



TEXAS
Health and Human
Services

**Texas Department of State
Health Services**



TEXAS
Health and Human
Services

**Texas Department of State
Health Services**

Reminder/Recall Report

**Texas Department of State Health Services
Immunization Section**

Introduction



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Training Objectives

- Discuss access levels in ImmTrac2 for school nurses,
- Demonstrate how to use filters and generate a Reminder/Recall report.
- Demonstrate how to generate a custom Reminder/Recall letter.



Agenda

- Special Notice for School Nurses
- Overview
- Using Filters to Select Clients for the Report
- Selecting an Output Option
- Creating Custom Reminder/Recall Letters



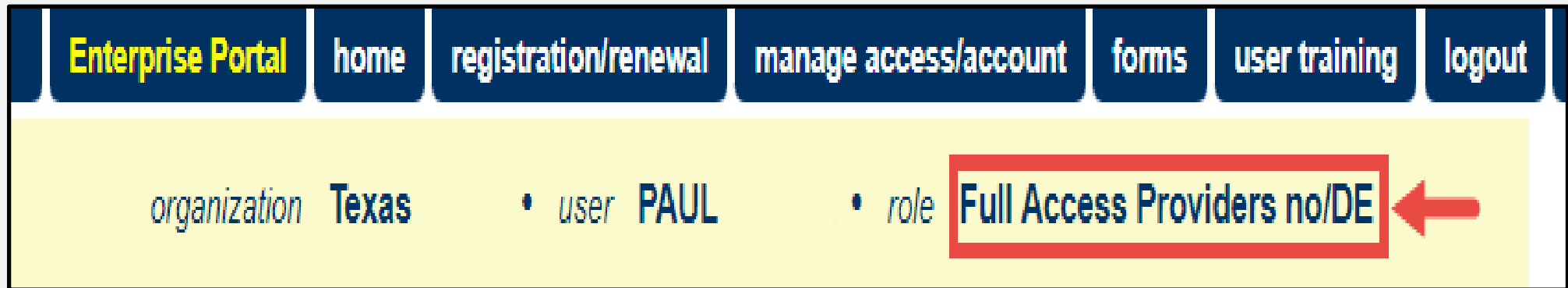
Special Notice for School Nurses



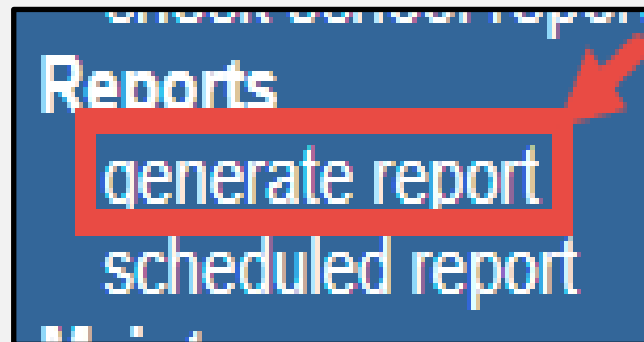
TEXAS
Health and Human
Services

Texas Department of State
Health Services

Generated Reports in ImmTrac2 Require “Full Access Provider” Privileges



The screenshot shows the ImmTrac2 user interface. At the top, there is a navigation bar with buttons for "Enterprise Portal", "home", "registration/renewal", "manage access/account", "forms", "user training", and "logout". Below this, a yellow box displays user information: "organization Texas", "user PAUL", and "role Full Access Providers no/DE". A red box highlights the role text, and a red arrow points to it from the right.



The screenshot shows a "Reports" menu with three options: "generate report", "scheduled report", and "check current report". A red box highlights the "generate report" option, and a red arrow points to it from the right.



Registered Nurses and Licensed Vocational Nurses: You Can Apply to be a Full-Access Provider

- If you are a “View Only Non-Provider” (see below) and an APRN, RN, or LVN at your school, you can apply to upgrade your access to Full-Access Provider.

The screenshot shows a navigation bar with the following items: Enterprise Portal (highlighted in yellow), home, registration/renewal, manage access/account, forms, user training, and logout. Below the navigation bar, the user information is displayed: organization Texas, user PAUL, and role View Only Non-Providers no/DE. The role text is enclosed in a red rectangular box, and a red arrow points to it from the right.



Here's How You Can Apply to be a Full-Access Provider!

- 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

- 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.



Full-Access Providers Can

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



Overview



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Overview of the Reminder/Recall Report

1. Filters in the report are used to select clients
2. Output can be:
 - Preformatted reminder letters,
 - Reminder postcards,
 - Mailing labels,
 - A client list,
 - A spreadsheet, or
 - A custom letter



Using Filters to Select Clients for the Report



Before You Begin

- 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 must be “Yes”.
 - Note “Last Notice” field for last Reminder/Recall sent to client.

Organization Information ▲

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

Status ▼

Date of Death

Provider- PCP ▼

Allow Reminder and Recall Contact? ▼

* Tracking Schedule ▼

Last Notice

Client Identifiers

Remove Identifier	Client Identifier	Primary
No Client Identifiers have been added for this client.		

