TEXAS Health and Human Services | Texas Department of State Health Services

The Texas Immunization Registry

Guide to Reminder/Recall Report

Contents

Summary

The Reminder/Recall Report generates client notices, which include letters, cards, mailing labels, and client listings. Reminder and recall notices can be generated for each client if the following conditions in the client record are met:

- The client status is “Active” in the Client Information section for your organization.
- The “Allow Reminder and Recall Contact?” indicator in the Client Information section is “Yes.”
- The client has complete address information listed in the Address Information section.

Generate Reminder/Recall Report

See Figure 1: Generate Reminder/Recall Report

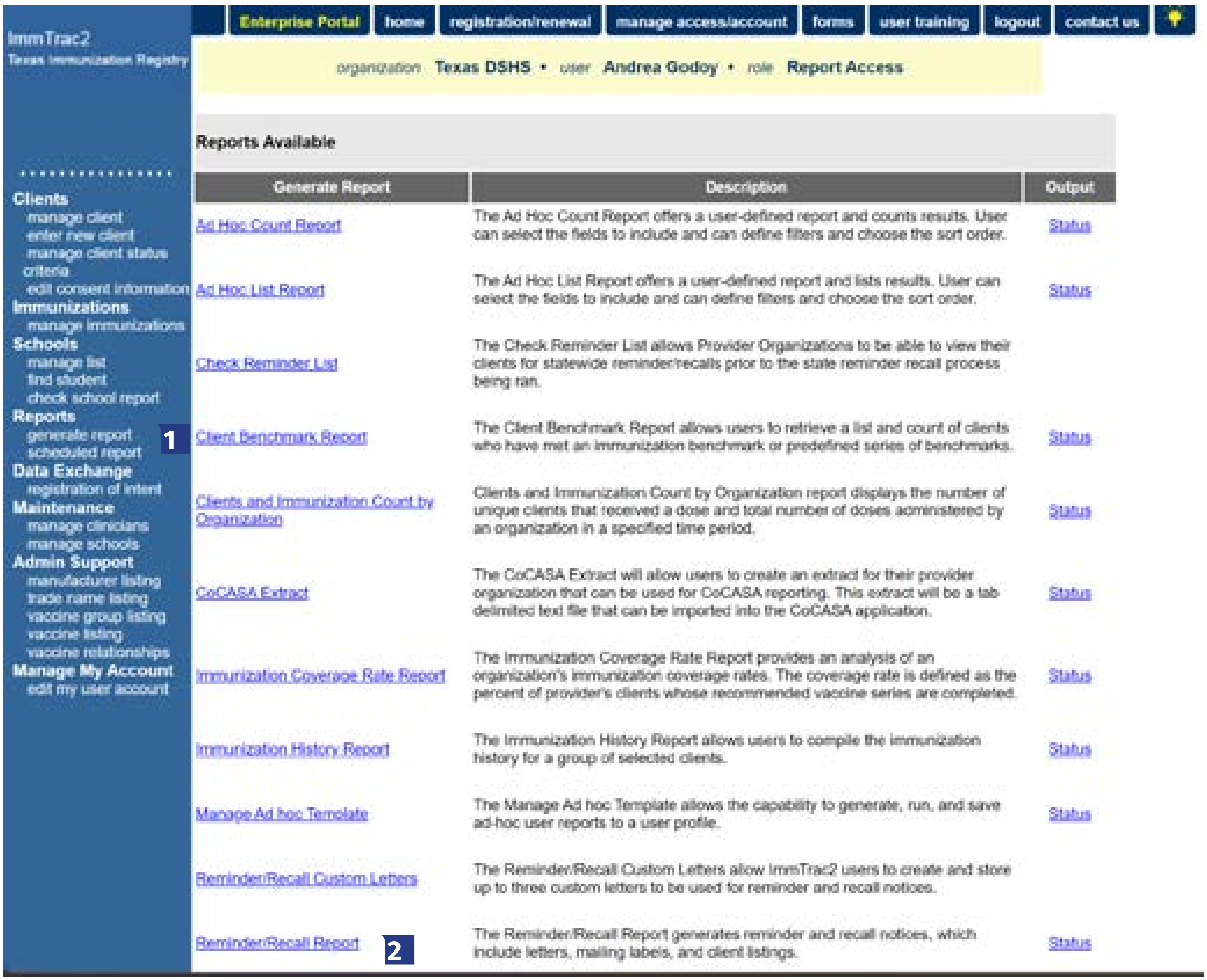


Figure 1: Generate Reminder/Recall Report

To generate the Reminder/Recall Report, follow the steps below.

1. Click the Generate Report option from the menu panel.

2. Select the Reminder/Recall Report.

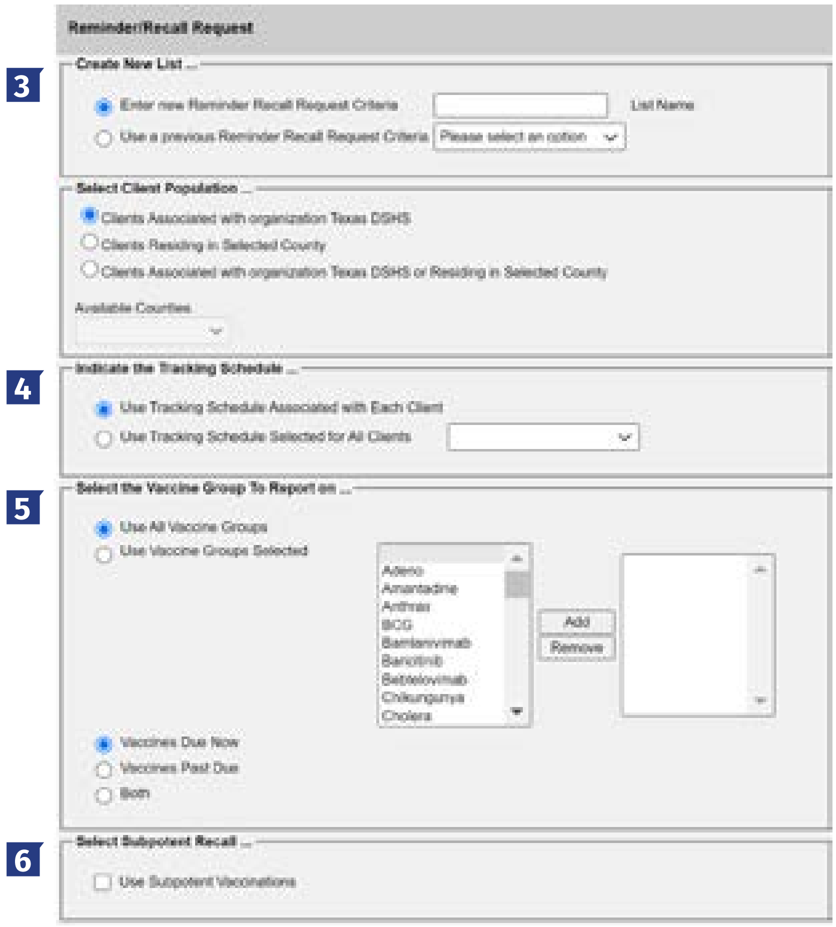


Figure 2: Generate Reminder/Recall Report Part 2

3. Set the Request Criteria: The Create New List Section gives users the option of selecting saved reminder recall request criteria or creating a new reminder recall request.

