Generating Reminder Recall Reports

Welcome to the ImmTrac2 Training Video: Generating Remind/Recall Reports

Training Objectives

The objectives of this video are to demonstrate how to configure and generate the Reminder/Recall Reports.

Generate Reports

ImmTrac2 offers different client and immunization reports that can be generated by users in their organization throughout the application.

The **Generate Reports** menu option offers additional report options to all user except the View Only – Non Provider users, which can be configured in different ways to meet the needs of their organization.

In this video we will cover the Reminder/Recall Report.

NOTE: *For information on all the Generate Report options, please review the ImmTrac2 User Manual.*

Reminder/Recall Report

The **Reminder/Recall Report** generates reminder and recall notices, which include letters, post cards, and mailing labels for clients associated with the user's organization.

A reminder/recall notice is generated for a client if the following conditions are met:
- The client's Status is set to '**Active'** in the client's record for the user's organization.
- The '**Allow Reminder and Recall Contact?**' indicator in the client's record is set to '**Yes**.'
- The client's record has a complete address.

Reminder Request Screen

Let's begin by clicking the **Reminder/Recall Report** link to configure the report.

For this example, let's generate reminder letters to all the clients who are past due on their immunizations based on the ACIP schedule and under 12 months of age.

Create New List: In this section users must select if they want to 'Enter new Reminder/Recall Request Criteria' or 'Use a previous Reminder Recall Request Criteria.'

If you choose to enter new criteria, it's saved under a '**List Name'** so it can be accessed in the future to quickly configure the report criteria. If you chose to use previous reminder request criteria, use the drop down arrow to select the **List Name** you wish to use.

For this example, let's enter new criteria and give it a **List Name** of '**Imms Past Due under 12 mnths**.'

Reminder: *For this example we are generating reminder letters to all the clients who are past due on their immunizations based on the ACIP schedule and **under 12 months** of age.*

Indicate the Tracking Schedule: This section is used to select which tracking schedule will be used to generate the reminder notices. ImmTrac2 defaults to the 'Use Tracking Schedule Associated with Each Client' option.

Note: The ACIP schedule is the default tracking schedule for newly added clients, but can be changed by users in the Organization Information demographic tab.

To ensure all reminder letters are based off the ACIP schedule, let's select the option '**Use Tracking Scheduled Selected for All Clients**.' Then use the drop down arrow to select the **ACIP schedule**.

Select the Vaccine Group to Report on: This section provides the option to filter by any given vaccines within the selected tracking schedule. '**Use All Vaccine Groups**' is the default options. The option to '**Use Vaccine Groups Selected**' can be utilized to select specific Vaccine Groups within the selected tracking schedule.

Selecting specific vaccine groups will limit the search to only clients who are due or past due for those immunizations.

If this option is chosen, the reminder notice still includes all immunizations due or past due, and not just the immunizations for the selected vaccine groups.

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

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

For this example, let's use the default option and include all vaccine groups.

Next, indicate if you would like to include **Vaccines Due Now**, **Vaccines Past Due**, or **Both**. By default, **Vaccines Due Now will be selected**. For this example, let's select the '**Vaccines Past Due**' option.

Select Subpotent Recall: This section provides the option to filter for clients that have subpotent vaccinations by selecting the check box.

Select the School & Primary Care Provider: This section allows users to filter for clients who have been assigned to a particular school or Primary Care Physician in their client record.

The school list is created and updated by the organization using the **Maintenance/Manage Schools** menu options. Clients are assigned to a school using the **Client Information** demographic tab in the client record.

The Provider (PCP) list is based on the registered clinicians assigned to the organization, which can be viewed using the **Maintenance/Manage Clinicians** menu option. Clients are assigned a Primary Care Physician using the **Organization Information** demographic tab in the client record.

For this example, we will not use these filters.

Enter Additional Demographic Criteria: This section provides additional options to filter for clients whose record matches specific demographic information.

Users have the option to filter by the following: City, Zip Code, County, Language, Vaccine Eligibility, Occupation and High Risks and Exemptions.

In this example, let's leave these blank.

Enter the Date Criteria: This section provides options to filter clients by a '**Target Date**' and a '**Date of Birth Range**' or '**Age Range**.'

Entering a **Target Date Range** returns clients who are due now, past due, or will be due for the selected vaccines within the specified date range. If no Target Date range is selected, today's date will be used.

Entering a **Date of Birth Range** returns clients who have a birth date that falls within the dates entered.

Entering an **Age Range** returns clients who falls within the age range entered.

For our example, let's leave the Target Date Range blank and enter an Age Range to filter by clients less the 12 months of age. Let's enter 0 in the '**From**' field, and 12 in the '**To**' field, to filter by client's that are less than 12 months of age.

The **Age Range** can be filter by months or years.

Select the Vaccine Groups to Display: This section provides the option to only have selected Vaccine Groups display in the reminder notice as being recommended.   By default '**Use All Vaccine Groups**' is selected.

As previously mentioned, double click an item or use the **Add** and **Remove** buttons to choose which **Vaccine Groups** will display in the reminder notice.

For this example, let's use the default option '**Use all Vaccine Groups**.'

Specify How to Sort the Report Data: This section allows users to select of up to four items to determine how the information in the report is sorted. By default the sort order is 1st by Last Name ascending, and the 2nd sort order is by First Name ascending.

To add a 3rd and 4th sort option, use the drop down arrow to create additional sort criteria. The following options are available in all 4 sort fields: **Last Name**, **First Name**, **School**, **Provider**, and **County**.

Now that report criteria had been selected, click the **Generate** button if the report criteria does not need to be saved. For this example, let's click the **Save & Generate** button to generate the report and save the report criteria under the List Name '**Imms Past Due under 12 mnths**.'

Reminder Request Status Screen

Users are redirected to the **Reminder Request Status** screen. This screen displays only one reminder report at a time.

Click the **Refresh** button until the report has completed generating

NOTE: Depending on the number of clients associated with your organization, this report could take longer to process the different report outputs. Users may navigate away and return later to check the status.

Once the status is **100%**, the report Name will become a hyperlink.

This screen will display the following:

- **Started**: Displays the date and time that the report **Started** generating.

- **Completed**: Display the date and time the report **Completed** generating.
- **Status**: Displays the percent complete of the report. Currently running reports will have a percent less than 100%.
- **Clients**: Displays the number of clients that met the report criteria.
- **Target From / Target To**: Displays the Target Date Range criteria that was selected when configuring the report.

Click the hyperlink to view the report results.

Reminder Request Process Summary Screen

Users are redirected to the **Reminder Request Process Summary** and **Output Options** screen. This screen allows users to generate each of the reminder/recall output options.

The **Reminder Request Process Summary** section displays the criteria name, and the step-by-step process by which the report criteria produced the **Total Number of Clients Eligible for** the **Reminder**.

The **Reminder Request Output Options** section displays each of the output file types that can be generated for the clients eligible for the reminder.

From this section, users can generate Reminder Letters, Reminder Cards, Mailing Labels and Custom Reminder Letters. Also available is the Client Query Listing, Extract Client Data, and the Client Reminder/Recall Spreadsheet.

Reminder Letters

Reminder Letters: Clicking this link will generate a standard letter for each client eligible for the reminder, and includes their immunization history and recommended immunizations.

Use the **Additional Input** column to perform the following:
- Select '**Duplex Printing**.'
- Give the output file a specific '**Report Name**,' with up to 20 characters to make it easily identifiable.
- Use the '**Free Text**' field to enter up to 400 characters of free text to customize the letter.
- Enter the Organization's '**Phone #**' to display in the letter.

NOTE: The **Additional Input** *fields are optional.*

After the Additional Input information is added, click the Reminder Letter hyperlink to generate the letters.

Reminder Output Status

Users are redirected to the **Reminder Request Status** screen where the Reminder Letter displays in the **Reminder Output Status** section.

NOTE: *Click the Refresh button as needed until the output Status is 'Ready.'*

If there are any clients who selected Spanish in the '**Language Spoken**' field of the client record, an output letter will generate in Spanish for those clients.

Click the report **Name** hyperlink to open the reminder letters in a separate browser window.

The reminder letters open in a PDF format in the sort order that was selected in the report criteria. Notice, the free text and phone number are displayed at the bottom of the letter.

As previously mentioned, the letter includes the standard reminder verbiage, the client's Immunization History and the recommended immunizations.

To return to the ImmTrac2 registry close the browser window. Users are returned to the **Reminder Request Status** screen. To navigate back to the output options, click the report hyperlink.

Reminder Card

Now let's look at the next output option.

Reminder Card: Clicking this link will produces a reminder notice in a standard 4x5 postcard format.

Follow the same procedures as we did for the reminder letter to generate the reminder cards. Enter the **Additional Input** information as needed and click the **Reminder Card** link.

Users are once again redirected to the **Reminder Request Status** screen where the **Reminder Card** is available in the **Reminder Output Status** section displays.

NOTE: *Click the Refresh button as needed until the output Status is 'Ready.'*

The Reminder Card is also generated in Spanish for clients who have Spanish selected in the '**Language Spoken**' field of the client record.

Notice, because we didn't enter a Report Name, the name is simply the Reminder Card.

Click the report **Name** hyperlink to open the reminder cards in a separate browser window.

The reminder cards will open in a PDF format in the sort order that was selected in the report criteria. The body of the card includes the standard reminder verbiage, client's recommended immunizations, and the free text and phone number information if it was entered in the **Additional Input** fields.

To return to the ImmTrac2 registry close the browser window.

Users are returned to the **Reminder Request Status** screen. To navigate back to the output options, click the report hyperlink.

Mailing Labels

Let's review the next output option.

Mailing Labels: Clicking this link generates a Mailing Label for each of the reminder letters in an Avery 5160 label format.

Once again users are redirected to the **Reminder Request Status** screen. The Mailing Labels generate in one output file and is also sorted according to the report criteria.

Click the report **Name** hyperlink to open the mailing labels in a separate browser window.

The mailing labels open in a PDF format in the sort order that was selected in the report criteria. To return to the ImmTrac2 registry close the browser window.

Back on the **Reminder Request Status** screen, click the report hyperlink to return to the output options.

Client Query List

Client Query Listing: Clicking this link produces a list of clients who matched the criteria, along with their phone number, full address, and immunization information.

Click the report **Name** hyperlink to open the Client List in a separate browser window.

The Client List opens in a PDF format. Close the browser window to return to the registry.

Click the report hyperlink to return to the output options.

Extract Client

Extract Client Data: Clicking this link produces an XML format of the clients who met the criteria and includes client demographic and immunization information.

Client Reminder/Recall Spreadsheet

Client Remind/Recall Spreadsheet: Clicking this link opens an excel file of the client demographic information and vaccines due.

Customer Letter

Custom Letter: Displays each of the saved custom letters created through the **Manage Custom Letter** screen. Clicking a Custom Letter link produces the custom reminder letter for the clients who matched the report criteria.

NOTE: *For details on how to create a Customer Letter please review the ImmTrac2 User Manual.*

Last Notice Date Options

Now that we have review the different output options, let's take a look at the **Last Notice Date Options**.

Preview Clients: Clicking this button, will redirect users to the '**Preview Client**' screen, where all the clients that meet the report criteria will be listed.

Increment Eligible: Click this button to reset the '**Last Notice Date'** for all clients eligible for this reminder, regardless if the reminder/recall notice is sent. This places a date stamp in the **Last Notice Date** field that can be found in the client's record under the **Organization Information** demographic tab.

Increment Immunized: Click this button to reset the '**Last Notice Date'** for all clients immunized by the user's organization regardless if the met the report criteria.

Cancel: Click this button to return to the **Reminder Request Status** screen.

For more detailed information regarding any of these topics, see the Online User Manual located on the Related Links tab.

Please review the other ImmTrac2 videos at https://immtrac.dshs.texas.gov at your convenience.