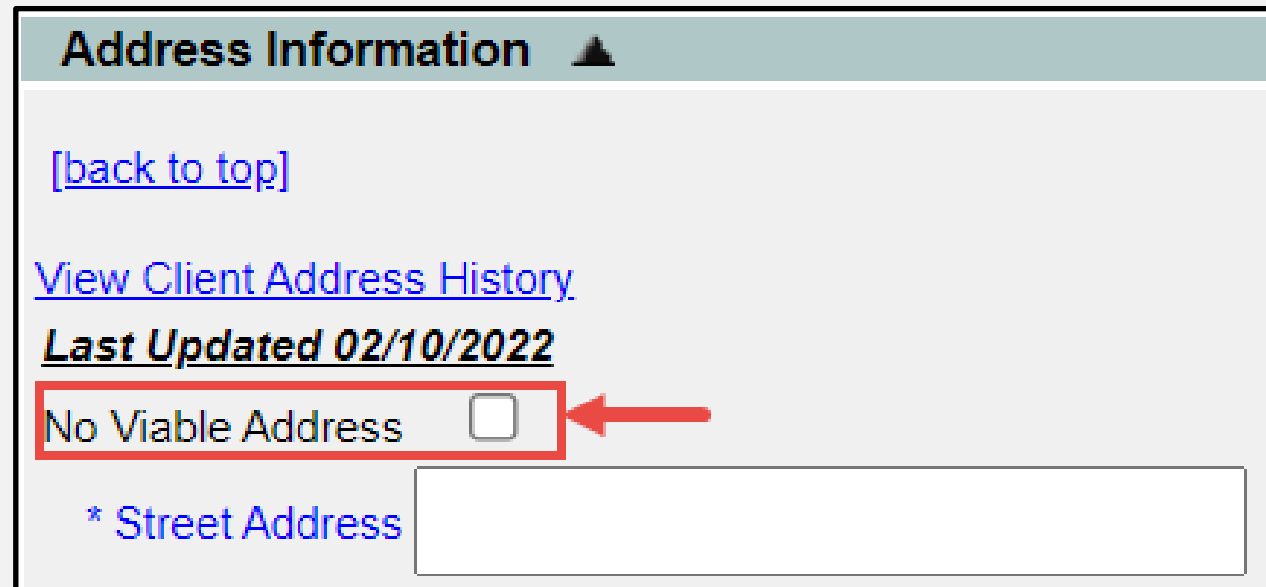
Add Client Identifier

Client Identifier



Good Address Required

- “No viable address” box in Address tab of client record must not be checked.
- The client must have a complete address.
- Not on this screen – clients must have an immunization by this organization.



Address Information ▲

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

[View Client Address History](#)

Last Updated 02/10/2022

No Viable Address ←

* Street Address



Create and Save a Criteria List

- Enter the Request Criteria Name if you want to save your selections, or
- Select a previous criteria list you have saved, or
- Just leave this option blank

Create New List ...

Enter new Reminder Recall Request Criteria List Name

Use a previous Reminder Recall Request Criteria



Indicate the Tracking Schedule

- Use tracking schedule associated with each client, or
- Use the tracking schedule selected for ALL clients (ACIP)

Indicate the Tracking Schedule ...

Use Tracking Schedule Associated with Each Client

Use Tracking Schedule Selected for All Clients

ACIP



Select Vaccine Groups to Filter

- Select which vaccines to filter on, or filter on all vaccines.
- Example: DTaP, Polio, MMR, HiB, HepB, Varicella, & Pneumococcal. The report returns all patients missing at least one dose from the vaccine groups you selected.
- Select to filter by vaccines due now, past due, or both.

Select the Vaccine Group To Report on ...

Use All Vaccine Groups
 Use Vaccine Groups Selected

Vaccines Due Now
 Vaccines Past Due
 Both

Pertussis
Plague
PneumoPoly 23
Rabies
Regeneron-DosePk
Regeneron-IgG1
Relenza
Remdesivir
Rotavirus
Rubella

Add
Remove

DTP/aP
Polio
MMR
Hib
HepB
Varicella
PneumoConjugate



Choice to Use Subpotent Vaccinations

- If checked, subpotent vaccinations count as vaccinations
- Examples of subpotent vaccinations:
 - 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

Select Subpotent Recall ...

Use Subpotent Vaccinations



Schools Can Be a Filter

- Use the drop-down box to filter by a school if desired.

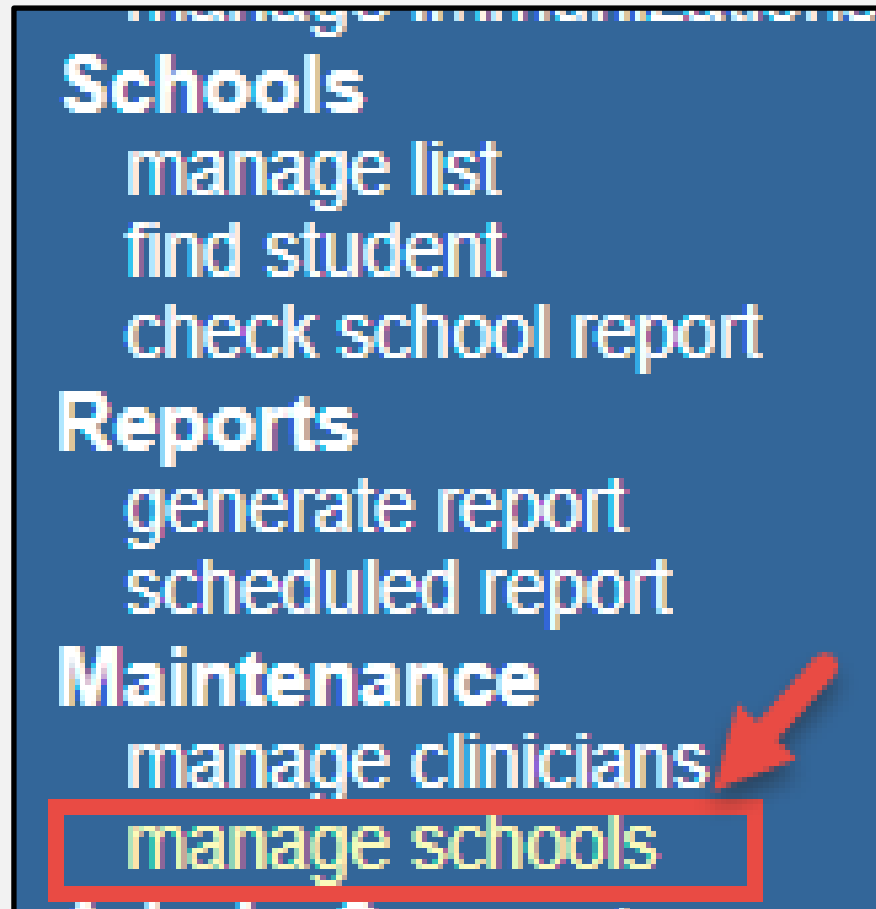
Select the School & Primary Care Provider ...