- Enter new Reminder Recall Request Criteria: Selecting the radio button and supplying a list name will generate a new reminder recall request report that can be generated as a report or saved as a template and later generated as a report.

- Use a previous Reminder Recall Request Criteria: Selecting the “Use a previous Reminder Recall Request Criteria” radio button and selecting a list name displays that template’s criteria. Once the criteria displays, users can edit the criteria from the previous list before generating the report.

4. Indicate the Tracking Schedule: Choose which set of recommended immunizations and corresponding dates will be compared to each client’s immunization history.

5. Select the Vaccine Group to Report on: Choose which vaccines will be included in the report by selecting a vaccine and clicking the Add button. Also select which vaccines to include, vaccines that are Due Now, Past Due, or Both.

6. Selecting Subpotent Recall: This filter will show the clients with Sub-potent vaccinations recorded.

7. Selecting a School or Primary Care Provider: This filters the clients who have been assigned to the selected school or physician.

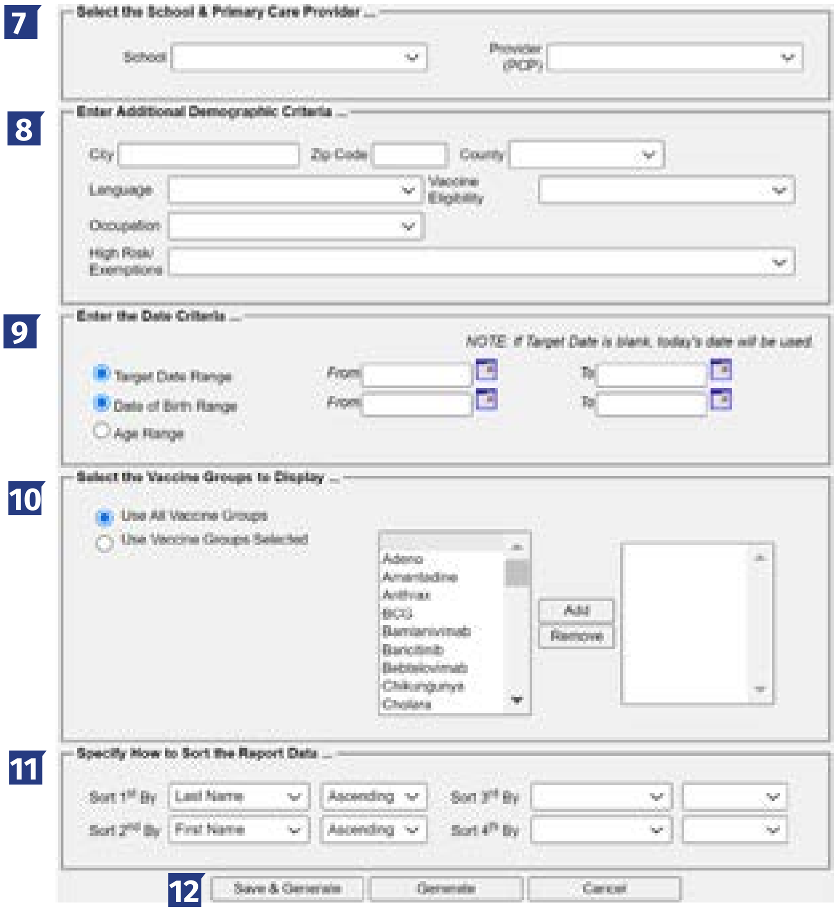


Figure 3: Generate Reminder/Recall Report Part 3

8. Enter Additional Demographic Information: Entering and/or selecting these options allows filtering of clients whose records match specific demographic information.

9. Enter the Date criteria: Select a Date Range to filter clients.

- Target Date – Entering a target date range will return clients who are due now, are past due, or will be due for the selected vaccine within the specified date range.
- Birth Date - Entering a birth date range will return clients who were born between the dates entered.
- Age Range - Entering an age range will return clients whose age falls between the dates entered.

10. Select Vaccine Groups to Display: Selecting Vaccine Groups to display will filter for the vaccine groups that display on the report as being recommended. By default, all vaccine groups that are due now or past due display on the report.

11. Specify How to Sort the Report Data: Allows a choice of sorting options. The default is last name in ascending order, then first name in ascending order.

12. Click the Save & Generate button to save the request criteria and to generate the report.

- If previous Reminder Recall Request Criteria was selected, this will save any changes made to template.
- Click the Generate button to generate the report and not save as a template or save changes to the criteria list.
- Click the Cancel button to return to the Generate Reports screen.

Reminder Request

Status Screen See Figure 4: Status Screen.

Once the reports are generated the Reminder Request Status screen displays. This screen will only retain one report at a time, and as new reports are generated the previous report will no longer be accessible. The status indicates the percentage of completion for the report. Periodically click on Refresh to update the completion percentage information. The time it will take for the report to generate will depend upon the number of clients associated with the provider organization.

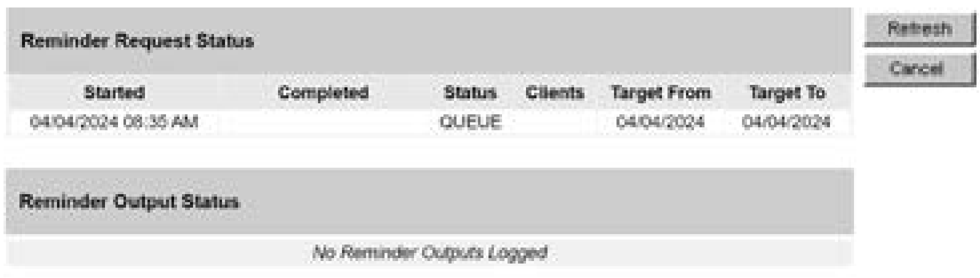


Figure 4: Status Screen

This screen will also display all the reminder output options that were generated for the specific report.

