



TEXAS
Health and Human
Services

Texas Department of State
Health Services

The Texas Immunization Registry

Guide to the Modernized Reminder/Recall Report

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Introduction

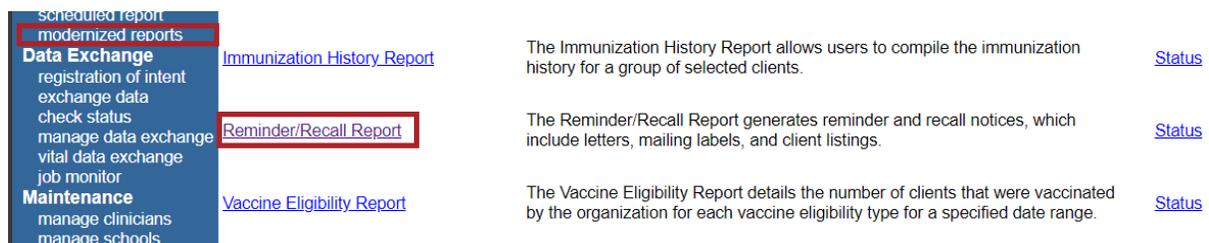
The Modernized Reminder/Recall Report generates client notices, including letters, cards, mailing labels, and client listings. This feature allows organizations to customize and send important reminders and recall notifications to clients. To successfully generate these notices, the following conditions in the client's ImmTrac2 record must be met:

- The client's status is "Active"
- The "Allow Reminder and Recall Contact?" indicator is set to "Yes"
- The client's address is complete.

Select the Modernized Reminder/Recall Report

To generate the Reminder/Recall Report:

- Login to ImmTrac2
- Click on “modernized reports” from the menu panel
- Select the Reminder/Recall Report.



The image shows a screenshot of the ImmTrac2 application interface. On the left is a blue sidebar menu with the following items: 'scheduled report', 'modernized reports' (highlighted with a red box), 'Data Exchange' (with sub-items: 'registration of intent', 'exchange data', 'check status', 'manage data exchange', 'vital data exchange', 'job monitor'), and 'Maintenance' (with sub-items: 'manage clinicians', 'manage schools'). To the right of the menu, three report links are listed: 'Immunization History Report', 'Reminder/Recall Report' (highlighted with a red box), and 'Vaccine Eligibility Report'. Further to the right, there are three paragraphs of text describing each report, each followed by a blue 'Status' link.

Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	Status
Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	Status
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.	Status

Figure 1: Reminder/Recall Report Link

Reminder Report Parameter Selection

The Reminder Report Parameter Selection screen is the Date Filter default page. It allows users to set filters to generate reports. It consists of filters and generates report panels.

The screenshot displays the 'Reminder Report Parameter Selection' interface. The top navigation bar includes the Texas Health and Human Services logo and the title 'Reminder Report Parameter Selection'. The left sidebar is divided into three main sections: 'Standard Filters' (containing 'Vaccine Filters' and 'Date Filters'), 'Additional Filters' (containing 'Geographic Filters' and 'Demographic Filters'), and a 'Generate Report' button. The main content area is titled 'DATE FILTERS' and features two date range selection panels. The 'Target Date Range' panel shows date pickers for 8/31/2022 and 8/30/2024. The 'Birth Date Range' panel shows date pickers for 10/11/2019 and 8/30/2024. Both panels include the instruction 'Enter the dates in the format MM/DD/YYYY'.

Figure 2: Reminder Report Parameter Selection

On the left panel are:

- Standard Filters
 - Vaccine Filters
 - Date Filters
- Additional Filters
 - Geographic Filters
 - Demographic Filters
- A “Generate Report” button

Once you have selected the appropriate filters, click the Generate Report button to create the report.

Standard filters

Vaccine Filters

Vaccine Group to Report On: Select one or multiple vaccines to report on. The default is “Select All” which includes all vaccine groups.

