Status (state/county)
- Review best practices for updating patient demographics
- Review available patient records
- Go over how to run:
 - Coverage Rate Report
 - Patient Detail Report
 - Lot Usage and Recall Report

New imMTrax: Facility Ownership and patient status

Organizational Level a field containing three options in the new imMTrax that two main purposes:

1. Updates and displays the relationship between the facility the user is logged in under:
 1. ACTIVE (current facility owner and active patient in facility's population)
 2. INACTIVE (not the current facility owner or this patient is inactive in facility's population)
- OR-
2. Displays the patient's vital status as DECEASED.



The screenshot shows a web form with a dropdown menu. The label 'Organization Level:' is on the left. The dropdown menu is open, showing four options: 'Inactive', 'Active', 'Inactive', and 'Deceased'. The 'Deceased' option is highlighted in blue.

Organization Level:	Inactive ▼
	Active
	Inactive
	Deceased

New imMTrax: Facility Ownership and patient status

Q: In a patient's demographics, what does it mean when Organizational Level = Active?

A: Three things are always true when Organizational = Active:

1. The facility you are logged in under is the facility owner,
2. The patient is part of your active (imMTrax) patient population, and
3. The patient may be included in various reports and assessments (coverage reports, reminder/recall, etc)

Patient Demographic Master View			
Record Info			
SIIS Patient ID:	1310723		
Organization Owner:	15853 - PARTNERS IN PEDIATRICS		
Facility Owner:	17718 - PARTNERS IN PEDIATRICS		
Entry Date:	05/05/2020	Last Update:	05/20/2020
Entered By:	SARAH KEPPEM	Last Updated By:	SARAH KEPPEM
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Cascade)		

New imMTrax: Facility Ownership and patient status

Q: In a patient's demographics, what does it mean when Organizational Level = Inactive?

A: It depends! Here are the possibilities:

1. If the facility you are logged in under is displayed as the facility owner, you are the most recent owner of the patient. However, this your former patient is NOT part of your active (imMTrax) population.
2. If the facility you logged in under is displayed as the facility owner, you are the most recent owner of the patient. However, the patient consent status = DENIED. Persons with a denied consent status may not be part of any facility's active population.
3. If the facility you logged in under does NOT display as the facility owner, you are not the current facility owner. If the facility owner is not your facility, the Organization Level status will always be "inactive".

Organization/Facility: PARTNERS IN PEDIATRICS (15853) / PARTNERS IN PEDIATRICS Date: May 20, 2020

+ -

Patient Demographic Master View			
Record Info			
SIIS Patient ID:	1310723		
Organization Owner:	80812 - ABCD		
Facility Owner:	24821 - TRAINING CLINIC		
Entry Date:	05/05/2020	Last Update:	05/20/2020
Entered By:	SARAH KEPPEN	Last Updated By:	SARAH KEPPEN
Patient Status			
State Level:	Active	Organization Level:	Inactive
County Level:	Active (Cascade)		
Datient			

New imMTrax: Facility Ownership and patient status

Q: Will facility ownership and patient status change automatically when another eligible facility inserts a newly administered immunization?

A: An eligible facility that submits a newly administered immunization electronically (direct from their EHR) will become the new facility owner upon imMTrax receiving that data. The patient status for that facility will be ACTIVE.

An eligible facility that manually enters an immunization into imMTrax as newly administered (deducts from inventory) will become the new facility owner unless they manually check the box “Do Not Take Ownership When Adding Vaccinations” BEFORE proceeding to adding administered vaccines.

Do not take ownership when adding vaccinations.

Add Administered

Clear

Add Historicals

New imMTrax: Facility

Ownership and patient status

Q: Are there other ways facility ownership and Organizational Level will be changed automatically?

A. One. If an eligible facility edits a patient's consent status (moving consent from NO or Undetermined to YES) the patient's ownership and Organizational Level status will change to that facility unless the user manually changes the patient status back to inactive BEFORE SAVING.

