

ImmTrac2
Patient Active/Inactive Status
(PAIS)

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Agenda



Introduction & Scope



User Interface (UI) Modules & Functionality



Scheduled Task Logic & Workflow



Project Impact & Performance



Framework & References

Patient Active/Inactive Status (PAIS)

Project went Live on June 13, 2025



Introduction

- The scope of this PAIS project is to implement an automated process to update the provider organization and client (org/client) relationship status from Active to Inactive status and assigning the status code to 'U' (Unknown).
- This project developed two modules that enables **Texas IIS and Provider-Organization** to manage PAIS statuses through status rule configuration features.
- The modules are categorized as:
 - **Global Client Status Rule**
 - **Client Status Rule**

What is Provider Active Inactive Status?

- **Patient Active/Inactive Status (PAIS)** - also referred to as patient status. The term PAIS defines the relationship between the patients and provider organizations (org/client) in ImmTrac2.
- This status determines which provider organization(s) and geographic jurisdiction(s) are **responsible for patient's vaccinations**.
- Patients may maintain associations with more than one provider organization at the same time;

Meaning, a patient can have an “**Active**” status with one or more provider organization and an “**Inactive**” status with one or more other provider organizations at the same time within the IIS.

Active Status vs Inactive Status

- **Active** status is established when a qualifying event has taken place, such as:
 - Provider organizations submitting vaccination events to the IIS via Electronic Data Exchange (DX) or User Interface (UI).
 - Adding or updating of a patient record's demographic or consent information.
- **Inactive** status is applied when there has been no recorded activity for an extended period.
 - A client being marked as “inactive” for one provider association does not automatically result in inactivation with all other provider organizations.

Inactive Status

- Texas IIS currently utilizes four types of inactive codes, which can be reported to IIS via Electronic Data Exchange (DX) and User Interface (UI).
 - I - Inactive-Unspecified
 - L - Inactive-Lost to follow-up
 - M - Inactive-Moved or gone elsewhere
 - P - Deceased

PAIS Automation Process for Inactivating Patient Status

Module Design and Functionality



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Setting Default Inactivation Year

- Texas ImmTrac2 System Administrator defines the specific number of years of inactivity required to trigger an automatic update a client-provider organization relationship to 'Inactive' status.

organi. **Texas DSHS** **ImmTrac2 System Administrator**

Global Client Status Rule
* Required Field

Default year set

Inactivate clients with date of last activity more than years ago.

Inactivate clients with date of last activity more than years ago.

Save
Cancel

Rule Range Configuration

- Texas ImmTrac2 System Administrator defines a specific year range (Minimum/Maximum) that individual providers can use to override the global rule.
- This provides flexibility to the providers and ensures that client record inactivation aligns as per provider organization needs.

Set Minimum and Maximum Year Limits

* Minimum Year

5

* Maximum Year

12

Configurable custom rule range

Recommended (default) Global Rule Settings:

Inactivate clients with date of last activity more than 10 years ago.

Minimum Year: 7

Maximum Year: 12

Revision History:

- Revision history displays a comprehensive log of all changes made to the Global Client Status Rule settings.
- This log ensures full transparency and accountability.
- Capturing the time stamp (date & time) on when and how updated the default year selected, minimum and maximum limits, and the specific username of the individual made the updated.

The Global Client Status Rule will be updated every morning.

The Global Client Status Rule will be updated every morning.

Revision History

Effective Date/Time ▾	Year Selected ▾	Minimum Limit ▾	Maximum Limit ▾	Username ▾
09/15/2025	10	5	10	Test_user1
06/13/2025	8	7	12	Test_user2

Configurable Rule Range

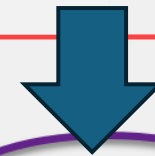
- By selecting second radio button “Set my organization’s Client Status Rule”, providers can define the inactive years (typically ranging from 5 to 12 years) required to trigger an automatic status change from active to inactive.
- This enables providers to manage organization-specific Client Status Rules to align with their active and inactive clinic records.

Client Status Rule
* Required Field

Please select a Client Status Rule

Apply Global Client Status Rule
Inactivate clients with date of last activity more than 10 years ago.

Drop-down selection



Set my organization's Client Status Rule
* Inactivate clients with date of last activity more than years ago.

