

ImmTrac2 Reminder/Recall Report Script

March 3, 2022

Welcome to the webinar on the ImmTrac2 Reminder/Recall Report.

Introduction

The objectives of this training are to:

- Briefly discuss access levels in ImmTrac2 for school nurses,
- Demonstrate how to use filters and generate reminder letters, mailing labels, and lists from the Reminder/Recall Report, and
- Demonstrate how to generate a custom Reminder/Recall letter.

For the Agenda:

- We have a special notice for school nurses,
- We'll have a brief overview of the Reminder/Recall report,
- Then we'll get into the details of using filters to select clients for the Reminder/Recall report,
- And go over selecting output options for the report,
- Finally, we'll go through creating a custom Reminder/Recall letter.

Special Notice for School Nurses

Generated reports in ImmTrac2 require "Full Access Provider" privileges.

- You can look at the top of the screen and see if your role is Full Access Provider
- Also, if you're a Full Access Provider you'll see in the menu bar on the left side of the ImmTrac2 screen a link labelled "generate report".

Registered nurses and licensed vocational nurses can Apply to be a Full Access Provider!

- If you're a View Only Non-Provider, AND you're an APRN, RN, or LVN at your school, you can apply to upgrade your ImmTrac2 access to be a Full Access Provider.

Here's how you can apply to be a Full Access Provider!

- To apply:
 - Email ImmTrac2@dshs.texas.gov with the subject line of SCHOOL NURSE and the name of your school.
 - In the body of the email include your:
 - First and Last Name,
 - ImmTrac2 Org Code and Username,
 - Texas Nurses License Number, and
 - Email address
 - You will receive an email response when your request has been processed.

Nurse Licenses

- Again, Your Texas Nurse License can be an:
 - Advanced Practice Nurse (APRN),
 - Registered Nurse (RN), or
 - Licensed Vocational Nurse (LVN)
- Your license must be current and registered in Texas, which we will verify.

As a Full-Access Provider You Can

- Search for clients (students) in your organization,
- Add and Edit client records,
- Add immunization records,
- Run many more reports, and
- Create school lists

Overview

Here's a Quick Overview of the Reminder/Recall Report

- First, filters are used to select clients.
- Second, you select an output which can be preformatted reminder letters, postcards, mailing labels, a client list, a spreadsheet, or a custom letter.

Using Filters to Select Clients for the Report

Before you begin,

- Know that for clients to be included in the report, in their Organization Information tab:
 - Their client status must be set to "Active".
 - Their "Allow Reminder and Recall Contact" flag in the client's record must be "Yes".
 - Note the "Last Notice" field which lists the date that the last Reminder/Recall notice was sent to the client.

Also, a good address is required.

- Clients must not have the "No viable address" box checked in the Address Information tab of the client record.
- The client must have a complete address.
- Not shown on this screen is that clients must have had an immunization by this organization.

To begin, first select the Generate Report link in the menu bar on the left, then select the Reminder/Recall Report.

Create and Save a Criteria List

- You get to choose how you want to filter which clients you send reminders or recalls to. For example, you can restrict it to clients from a certain city or zip code or county and you can select which vaccines you want to list. To save time later on, you may want to give your selection criteria a name and save it to be used again later.
- Or you can use a previous request criteria list that you saved,
- Or just leave it blank.

Indicate the Tracking Schedule

This section is used to select which tracking schedule will be used to generate reminder notices. You can choose to:

- Use the tracking schedule associated with each client, or
- Use the tracking schedule selected here for ALL clients, which is the ACIP schedule.

ImmTrac2 defaults to the 'Use Tracking Schedule Associated with Each Client' option.

Select the Vaccine Group and Select Due Now, Past Due, or Both

- Select which vaccines to filter on, or you can include all vaccines.
- For example you could select DTaP, Polio, MMR, HiB, Hep B, Varicella, and Pneumococcal. The report will return all clients missing at least one dose from the vaccine groups you selected.

To add a Vaccine Group, double click an item from the list in the left-hand box or select an item and then click the Add button to move it to the right-hand box.