Vaccines to Report On: Specify the vaccine status:

- Vaccines Due Now,
- Vaccines Past Due, or
- Both (includes both due now and past due vaccines)

The screenshot displays the 'Reminder Report Parameter Selection' interface. On the left is a dark blue sidebar with navigation options: 'Standard Filters' (with 'Vaccine Filters' highlighted), 'Date Filters', 'Additional Filters' (with 'Geographic Filters' and 'Demographic Filters'), and 'Generate Report'. The main content area has a blue header with the Texas Department of State Health Services logo and the title 'Reminder Report Parameter Selection'. Below the header, a red-bordered box labeled 'VACCINE FILTERS' contains two sections: 'Vaccine Group to Report On' with a dropdown menu set to 'All', and 'Vaccines to Report On' with three radio button options: 'Vaccines Due Now' (selected), 'Vaccines Past Due', and 'Both'.

Figure 3: Vaccine Filters

Date Filters

1. **Target Date Range:** Entering a target date range will return clients who are due now, past due, or both for the selected vaccine(s) within the specified date range. Start and end dates are entered in the MM/DD/YYYY format.
Note: It is recommended to enter the end date first, followed by the start date. If you enter the start date first and it is a later year than the end date, the system will not allow you to proceed, even if you intend to update the end year afterward to match the start year.
2. **Birth Date Range:** Entering a birth date range will return clients whose birth dates fall between the entered dates. Dates are entered in the MM/DD/YYYY format.

The screenshot shows the 'Reminder Report' interface with the following elements:

- Header:** TEXAS Health and Human Services | Texas Department of State Health Services. Title: Reminder Report, Parameter Selection.
- Navigation Menu (Left):** Standard Filters, Vaccine Filters, **Date Filters** (highlighted with a red box), Additional Filters, Geographic Filters, Demographic Filters, Generate Report.
- DATE FILTERS (Red Box):**
 - Target Date Range:** Input fields for 8/31/2022 and 8/30/2024. Below the fields: Enter the dates in the format MM/DD/YYYY.
 - Birth Date Range:** Input fields for 10/11/2019 and 8/30/2024. Below the fields: Enter the dates in the format MM/DD/YYYY.

Figure 4: Date Filters

Additional Filters

Geographic Filters

Geographic Filters allow users to include only clients from specific geographic areas. The available options are:

- None,
- County,
- City, or
- Zipcode

Users can also choose None if they do not wish to apply a geographic filter.

GEOGRAPHIC FILTERS

Filter Report on Following Geography Type (Select One):

 None
 County
 City
 Zip Code

Figure 5: Geographic Filters – None

GEOGRAPHIC FILTERS

Filter Report on Following Geography Type (Select One):

 None
 County
 City
 Zip Code

County Name

All ▼

Figure 6: Geographic filters: County

GEOGRAPHIC FILTERS

Filter Report on Following Geography Type (Select One):

None
 County
 City
 Zip Code

City Name

All

Figure 7: Geographic filters: City

GEOGRAPHIC FILTERS

Filter Report on Following Geography Type (Select One):

None
 County
 City
 Zip Code

Zip Code

All

Figure 8: Geographic filters: Zip Code

Demographic Filters

Demographic Filters provide dropdown options which include:

- School
- Provider (PCP)
- Occupation
- Vaccine Eligibility
- Language
- High Risk Exemption