Revision History (Provider View)

- Revision history displays a comprehensive log of all changes made to the Client Status Rule settings.
- The log includes the rule selected, the inactivation years selected, and the username of the individual updates along with a timestamp (date and time).

The Client Status Rule will be updated every morning.

Revision History

Effective Date/Time	Rule Selected	Year Selected	Username
02/12/2026	Global Rule	10	IIS_User
10/10/2025	Custom Rule	5	P_User2
10/10/2025	Custom Rule	8	P_User1
06/18/2025	Global Rule	10	IIS_User

Preview Client:

- The 'Preview Clients' button allows users to view the list of clients who have an active organization-client relationship and will be updated to Unknown (U) in the next run.
- User may utilize this function to audit the list of client records before the scheduled job run.

Please select a Client Status Rule

Apply Global Client Status Rule
Inactivate clients with date of last activity more than 10 years ago.

Set my organization's Client Status Rule
* Inactivate clients with date of last activity more than years ago.

Preview Clients (circled in red)

Preview Clients (circled in red)
Run History
Save
Cancel

The Client Status Rule will be updated every morning.

Preview Clients

Show 25 records

Showing 1 to 13 of 13 records

Imm Trac2 ID	First Name	Last Name	Birth Date	City	Your Orgs Last Activity Date
1110000231	Blue	Berry	10/10/1972	Austin	03/05/2016
1110000242	Rossy	Bolt	10/10/1980	Austin	03/05/2016

Run History

- Displays when the scheduled job was run for the individual provider organization, the type of rule selected, and the year applied for the inactivation process.
- The total count of client's inactivated by the system automation status is also included.

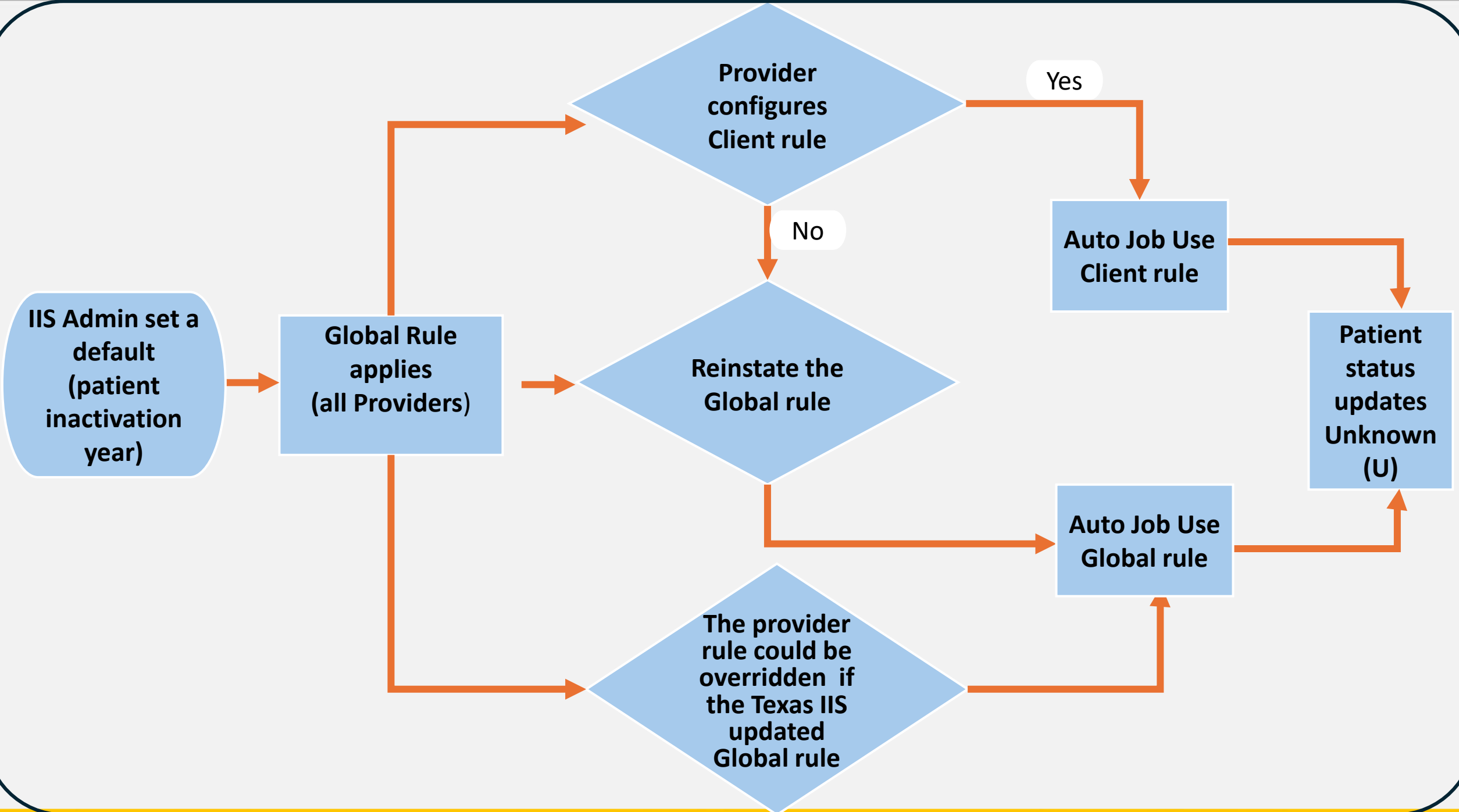
The screenshot displays a web interface for configuring and viewing client status rules. At the top, there are two radio button options: "Apply Global Client Status Rule" (selected) and "Set my organization's Client Status Rule". The "Apply Global Client Status Rule" option is described as "Inactivate clients with date of last activity more than 10 years ago." The "Set my organization's Client Status Rule" option is described as "Inactivate clients with date of last activity more than 10 years ago." Below these options, a note states "The Client Status Rule will be updated every morning." To the right of the configuration options, there is a "Run History" button, which is highlighted with a red box. Below the configuration options, there is a "Run History" section with a "Show 25 records" dropdown and "Showing 1 to 3 of 3 records" text. Below this section is a table with the following data:

Run Date	Rule Selected	Year Selected	Clients Updated
09/03/2025	Client Rule	5	200
05/25/2025	Global Rule	10	1

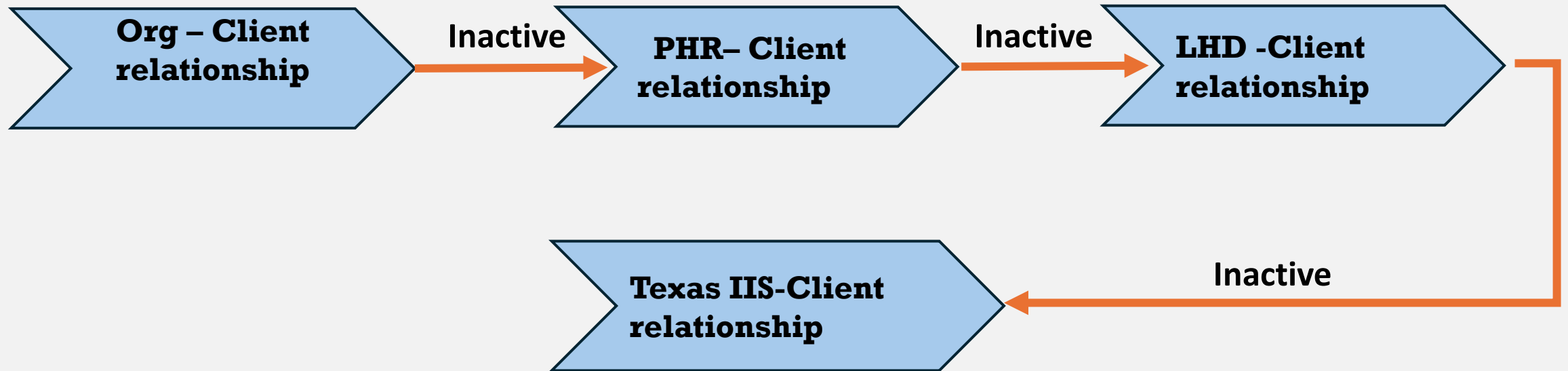
Scheduled Task Logic



An automated script that is set to run at a specific interval
everyday



Inactive Client workflow



PHR-Client Relationship Process

- An automated address Validation process is triggered to query the Texas IIS (ImmTrac2) database to identify and update client addresses using County.
- ImmTrac2 database returns the updated address information to the batch process.
- This triggers a Continual looping process meaning; it picks up the first client, completes the address validation and automatically jumps back to the next client record.
- For every updated address found, the system evaluates specific criteria to determine if a relationship change is necessary.
- System creates an “**Active**” PHR- Client relationship and Inactivates any previously Active statue exists to prevent duplication.