To remove it, double click the item from the list in the right-hand box, or select an item and then click the Remove button to move it back to the left-hand box.

- Select to filter by vaccines due now, vaccines past due, or both.

Choice to Use Subpotent Vaccinations

- If this box is checked, subpotent vaccinations count as vaccinations.
- Examples of subpotent vaccinations would be if:
 - The full volume of the dose was not administered, or
 - The vaccine experienced a cold chain break, or
 - The vaccine was recalled by the manufacturer

Schools Can Be a Filter

- Use the drop-down box to filter by a school if desired. Schools are simply a group and can actually be any group of clients that you choose to define. Here are the steps to filter by a school.

First, Select “Manage Schools” in the Menu Bar.

- The “manage schools” link is under Maintenance.

Then Create a School.

- Enter the school name and select Save.

Link the Client to a School.

- In the client record, go to the Client Information tab and select the school from the drop-down list.

Finally, in the Reminder/Recall Report Select the School.

- Use the drop-down box to select a school. This will limit the report to clients who are associated with a particular school.

In Summary, to Use “School” as a Filter

1. First go to the menu bar on the main ImmTrac2 page and select “Manage Schools”.
2. Next, add, which means to create, a school.
3. In the Client Information tab of the client’s record, select the school from a drop-down list. This links the client to the school.
4. Finally, in the Reminder/Recall report, select the school from the drop-down list of schools.

Selecting a Primary Care Provider

- Use the drop-down box to select a Provider or PCP as a filter. This will restrict the report to clients who have this provider listed in their client record.

Set the Primary Care Provider in the Client Record

- The “**Provider**” is set in the Organization Information tab of the client record. This links the client to a provider for the report.

Additional Demographic Criteria

- You can also filter by city, zip code, county, language, vaccine eligibility, occupation, or High Risk/Exemptions.

Zip Code, City, and County Fields

- These fields are set in the address information tab of the client record.

High Risk and Exemptions are set in the Client Comment field near the bottom of the client record.

Date Criteria

- Entering a Target Date Range returns clients with vaccines that are due, past due, or both within the target date range you select. If no target date is selected, the current date is used.
- Entering a Date of Birth Range returns clients who have a birth date that falls between the dates entered.
- Entering an Age Range will return clients whose age falls between the ages entered.

Here's an Example of Using the Date Criteria

- In this example the clients are 24 to 35 months old AND were due or past due on one or more specified immunizations between January 1, 2019 through January 1, 2020.

Select Which Vaccine Groups to Display

- You can use all vaccine groups or select specific vaccine groups.
- Double click an item or use the Add and Remove buttons to choose which vaccine groups will display in the reminder notice. The default is "Use All Vaccine Groups".

Select a Sorting Option

- You can choose how you want the report sorted.
- The default is to sort by last name.

Save and Generate

Now that the filter criteria have been selected:

- Click the **Generate** button if you do not need to save the filter criteria you have selected,
- Click the **Save & Generate** button to generate the report and save the filter criteria, or,
- Click **Cancel** to go back to the filter criteria.

Selecting an Output Option

Reminder Request Status

- After clicking the **Generate** button or the **Save & Generate** button, you are directed to the Reminder Request Status screen. The Reminder Request Status displays only one reminder report at a time. To check if the data is ready to be reported, click the "Refresh" button until the status is 100%.

Report is Ready

- Once the status is 100%, the screen will display the following subheadings:
 - **Started**: Displays the date and time that the report Started generating. The Started date and time becomes a hyperlink that you can click to continue with the report.
 - **Completed**: Displays the date and time the report Completed generating.
 - **Status**: Displays the percent complete of the report. Currently running reports will have a percent less than 100%.
 - **Clients**: Displays the number of clients that met the report criteria.
 - **Target From / Target To**: Displays the Target Date Range criteria that was selected when configuring the report.
- Again, clicking on the Started date and time continues generating the report and takes you to the Reminder Request Process Summary.