School	<input type="text"/>	Provider (PCP)	<input type="text"/>
--------	----------------------	-------------------	----------------------



1. Select “Manage Schools” in Menu Bar

- The “manage schools” link is under Maintenance.



2. Then Create a School

- Enter school name and select Save.

Select a School to Edit

School Name

Add School

* School Name

Street Address

Other Address P.O. Box

City State Zip -

Email

Telephone # () - Ext



3. Link the Client to a School

- Set in the Client Information tab of the client record.

Client Information ▲

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

* **Race (select all that apply)**

- American Indian or Alaska Native
- Asian
- Native Hawaiian or Other Pacific Islander
- Black or African-American
- White
- Other Race
- Recipient Refused

* **Ethnicity**

Most Recent Provider


Most Recent Provider Date

Birth Facility

School

Occupation

Language Spoken



4. In Reminder/Recall Report Select the School

- This will limit the report to clients who are associated with a particular school.

Select the School & Primary Care Provider ...

School

Provider (PCP)



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. Add (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. In the Reminder/Recall report, select the school from the drop-down list of schools.



Selecting a Primary Care Provider

Select the School & Primary Care Provider ...

School	<input type="text"/>	Provider (PCP)	<input type="text"/>
--------	----------------------	----------------	----------------------



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.

Organization Information ▲

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

Status	ACTIVE ▼	Date of Death	<input type="text"/>
Provider- PCP	<input style="border: 2px solid red;" type="text"/> ▼	Allow Reminder and Recall Contact?	Yes ▼
* Tracking Schedule	ACIP ▼	Last Notice	

Client Identifiers



Additional Demographic Criteria

- Filter by city, zip code, county, language, vaccine eligibility, occupation, or High Risk/Exemptions

Enter Additional Demographic Criteria ...

City	<input type="text"/>	Zip Code	<input type="text"/>	County	<input type="text" value="v"/>
Language	<input type="text" value="v"/>	Vaccine Eligibility	<input type="text" value="v"/>		
Occupation	<input type="text" value="v"/>				
High Risk/Exemptions	<input type="text" value="v"/>				



Zip Code, City, and County

- Set in the Address Information tab of the client record.

Address Information ▲

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

[View Client Address History](#)

Last Updated 01/27/2022

No Viable Address

* Street Address

Other Address

P.O. BOX

* Zip +4

* City State Country

* County

Phone Number - -

Extension

E-Mail



High Risk/Exemptions

- Set in the Client Comment field at bottom of the client record.

Client Comments (0) ▲

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


Client Comment listing

Start Date	End Date	Client Comment
<i>No Comments have been added for this client</i>		

Enter New Client Comment

* Client Comment

Start Date End Date







Date Criteria

- Entering a Target Date Range includes clients with vaccines that are due, past due, or both within the target date range you select. If no target date is selected, current date is used.
- AND you have a choice of
 - Not entering any other date criteria, or
 - Further restriction by entering a Date of Birth Range, or
 - Further restriction by entering an Age Range of clients.

Enter the Date Criteria ...

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

Example of Date Criteria

1. Clients 24 to 35 months old AND
2. Due or past due on one or more specified immms between 1/1/2019 and 1/1/2020 will be included.

Enter the Date Criteria ...

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

Target Date Range **2** From 01/01/2019  To 01/01/2020 

Date of Birth Range

Age Range **1** From 24



Select Which Vaccine Groups to Display

- Use all vaccine groups, or
- Select specific vaccine groups to display.

Select the Vaccine Groups to Display ...

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno
Amantadine
Anthrax
Bamlanivimab
Baricitinib
BCG
Cholera
Dengue Fever
Diphtheria

Add
Remove

DTP/aP
Polio
MMR
Hib
HepB
Varicella
PneumoConjugate



Select a Sorting Option

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

Specify How to Sort the Report Data ...

Sort 1 st By	Last Name ▼	Ascending ▼	Sort 3 rd By	▼	▼
Sort 2 nd By	First Name ▼	Ascending ▼	Sort 4 th By	▼	▼



Save and Generate

- Click **“Generate”** if the filter criteria doesn't need to be saved.
- Click **“Save and Generate”** to generate the report and save the filter criteria.
- Click **“Cancel”** to go back to the filter criteria.