1. When redirected to the Reminder Request Status screen, click the Refresh button until the status is 100%.

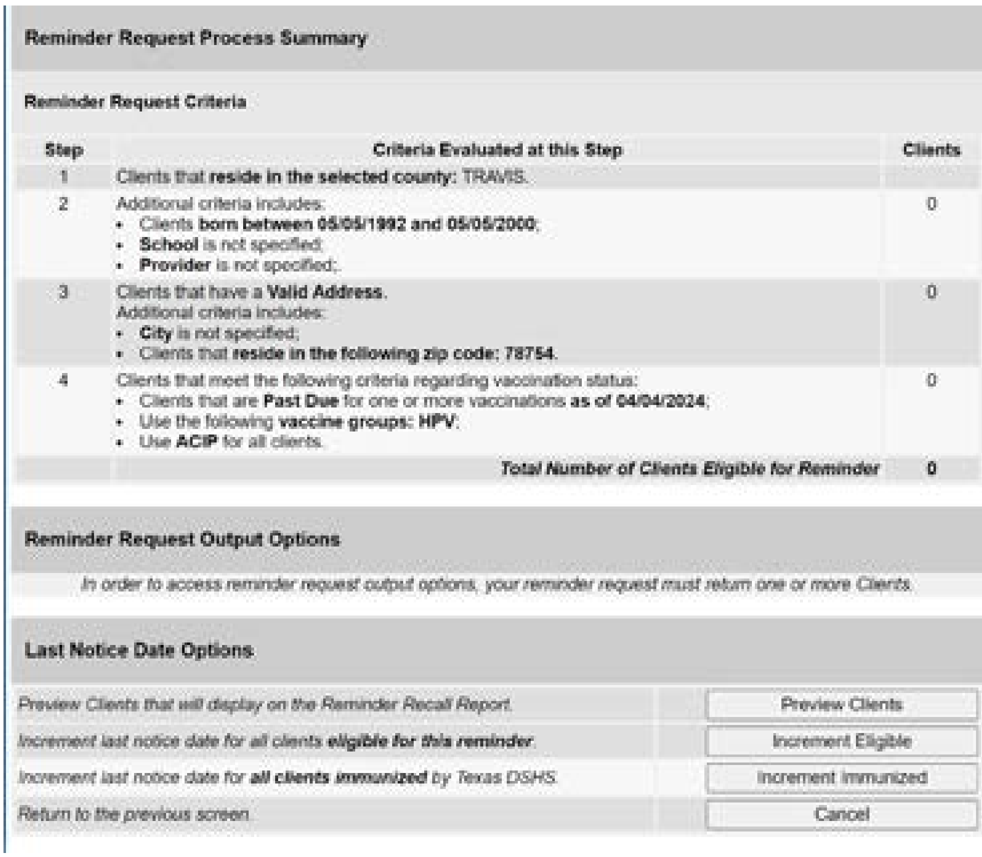
2. When the report is ready, click on the blue hyperlink to go to the Reminder Request Process Summary screen.

Note: The report will run in the background similar to other reports, allowing users to exit ImmTrac2 or work on other ImmTrac2 tasks until it completes. To go to the Reminder Request Status screen, click on “generate report” on the menu panel and click the “Status” link next to the Reminder/Recall Report link.

Reminder Request Process Summary Screen

The Summary screen is broken up into three sections: Reminder Request Criteria, Reminder Request Output Options, and Last Notice Date Options. From the Summary screen, users can create various reminder output options.

Reminder Request Criteria: This section lists the number of clients involved in the search and the criteria used to define the search. The Total Number of Clients Eligible for Reminder at the bottom of the screen is dependent upon the search criteria and is narrowed down by each criteria step. See Figure 5: Reminder Request Criteria.



Reminder Request Process Summary

Reminder Request Criteria

Step	Criteria Evaluated at this Step	Clients
1	Clients that **reside in the selected county:** TRAVIS.	
2	Additional criteria includes: • Clients **born between 05/05/1992 and 05/05/2000**; • **School** is not specified; • **Provider** is not specified;.	0
3	Clients that have a **Valid Address**. Additional criteria includes: • **City** is not specified; • Clients that **reside in the following zip code: 78754**.	0
4	Clients that meet the following criteria regarding vaccination status: • Clients that are **Past Due** for one or more vaccinations **as of 04/04/2024**; • Use the following **vaccine groups: HPV**; • Use **ACIP** for all clients.	0
	Total Number of Clients Eligible for Reminder	**0**

Reminder Request Output Options

In order to access reminder request output options, your reminder request must return one or more Clients.

Last Notice Date Options

Preview Clients that will display on the Reminder Recall Report.	Preview Clients
*Increment last notice date for all clients **eligible for this reminder**.*	Increment Eligible
*Increment last notice date for **all clients immunized** by Texas DSHS.*	Increment Immunized
Return to the previous screen.	Cancel

Figure 5: Reminder Request Criteria

Reminder Request Output Options: This section lists the various reminder output options available, including both standard outputs and custom outputs. See below and see also Figure 6: Reminder Request Output Options.

- Output – This column displays the types of reports that can be produced. These reports are described in detail in the table below. Clicking the Hyperlink in the Output column will generate the report that was selected.
- Description - This column provides a brief description of the output option.
- Additional Input - This column displays options for including additional information on the output report and defining a report:
    - Report Name: Enter the Name to describe the output report.
    - Free text: Enter in text that will appear on the report.
    - Phone number: Enter in the phone number that will appear on the output report.

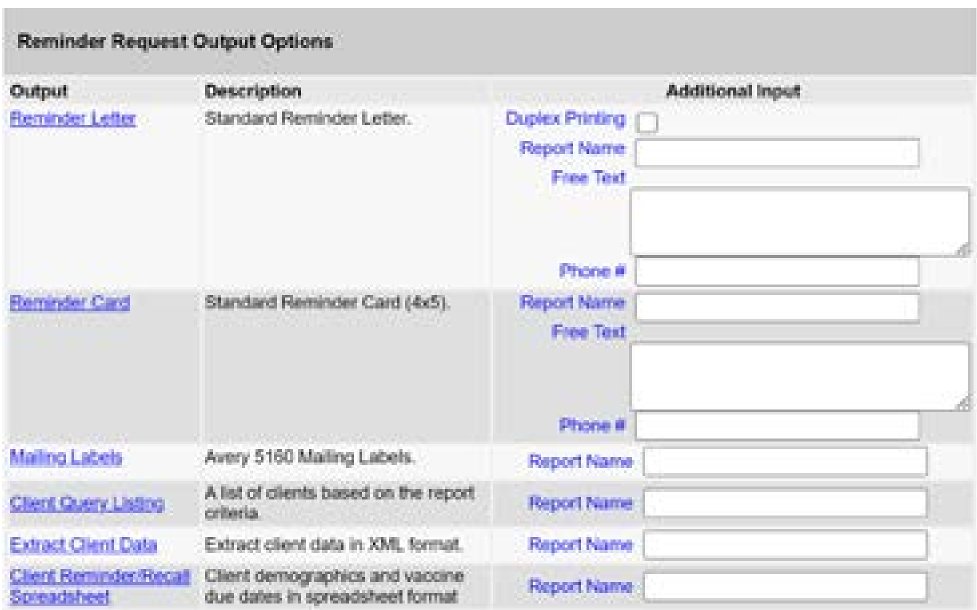


Figure 6: Reminder Request Output Options

Reminder Letter

The letter output option allows users to generate a standard form letter to the parent/guardian for each client returned on the query. The letter allows room at the top for the organization's letterhead. The body of the letter includes the client's immunization history, recommended immunizations, and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letter, follow the steps below (see Figure 7: Generate Reminder Letter Steps 1-2):

Figure 7: Generate Reminder Letter

1. Under the Additional Input column, there are options to enter the following:

- Duplex printing – printing on both sides.
- Report Name - if a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.
- Free Text - include a maximum of 400 characters in this field. This information will be displayed as the closing for each letter.
- Phone - the telephone number is presented in the closing for each letter.