Change Organizational Level back to INACTIVE to prevent taking ownership when updating consent status only.

Patient Demographics Edit			
Patient Status			
State Level:	Active	Organization Level:	Inactive
County Level:	Active (Cascade)		
Patient			
Last Name:	PICKLES	Race:	White
First Name:	DILL	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
Birth Date:	11/18/2019	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
Sex:	MALE	Nationality:	--select--
Mother Maiden Name:	PICKLES	Passport #:	
VFC Status:	--select--	Visa #:	
Military:	<input type="checkbox"/>	Reminder/Recall Publicity Code	Reminder/recall - any metho
Comments:			
Consented:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Undetermined		

Patient Demographics Edit			
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Cascade)		
Patient			
Last Name:	PICKLES	Race:	White
First Name:	DILL	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
Birth Date:	11/18/2019	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
Sex:	MALE	Nationality:	--select--
Mother Maiden Name:	PICKLES	Passport #:	
VFC Status:	--select--	Visa #:	
Military:	<input type="checkbox"/>	Reminder/Recall Publicity Code	Reminder/recall - any metho
Comments:			
Consented:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined		

New imMTrax: Facility Ownership and patient status

Q: Can I manually change facility ownership to be my facility?

A. Yes. Simply edit the patient's demographics to an Organizational Level of Active. Upon saving, your facility will be the new facility owner and will have an Organizational Level of Active.

The screenshot shows the 'Patient Demographics Edit' form. The 'Patient Status' dropdown menu is highlighted with a red box and is set to 'Active'. Other fields include:

Status	Patient Status: Active	
Patient		
Last Name:	TEST	Race: White
First Name:	TEST	Black or African American
Middle Name:		Asian
Suffix:	--none--	Ethnicity: --select--
Birth Date:	08/27/2008	Language: --select--
Birth File #:		Medicaid #:
Sex: FEMALE		Birth Order: Single Birth
Mother Maiden Name:		VFC Status: --select--
Military: <input type="checkbox"/>		Reminder/Recall Publicity Code: --select--
Comments:		
Consented:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined	

New imMTrax: Facility Ownership and patient status

Q: My facility is the current facility owner and has an Organizational Level of active to a patient that has moved to another jurisdiction or practice. They are no longer part of our active patient population. Can I update imMTrax so they will no longer be part of our active imMTrax population?

A. Yes. Simply edit the patient's demographics to an Organization Level of Inactive. Upon saving, your facility will still be the facility owner (most recent) but will have an Organizational Level of Inactive.

Patient Demographic Master View			
Record Info			
SIIS Patient ID:	1310723		
Organization Owner:	15853 - PARTNERS IN PEDIATRICS		
Facility Owner:	17718 - PARTNERS IN PEDIATRICS		
Entry Date:	05/05/2020	Last Update:	05/20/2020
Entered By:	SARAH KEPPEM	Last Updated By:	SARAH KEPPEM
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Cascade)		

New imMTrax: Facility Ownership and patient status

The “new” imMTrax only allows ONE facility owner a time!

Q: What if no eligible* facility owner exists?

A: If no eligible* facility owner exists, the facility ownership may be null. An example would be a patient record that contains only a single immunization given and reported by a pharmacy.

If the (sole) eligible facility previously designated that patient as MOGE or otherwise Not Associated, they may still display as the facility owner. However, they will have an Organizational Level of “INACTIVE”. This patient will be owned jurisdictionally at the State and County level.

*Certain facilities are set up as NOT eligible to be a facility owner. These include hospitals/ERs, pharmacies, schools (non-SBHC), etc.

Jurisdictional PAIS

- Patient status will be maintained at a facility-organization **and** a geographic-jurisdiction level. The previous “Patient Status” data field has expanded into three categories. The new categories will allow better identification of Montana’s population.