Save & Generate

Generate

Cancel

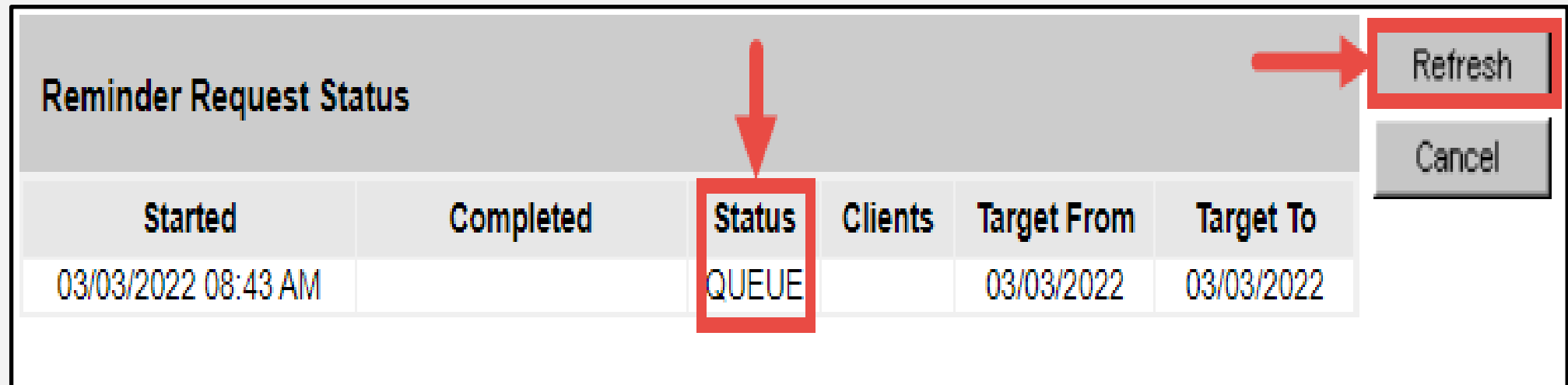


Selecting an Output Option



Reminder Request Status

- To check if the data is ready to be reported, click the “Refresh” button until the status is 100%.



Reminder Request Status

Started	Completed	Status	Clients	Target From	Target To
03/03/2022 08:43 AM		QUEUE		03/03/2022	03/03/2022

Refresh

Cancel

Report is Ready

- When the Status is 100%, the “Started” date/time becomes a hyperlink to the Process Summary and Output Options.

Reminder Request Status							Refresh
Started	Completed	Status	Clients	Target From	Target To		Cancel
03/03/2022 08:43 AM	03/03/2022 08:44 AM	100 %	69	03/03/2022	03/03/2022		



Reminder Request Process Summary

- Client selection criteria are displayed. This is helpful in diagnosing any errors in the criteria.

Step	Criteria Evaluated at this Step	Clients
1	Clients associated with	13742
2	Clients immunized by	13732
3	Clients that are active within Reminder & Recall Contact . Additional criteria includes: <ul style="list-style-type: none"> Client Age Range 24 Month to 35 Month; School is not specified; Provider is not specified; 	64
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. 	61
5	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> Clients that are Due Now or Past Due for one or more vaccinations between 01/01/2019 to 01/01/2020; Use all vaccine groups; Use tracking schedule associated with each client. 	30
Total Number of Clients Eligible for Reminder		30




Selection Criteria Display Example

Step	Criteria Evaluated at this Step	Clients
1	Clients associated with	13742
2	Clients immunized by	13732
3	Clients that are active within Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none">Client Age Range 24 Month to 35 Month;School is not specified;Provider is not specified;	64
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.	61
5	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">Clients that are Due Now or Past Due for one or more vaccinations between 01/01/2019 to 01/01/2020;Use all vaccine groups;Use tracking schedule associated with each client.	30
Total Number of Clients Eligible for Reminder		42 30



Preview Clients

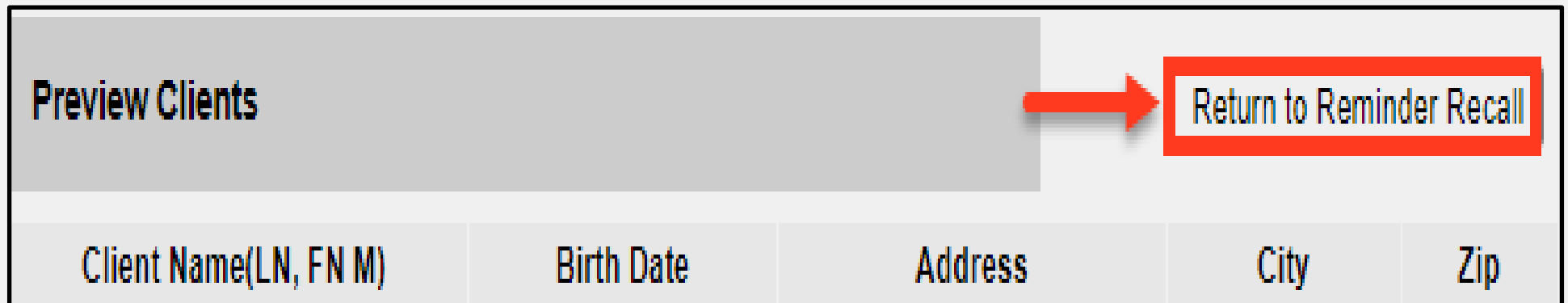
- At the bottom of the page, you can click the Preview Clients button to preview the clients selected.

Last Notice Date Options	
<i>Preview Clients that will display on the Reminder Recall 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 Community Health Center Of Lubbock - Lubbock 2.</i>	<input type="button" value="Increment Immunized"/>
<i>Return to the previous screen.</i>	<input type="button" value="Cancel"/>



Return to Reminder/Recall

- The clients name, birth date, address, city, and zip are displayed.
- Click the “Return to Reminder Recall” button to return to the report.