Reminder Request Process Summary

- The step-by-step process by which the report criteria selected clients is displayed. The **Total Number of Clients Eligible for the Reminder Report** at the bottom tells you how many clients were selected. This is helpful in diagnosing any errors in the selection criteria.

Selection Criteria Display Example

- In this example, the client age range was 24 months old to 35 months old, and they were Due Now or Past Due for one or more vaccinations between January 1, 2019 to January 1, 2020. Thirty clients were selected.

Preview Clients

- At the bottom of the page, you can click the Preview Clients button to preview the clients selected

Return to Reminder/Recall

- In the preview, the clients' name, birth date, address, city, and zip code are displayed.
- Click the "Return to Reminder Recall" button to return to the report.

Output Options

- The Reminder Request Output Options screen displays each of the output file types that can be generated for the clients eligible for the reminder.
- You can generate Reminder Letters, Reminder Cards, Mailing Labels, a Client Query Listing, a Spreadsheet of Client Data, and Custom Reminder Letters.

Reminder Letters

- Use this option to send a form letter to clients eligible for the reminder, including their immunization history and immunizations due.

Clicking the "Reminder Letter" hyperlink will generate a standard letter for each client eligible for the reminder and includes their immunization history and recommended immunizations.

Report Name allows you to give the output a report name of up to



20 characters so the report is easily identifiable.

Free Text allows you to enter up to 400 characters of free text to customize the letter.

Phone # lets you include the office phone number with each letter.

Duplex Printing will force every letter to be two sided. Even if the letter didn't fill up two pages, it would still use two pages for each client.

If any clients selected Spanish in the 'Language Spoken' field of their client record, an output letter will generate in Spanish for them.

Click the Refresh button if needed until the output Status is 'Ready.'

Clicking the Reminder Letter link continues the report.

Reminder Letter – Reminder Request Status Screen

You are redirected to the Reminder Request Status screen. Click the report name hyperlink to open the letters in a separate browser window.

Here's an Example of a Reminder Letter

The standard letter includes the immunizations given that were selected to be displayed, and it gives the immunizations that are due or past due, depending on your selection earlier.

Close the browser window to return to the **Reminder Request Status** screen.

Reminder Card

- Use "Reminder Card" to send a standard 4 by 5 inch postcard to clients with immunizations due or past due. No immunization history is listed on the card.
- Verify that sending a card doesn't violate your clinic's privacy policies before you use this option.

The Reminder Card is generated in Spanish for clients who have Spanish selected in the '**Language Spoken**' field of their client record. Enter a Report Name for the card and click the Reminder Card link to continue.

Reminder Card – Reminder Request Status Screen

- Once again you are redirected to the Reminder Request Status screen. Click the report name hyperlink to open the cards in a separate browser window.
Click the Refresh button as needed until the output Status is 'Ready.'

Mailing Labels

- Enter a Report Name to identify the report later.
- Address labels will be created for each client in an Avery 5160 label format.
- Click the "Mailing Labels" hyperlink to continue.

Mailing Labels – Reminder Request Status Screen

- In the Reminder Request Status screen click the report name hyperlink to open the mailing labels in a PDF format in a separate browser window.

Client Query Listing

- Use the "Client Query Listing" to generate a PDF of patients, their phone number, full address, immunizations given, and immunizations needed. This is helpful when calling clients.
- Click the "Client Query Listing" hyperlink to continue.

Client Query Listing – Reminder Request Status Screen

- Click the name of the Listing to open up the listing.

Client Query List - Output

- This is an example of the Client Query Listing

Client Reminder/Recall Spreadsheet

- This report lists demographic data of clients and vaccines due.
- Click the "Client Reminder/Recall Spreadsheet" hyperlink to continue.

Spreadsheet – Reminder Request Status Screen

- Click the name of the spreadsheet to open it up.

Spreadsheet - Output

- The spreadsheet lists the TVFC PIN, client first and last name, date of birth, parent, address, city, state, zip, county, phone, and immunizations due and date recommended.

Custom Letter

- Clicking the “Custom Letter” link displays and produces the custom reminder letter for clients who matched the report criteria.

