

# Guide to the Reminder/Recall Report

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## 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 Steps 1-2

See Figure 1: Generate Reminder/Recall Report Steps 1-2.

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**.

Clients manage client enter new client edit consent information	Reports Available		
	Generate Report	Description	Output
Immunizations manage immunizations	<a href="#">CoCASA Extract</a>	The CoCASA Extract will allow users to create an extract for their provider organization that can be used for CoCASA reporting. This extract will be a tab delimited text file that can be imported into the CoCASA application.	<a href="#">Status</a>
Schools manage list find student check school report	<a href="#">Immunization Coverage Rate Report</a>	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	<a href="#">Status</a>
Reports <b>generate report</b> <b>1</b> scheduled report	<a href="#">Immunization History Report</a>	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	<a href="#">Status</a>
Maintenance manage clinicians manage schools	<a href="#">Manage Ad hoc Template</a>	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.	<a href="#">Status</a>
Admin Support manufacturer listing trade name listing vaccine group listing vaccine listing vaccine relationships	<a href="#">Reminder/Recall Custom Letters</a>	The Reminder/Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.	<a href="#">Status</a>
Manage My Account edit my user account change my password	<a href="#">Reminder/Recall Report</a> <b>2</b>	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	<a href="#">Status</a>

Figure 1: Generate Reminder/Recall Report Steps 1-2

## Generate Reminder/Recall Report Steps 3-6

See Figure 2: Generate Reminder/Recall Report Steps 3-6.

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.

The screenshot shows the 'Reminder/Recall Request' form with the following sections highlighted:

- Step 3:** 'Create New List ...' button.
- Step 4:** 'Indicate the Tracking Schedule ...' section, including radio buttons for 'Use Tracking Schedule Associated with Each Client' and 'Use Tracking Schedule Selected for All Clients', and a dropdown menu.
- Step 5:** 'Select the Vaccine Group To Report on ...' section, including radio buttons for 'Use All Vaccine Groups', 'Use Vaccine Groups Selected', 'Vaccines Due Now', 'Vaccines Past Due', and 'Both'. It also features a list of vaccines (Adeno, Amantadine) with 'Add' and 'Remove' buttons.
- Step 6:** 'Select Subpotent Recall ...' section, including a checkbox for 'Use Subpotent Vaccinations'.

Figure 2: Generate Reminder/Recall Report Steps 3-6

## Generate Reminder/Recall Report Steps 7-12

See Figure 3: Generate Reminder/Recall Report Steps 7-12.

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

**Select the School & Primary Care Provider ...** 7

School        Provider (PCP)

**Enter Additional Demographic Criteria ...** 8

City       Zip Code       County    
 Language        Vaccine Eligibility    
 Occupation    
 High Risk/Exemptions

**Enter the Date Criteria ...** 9

NOTE: If Target Date is blank, today's date will be used.

 Target Date Range      From        To    
 Date of Birth Range      From        To    
 Age Range

**Select the Vaccine Groups to Display ...** 10

Use All Vaccine Groups  
 Use Vaccine Groups Selected

Adeno	▲	Add	
Amantadine	▼	Remove	

**Specify How to Sort the Report Data ...** 11

Sort 1<sup>st</sup> By               Sort 3<sup>rd</sup> By           
 Sort 2<sup>nd</sup> By               Sort 4<sup>th</sup> By

Save & Generate	Generate	Cancel
-----------------	----------	--------

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Figure 3: Generate Reminder/Recall Reports Steps 7-12

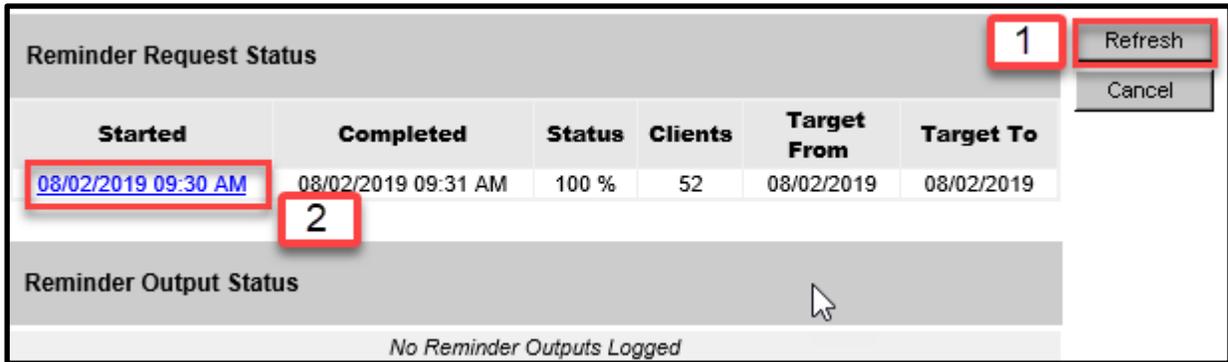
## Reminder Request Status Screen

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.