The screenshot shows a software interface with a grey header bar containing the text "Preview Clients". Below this is a table with five columns: "Client Name(LN, FN M)", "Birth Date", "Address", "City", and "Zip". To the right of the table is a red button labeled "Return to Reminder Recall", which is highlighted with a red border and a red arrow pointing to it from the left.



Output Options

- Options: Letter, Card, Mailing Labels, Client Query Listing, Client Reminder/Recall Spreadsheet, and Custom Letter.

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text" value="Please call us with any questions."/> Phone # <input type="text" value="512-123-4567"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>
Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name <input type="text"/>
Pauls Custom Letter	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>



Reminder Letters

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

The screenshot shows a web form for generating reminder letters. On the left, a red-bordered box contains the text "Click Link to Generate Letters" with a red arrow pointing to the "Reminder Letter" link. The form itself has a title "Standard Reminder Letter." and a "Duplex Printing" checkbox. Below the title are two red-bordered boxes: "Put Report Name Here" with a red arrow pointing to the "Report Name" field (containing "Pauls Ltr 3-3-22") and "Put Office No. Here" with a red arrow pointing to the "Phone" field (containing "512-123-4567"). There is also a "Free Text" field containing "Please call us with any questions." and a "Print" button.

Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/>
Click Link to Generate Letters	Put Report Name Here	Report Name <input type="text" value="Pauls Ltr 3-3-22"/>
	Put Office No. Here	Free Text <input type="text" value="Please call us with any questions."/>
		Phone <input type="text" value="512-123-4567"/>
		<input type="button" value="Print"/>



Reminder Letter – Reminder Request Status Screen

- Click the report name hyperlink to open the letters in a separate browser window.

Reminder Request Status						
Started	Completed	Status	Clients	Target From	Target To	
03/03/2022 09:41 AM	03/03/2022 09:42 AM	100 %	20	01/01/2019	01/01/2020	

Reminder Output Status						
Name	Type	Requested	Started	Completed	Status	
Letter 3-3-22	Reminder Letter	03/03/2022 11:28 AM	03/03/2022 11:28 AM	03/03/2022 11:28 AM	Ready	
Letter 3-3-22(Spanish)	Reminder Letter	03/03/2022 11:28 AM	03/03/2022 11:28 AM	03/03/2022 11:28 AM	Ready	



Example of a Reminder Letter

Dear Parent/Guardian of Jack Sparrow,

Our records indicate that Jack Sparrow has received the following immunizations:

Immunization Record		Tracking Schedule: ACIP	
Vaccine Group	Date Administered	Series	Vaccine
SARS-COV2	04/07/2021	1 of 2	COVID-19,mRNA,LNP-
	04/28/2021	2 of 2	COVID-19,mRNA,LNP-

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

Immunizations Due
Flu NOS
HepA, NOS
HepB, NOS
HPV, NOS
MCV4, NOS
MMR
Pfizer COVID-19 Vaccine
Polio, NOS
Tdap
Varicella

Please call us with any questions.

The number for our office is: 512-123-4567



Texas Department of State
Health Services

Reminder Card

- Use “Reminder Card” to send a postcard to clients with immunizations due. No immunization history is listed.
- Verify that this doesn’t violate your clinic’s privacy policies before you use this option.

[Reminder Card](#)

Standard Reminder Card (4x5).

Report Name

Free Text

Phone

Click Link to Generate Cards

Put Report Name Here

Put Office No. Here



Reminder Card – Reminder Request Status Screen

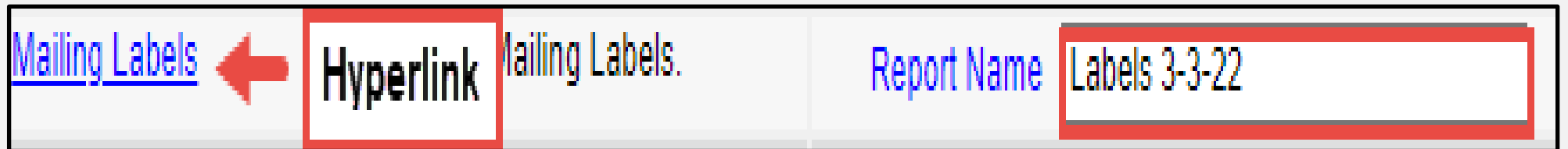
- Click the report name hyperlink to open the cards in a separate browser window.

Reminder Request Status						Refresh
Started	Completed	Status	Clients	Target From	Target To	Cancel
03/03/2022 09:41 AM	03/03/2022 09:42 AM	100 %	20	01/01/2019	01/01/2020	
Reminder Output Status						
Name	Type	Requested	Started	Completed	Status	
(Spanish)	Reminder Card	03/03/2022 10:42 AM	03/03/2022 10:42 AM	03/03/2022 10:42 AM	Ready	
Reminder Card	Reminder Card	03/03/2022 10:42 AM	03/03/2022 10:42 AM	03/03/2022 10:42 AM	Ready	
Card 3-3-2022	Reminder Card	03/03/2022 10:39 AM	03/03/2022 10:39 AM	03/03/2022 10:39 AM	Ready	



Mailing Labels

- Use the “Mailing Labels” option to print address labels to save time on addressing envelopes



Mailing Labels – Reminder Request Status Screen

- Click the report name hyperlink to open the labels in a separate browser window.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
03/03/2022 09:41 AM	03/03/2022 09:42 AM	100 %	20	01/01/2019	01/01/2020

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Labels 3-3-22	Mailing Labels	03/03/2022 11:20 AM	03/03/2022 11:20 AM	03/03/2022 11:20 AM	Ready
(Spanish)	Reminder Card	03/03/2022 10:42 AM	03/03/2022 10:42 AM	03/03/2022 10:42 AM	Ready



Client Query Listing

- Use the “Client Query Listing” to generate a PDF of patients, their contact information, immunizations given, and immunizations needed. This helps when calling clients.