2. Click the Reminder Letter hyperlink.

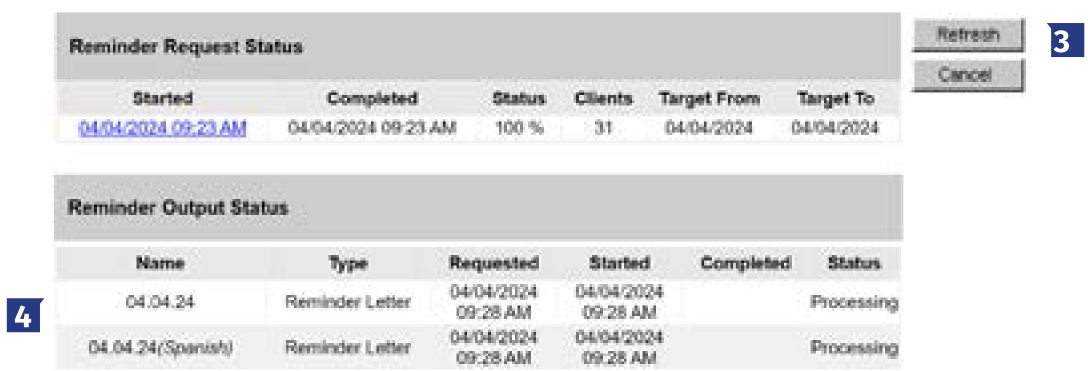


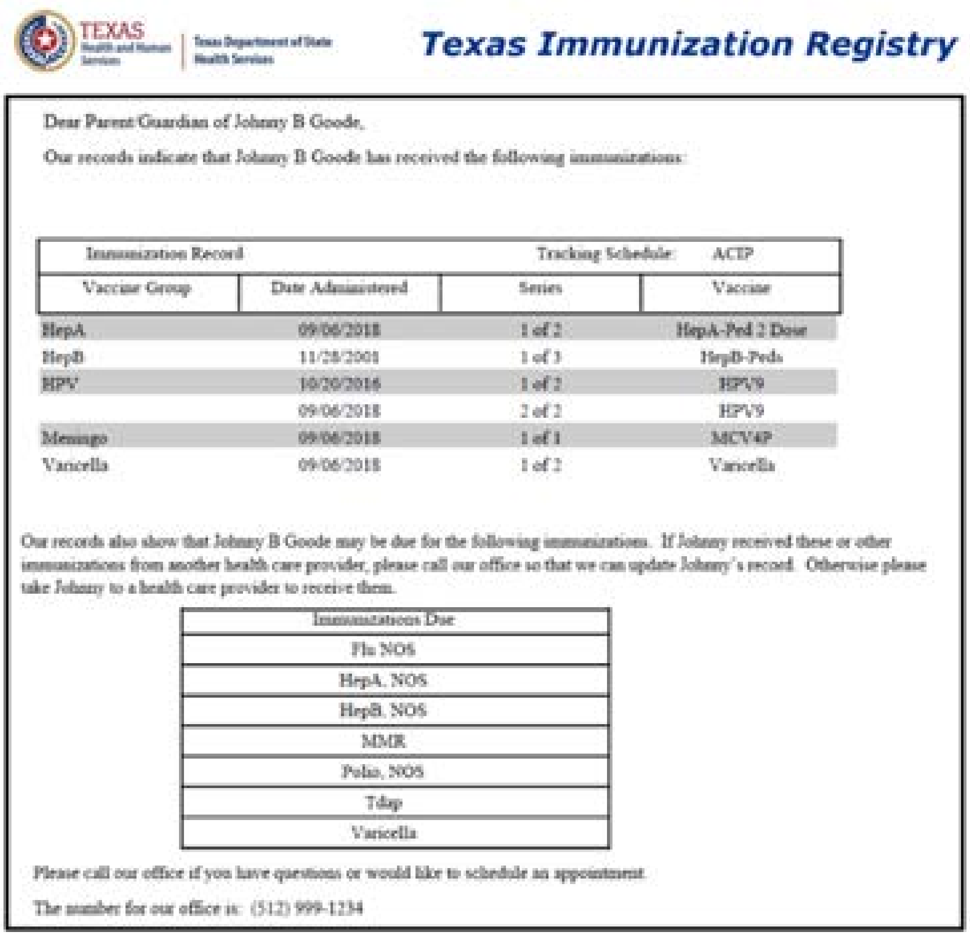
Figure 8: Generate Reminder Letter

3. Users are redirected back to the Reminder Request and Output Status screen. If needed, click the Refresh button until the status is "Ready." See Figure 8: Generate Reminder Letter Steps 3 and 4.

4. The Reminder Letter will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish.

- For clients who have selected Spanish as their "Language Spoken" option in the Client Information tab of their client's record, the Reminder Letter will be output in Spanish.

- Click on the Reminder Letter hyperlink to view or print the letters in a PDF file. See Figure 9: Reminder Letter Example.



TEXAS Health and Human Services | Texas Department of State Health Services

Texas Immunization Registry

Dear Parent/Guardian of Johnny B Goode,

Our records indicate that Johnny B Goode has received the following immunizations:

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
HepA	09/06/2018	1 of 2	HepA-Ped 2 Dose
HepB	11/28/2001	1 of 3	HepB-Peds
HPV	10/20/2016	1 of 2	HPV9
	09/06/2018	2 of 2	HPV9
Meningo	09/06/2018	1 of 1	MCV4P
Varicella	09/06/2018	1 of 2	Varicella

Our records also show that Johnny B Goode may be due for the following immunizations. If Johnny received these or other immunizations from another health care provider, please call our office so that we can update Johnny's record. Otherwise please take Johnny to a health care provider to receive them.

Immunizations Due
Flu NOS
HepA, NOS
HepB, NOS
MMR
Polio, NOS
Tdap
Varicella

Please call our office if you have questions or would like to schedule an appointment.

The number for our office is: (512) 999-1234

Figure 9: Reminder Letter Example

Reminder Card

The Reminder Card output option allows users to generate a standard reminder card for the parent/guardian for each client returned on the query. The card allows room at the top for a greeting. The body of the card includes the client's recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number.

To generate Reminder Cards, follow the steps below (see Figure 10: Generate Reminder Card and Figure 11: Generate Reminder Card).

1. Under the Additional Input column, users have the option of entering:

    a. Report Name - If a Report Name is not indicated, the report will simply be named "Reminder Card" on the Reminder Report Status screen with the date it was generated. Enter up to 20 characters in this field.

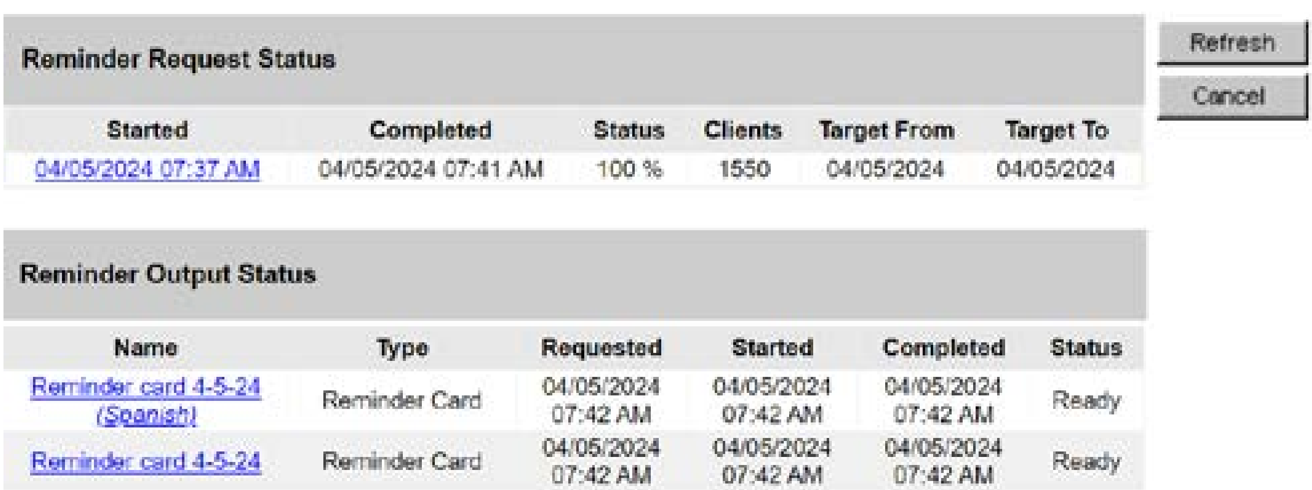
    b. Free Text - Includes a maximum of 400 characters in this field. This information will be displayed as the closing for each card. c. Phone - The telephone number is presented in the closing for each of the card.