Patient Demographic Master View				
Record Info				
SIIS Patient ID:	1310723			
Organization Owner:	80812 - ABCD			
Facility Owner:	24821 - TRAINING CLINIC			
Entry Date:	05/05/2020	Last Update:	05/20/2020	
Entered By:	SARAH KEPPEM	Last Updated By:	SARAH KEPPEM	
Patient Status				
State Level:	Active	Organization Level:	Inactive	
County Level:	Active (Cascade)			
Patient				
Last Name:	PICKLES	Race:		
First Name:	DILL	Ethnicity:		
Middle Name:		Language:		
Suffix:				
Birth Date:	11/18/2019	Medicaid #:		
Birth File #:		Multi Birth Indicator:	N	
		Birth Order:		
Age:	26 weeks, 6 months, 0 yrs	Military:		
Reminder/Recall Publicity Code	Reminder/recall - any method	Recall Attempts:	2	
Sex:	MALE	Nationality:		
Mother Maiden Nm:	PICKLES	Passport #:		
VFC status:	(Unknown)	Visa #:		
		Vaccine Supply:	PRIVATE	
Consented:	Yes			
Primary Address				
Address 1:	1258 NORTH HIGHLAND AVE		Address 2:	
City:	GREAT FALLS		State:	MT
Zip Code:	59404			
Email:				
Country:	United States	County/Parish:	CASCADE	
Patient Phone Number(s)				
Phone Number	Extension:	Phone Use Code	Equipment Type	Primary
(406)123-4567		Primary residence number		Y
(406)261-4530		Other residence number	Cellular phone	N
Family & Contact				
Contact 1:	DIDI PICKLES			
+ Alias				
+ School				
+ Birth & Death				
+ Patient Specific Reports				

Jurisdictional PAIS

What stayed the same:

- The current patient ownership workflow still remains in place.
- The current patient facility ownership data is **not** being reassessed or migrated.
- The Organization and Facility ownership will remain unchanged,

What changed:

- The Patient Status data field is now called “Organization Level”.
- Two new patient status fields that are automatically determined and defined by data in the patient demographic and/or vaccination record:
 - State Level status and County Level status

Patient Status	
State Level:	Active
County Level:	Active (Cascade)
	Organization Level: Inactive

Demographics Best Practice: Address Maintenance

Patient Demographic Master View			
Record Info			
SIIS Patient ID:	1306206	Last Update:	02/14/2020
Organization Owner:	15735 - GREAT FALLS CLINIC	Last Updated By:	SARAH KEPPEEN
Facility Owner:	17530 - GREAT FALLS CLINIC		
Entry Date:	02/03/2020		
Entered By:	SARAH KEPPEEN		
Patient Status			
State Level:	Inactive	Organization Level:	Inactive
County Level:	Inactive		
Patient			
Last Name:	MALFOY	Race:	
First Name:	DRACO	Ethnicity:	
Middle Name:		Language:	
Suffix:		Medicaid #:	
Birth Date:	06/05/2009	Multi Birth Indicator:	N
Birth File #:		Birth Order:	
Age:	10 yrs	Military:	
Reminder/Recall Publicity Code		Recall Attempts:	0
Sex:	MALE	Nationality:	
Mother Maiden Nm:		Passport #:	
VFC status:	VFC eligible- Uninsured	Visa #:	
		Vaccine Supply:	PUBLIC
Consented:	Yes		
- Primary Address			
Address 1:		Address 2:	
City:	RENO	State:	NV
Zip Code:	89503		
Email:			
Country:	United States	County/Parish:	WASHOE
- Family & Contact			
Guardian 1:	LUCIOUS MALFOY		
+ Alias			
+ School			
+ Birth & Death			
+ Patient Specific Reports			

Include in CASA (currently 0 patients flagged)

Demographics Best Practices:

Patient Demographics Edit

Patient Status: Active
State Level: Active (Cascade)
County Level: Patient
Organization Level: Active

Last Name: WEASLEY
First Name: RONALD
Middle Name:
Suffix: --none--
Birth Date: 03/01/2009
Birth File #:
Sex: MALE
Mother Maiden Name:
VFC Status: Not VFC Eligible
Military:

Race: White
Ethnicity: --select--
Language: --select--
Medicaid #:
Birth Order: Single Birth
Nationality: --select--
Passport #:
Visa #:
Reminder/Recall Publicity Code: --select--

Comments:
Consented: Yes No Undetermined

Address
Address 1: 310 DIAGON ALLEY RD
Address 2:
Country: United States
County/Parish: CASCADE
City: GREAT FALLS
State: MT
Zip Code: 59401
Email:
Add

Patient Phone Number(s)
Phone Number: (406)123-4567
Extension:
Phone Use Code: Primary residence numt
Equipment Type: Cellular phone
Primary:
Add

Family & Contact
First Name:
Middle Name:
Last Name:
Contact Type: --select--
Guardian?
Address 1:
Address 2:
Country: United States
State: --select--
Zip Code:
Phone Number: --select--
Phone Use Code:
Equipment Type: --select--
Email:
Add

First	Last	Type	Phone Number	Guardian?	Phone Use Code	Equipment Type	
MOLLY	WEASLEY						Edit Remove

+ Alias
+ School
+ Birth & Death

Cancel Save

Print Patient Record Report

– Patient Specific Reports

School Form

Complete Immunization Report



State of Montana Official Immunization Record

Patient Name: WEASLEY, RONALD

Date of Birth: 03/01/2009

Gender: M

Vaccine	Dose	Date	Lot Number	Reporting Provider
DTaP/DT/Td				
DTaP	1	02/04/2020	T753J	PARTNERS IN PEDIATRICS
MMR				
MMR	INVALID	02/04/2020	R010474	PARTNERS IN PEDIATRICS
MMR	INVALID	02/14/2020	R027999	GREAT FALLS CLINIC
FLU				
influenza, injectable, 1 quadrivalent, preservative free		01/16/2019		PARTNERS IN PEDIATRICS
ZOSTER				
zoster recombinant	INVALID	03/10/2020	3FD3N	ROOSEVELT COUNTY HEALTH DEPARTMENT

History of Varicella Noted: 02/03/2020



Coverage Rate Report

Coverage Rate Report

Run By

By Ownership **1**

By Service

Select to run by series or individual vaccine

Series * **2** 4-3-1-4-3-1-4 [Series Description](#)

Vaccine

Vaccine Date Range

From: mm/dd/yyyy To: mm/dd/yyyy

From: 24 Months

Through: 35 Months

Age Range **3**

Age as of Date (Today's date if left blank)

Evaluate At Age **4** 24 Months

Limit Report By

Organization Level Status Active Only Inactive Only All

Patient VFC Status Select...

Vaccine Status All Vaccinations Valid Vaccinations Only

Patient Race Select...

Gender --select--

District/Region --select--

Patient County --select--

ZIP Code

Organization --select--

Do Not Limit

Facility --select--

Do Not Limit

VFC PIN --select--

Exclude patients who have either no forecast or aged out

View By

District/Region

County/Parish

ZIP Code

Organization

Facility

VFC PIN

Aggregate (Total Only)

Display Report Columns

Complete By Vaccine **5**

Incomplete Series

One Dose to Complete Series

One Visit to Complete Series (Multiple doses needed but could be given with one visit to vaccinator)

Not Yet Due

Not Yet Due (Late by Age)

Missed Opportunities

6

Patient Detail Report

Patient Detail Report

Run By

By Ownership
 By Service

Limit Report By

Vaccination Date Range From: 01/01/2020 Through: 03/31/2020
 Birth Date Range From: [mm/dd/yyyy] Through: [mm/dd/yyyy]

Organization Status:

Organization
All Organization ▼
ST. PETERS HOSPITAL ▼
ST. PETER'S MEDICAL GROUP- BROADWAY ▼

Facility
 Do Not Limit
 VFC PIN
 State
 Patient County
 Zip Code
 Primary Care Physician
 Program
 Health Plan
 Race
 Patient VFC Eligibility
 Vaccine VFC Eligibility
 Funding Type
 Inactive Status at the Organization Level