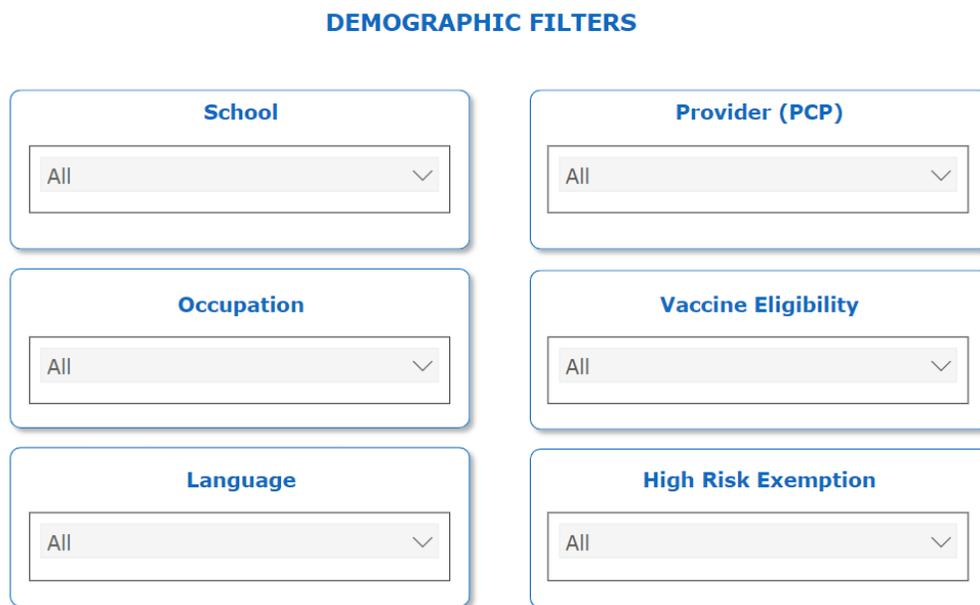


Figure 9: Demographic Filters

Generate Report

The Generate Report button allows users to review all the parameters or filters they have applied before submitting the report. The categories available for review include:

1. **Vaccine Filters:** Displays the selected vaccine groups and the “Vaccines to Report On” options (e.g., Vaccines Due Now, Vaccines Past Due).
2. **Date Filters:** Shows the Target Date Range and Birth Date Range set.
3. **Geographic Filters:** Displays the geographic type selected (County, City, Zipcode, or None).
4. **Demographic Filters:** Lists the options selected for categories such as School, Provider (PCP), Occupation, Vaccine Eligibility, Language, and High-Risk Exemption.

Once users review and confirm that all filters and options are correctly applied, they can click the “Confirm and Generate Report” button at the bottom of the page to generate the report.

GENERATE REPORT

Vaccine Filters

Vaccine Group Name

Zoster

Yellow Fever

Varicella

Typhoid

Tocilizumab

tickborne enceph

Tetanus

Td/Tdap

Tamiflu Suspension

Vaccines to Report On

Vaccines Due Now

Date Filters

Target Date Range		Birth Date Range	
8/31/2022	8/30/2024	10/11/2019	8/30/2024

Geographic Filters

Geography

None

Demographic Filters

School Name	Provider PCP	Occupation
N/A	N/A	N/A

Vaccine Eligibility	Language	High Risk Exemption
N/A	N/A	N/A

Confirm and Generate Report

Figure 10: Generate Report

Reminder Request Status

The report status is displayed as it is being processed. To speed up the processing time, users can click the Refresh button, at the top right of the page. Once the status reaches 100%, the Started column which shows the date and time, becomes a hyperlink.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
10/10/2024 03:52:17 PM		11%	0	08/31/2023	08/30/2024

Refresh Cancel

Figure 11: Reminder Request Status Processing

Click the blue hyperlink to access the “Reminder Request Process Summary” screen.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
10/22/2024 08:43:12 AM	10/22/2024 08:53:28 AM	100%	1695	01/31/2024	08/30/2024

Refresh Cancel

Figure 12: Reminder Request Status Complete hyperlink

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.

Immunization History Report	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	Status
Reminder/Recall Report	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	Status
Vaccine Eligibility Report	The Vaccine Eligibility Report details the number of clients that were vaccinated by the organization for each vaccine eligibility type for a specified date range.	Status

Figure 13: Reminder Recall Status link

Reminder Request Process Summary

The Reminder Request Process Summary page is divided into three sections: Reminder Request Criteria, Reminder Request Output Options, and Last Notice Date Options.