2. Click the Reminder Letter hyperlink.

Figure 10: Generate Reminder Card

3. Users are redirected back to the Reminder Request and Output Status screen, and if needed click the Refresh button until the status is "Ready."

4. The Reminder Card will be listed at the top of the Output Status section as an active hyperlink available in both English and Spanish. Click on the Reminder Card hyperlink to view or print the letters in a PDF file.



Refresh | Cancel

Reminder Request Status

Started	Completed	Status	Clients	Target From	Target To
04/05/2024 07:37 AM	04/05/2024 07:41 AM	100 %	1550	04/05/2024	04/05/2024

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Reminder card 4-5-24 (Spanish)	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready
Reminder card 4-5-24	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready

Figure 11: Generate Reminder Card

See Figure 12: Generate Reminder Card Example.

Dear Parent of Johnny B Goode

Our records show that Johnny B Goode may be due for the following immunizations. If Johnny received these or other immunizations from another health care provider, please call our office so that we can update Johnny's record. Otherwise please schedule an appointment for Johnny to receive them.

Vaccine Group	Date Needed
Influenza-seasnl	07/01/2019

The number for our office is: (512) 999-1234
Please call our office if you have questions or would like to schedule an appointment.

Figure 12: Generate Reminder Card Example

Mailing Labels

The labels output option produces 30 labels per screen on Avery Mailing Labels #5160.

See Figure 13: Generate Reminder Mailing Labels Example.

To the Parent/Guardian of: ANCE MARLIN BOB 234 MULBERRY LANE AUSTIN TX 78749	To the Parent/Guardian of: LANI BOB 123 MULBERRY LANE AUSTIN TX 78723	To the Parent/Guardian of: LARRY BOB 123 MULBERRY DRIVE AUSTIN TX 78749

Figure 13: Generate Reminder Mailing Labels Example

Client Query

Listing The Client Query Listing displays contact information for those clients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every client that was returned in the report query process.

See Figure 14: Client Query Listing Example.

Report run on : 08/02/2019 **Client Query Listing** Page 1 of 1

Client Name (F/M/L)	Phone Number	Address	City/State/ZIP
JOHNNY B GOODE – 08/02/2002	(512) 123-4567	9934 PRIVATE ROAD	ANYTOWN, TX 79999-

Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)
HepA	Complete	1) 02/13/2006 2) 09/09/2014
HepB	Complete	1) 02/05/2002 2) 03/05/2002 3) 09/17/2002
Hib	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)
HPV	Complete	1) 09/09/2014 2) 01/30/2017
Influenza-seasnl	07/01/2019	1) 11/23/2010 2) 11/03/2017
Meningo	Complete	1) 08/13/2014 2) 06/04/2018
Meningococcal B	Complete	1) 06/04/2018 2) 07/12/2018
MMR	Complete	1) 08/12/2003 2) 02/13/2006
PneumoConjugate	Complete	1) 08/08/2002 2) 08/12/2003 3) 02/10/2004
Polio	Complete	1) 08/08/2002 2) 09/17/2002 3) 08/12/2003 4)
Td/Tdap	08/13/2024	1) 08/13/2014
Varicella	Complete	1) 02/10/2004 2) 02/13/2006 3) 08/13/2014

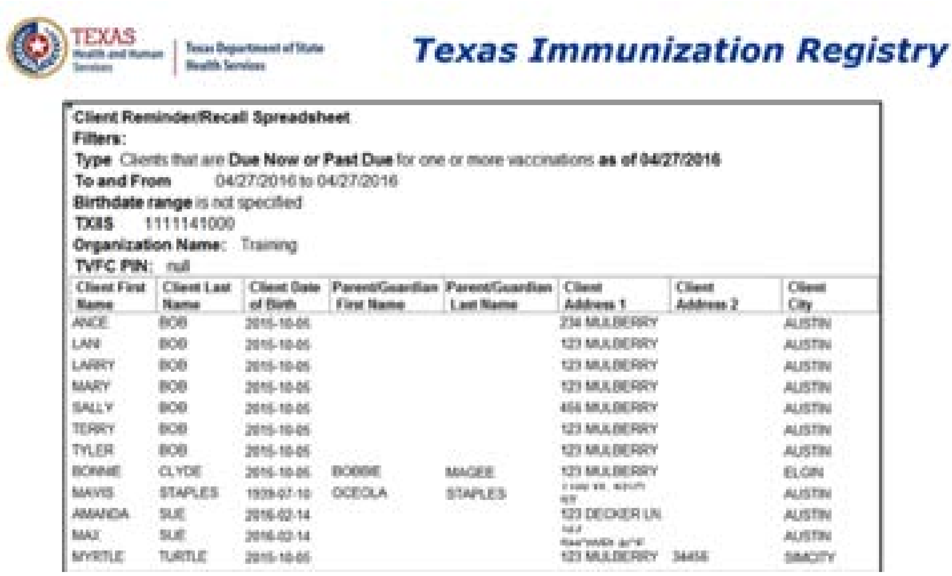
Figure 14: Client Query Listing Example

Extract Client

Data The Client Extract Data displays in an XML format and contains every client and their demographic information that was returned in the report query process.

Client Reminder/Recall Spreadsheet

The Client Extract Data displays client demographic information, immunization history, and recommendations for those clients identified as being due/overdue in the Reminder/Recall output in an Excel spreadsheet. This report lists every client that was returned in the report query process. See Figure 15: Reminder/Recall Spreadsheet Example.