Vaccines

Vaccinator
 Lot Number
 Doses Decrement
 District/Region
 School
 Do Not Limit
 Only Show Patient Info
 Sort By

From: [mm/dd/yyyy] Through: [mm/dd/yyyy]

Select from the list below:

White
Black or African Amer ▼
--select--
--select--
--select--
--select--
Active patients only ▼

Unselected

- AS03 Adjuvant
- Adenovirus types 4 and 7
- BCG
- Botulinum Toxoid
- Botulism IG, human, intravenous [BabyBIG or BIG-hyphenIV]
- CMVIG
- DT (pediatric)
- DT,IPV adsorbed
- DTAP/IPV/HIB - non-US
- DTP
- DTP - unspecified
- DTP-Hib
- DTP/IPV
- DtaP
- DtaP, 5 pertussis antigens
- select--

Selected

- HPV, bivalent
- HPV, quadrivalent
- HPV, unspecified formulation
- HPV9

Select from the list below:

All ▼

[Click to select](#)

Last Name Vaccination Date Vaccinator

Lot Usage and Recall Report

Lot Usage and Recall Report

Limit Report By

Organization

Do Not Limit

Facility

Do Not Limit

VFC PIN

Active Lots

Unselected

- PARK COUNTY HEALTH DEPARTMENT / HPV9 / N035032 / VFC
- PARK COUNTY HEALTH DEPARTMENT / Hep B, adult / 2NK52 / PRVT
- PARK COUNTY HEALTH DEPARTMENT / Hep B, adult / N754X / PRVT
- PARK COUNTY HEALTH DEPARTMENT / Tdap / 4P9CL / VFC
- PARK COUNTY HEALTH DEPARTMENT / Tdap / XJ5L2 / 317
- PARK COUNTY HEALTH DEPARTMENT / Tdap / XJ5L2 / PRVT

Selected

- PARK COUNTY HEALTH DEPARTMENT / Tdap / 9PD92 / VFC

Inactive Lots

Unselected

- PARK COUNTY HEALTH DEPARTMENT / HPV9 / R008164 / PRVT
- PARK COUNTY HEALTH DEPARTMENT / HPV9 / R011631 / PRVT

Selected

- PARK COUNTY HEALTH DEPARTMENT / HPV9 / N022952 / VFC

All Expired Lots

Unselected

- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / ZA72G / PRVT
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / 2XF7E / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / 4DY9K / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / TL72B / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / 427R5 / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / 4H5PT / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / B444T / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / 5T943 / PRVT
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / FH9NA / VFC
- PARK COUNTY HEALTH DEPARTMENT / influenza, injectable, quadrivalent, preservative free / D9L92 / PRVT

Selected

Date Range From: Through:

Lot Number

imMTrax Reports Guide



imMTrax Report Guide: Introduction



This guide provides users with a brief description of each report in the Reports Module, including important considerations and what site could use this report. The Reports Module contains eight sub-sections and this guide lists each report in the same sub-sections.

Helpful Tips:

- What kind of site am I?
 1. Integrated sites manually manage their inventory in VOMS within imMTrax and manually enter immunizations given at their facility as “administered” for each administered dose to be deducted from inventory.
 2. All other sites are aggregate sites. Aggregate sites can manually manage their inventory in VOMS within imMTrax by an aggregate count. Aggregate sites may be sending data electronically into imMTrax from their facility’s electronic health record or entering all immunizations into imMTrax as historicals.
- An imMTrax user must have Client Maintenance level of access or higher to run reports. Some reports are not available to Client Maintenance users.

★ Report titles with a star next to them are recommended reports and are listed below:

1. Lot Usage and Recall Report (page 2)
2. Vaccine Lots to Expire (page 3)
3. Patient Detail (page 4)
4. Vaccine Administered (page 6)
5. Vaccine Inventory (page 7)

'2019

Montana Department of Health
and Human Services
Public Health and Safety
Division
Immunization Program

Questions?

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Thank you for attending!