Reminder Request Criteria

This section displays the total number of clients eligible for reminders based on the search criteria. The Total Number of Clients Eligible for Reminder is displayed at the bottom of the screen. The criteria are outlined in five key steps, with the number of clients (if any) shown for each. The steps include:

1. Clients associated with the organization
2. Clients immunized by the user's organization
3. Clients who are marked as active
4. Clients with valid addresses
5. Clients who meet the vaccination status criteria (e.g., due or past due for vaccines)

Reminder Request Process Summary		
Reminder Request Criteria		
Step	Criteria Evaluated at this Step	Clients
1	Clients associated with <i>JOHN D. Children's Health Clinic</i> .	9444
2	Clients immunized by <i>JOHN D. Children's Health Clinic</i> .	9435
3	Clients that are active within <i>Lubbock Children's Health Clinic</i> and allow Reminder Contact . Additional criteria includes: <ul style="list-style-type: none">• Clients born between 8/30/1924 and 8/30/2024;• School is not specified;• Provider is not specified;	6002
4	Clients that have a Valid Address . Additional criteria includes: <ul style="list-style-type: none">• City is not specified;• Zip Code is not specified;	4839
5	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">• Clients that are Past Due for one or more vaccinations between 1/31/2024 to 8/30/2024;• Use the following vaccine groups: DTP/aP, HepA, HepB, HPV;• Use tracking schedule associated with each client;	1695
Total Number of Clients Eligible for Reminder		1695

Figure 14: Reminder Request Criteria

Reminder Request Output Options

This section provides a link to access the Reminder Recall letters and cards. A “View Reminder Report” hyperlink appears only if one or more clients were identified based on the search parameters entered.

Reminder Request Output Options		
Output	Description	Additional Input
View Reminder Report	View Reminder Report Standard Template	

Figure 15: Reminder Request Output Options

Last Notice Date Options

Last Notice Date Options	
<i>Preview Clients that will display on the Reminder Report.</i>	<input type="button" value="Preview Clients"/>
<i>Increment last notice date for all clients eligible for this reminder.</i>	<input type="button" value="Increment Eligible"/>
<i>Increment last notice date for all clients immunized by CONTROL MEDICAL GROUP</i>	<input type="button" value="Increment Immunized"/>
<i>Return to the previous screen.</i>	<input type="button" value="Cancel"/>

Figure 16: Last Notice Date Options

Preview Clients

The “Preview Clients” button displays a list of generated clients along with hyperlinks to their names. Clicking a client’s name takes you directly to view the client’s record, which is the same profile found using either the Basic or Smart search. This feature provides quicker access to a client’s record, allowing for updates or edits without starting a new search. To access a profile, click the client’s hyperlink.

Preview Clients					<input type="button" value="Return to Reminder Recall"/>
Client Name(LN, FN M)	Birth Date	Address	City	Zip	
JOHN DOE	02/01/1900	308 MANORR DR	BROWN	76000	
JANE DOE	03/02/1800	1234 WONDERFUL APT A	LUBBOCK	79000	
ADAM DOE	10/17/1996	PO BOX 000	RIVER	70000	

Figure 17: Preview Clients

Increment Eligible

Selecting Increment Eligible updates each client’s record with the Last Notice Date, which reflects the most recent date a reminder was sent. Users can reference this date to decide if a client should be included in the next reminder or recall notice, helping to avoid sending reminders too soon or creating duplicate letters. It allows users to verify the most recent date on which the Increment Eligible status was updated.

To view this information:

1. Select the “**Increment Eligible**” button. This will refresh the page to load the relevant details.
2. After the page refreshes, click on the “**Preview Client**” button located above it.
3. Locate the client’s name of your choice in the list, and click the hyperlink. This will take you to the Client’s record page, labeled “**View Client.**”
4. On the Client Profile page, expand the “**Organization Information**” section by clicking the dropdown arrow.
5. Find the “**Last Increment Date**” below the “**Allow Reminder and Recall Contact?**” checkbox. This date will reflect the last date when the “Increment Eligible” button was selected.