Client Reminder/Recall Spreadsheet
Filters:
Type Clients that are Due Now or Past Due for one or more vaccinations as of 04/27/2016
To and From 04/27/2016 to 04/27/2016
Birthdate range is not specified
TXIIS 1111141000
Organization Name: Training
TVFC PIN: null

Client First Name	Client Last Name	Client Date of Birth	Parent/Guardian First Name	Parent/Guardian Last Name	Client Address 1	Client Address 2	Client City
ANCE	BOB	2015-10-05			234 MULBERRY		AUSTIN
LANI	BOB	2015-10-05			123 MULBERRY		AUSTIN
LARRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
MARY	BOB	2015-10-05			123 MULBERRY		AUSTIN
SALLY	BOB	2015-10-05			456 MULBERRY		AUSTIN
TERRY	BOB	2015-10-05			123 MULBERRY		AUSTIN
TYLER	BOB	2015-10-05			123 MULBERRY		AUSTIN
BONNIE	CLYDE	2015-10-05	BOBBIE	MAGEE	123 MULBERRY		ELGIN
MAVIS	STAPLES	1939-07-10	OCEOLA	STAPLES	[illegible]		AUSTIN
AMANDA	SUE	2016-02-14			123 DECKER LN		AUSTIN
MAX	SUE	2016-02-14			[illegible]		AUSTIN
MYRTLE	TURTLE	2015-10-05			123 MULBERRY	34456	SIMCITY

Figure 15: Reminder/Recall Spreadsheet Example.

To generate the Mailing Labels, Client Query Listing, Extract Client Data, and Client Reminder/ Recall Spreadsheet, follow the steps below.

See Figure 16: Generate Reminder Output Options Step 1-2.

Note: The reminder output options are generated one at a time.

1. Under the Additional Input column of the table enter a Report Name - if a Report Name is not indicated, the report will simply be named "Mailing Labels" or "Client List", or "Client XML", or "Client Reminder/Recall Spreadsheet" on the Reminder Report Status screen with the date and time it was generated. Enter up to 20 characters in each file name field.

2. Click the appropriate Output hyperlink: "Mailing Labels", "Client Query Listing", "Extract Client Data", or "Client Reminder/Recall Spreadsheet".

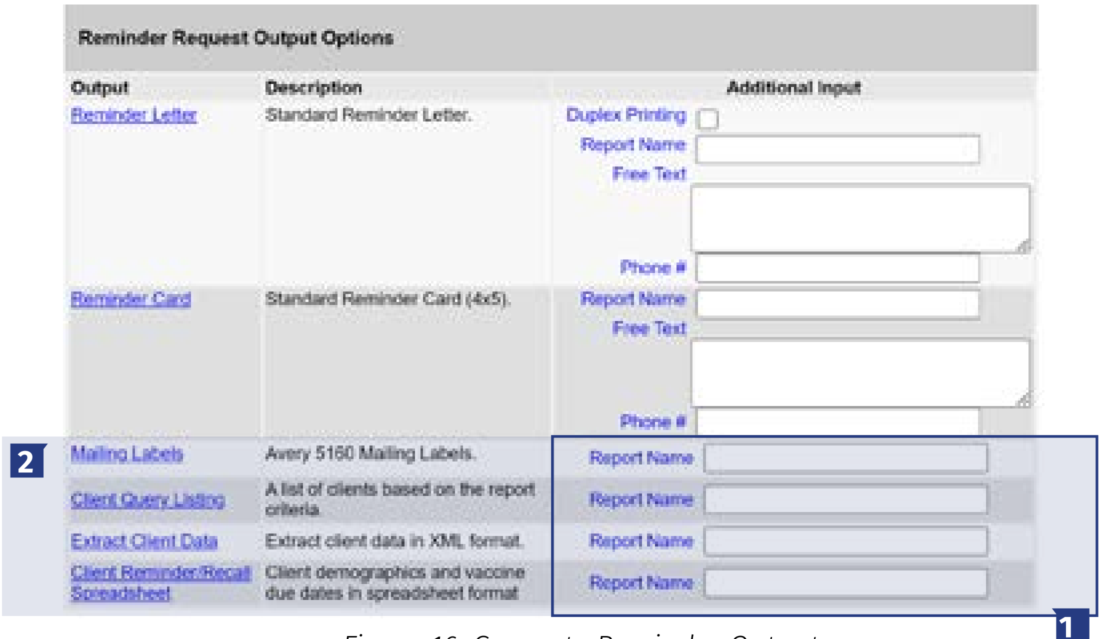


Figure 16: Generate Reminder Output

3. You will be redirected back to the Reminder Request Status and Output Status screen

(See Figure 17: Generate Reminder Output Options Step 3-4). Click the Refresh button until the status is "Ready."

4. Each reminder output will be listed in the Output Status section as an active hyperlink - click on the applicable option to open the output file.

Reminder Request Status

Refresh

Cancel

Started	Completed	Status	Clients	Target From	Target To
04/05/2024 07:37 AM	04/05/2024 07:41 AM	100 %	1550	04/05/2024	04/05/2024

Reminder Output Status

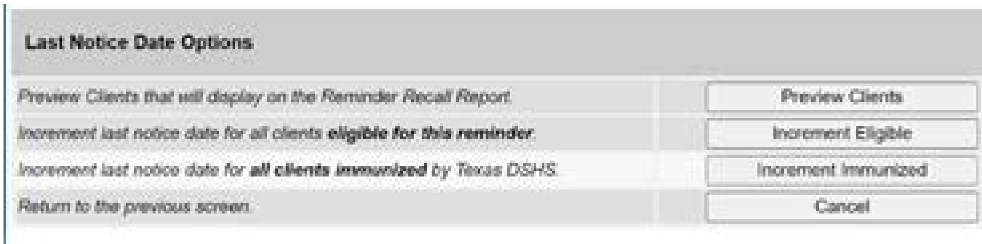
Name	Type	Requested	Started	Completed	Status
Reminder card 4-5-24 *(Spanish)*	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready
Reminder card 4-5-24	Reminder Card	04/05/2024 07:42 AM	04/05/2024 07:42 AM	04/05/2024 07:42 AM	Ready

Figure 17: Generate Reminder Output

Last Notice Date Options

The Reminder Request Process Summary screen allows users to reset the last notice date, which will affect future reminder/recall notices generated using this information.

See Figure 18: Reminder/Recall Last Notice Date Options.



Last Notice Date Options	
Preview Clients that will display on the Reminder Recall Report.	Preview Clients
*Increment last notice date for all clients **eligible for this reminder**.*	Increment Eligible
*Increment last notice date for **all clients immunized** by Texas DSHS.*	Increment Immunized
Return to the previous screen.	Cancel