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.



Started	Completed	Status	Clients	Target From	Target To
<a href="#">08/02/2019 09:30 AM</a>	08/02/2019 09:31 AM	100 %	52	08/02/2019	08/02/2019

Reminder Output Status

No Reminder Outputs Logged

Figure 4: Status 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 associated with <i>COMMUNITY HEALTH CENTER</i>	2302
2	Clients immunized by <i>COMMUNITY HEALTH CENTER</i>	2301
3	Clients that are active within <i>COMMUNITY HEALTH CENTER CLINIC</i> and allow Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none"> <li>• Client Age Range 17 Year to 18 Year;</li> <li>• School is not specified;</li> <li>• Provider is not specified;.</li> </ul>	52
4	Clients that have a Valid Address. Additional criteria includes: <ul style="list-style-type: none"> <li>• City is not specified;</li> <li>• Zip Code is not specified.</li> </ul>	52
5	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> <li>• Clients that are Due Now or Past Due for one or more vaccinations as of 08/02/2019;</li> <li>• Use all vaccine groups;</li> <li>• Use tracking schedule associated with each client.</li> </ul>	52
<b>Total Number of Clients Eligible for Reminder</b>		<b>52</b>

*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#:** Enter in the phone number that will appear on the output report.

Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Query Listing</a>	A list of clients based on the report criteria.	Report Name <input type="text"/>
<a href="#">Extract Client Data</a>	Extract client data in XML format.	Report Name <input type="text"/>
<a href="#">Client Reminder/Recall Spreadsheet</a>	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>
<a href="#">Past Due Clients Immunization(s)</a>	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>

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*):

- 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.
- Click the **Reminder Letter** hyperlink.

Output <b>2</b>	Description	Additional Input <b>1</b>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text" value="8.02.19"/> x Free Text <input type="text" value="Please call our office if you have questions or would like to schedule an appointment."/> Phone # <input type="text" value="(512) 999-1234"/>

Figure 7: Generate Reminder Letter Steps 1-2

- 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.

Reminder Request Status						<b>3</b>
<a href="#">08/02/2019 09:30 AM</a>	08/02/2019 09:31 AM	100 %	52	08/02/2019	08/02/2019	<input type="button" value="Refresh"/> <input type="button" value="Cancel"/>

Reminder Output Status					
Name <b>4</b>	Type	Requested	Started	Completed	Status
<a href="#">8.02.19 Reminders</a>	Reminder Letter	08/02/2019 01:25 PM	08/02/2019 01:25 PM	08/02/2019 01:25 PM	Ready

Figure 8: Generate Reminder Letter Steps 3-4

- 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.



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 Steps 1-2* and *Figure 11: Generate Reminder Card Steps 3-4*).

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 Steps 1-2

- 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. See *Figure 12: Generate Reminder Card Example*.

Started	Completed	Status	Clients	Target From	Target To
<a href="#">08/02/2019 09:30 AM</a>	08/02/2019 09:31 AM	100 %	52	08/02/2019	08/02/2019

Name	Type	Requested	Started	Completed	Status
<a href="#">8.02.19 Remind Cards</a>	Reminder Card	08/02/2019 12:49 PM	08/02/2019 12:49 PM	08/02/2019 12:49 PM	Ready
<a href="#">9.01.19 Reminders</a>	Reminder Letter	08/02/2019 11:07 AM	08/02/2019 11:07 AM	08/02/2019 11:07 AM	Ready

Figure 11: Generate Reminder Card Steps 3-4

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-seasn1	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 (FML)	Phone Number	Address	City/State/ZIP
JOHNNY B GOODE - 08/02/2002	(512) 123-4567	9934 PRIVATE ROAD	ANYTOWN, TX 76999-
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-seasnI	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	1100 W. 4310 ST		AUSTIN
AMANDA	SUE	2016-02-14			123 DECKER LN.		AUSTIN
MAX	SUE	2016-02-14			123 SHOWPI ACE		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".



Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text" value="8.02.19 Mail Labels"/>
<a href="#">Client Query Listing</a>	A list of clients based on the report criteria.	Report Name <input type="text" value="8.02.19 Client List"/>
<a href="#">Extract Client Data</a>	Extract client data in XML format.	Report Name <input type="text" value="8.02.19 Extract"/>
<a href="#">Client Reminder/Recall Spreadsheet</a>	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text" value="8.02.19 Spreadsheet"/>

Figure 16: Generate Reminder Output Options Step 1-2

- 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."
- 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
Started	Completed	Status	Clients	Target From	Target To	Cancel
<a href="#">08/02/2019 09:30 AM</a>	08/02/2019 09:31 AM	100 %	52	08/02/2019	08/02/2019	

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">8.02.19 Spreadsheet</a>	Spreadsheet	08/02/2019 02:42 PM	08/02/2019 02:42 PM	08/02/2019 02:42 PM	Ready
<a href="#">8.02.19 Extract</a>	Client XML	08/02/2019 02:41 PM	08/02/2019 02:41 PM	08/02/2019 02:41 PM	Ready
<a href="#">8.02.19 Client List</a>	Client List	08/02/2019 02:41 PM	08/02/2019 02:41 PM	08/02/2019 02:41 PM	Ready
<a href="#">8.02.19 Mail Labels</a>	Mailing Labels	08/02/2019 02:39 PM	08/02/2019 02:39 PM	08/02/2019 02:39 PM	Ready

Figure 17: Generate Reminder Output Options Step 3-4

## 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 <b>eligible for this reminder</b> .	Increment Eligible
Increment last notice date for <b>all clients immunized by COMMUNITY HEALTH CENTER</b> .	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
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Query Listing</a>	A list of clients based on the report criteria.	Report Name <input type="text"/>
<a href="#">Extract Client Data</a>	Extract client data in XML format.	Report Name <input type="text"/>
<a href="#">Client Reminder/Recall Spreadsheet</a>	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>
<a href="#">Paul's Custom Letters</a>	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>

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 Steps 1-2*.

1. Click the **Generate Report** option from the menu panel.
2. Select **Reminder/Recall Custom Letters**.

Clients manage client enter new client edit consent information Immunizations manage immunizations Schools manage list find student check school report Reports generate report screened report Maintenance manage clinicians manage schools Admin Support manufacturer listing trade name listing vaccine group listing vaccine listing	Reports Available		
	Generate Report	Description	Output
	<a href="#">Immunization Coverage Rate Report</a>	The Immunization Coverage Rate Report provides an analysis of an organization's immunization coverage rates. The coverage rate is defined as the percent of provider's clients whose recommended vaccine series are completed.	<a href="#">Status</a>
	<a href="#">Immunization History Report</a>	The Immunization History Report allows users to compile the immunization history for a group of selected clients.	<a href="#">Status</a>
	<b>1</b> <a href="#">Manage Ad hoc Template</a>	The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.	<a href="#">Status</a>
	<a href="#">Reminder/Recall Custom Letters</a>	The Reminder/Recall Custom Letters allow ImmTrac2 users to create and store up to three custom letters to be used for reminder and recall notices.	
	<a href="#">Reminder/Recall Report</a>	The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.	<a href="#">Status</a>

Figure 20: Generate Reminder/Recall Custom Letters Steps 1-2

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*.

**Reminder/Recall Custom Letters**

(there are no letters for this provider organization)

[New Custom Letter](#) **3**

Figure 21: Generate Reminder/Recall Custom Letters Step 3

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.