Last Notice Date Options

Preview Clients that will display on the Reminder Report.

*Increment last notice date for all clients **eligible for this reminder.***

*Increment last notice date for **all clients immunized** by CONTROL MEDICAL GROUP*

Return to the previous screen.

Preview Clients

Increment Eligible

Increment Immunized

Cancel

Figure 18: Preview Client and Increment Eligible Button

Organization Information ▲

[\[back to top\]](#)

Status ACTIVE ▾

Date of Death

Provider- PCP ▾

Allow Reminder and Recall Contact? Yes ▾

* Tracking Schedule ACIP ▾

Last Notice 2024-10-25

Client Identifiers

Figure 19: Organization Information Dropdown

Increment Immunized

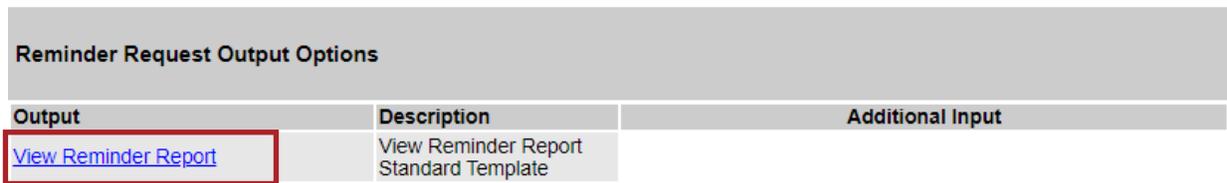
The Increment Immunized button updates the last notice date for all clients in this reminder/recall. When selected, it shows the date each client last received a notice or reminder related to their immunization. This helps users manage follow-up communications, ensuring that clients who have already been immunized are not sent duplicate reminders. It allows for better tracking of clients needing further reminders based on their immunization status.

Cancel

The Cancel button returns the user to the previous page, which is the processing page.

Output Options

Click the “View Reminder Report” link under Reminder Request Output Options.



Reminder Request Output Options		
Output	Description	Additional Input
View Reminder Report	View Reminder Report Standard Template	

Figure 20: View Reminder Report Link

When the “View Reminder Report” link is selected the dashboard opens, displaying an overview of the report. This dashboard is divided into multiple tabs that help organize the report into sections. The available tabs are:

- Report Navigation,
- Reminder Letter,
- Reminder Card,
- Mailing Labels, and
- Client List

Report Navigation

This section provides instructions on how to navigate the dashboard, review the report, and export the data to various formats. See Figure 20: Report Navigation.



How do you export your reports?



Note: All outputs are based of the ACIP Tracking Schedule

Figure 21: Report Navigation

Reminder Letter

This personalized letter generated for each client includes their tracking schedule, immunization records, vaccine past due, and vaccines due now.