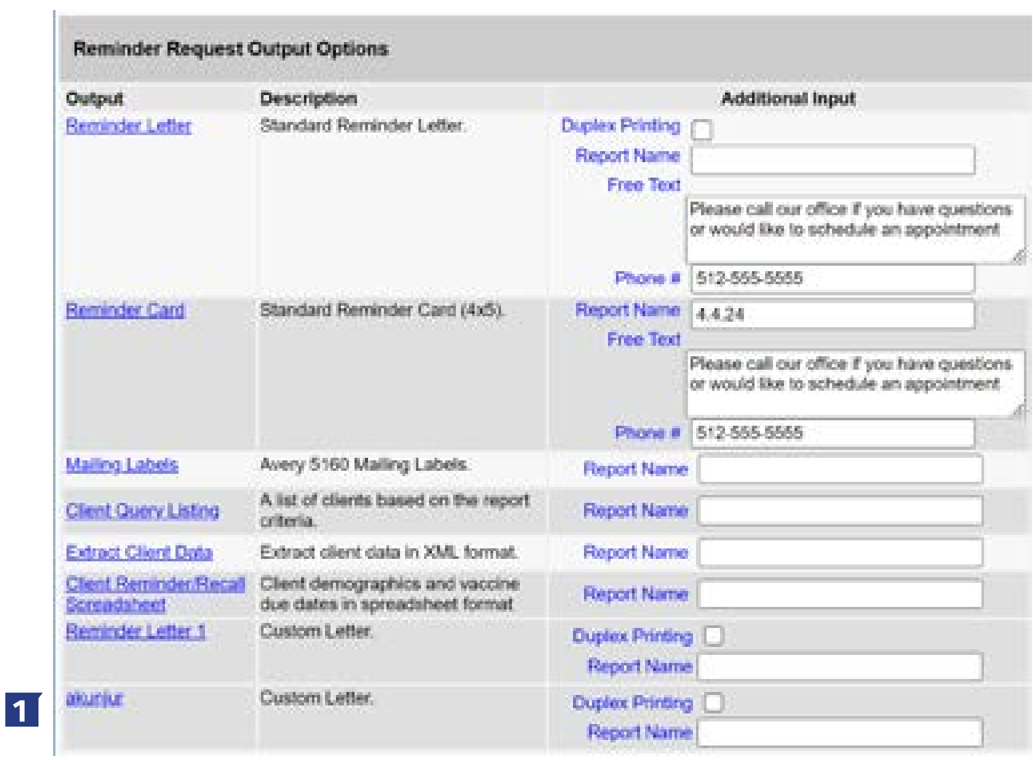
Figure 18: Reminder/Recall Last Notice Date Options

Preview Clients: view a list of clients included in the Reminder Recall Report. This information includes a hyperlink to each client's demographic record. This is the same screen that display if the Check Reminder List is selected from the Generate Report menu option.

Increment Eligible: used to reset the last notice date for all clients eligible for this reminder. The last notice date is viewable on the client's demographic record under the organization information section. Increment Immunized: used to increment the last notice date for all clients immunized by your organization.

Cancel: to return to the Reminder Request Status screen. Custom Letter In addition to the standard letter, ImmTrac2 allows users to create and store up to three custom letters to be used for reminders and recalls. Once a custom letter is created it is available for selection on the Reminder Request Output Option screen for the Reminder Report.

See Figure 19: Reminder Request Output Options.



Reminder Request Output Options

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing ☐ Report Name Free Text: Please call our office if you have questions or would like to schedule an appointment Phone #: 512-555-5555
Reminder Card	Standard Reminder Card (4x5).	Report Name: 4.4.24 Free Text: Please call our office if you have questions or would like to schedule an appointment Phone #: 512-555-5555
Mailing Labels	Avery 5160 Mailing Labels.	Report Name
Client Query Listing	A list of clients based on the report criteria.	Report Name
Extract Client Data	Extract client data in XML format.	Report Name
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name
Reminder Letter 1	Custom Letter.	Duplex Printing ☐ Report Name
1 akunjur	Custom Letter.	Duplex Printing ☐ Report Name

Figure 19: Reminder Request Output Options

Create a New Reminder/Recall Custom Letter

NOTE: One advantage of the Reminder/Recall Custom Letter is that you can choose to not include the client's immunization history in the letter if you do not want to include it. To create Reminder/Recall Custom Letters, follow the steps below.

See Figure 20: Generate Reminder/Recall Custom Letters.

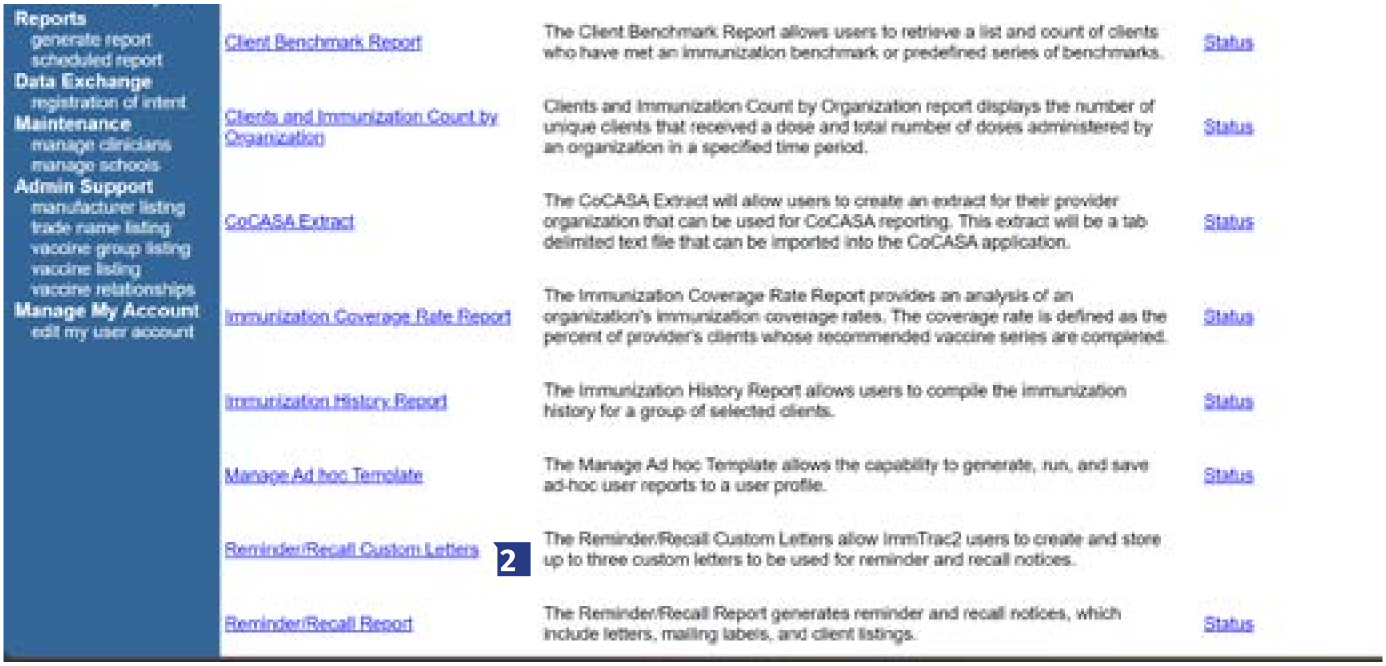


Figure 20: Generate Reminder/Recall Custom Letters

1. Click the Generate Report option from the menu panel.
2. Select Reminder/Recall Custom Letters.
3. On the Reminder/Recall Customer Letter screen, click the New Customer Letter link to begin creating the custom letter. See Figure 21: Reminder/Recall Custom Letters Step 3.

Figure 21: Generate Reminder/Recall Custom Letters

4. Fill out the template using Figure 22: Reminder/Recall Custom Letters Step 4 and also see the Reminder/Recall Custom Letters Options to help complete the customized template.

