



# Releasing imMTrax Client Records: Tip Sheet



When releasing protected health information, organizations will subscribe to their internal policies and procedures. While internal policies may vary, health care organizations typically verify the requestor’s identity and ask them to complete a records release form.

Example of the Release Form Currently Used by the State of Montana Immunization Program:  
<https://dphhs.mt.gov/assets/publichealth/Immunization/imMTrax/imMTraxRecordsReleaseForm.pdf>

## Who is requesting the immunization record?

*Organizations should validate the requestor’s authority to receive the immunization record requested.*

For persons ages 0-17 years, the requestor must be:

- A Parent
- A Legal Guardian

For persons ages 18 and older, requestors must be:

- Requesting on their own behalf (Self)
- Requesting on behalf of person to whom they have legal authority (guardian, guardian ad litem, power of attorney, etc)

## For the most complete and up-to-date immunization record:

- Ensure immunization information is up-to-date
- Check and maintain your organization’s merge queue
- Use a broad search when looking for the record and look for possible duplicate records that need to be merged prior to release. Be sure to consider previous, married and/or maiden names.
- Review and make any necessary updates to the record’s demographic or immunization information
- Review any comments saved to the record, updating or removing as needed
- Update consent to participate in imMTrax as needed

<b><u>Ensure secure immunization record delivery</u></b>	
✓ In-Person Pick Up	✓ Fax
✓ Mail	<b>X DO NOT EMAIL</b>