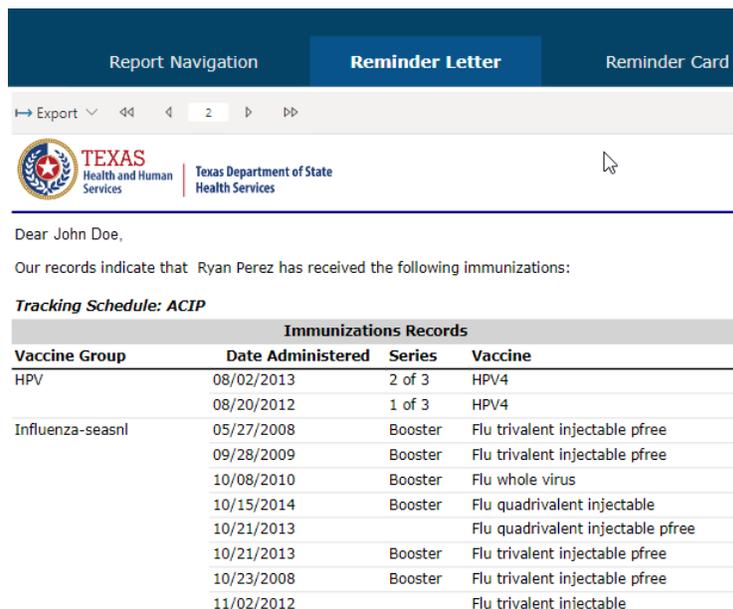


Figure 22: Reminder Letter

Reminder Card

A shorter version of the Reminder Letter. While still a letter, it contains less detailed information and focuses only on immunizations currently due.

The screenshot shows the 'Reminder Card' report interface. At the top, there is a blue header with the Texas Department of State Health Services logo and the text 'Reminder Report Reminder Card'. Below the header is a navigation bar with three tabs: 'Report Navigation', 'Reminder Letter', and 'Reminder Card' (which is selected). Underneath the navigation bar is an 'Export' dropdown menu and a page number '1'. The main content area features the Texas Department of State Health Services logo and a salutation: 'Dear Parent/Guardian of Bill Jones,'. The text below the salutation reads: 'Our records also show that Bill Jones may be due for the following immunizations. If Bill received these or other immunizations from another health care provider, please call our office so that we can update Bill's record.' Below this text is a table titled 'Immunizations Due' with two columns: 'Vaccine Group' and 'Date Needed'. The table lists five immunizations: SARS-COV2 (5/19/2019), DTP/aP (11/19/2022), Influenza-seasonal (7/1/2024), MMR (11/19/2022), Polio (11/19/2022), and Varicella (11/19/2022). At the bottom of the page, the office phone number is listed as '(512) 123-4567'.

Vaccine Group	Date Needed
SARS-COV2	5/19/2019
DTP/aP	11/19/2022
Influenza-seasonal	7/1/2024
MMR	11/19/2022
Polio	11/19/2022
Varicella	11/19/2022

Figure 23: Reminder Card

Mailing Labels

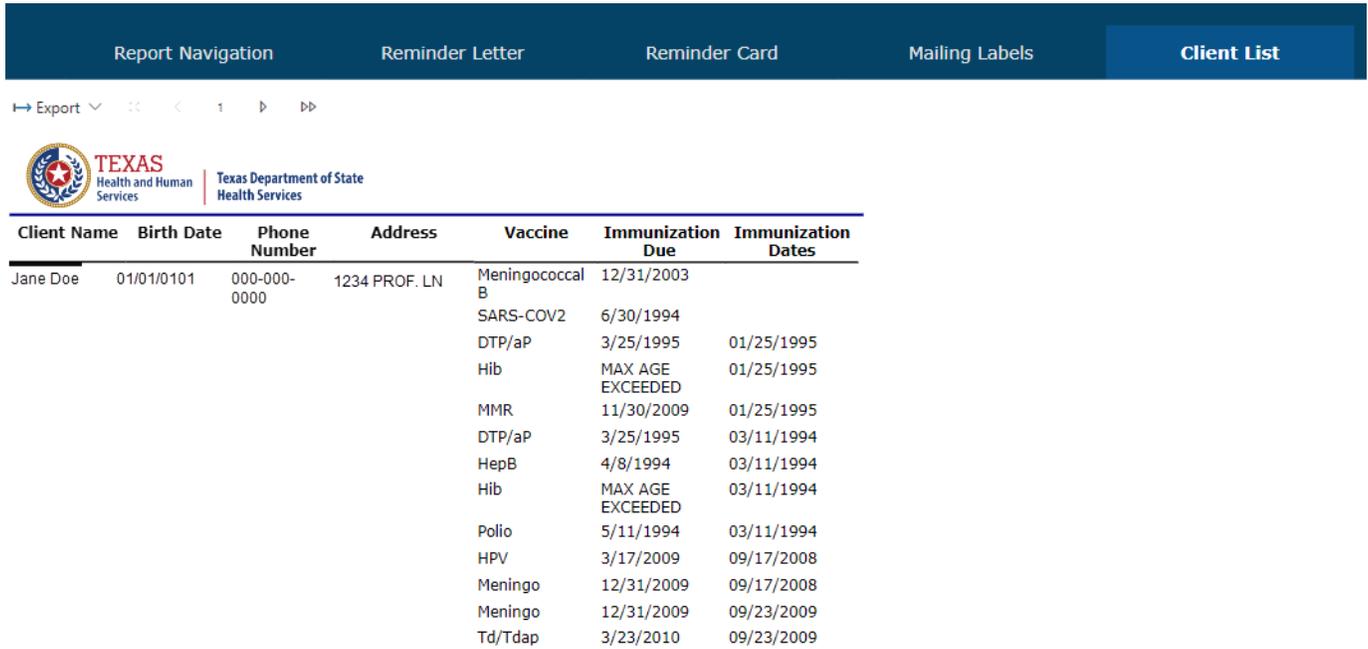
This section generates mailing labels for each client's address, making it easy for providers to mail letters.

