NEW IMMTRAX TRAINING SYSTEM MANUAL

MONTANA IMMUNIZATION PROGRAM

Contact the Montana Immunization Program:

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System Recommendations

1. Supported browser is Internet Explorer Version 11.
2. Enable browser to Accept Cookies.
3. Enable browser to allow Scripting.
4. Disable browser Pop-Up Blocker.
5. Enable Delete Temporary Internet Files.

System Best Practices

- Each user should have their own account and only login under that account.
- Always use the Log Out feature located under the Main panel instead of closing browser.
- Login once a month, to avoid account inactivation.
- Notify the Montana Immunization Program if you or your staff no longer need access to imMTrax (left employment, change of jobs, etc.)

Password Requirements

- ✓ Minimum 12 characters
- ✓ At least one uppercase letter
- ✓ At least one lowercase letter
- ✓ At least one special character (!, @, #, etc.)

Login

STEP NAME	STEP DESCRIPTION
1. Login to imMTrax	Navigate to imMTrax login screen. Enter username and password. Click **Log In**.
2. Forgot Password?	Navigate to imMTrax login screen. Click **Forgot Password?**. Enter username. Check email for link to reset password.

Tips to Remember:

- Username is not case sensitive. Password is case sensitive.
- Valid email assigned to user account required for Forgot Password functionality.
- Link to reset password expires in five minutes.

Notes:

Search Patient Record

STEP NAME	STEP DESCRIPTION
1. Search Patient Record	Click **Patient** panel. Click **Search/Add**. Enter Search Criteria. Click **Search**. Patient Search Results display. Click **patient record**.
2. Search Criteria	Search patient using only first three letters of the First and Last name followed by the wildcard “%”. Search using only the patient Birth Date. Combine the two searches together.

Tips to Remember:

- ❖ Patient first name is the first listed field, last name is below first name.
- ❖ Inset wildcard “%”after first three letters of first and last name, to ensure system calls all possible patient matches.
- ❖ Search patient by entering SIIS ID on patient search screen.
- ❖ SIIS ID located in demographic portion of the patient record.
- ❖ Sort patient search results by first, middle, last name, birth date, SIIS ID, grd first and last name by clicking arrows in category column.

Notes:

Update Consent

STEP NAME	STEP DESCRIPTION
1. Search Patient	Click **Patient** panel. Click **Search/Add**. Enter Search Criteria. Click **Search**. Patient Search Results display.
2. Update Consent	If the patient information is red, consent status is either "undetermined" or "no" (denied). If consent has been obtained for the patient, click **patient name**. A message will appear. Select **Yes** to confirm status. Click **Edit**, located right bottom corner. Use the radio button to update consent status. A message appears. Click **Yes**. Click **Save**.

Tips to Remember:

- The State of Montana requires consent be obtained and documented in imMTrax in order for a patient record to be made accessible by an authorized party (i.e. healthcare provider, public health, etc.). Consent may be withdrawn at any time and should be updated in imMTrax accordingly.

Notes:

Add Patient Record

STEP NAME	STEP DESCRIPTION
1. Search Patient	Click **Patient** panel. Click **Search/Add**. Enter Search Criteria. Click **Search**. Patient Search Results display.
2. Add Patient Record	If no match appears after comprehensive patient search, select **"Check here if adding new patient."** Enter required information (text in red). Click **Search**. Click **OK** when message appears. Click **Add Patient**.

	Complete demographic information* and click **Save**. *For patients 18 years or age and younger, select **Add** under Family & Contact section to add Guardian First Name before selecting Save.

Tips to Remember:

- Before creating a new record within imMTrax, conduct a broad search to identify any existing records.
- For record creation for patients 18 years of age and younger, Mother's Maiden Name is highlighted in red, but is <u>not</u> required.
- Enter legal first and last name (no alias or nicknames).
- Enter correct information in correct field. Do not use any field to hold information.

Notes:

Demographics

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

Consented: if patient consent is “undetermined” or “no”, patients will not appear on Reminder/Recall outputs. If a patient consent status is “no”, the patient will not be included in Reminder/Recall outputs, Patient Lists, or Reports.

Patient Phone Number: one listed phone number must be designated “Primary” in order for any listed phone number to be an available contact method for Reminder/Recall outputs.

Patient Status: if patient status is set to Inactive, the patient will not be automatically included in Reminder/Recall or Reports.

Reminder/Recall Publicity Code: to include patients in any reminder/recall output, select “Reminder/Recall- any method” or leave as “—select—". If other values are selected for the Reminder/Recall Publicity Code field, the patient will not be included in outputs.

Patient Ownership and Status

Patient Ownership: 1:1 facility connection to patient.

- Conditions to change ownership.
    - If a non-owning facility records an administered immunization.
    - If an administered immunization message is sent electronically by a non-owning facility.

Patient Status: Patient status at facility.