Last Notice Date Options

- The **Preview Clients** button displays the ‘Preview Client’ screen, where all clients that met the report criteria are listed.
- The **Increment Eligible** button resets the ‘Last Notice Date’ for all clients **that are eligible** for this reminder, regardless if the Reminder/Recall notice is actually sent. This places a date stamp in the Last Notice Date field in the client’s record under the Organization Information demographic tab.
- The **Increment Immunized** button increments the ‘Last Notice Date’ for all clients immunized by the user’s organization, regardless if they met the report criteria.
- The **Cancel** button returns you to the Reminder Request Status screen.

Creating Custom Letters

Advantages of the Custom Reminder Letter

- You have more control over what you want to say in a custom letter.
- You can choose to not include the client's immunization history in the letter if you do not want to include it. This can be a security issue.

To Create a Reminder/Recall Custom Letter:

- First click "Generate Report" and then select Reminder/Recall Custom Letters.

Select the link "New Custom Letter"

Next, Begin Filling Out the Template

Top Margin and Client Address

- For the **Top Margin**, from the drop-down list provided choose the number of blank lines at the top of the letter. **These blank spaces will leave room for your office letterhead.** This field will default to 3.
- For the **Client Address**, check the box to include the client's address at the top of the letter.

Salutation

- Enter a greeting in the text box to begin the letter. For example, "To the ." Use the drop-down arrow to determine if you want to include a name at the end of the salutation.
- If "Name" is selected, the name or parent/guardian of the client will show up after the salutation.
- If "Responsible Person" is chosen, the letter will read, whatever is in the salutation then "Parent/Guardian of", followed by the client's name. For example, "To the Parent/Guardian of Peggy Sue."

Paragraph 1 First Part, Name, and Second Part

- For Paragraph 1 First Part, enter the desired text, up to 4,000 characters of text.
- For Paragraph 1 Name Option, include a name between the first and second part of this paragraph: Use the drop-down list to choose the name to appear within the paragraph. For the name, select either parent/guardian, client name, or no name.
- For Paragraph 1 Second Part. If you chose to enter a name, add the remaining text for the first paragraph in this field.
- In this example the first part is “We care about”, then the child’s name is inserted, followed by the text “and your child’s health, and that is why we’re sending this letter. Here is your child’s immunization history.”

Immunization History Option

- Check the box to include the client’s immunization history in the letter. If you do not want to include the client’s immunization history in this letter, do **not** check the box.

Paragraph 2 and Immunizations Recommended Option

- In paragraph 2, enter desired text. You can enter up to 4,000 characters of text in this field.
- Check the “Include immunization recommendations” box to include the immunization needed forecast for the client in the letter.

Paragraph 3 and Closing

- For paragraph 3, enter any desired text. You can enter up to 4,000 characters of text in this field. In this example we chose to leave it blank.
- In the closing, you can enter a closing word or statement for the letter in this field. In this example we said, “Thank you and please call if you have questions!”. You have the option of checking a box to include the name of your organization in the closing, and another option of checking a box to include your organization’s phone number.

Enter Custom Letter Name and Click Save

- The screen will refresh, but no message will display.
- Click the **Cancel** button to return to the previous Reminder/Recall Customer Letters screen, where the newly created letter displays as a hyperlink.

Edit a Reminder/Recall Custom Letter

- To edit an existing Custom Letter, go back to Generated Reports, click the Reminder/Recall Custom Letters link, then click the name of the custom letter to be edited.

Update and Save the Letter

- Update the customer letter data or letter name as needed, and then click the **Save** button.
- The screen will refresh, but no message displays.
- Click the **Cancel** button to return to the previous Reminder/Recall Custom Letters.

To Delete a Reminder/Recall Custom Letter

- Go to the Reminder/Recall Custom Letter and click the **Delete** button next to the name of the custom letter to be deleted.
- Click the **OK** button to delete the Custom Letter.

Click OK to Confirm

- You will be asked if you are sure you want to delete the letter.
- Click the **OK** button to delete the Custom Letter.

Thank You from all of us at the Texas Immunization Registry!