The screenshot shows the 'Mailing Labels' report interface. At the top, there is a blue header with the Texas Department of State Health Services logo and the text 'Mailing Labels'. Below the header is a navigation bar with four tabs: 'Report Navigation', 'Reminder Letter', 'Reminder Card', and 'Mailing Labels' (which is selected). Underneath the navigation bar is an 'Export' dropdown menu and a page number '1'. The main content area displays two mailing labels. The first label is for Jane Doe, located at 1234 John Doe Drive, Austin, TX 79000. The second label is for Mary Brown, located at 00000 Believe RD, Austin, TX 79100.

Figure 24: Mailing Labels

Client List

Provides a comprehensive list of all the clients in the report, specifically those associated with the organization.



Client Name	Birth Date	Phone Number	Address	Vaccine	Immunization Due	Immunization Dates
Jane Doe	01/01/0101	000-000-0000	1234 PROF. LN	Meningococcal B	12/31/2003	
				SARS-COV2	6/30/1994	
				DTP/aP	3/25/1995	01/25/1995
				Hib	MAX AGE EXCEEDED	01/25/1995
				MMR	11/30/2009	01/25/1995
				DTP/aP	3/25/1995	03/11/1994
				HepB	4/8/1994	03/11/1994
				Hib	MAX AGE EXCEEDED	03/11/1994
				Polio	5/11/1994	03/11/1994
				HPV	3/17/2009	09/17/2008
				Meningo	12/31/2009	09/17/2008
				Meningo	12/31/2009	09/23/2009
				Td/Tdap	3/23/2010	09/23/2009

Figure 25: Client List

Each tab provides a different view or function related to the report, which can be exported through various formats.

Download and Export Report

The Export tab is located on the far left beneath any of the following tabs: Reminder Letter, Reminder Card, Mailing Labels, and Client List.

To download and export the report, click the Export tab and choose from the available export options.

The available export formats include:

- Microsoft Excel
- PDF
- Accessible PDF
- Comma Separated Values (.CSV)
- Microsoft PowerPoint
- Microsoft Word
- Web Archive
- XML

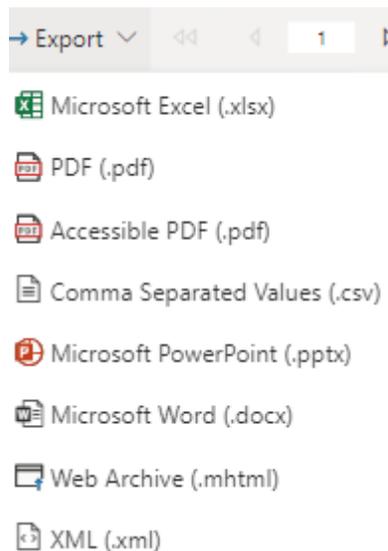


Figure 26: Export Data