LHD – Client Relationship Process

- An automated address Validation process is triggered to query the Texas IIS (ImmTrac2) Data Base and ImmTrac2 Data Base returns all updated address.
- This triggers a continues looping processes for every client whose **county or Zip code** has been updated.
- The system creates a new ‘Active’ statue between Local Health Department (LHD) – Client relationship using appropriate County and Zip code.
- Any previously “Active” relationship with the jurisdiction is automatically updated to “Inactive Status”

Project Impact

Data Samples

Provider Organization Performance

- Following the project launch on June 13, 2025, provider organizations began utilizing the new PAIS functionality to streamline client record maintenance.
- As of August 2025 (post-launch), a sample of provider organizations successfully inactivated 7,980 clients by executing a customized status rule (5 year)

Before using PAIS functionality

Monthly Reporting Period: 07/2025

User Activity Summary:

Displays the user activity for the reporting period and compares the total

Total User Logins: 79

Online Client Searches: 2,646

Clients Served: 13,609

Ater using the PAIS functionality

Monthly Reporting Period: 08/2025

User Activity Summary:

Displays the user activity for the reporting period and compares the total

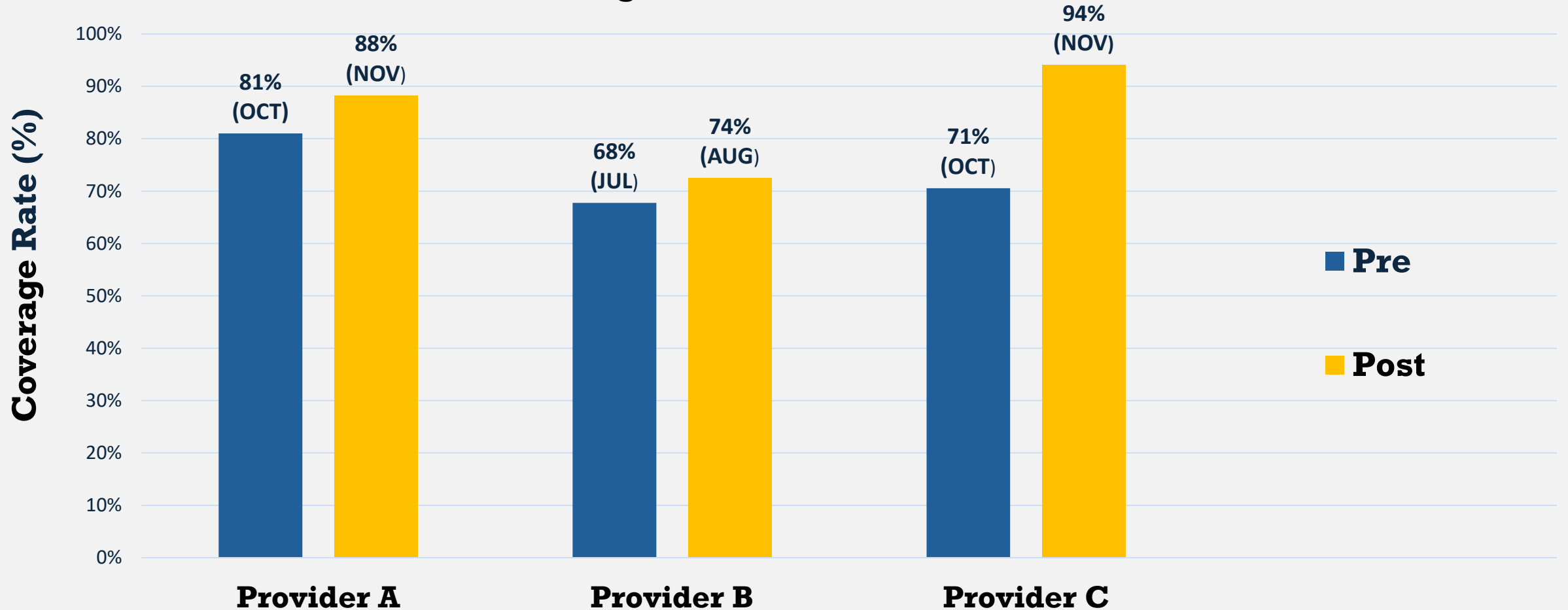
Total User Logins: 64

Online Client Searches: 2,481

Clients Served: 5,729

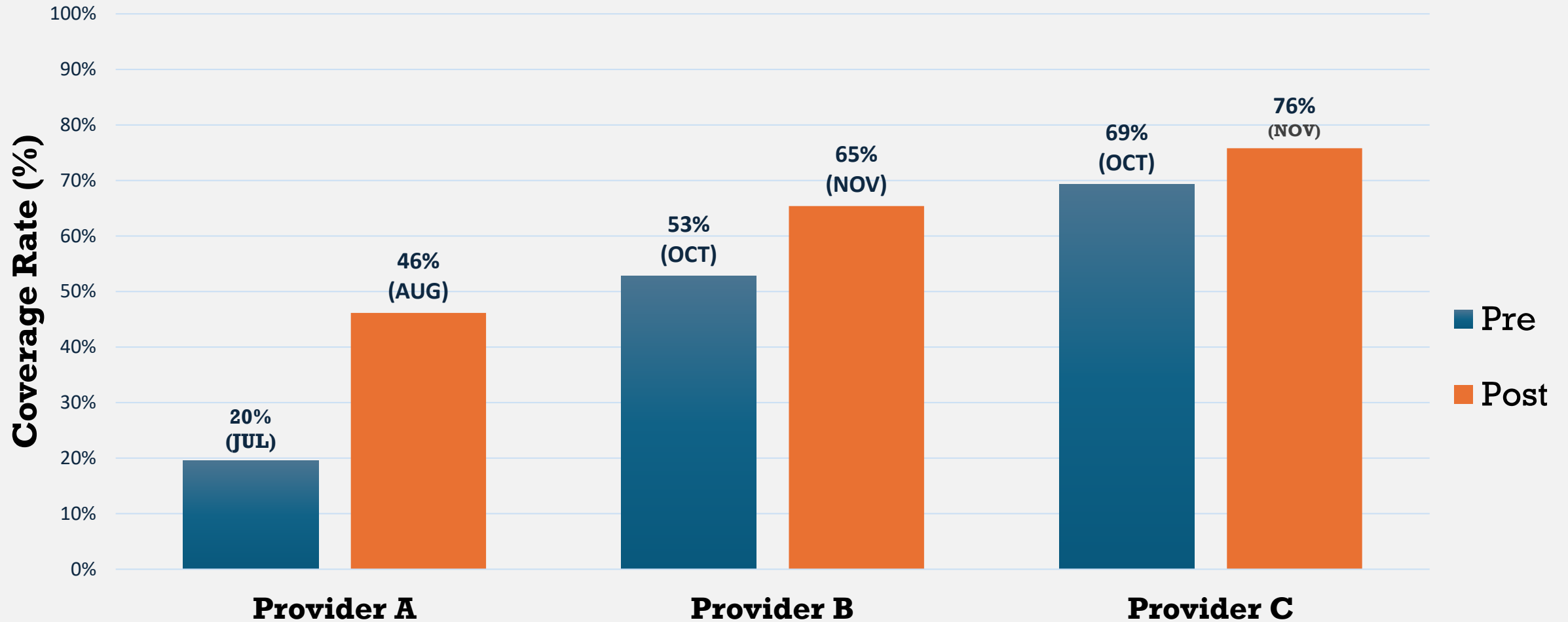
Pre and Post PAIS Module Usage for MCV4 Vaccine Coverage Rates

MCV4 Coverage Rates for 13 Year Olds



Pre and Post PAIS Module Usage for MCV4 Vaccine Coverage Rates

MCV4 Coverage Rates for 17 Year Olds



Training and Webinar



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Health Services

Training

- Texas IIS conducted two trainings on **Patient Active/Inactive Status (PAIS)** on March 4, 2026, for external stakeholders.
 - In-person training.
 - Virtual Texas IIS office hours.
- Post –Training client Inactivation increased significantly, ranging (between 5% and 24%) among the 22 providers currently using this functionality.

Reference

Model and design was developed utilizing AIRA Modeling of Immunization Registry Operations Work Group (MIROW) framework and PAIS guidelines.

- [MIROW and the Best Practice Development Process](#)
- [AIRA MIROW Mgmt of Patient Status in IIS](#)

Thank You

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