- Patient status information.
    - Patient status can be manually changed.
    - Patient status is either “active” or “inactive” per facility.
    - “Active” patient status is 1:1 with the owning facility.

- If a non-owning facility user manually changes patient status from “inactive” to “active”.
- If a non-owning facility user manually updates consent from undetermined or no, to yes.
- The owning facility can change patient status from “active” to “inactive”, but will retain ownership.
- Patient status for a non-owning facility will always be “inactive”.
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Add Immunizations

STEP NAME	STEP DESCRIPTION
1. Add Administered Immunizations (Integrated Sites Only)	Click **Patient** panel. Click **Search/Add**. Enter Search Criteria. Click **Search**. Patient Search Results display. Click **Vaccinations** panel. Click **View/Add**. Enter administration date for vaccine (can enter multiple at once). *Click **Add Administered**. Verify VFC Eligibility and select eligibility category (if patient is 18 years of age or younger). Click **Continue**. Enter vaccine specific information. Click **Save**. *If entering administered immunization and your facility is not a routine vaccinator for this patient (i.e. influenza vaccination administered at flu clinic), select **Do Not Take Ownership When Adding Vaccination** before selecting **Add Administered**.
2. Add Anonymous Immunization	Click **Vaccinations** panel. Click **Add Anonymous.** Enter Birth Date, Vaccine, Date Administered

	and VFC Status. Click **Save**. Enter vaccine specific information. Click **Save**.
3. Add Historical Immunizations (Aggregate and Integrated Sites)	Click **Vaccinations** panel. Click **View/Add**. Enter administration date for vaccine (can enter multiple at once). Click **Add Historicals.**

Tips to Remember:

- A user at a non-owning organization of recorded administered shot cannot edit or delete shot.
- A user at a non-owning and owning organization of recorded historical immunization can edit and delete immunization.
- Refer to symbol legend (top of View/Add screen) for symbol definitions.
- Date of recorded administered or historical immunization by your facility will appear in blue on View/Add screen.
- Date of recorded administered or historical immunization by another facility will appear in black on View/Add screen.

Notes:

Inventory Management (VOMS 2.0)

STEP NAME	STEP DESCRIPTION
1. View & Manage Inventory	Select **Inventory Management** panel. Click **VOMS 2.0.** Select **Inventory drop-down**. Select **Search/Add Inventory**. Search specific vaccines. Click **View**. Select **View Lot History**.
2. Reconcile [Integrated Site: sites that directly record patient immunizations given from inventory]	Select **Inventory drop-down**. Select **Reconciliation**. Print Reconciliation Worksheet for Public and Private inventory (if manage private inventory). Write in physical counts on worksheet for each vaccine based on what is in your site's fridge/freezer. Enter Physical Counts for each vaccine in system [Investigation must occur if discrepancy occurs]. Click **Submit Inventory**. **<u>Acceptable Adjust Category and Reasons:</u>** 1. Wasted Vaccine: Category=Wasted, Reason= Choose based on situation. 2. Spoiled Vaccine: Category= Spoiled, Reason= Choose based on situation.
3. Reconcile [Aggregate Site: sites that only record how many doses were given month to month because	Select **Inventory drop-down**. Select **Reconciliation**. Print Reconciliation Worksheet for Public and (Private, if applicable). Write in physical counts on worksheet for each vaccine based on what is in

immunization data is sent electronically or being entered historically]	your site's fridge/freezer. Enter Physical Counts for each vaccine in system. For administered doses, must use adjustment: Category= Administered, Reason= System Non-user aggregate reporting only [Investigation must occur if discrepancy occurs]. Click **Submit Inventory**. **<u>Acceptable Adjust Category and Reasons:</u>** 1. Administered Vaccine: Category= Administered, Reason= System Non-user aggregate reporting only 2. Wasted Vaccine: Category=Wasted, Reason= Choose based on situation. 3. Spoiled Vaccine: Category= Spoiled, Reason= Choose based on situation.
4. Inactivate Lots	During next reconciliation after doses equal zero for specific lot, check the Inactive check box, located in last column on Reconciliation screen. * In order to inactive a lot, total doses must equal zero. Lots should only be inactivated once there are zero doses physically on hand.
5. Create New Order	Select **Orders & Returns** drop-down. Select **Orders & Transfers**. Select **New Order**. Reconcile Inventory and select **Submit Inventory** (based on Reconciliation

	steps above). Enter doses requested (divisible by package size). **IGNORE Priority Reason**. **IGNORE Comments box**. Select **Next**. Review information. Select **Submit Order**. If any edits/changes need to be made call the MT IZ Program.
6. Check on Order	Select **Orders & Returns** drop-down. Select **Orders & Transfers**. Select **View** for pending order.
7. Receive Order	<u>Once vaccine arrives</u>, select **Orders & Returns** drop-down. Select **Orders & Transfers**. Select **Receive**. Check that physical inventory matches order information. If so, enter **Receipt Quantity**. Select **Receive**, inserts lot(s) into inventory. *If your vaccine order has physically arrived and the information is not pre-populated in imMTrax, contact the MT IZ Program.
8. Add Private Inventory	Select **Inventory** drop-down. Select **Search/Add Inventory**. Select **Add New Inventory** (bottom right-hand). Insert required fields; **Vaccine, Funding Source (PRVT, is auto-populated), Lot #, Expiration Date, Category= Order Received, Reason= Order Received, Quantity**. Select **Save**.