<b>Top Margin</b>		Number of blank lines at the top of the letter: 3 ▼	4
<b>Client Address</b>			
Include a name with the client address: (no name) ▼			
<input type="checkbox"/> Include client address			
<b>Salutation</b>			
Enter a salutation for the letter: To the			
Include a name at the end of the salutation: Responsible person ▼			
<b>Paragraph 1</b>			
First Part			
We care about			
Include a name between the first and second parts of this paragraph: Client name ▼			
Second Part			
and your child's health, and that is why we're sending this letter. Here is your child's immunization history:			
<b>Immunization History</b>			
<input checked="" type="checkbox"/> Include immunization history			
<b>Paragraph 2</b>			
And here are the recommended immunizations:			
<b>Immunization Recommendations</b>			
<input checked="" type="checkbox"/> Include immunization recommendations			
<b>Paragraph 3</b>			
<b>Closing</b>			
Enter a closing for the letter: Thank you, and call if you have questions!			
<input checked="" type="checkbox"/> Include provider organization name in the closing			
<input checked="" type="checkbox"/> Include provider organization phone number in the closing			

Figure 22: Reminder/Recall Custom Letters Data Step 4

## 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**  button. See *Figure 23: Reminder/Recall Custom Letters Data Step 5.*

- The screen will refresh, but no message displays.
- Click the Cancel  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.

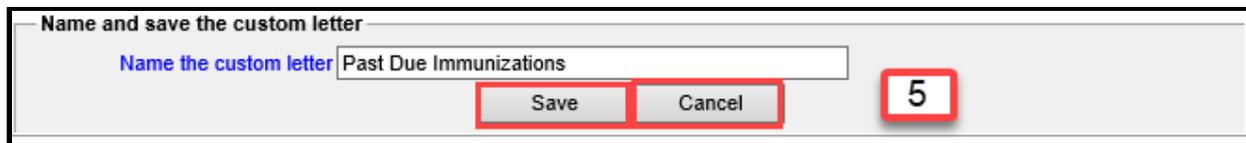


Figure 23: Reminder/Recall Custom Letters Data Step 5

### Edit a Reminder/Recall Custom Letter

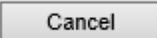
To edit an existing Reminder/Recall Customer Letter, follow the steps below.

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.



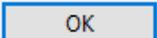
Figure 24: Edit Reminder/Recall Custom Letters Step 1

2. Update the customer letter data or letter name as needed, and then click the Save  button. See Figure 24: Reminder/Recall Custom Letters Data Table for details on each data field.
  - 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  button next to the letter to be deleted.
2. Click the OK  button to delete the Reminder/Recall Custom Letter.

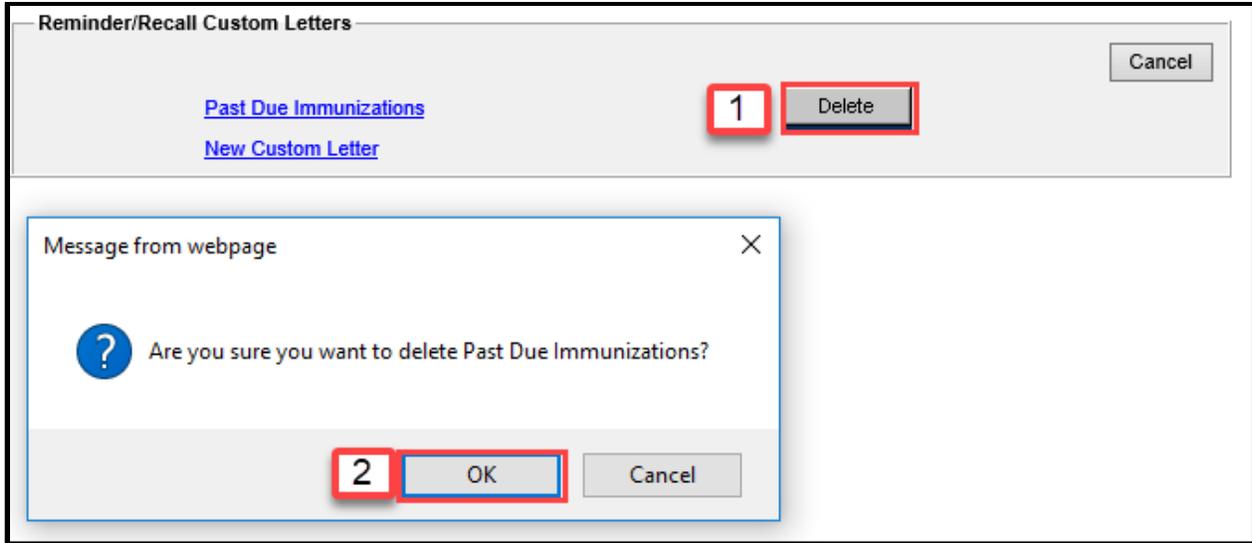


Figure 25: Delete Reminder/Recall Custom Letters Steps 1 and 2