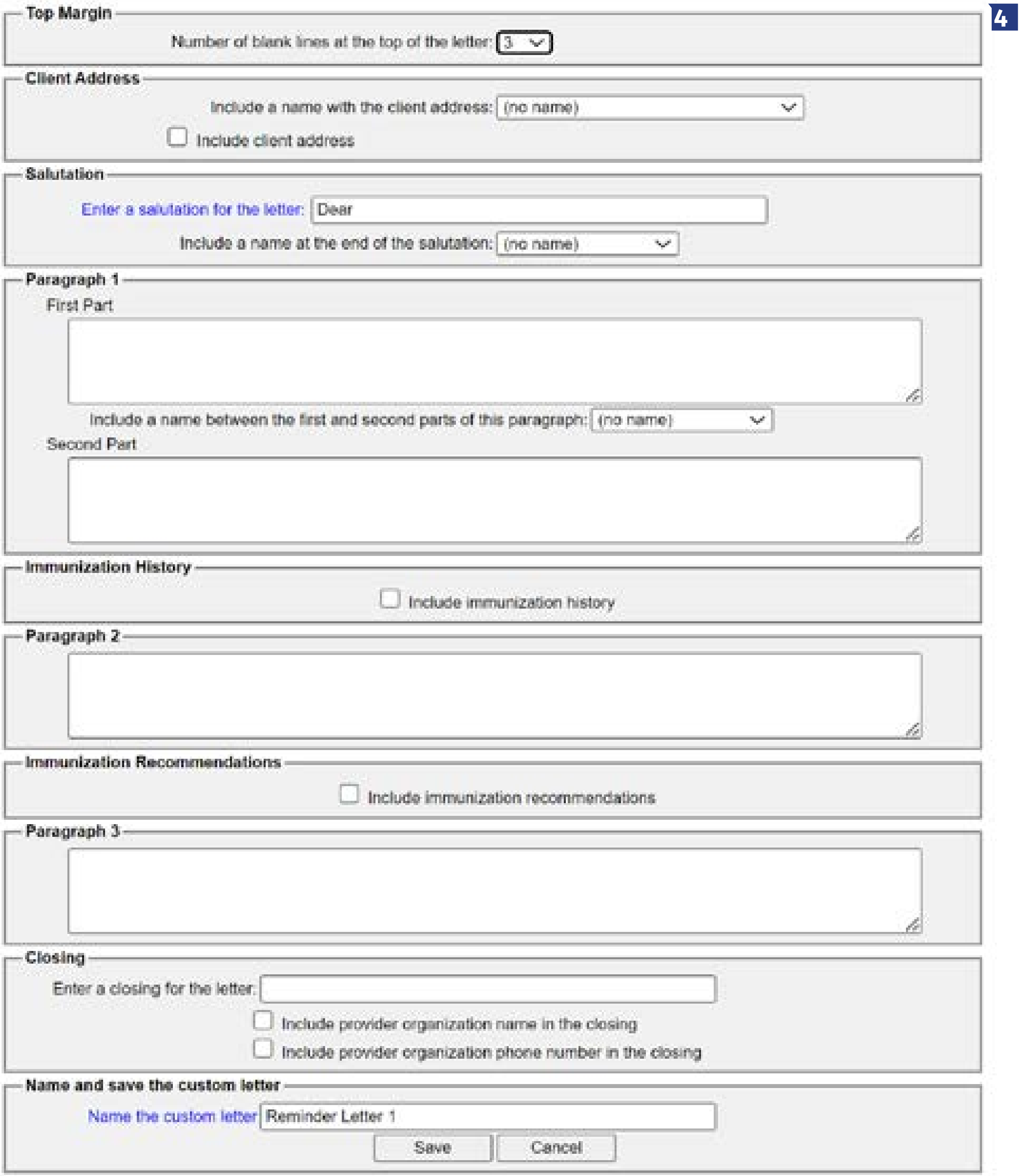


Figure 22: Generate Reminder/Recall Custom Letters

Reminder/Recall Custom Letter options:

- **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.
- **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, "Dear" or "Greetings." 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 of the client will show up after the salutation. If "Responsible Person" is chosen, the letter will read <salutation> Parent/Guardian of <client name>. For example, "Dean Parent/Guardian of Peggy Sue."
- **Paragraph 1 First Part.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Paragraph 1 Name Option.** Include a name between the first and second part of this paragraph: Choose the name to appear within the paragraph from the drop-down list. Select either parent/guardian, client name or no name.
- **Paragraph 1 Second Part.** If you chose to enter a name, add the remaining text for the first paragraph in this field.
- **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 "Include immunization history."
- **Paragraph 2.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Immunizations Recommended Option.** Check this box to include the immunization needed forecast for the client in the letter.
- **Paragraph 3.** Enter desired text. Enter up to 4,000 characters of text in this field.
- **Closing.** Enter a closing word or statement for the letter in this field. You have the option of checking a box to include the name of the provider organization in the closing, and another option of checking a box to include the phone number of the organization in the closing.

5. Enter the Customer Letter Name, and then Click the Save Figure 23: Reminder/Recall Custom Letters Data Step 5.

- The screen will refresh, but no message displays.
- Click the Cancel button. See button to return to the previous Reminder/Recall Customer Letters screen as seen in step 3, where the newly created letter displays as a hyperlink.

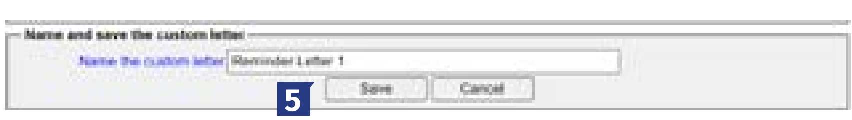


Figure 23: Generate Reminder/Recall Custom Letters

Edit a Reminder/Recall Custom Letter

To edit an existing Reminder/Recall Customer Letter, follow the steps below.
See Figure 24: Edit Reminder/Recall Custom Letters Step 1.

1. Once you have navigated to the Reminder/Recall Custom Letter screen, click the customer letter link.

Figure 24: Edit Reminder/Recall Custom Letters

2. Update the customer letter data or letter name as needed, and then click the Save button. See Figure 23: Reminder/Recall Custom Letters Data Table for details on each data field.

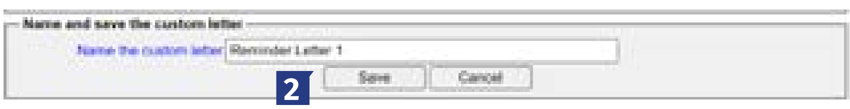


Figure 23: Generate Reminder/Recall Custom Letters

- The screen will refresh, but no message displays. (Not Shown)
- Click the Cancel button to return to the previous Reminder/Recall Customer Letters screen as seen in step 3. If the letter name was updated, the new name displays.

Delete a Reminder/Recall Custom Letter

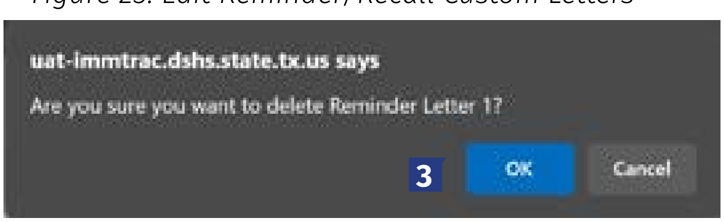
To delete an existing Reminder/Recall Customer Letters, follow the steps below.

See Figure 25: Delete Reminder/Recall Custom Letters Steps 1 and 2.

1. Once users have navigated to the Reminder/Recall Custom Letter screen, click the Delete

2. Click the OK button next to the letter to be deleted to delete the Reminder/Recall Custom Letter.

Figure 25: Edit Reminder/Recall Custom Letters



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