Client Query Listing	← All criteria based on the report	Report Name	List 3-3-22
--------------------------------------	------------------------------------	-------------	-------------



Client Query Listing – Reminder Request Status Screen

- Click the report name hyperlink to open the listing in a separate browser window.

Reminder Request Status						Refresh
Started	Completed	Status	Clients	Target From	Target To	Cancel
03/03/2022 09:41 AM	03/03/2022 09:42 AM	100 %	20	01/01/2019	01/01/2020	

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Listing - 3-3-22	Client List	03/03/2022 11:41 AM	03/03/2022 11:41 AM	03/03/2022 11:41 AM	Ready
Reminder Letter	Reminder Letter	03/03/2022 11:34 AM	03/03/2022 11:34 AM	03/03/2022 11:34 AM	Ready



Client Query Listing – Output

Report run on : 02/25/2022

Client Query Listing

Page 1 of 225

Client Name (FML)	Phone Number	Address	City/State/ZIP
-------------------	--------------	---------	----------------

JACK SPARROW - 01/01/1952	(512) 123-4567	1201 ELM ST	AUSTIN, TX 78704-1234
---------------------------	----------------	-------------	-----------------------

Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
DTP/aP	Complete	1) 07/21/2006 2) 08/19/2006 3) 05/23/2007 4) 06/04/2010
HepA	Complete	1) 05/23/2007 2) 12/07/2007
HepB	Complete	1) 05/17/2006 2) 07/12/2006 3) 12/04/2006
Hib	Complete	1) 05/23/2007 2) 08/27/2007 3) 11/27/2007 4) 06/04/2010
HPV	04/22/2019	1) 10/22/2018
Influenza-seasnl	07/01/2021	1) 12/31/2007 2) 02/08/2008 3) 10/10/2008 4) 11/03/2009
Meningo	05/17/2017	
MMR	Complete	1) 05/23/2007 2) 06/04/2010
PneumoConjugate	Complete	1) 03/15/2007 2) 05/23/2007 3) 08/27/2007 4) 12/07/2007
Polio	12/04/2010	1) 06/23/2006 (NV) 2) 07/21/2006 3) 08/19/2006 4)
SARS-COV2	11/09/2021	1) 05/19/2021 2) 06/09/2021
Td/Tdap	05/17/2017	
Varicella	Complete	1) 05/23/2007 2) 06/04/2010



Client Reminder/Recall Spreadsheet

- This Excel report lists client demographic data in addition to vaccines due and recommended date for the shot.

Client Reminder/Recall Spreadsheet	Client demographics and vaccine due dates in spreadsheet format	Report Name	Spreadsheet 3-3-2022
	LINK		



Spreadsheet – Reminder Request Status Screen

- Click the report name hyperlink to open the spreadsheet in a separate browser window.

Reminder Request Status						
Started	Completed	Status	Clients	Target From	Target To	
03/03/2022 09:41 AM	03/03/2022 09:42 AM	100 %	20	01/01/2019	01/01/2020	

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Spreadsheet 3-3-22	Spreadsheet	03/03/2022 12:02 PM	03/03/2022 12:02 PM	03/03/2022 12:02 PM	Ready

Refresh
Cancel



Spreadsheet – Output

- Lists TVFC PIN, client first and last name, date of birth, parent, address, city, state, zip, county, phone, & immunizations due and date recommended.

Report Date: 03/03/2022

Spreadsheet 3-3-22

Type: Clients that are Due Now or Past Due for one or more vaccinations between

To and From Date: 01/01/2019 to 01/01/2020

Client Age Range 24 Month to 35 Month

TXIIS ID:

Organization Name:

TVFC PIN:

Client First Name	Client Last Name	Client Date of Birth	Parent/Guardian	Parent/Guardian	Client Address 1	Client Address 2	Client City	Client State	Client Zip	Client County	Client Phone #	Client ID	Vaccine Due	Date Recommended
-------------------	------------------	----------------------	-----------------	-----------------	------------------	------------------	-------------	--------------	------------	---------------	----------------	-----------	-------------	------------------



Custom Letter

- Displays each of the saved custom letters created through the **Manage Custom Letter** screen.
- Described in the next section.

Pauls Custom Letter	Custom Letter.	Duplex Printing <input type="checkbox"/>
	LINK	Report Name <input type="text" value="Custom Ltr 3-3-2022"/>



Last Notice Date Options

Last Notice Date Options	
<i>Preview Clients that will display on the Reminder Recall Report.</i>	Preview Clients
<i>Increment last notice date for all clients eligible for this reminder.</i>	Increment Eligible
<i>Increment last notice date for all clients immunized by Community Health Center Of Lubbock - Lubbock 2.</i>	Increment Immunized
<i>Return to the previous screen.</i>	Cancel



Creating Custom Letters



TEXAS
Health and Human
Services

Texas Department of State
Health Services

Advantages of the Custom Reminder Letter

- More control.
- 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.



Click (1) Generate Report and Select (2) Reminder/Recall Custom Letters

<p>manage priority groups</p> <p>Reports</p> <ul style="list-style-type: none"> generate report scheduled report <p>Data Exchange</p> <ul style="list-style-type: none"> registration of intent exchange data check status manage data exchange vital data exchange job monitor <p>Maintenance</p> <ul style="list-style-type: none"> manage clinicians manage schools <p>Admin Support</p> <ul style="list-style-type: none"> manufacturer listing ter code upload trade name listing vaccine group listing vaccine listing vaccine relationships trade name rules manage schedules <p>Manage My Account</p> <ul style="list-style-type: none"> edit my user account 	<p>CoCASA Extract</p> <p>Immunization Coverage Rate Report</p> <p>Immunization History Report</p> <p>Manage Ad hoc Template</p> <p>Provider Level Report</p> <p>Reminder/Recall Custom Letters</p> <p>Reminder/Recall Report</p>	<p>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.</p> <p>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.</p> <p>The Immunization History Report allows users to compile the immunization history for a group of selected clients.</p> <p>The Manage Ad hoc Template allows the capability to generate, run, and save ad-hoc user reports to a user profile.</p> <p>The Provider Level Report allows a user to produce provider-specific reports (Provider Data Entry, Data Entry Compliance and Late Date Entry Detail) about aggregate transactions entered into ImmTrac2 for specified time periods.</p> <p>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.</p> <p>The Reminder/Recall Report generates reminder and recall notices, which include letters, mailing labels, and client listings.</p>	<p>Status</p> <p>Status</p> <p>Status</p> <p>Status</p> <p>Status</p> <p>Status</p> <p>Status</p>
--	--	--	---



Select “New Custom Letter”

Reminder/Recall Custom Letters

(there are no letters for this provider organization)

[New Custom Letter](#)



Fill Out the Template

Top Margin
Number of blank lines at the top of the letter: 3

Client Address
Include a name with the client address: (no name)
 Include client address

Salutation
Enter a salutation for the letter: To the
Include a name at the end of the salutation: Responsible person

Paragraph 1
First Part
We care about
Include a name between the first and second parts of this paragraph: Client name
Second Part
so that's why we're sending you this letter. Here's your child's immunization history:

Immunization History
 Include immunization history

Paragraph 2
and here are any recommended immunizations for your child:

Immunization Recommendations
 Include immunization recommendations

Paragraph 3

Closing
Enter a closing for the letter: If you have any questions, please call us!
 Include provider organization name in the closing
 Include provider organization phone number in the closing

Name and save the custom letter
Name the custom letter: Pauls Custom Letter
Save Cancel



Top Margin and Client Address

- **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.

Top Margin
Number of blank lines at the top of the letter: 3 ▼
Client Address
Include a name with the client address: (no name) ▼
<input type="checkbox"/> Include client address



Salutation

- Enter a greeting in the text box to begin the letter. For example, “To the” 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, “To the Parent/Guardian of Peggy Sue.”

Salutation

Enter a salutation for the letter:

Include a name at the end of the salutation:



Paragraph 1 First Part, Name, and Second Part

- **Paragraph 1 First Part.** Enter desired text, up to 4,000 characters of text.
- **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.

Paragraph 1

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.

68



Immunization History Option

- **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".**

Immunization History

Include immunization history



Paragraph 2 and Immunizations Recommended Option

- **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 2

And here are the recommended immunizations:

Immunization Recommendations

Include immunization recommendations



Paragraph 3 and Closing

- **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.

Paragraph 3

Closing

Enter a closing for the letter:

Include provider organization name in the closing

Include provider organization phone number in the closing



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.

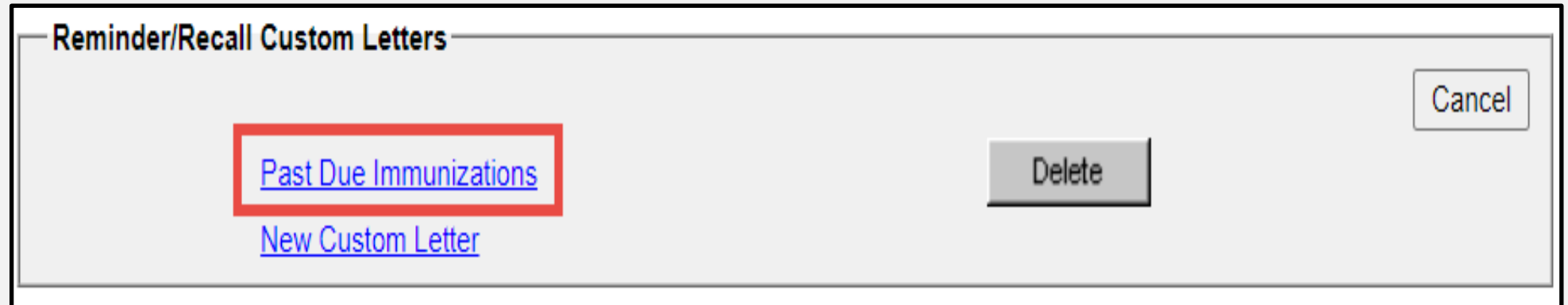
Name and save the custom letter

Name the custom letter



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.



Reminder/Recall Custom Letters

[Past Due Immunizations](#)

[New Custom Letter](#)

Delete

Cancel

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.

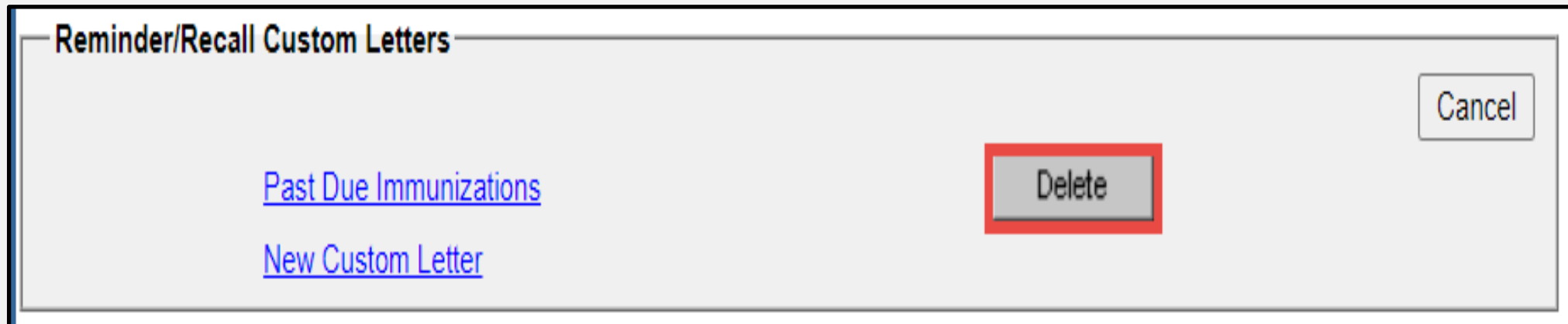
Name and save the custom letter

Name the custom letter



To Delete a Reminder/Recall Custom Letter

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



Reminder/Recall Custom Letters

[Past Due Immunizations](#)

[New Custom Letter](#)

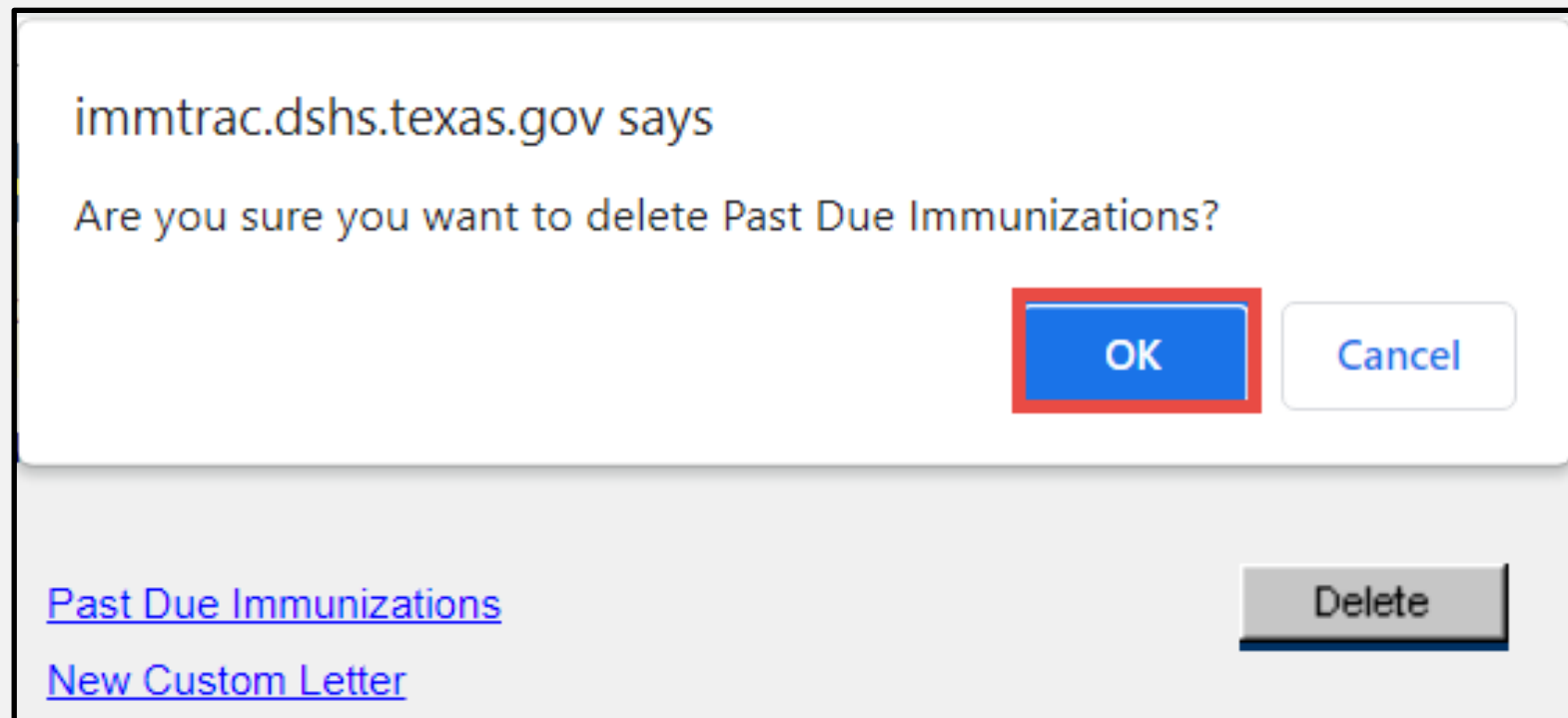
Cancel

Delete



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!

Texas Immunization Registry

ImmTrac2@dshs.texas.gov



Texas Department of State
Health Services