9. Transfers [Site Transferring Vaccine]	Select **Orders & Returns** drop-down. Select **Orders & Transfers**. Select **New Transfer**. Select **Receiving Organization and Facility**. Enter **Transfer Quantity for specific vaccine(s)**. Submit **Transfer**. Contact the MT IZ Program.
10. Transfers [Site Receiving Vaccine]	Once vaccine arrives, select **Orders & Returns** drop-down. Select **Orders & Transfers**. Select **Receive**. Check that physical inventory matches transfer information. Enter **Receipt Quantity**. Select **Receive**. If any information is different, call the MT IZ Program. DO NOT select Receive.
11. Borrowing	Refer to **Montana Immunization Program VFC/ Public Vaccine Borrowing Report** for instructions.
12. Returns	Fax completed **Wasted and Expired Form** to the MT IZ Program. Follow directions based on Wasted or Expired/Spoiled Vaccine (on form). Account for doses during next reconciliation. Adjustment category for doses adjusted in the system should reflect "reason" marked on form.

Tips to Remember:

- Track or troubleshoot inventory discrepancies using reports:
  - View Lot History- information about vaccine lot, date administered, imMTrax ID displays.
  - Lot Usage and Recall Report- view information about patient level transactions for a specific vaccine lot.
    - Comparable to Data for Billing Extract in old imMTrax.
  - Transaction Report- vaccine lot transactions (i.e. received lots, wasted/expired, etc.)

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Reminder/Recall

STEP NAME	STEP DESCRIPTION
1. Run Reminder/Recall	Phase 1: Select to **Run by Ownership or By Service**, option to include inactive patients. Select a **Due Date Timeframe**. Select **Patient Age Range** or **Patient Birth Date**. Option to limit search

	by gender and/or exclude patients who were sent a notification per designated time frame. Select a **Vaccine Series** or **Custom**. If checked Custom, select **vaccines**. Check **Due for All Selected Vaccines.** Select **Generate Patient List.** Phase 2: Select **Export Patient List** (patient list and vaccines needed) or **Select Submit.** Option to change patient status to inactive. Select drop down panel under **Reason for Inactivation**. Select **Inactive**. Select **Submit or Generate Patient List**. Phase 3: Select Reminder/Recall output option by clicking icon. Click **Run** (run immediately) or **Save As Template** (access template under Reminder/Recall → Run Template). If select check box for **Make This Count Towards Number of Recall Attempts**, recall attempts field on patient demographics will update by one.

Tips to Remember:

- Run by Ownership (for all patients you own) will only include patients your facility currently owns with a patient active status.

- Option to "Include Inactive Patients" to ensure all currently owned patients are captured by reminder/recall.

- Run by Service (for all patients you have seen at your facility) will only include patients who have a recorded administered immunization by your facility and patient active status.
  - Option to "Include Inactive Patients" to ensure patients who have a recorded administered immunization and are not currently owned by your facility are included.
- Use arrows at top (labeled 1, 2, 3) to go back or go forward between phases.

Notes:

Reports

STEP NAME	STEP DESCRIPTION
1. Run Reports	Select **Reports**. Select **Report Module.** Select specific report. Choose report criteria. Select to **Run** (Create Report, Export Patient List, etc.)
2. Schedule Reports	Select **Reports**. Select **Report Module.** Select specific report.

	Choose report criteria. Select **Parameters** of when report will run. Enter **Last name** of user that report will be accessed by and select **Search**. Select **Checkbox Next to User** and **Select User.** Select **Schedule**. After report has ran, select **Scheduled Reports** panel. Select **Received Jobs**.

Tips to Remember:

- ❖ Most reports will automatically run for patients currently owned by your facility and a patient active status.
    - o Some reports allow facility to run for patient active and inactive status.
- ❖ "Create report" will open new tab in browser.
- ❖ "Export report" will open Excel file.

Notes:

Report Duplicate Records

STEP NAME	STEP DESCRIPTION
1. Report Duplicate Records	Select **Search/Add**. Search **Patient**. If two or more records exist for the same patient, select **Report Duplicate**. Select **Patient Records to Report** and **Reason**. Use radio button to select most accurate, up-to-date record. Select **Merge.**

Tips to Remember:

- ❖ The identified matching patient records must display under Patient Search Results to report duplicates.
- ❖ All imMTrax users can report duplicate records, only users with patient deduplication access (merge) can consolidate the records for their site.

Notes: