



Reminder and Recall Functions

imMTrax User Training

Montana Department of Health
and Human Services

Public Health and Safety
Division

February 2014

Reminder and Recall Functions

An imMTrax tool allowing the user* to generate a series of reminder and recall notices, including:

- o Immunization Reminder/Overdue Letters and Cards
- o Mailing Labels
- o Client Lists (available in downloadable spreadsheet or report formats)



* Read Only and Read Only with Consent imMTrax users do not have access to Reminder/Recall functions

Reminder and Recall Functions, Required Conditions

- Client imMTrax status is **Active**
- Client is assigned as having a **Primary** or **Secondary Care** Association (site-specific)
- Client has **Allow Reminder & Recall Contact** saved as Yes
- A minimum of one **Responsible Person** assigned in the client's record as **Primary** and designating approval to receive notices
- **Primary Responsible Person** has sufficient contact information

Reminder and Recall Functions, Required Conditions

Only clients designated as having a *Primary* or *Secondary* Association may be included

Client Information	Responsible Persons	Client Comments	Contact History
Chart #	<input type="text"/>	Tracking Schedule*	ACIP
Ethnicity	Not Hispanic or Latino	Status	Active
Race	Unknown	Status Change Date	<input type="text"/>
Medical Home Association*	Secondary Care	School	<input type="text"/>
Primary Provider*	Medicine, Anne	Allow Reminder & Recall Contact?	Yes
VFC Eligibility*	Not Insured	Last Notice Date	02/03/2014
Other Eligibility*	<input type="text"/>	Primary Association	
Secondary Associations	Imafake Clinic		
Insurance Providers		Selected Providers	

Allow Reminder & Recall Contact is saved as Yes

Reminder and Recall Functions, Required Conditions

At least one *Responsible Person* must be assigned in the client record as **Primary** and must have adequate contact information saved

Responsible Persons Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary	
<input checked="" type="radio"/>	SOUP	POTATO	UNK	Helena	Y	Y	<input checked="" type="checkbox"/>

Details for Responsible Person: POTATO SOUP (Last Updated: 02/04/2014) 1 of 1

Last Name* SOUP Street Address* 5555 Montana Ave
First Name POTATO Other Address
Middle Name P.O. Box
Relationship* Unknown City* Helena
E-Mail State* MONTANA Zip* 59601 +4
Telephone 1 406 444 4444 Language County* LEWIS & CLARK
Extension 1 Type 1 Business
Telephone 2 406 444 4444
Extension 2 Type 2 Business

Recall Notices?
Primary?
Preferred Method of Recall Phone

Recall Notices? is checked and saved

Reminder and Recall Functions, Navigating Options

*imMTrax
Montana
Immunization
Information
System*

TEST 3.13.11.2.1
.....

Clients

manage client
last client
mass immunization

Inventory

manage inventory
manage cold chain
cold chain report
reconcile inventory
manage orders
manage transfers
data extract for billing

Reports - Coverage

request uptodate rpt
request imm coverage
check imm rpt status

Reports R/R

request reminder
request callback
check reminder status

Manage Locations

switch organizations
switch sites

Data Exchange

Administration

change password
system user manual

request reminder- choose parameters to generate new client or mailing lists

check reminder status- return to a recently queued or generated list

Reminder and Recall Functions, Selecting Parameters

what?

who?

sort by...

Reminder/Recall Request

Select the Vaccine Group(s) ...

Use All Vaccine Groups
 Use Vaccine Groups Selected

Adeno	▲
Anthrax	▢
BCG	▢
Cholera	▢
Comvax	▼

Use Deferred Status Only

Select the Organization, Sites and/or Lot...

Organization: Imafake Clinic

Sites: Imafake Too Health Center

Association: Primary or Secondary

NOTE: Lot is for use when there is a manufacturer recall. Other criteria on this page will be ignored, except for the Target Date Range.

Lot: _____

Select the School & Primary Care Provider ...

School: _____ Provider (PCP): _____

Enter Additional Demographic Criteria ...

City: _____ Zip Code: _____ County: _____

Enter the Date Criteria ...

Target Date Range

From: _____ To: _____

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

From: _____ To: _____

Birth Date Range
 Patient Age

Weeks Since Last Notice: _____

Exclude clients more than: _____ Month(s) Overdue

Exclude from: Today's Date Target From Date

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	_____	_____

Reminder and Recall Functions, Selecting Parameters

Select the Vaccine Group(s) ...

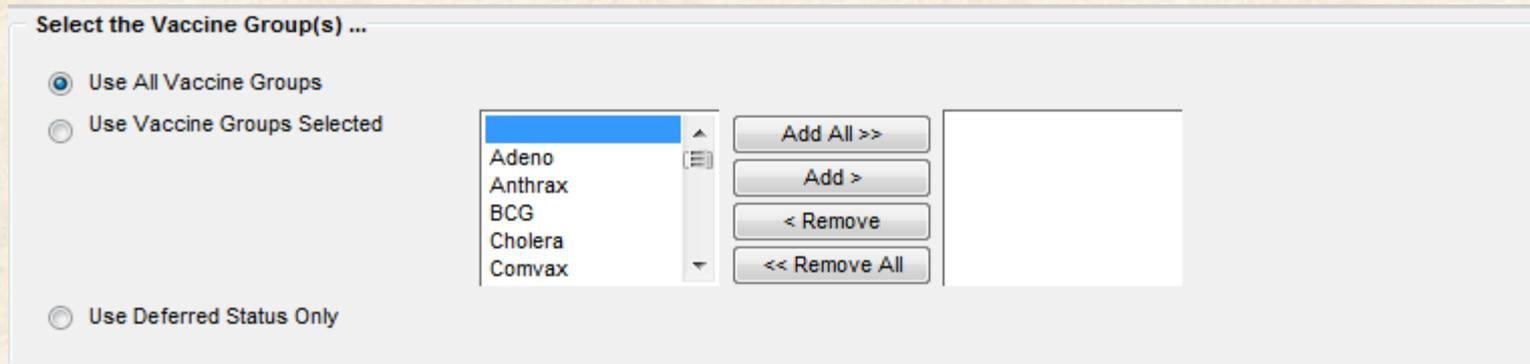
Use All Vaccine Groups

Use Vaccine Groups Selected

Use Deferred Status Only

Adeno
Anthrax
BCG
Cholera
Comvax

Add All >>
Add >
< Remove
<< Remove All



Choose the vaccine(s) or vaccination category:

- o All Vaccines Groups
- o Specific Vaccine Group(s)
- o Clients with an immunization under Deferred Status
(designation located under Client Comments)
example: *HIB deferred- Vaccine Shortage*

Reminder and Recall Functions, Selecting Parameters

Verify or modify the site(s) to be included

Select the association(s) to be included: *Primary, Secondary* or both

Select the Organization, Sites and/or Lot...

Organization	Imafake Clinic ▼												
Sites	<table><tr><td>Imafake Too Health Center</td><td>Add All >></td><td>Imafake Clinic</td></tr><tr><td></td><td>Add ></td><td></td></tr><tr><td></td><td>< Remove</td><td></td></tr><tr><td></td><td><< Remove All</td><td></td></tr></table>	Imafake Too Health Center	Add All >>	Imafake Clinic		Add >			< Remove			<< Remove All	
Imafake Too Health Center	Add All >>	Imafake Clinic											
	Add >												
	< Remove												
	<< Remove All												
Association	Primary or Secondary ▼												

Reminder and Recall Functions, Selecting Parameters

Further refine your list by isolating a school, provider, city, zip code or county.

Select the School & Primary Care Provider ...

School Provider (PCP)

Enter Additional Demographic Criteria ...

City Zip Code County

If your organization/site does not have a school or provider affiliated, no options will be available to select.

Reminder and Recall Functions, Selecting Parameters

Enter the Date Criteria ...

Target Date Range From  To 

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

Birth Date Range From  To 

Patient Age 

Weeks Since Last Notice

Exclude clients more than  Month(s) Overdue

Exclude from Today's Date
 Target From Date

Target Date Range- clients that are due or overdue for immunizations within a period in time (may use a future date in the “To” field)

Birth Date Range- clients that are born within a selected period in time

Patient Age- clients that are a specific age

Weeks Since Last Notice- excludes clients that have received a notice within the selected number of weeks

Exclude clients more than ____ Month(s) Overdue

Exclude from- Today's Date or Target From Date

Reminder and Recall Functions, Selecting Parameters

Select sorting preferences

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		

Generate Cancel

Choose from:

- o Last Name
- o First Name
- o School
- o County
- o Birthdate

Review selections and
select *Generate*

Reminder and Recall Functions, Results

Your search may take a few moments. Click **Refresh** to check the status. Once completed a blue hyperlink will appear. Select the link to proceed.

**imMTrax
Montana
Immunization
Information
System**

TEST 3.13.11.2.1
.....

Clients
manage client
last client
mass immunization

Inventory
manage inventory
manage cold chain
cold chain report
reconcile inventory
manage orders
manage transfers
data extract for billing

Reports - Coverage
request uptodate rpt
request imm coverage
check imm rpt status

Reports R/R
request reminder
request callback
check reminder status

Manage Locations
switch organizations
switch sites

Data Exchange

Administration
change password
system user manual

Reminder Request Status

Refresh

Cancel

Started	Completed	Status	Clients	Target From	Target To
02/05/2014 01:03 PM	02/05/2014 01:04 PM	100	2	02/05/2014	02/05/2014

Reminder Output Status

No Reminder Outputs Logged

Return to view results by selecting
check reminder status

Reminder and Recall Functions, Results

imMTrax
provides a
step-by-step
process
summary
showing how
selections
impacted overall
results

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Clients
1	Clients associated with <i>Imafake Clinic/Imafake Clinic, Imafake Too Health Center.</i>	5
2	Clients that are active within <i>Imafake Clinic/Imafake Clinic, Imafake Too Health Center</i> and allow Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none">● Birthdate range is not specified;● County is not specified;● School is not specified;● Provider is not specified;● Weeks Since Last Notice is not specified.● Clients with the following medical home association: Primary or Secondary;	3
3	Clients that have one or more responsible persons that meet the following criteria regarding address information. <ul style="list-style-type: none">● City is not specified● Zip Code is not specified.	2
4	Clients that Allow Sharing of Immunizations.	2
5	Clients that have one or more responsible persons that Receive Notices.	2
6	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">● Clients that are Recommended or Overdue for one or more vaccinations as of 02/05/2014;● Use all vaccine groups;● Use CDC Schedule for all clients.● Exclude Overdue Reminders is not specified.	2
	Total Number of Clients Eligible for Reminder	2
	Total Number of Responsible Persons Eligible for Reminder Mailings	2

Reminder and Recall Functions, Results

Unless imMTrax does not identify any clients matching your parameters, the following options will be directly under the process summary

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Schedule your appointment today"/> Phone # <input type="text" value="406-444-4444"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Reminder/Recall Extract	Reminder Recall extract file	Report Name <input type="text"/>

Name your report, add additional text or contact numbers

Reminder and Recall Functions, Results

Once the “last reminder date” specifications have been chosen or set to default, choose the desired output

Select the blue hyperlink to the format you'd like generated

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Schedule your appointment today"/> Phone # <input type="text" value="406-444-4444"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Reminder/Recall Extract	Reminder Recall extract file	Report Name <input type="text"/>

Reminder and Recall Functions, Output

Once your selection has generated, follow the blue hyperlink to view and print.

Reminder Request Status						Refresh
Started	Completed	Status	Clients	Target From	Target To	Cancel
02/05/2014 01:03 PM	02/05/2014 01:04 PM	100	2	02/05/2014	02/05/2014	
Reminder Output Status						
Name	Type	Requested	Started	Completed	Status	
Mailing Labels	Mailing Labels	Wed Feb 05 13:10:23 MST 2014	Wed Feb 05 13:10:24 MST 2014	Wed Feb 05 13:10:24 MST 2014	Ready	
Reminder Letter	Reminder Letter	Wed Feb 05 13:10:11 MST 2014	Wed Feb 05 13:10:12 MST 2014	Wed Feb 05 13:10:13 MST 2014	Ready	

Select the original hyperlink to create multiple formats or revised outputs

Reminder and Recall Functions, Results

Additional options impacting future outputs

Last Notice Date Options	
Set last notice date to today for all eligible clients when you select a report output.	<input checked="" type="checkbox"/>
Revert last notice date to previous last notice date for all clients eligible for this reminder .	Revert Eligible
Revert last notice date to previous last notice date for all clients immunized by Imafake Clinic/Imafake Clinic, Imafake Too Health Center .	Revert All
List all Clients eligible for Reminder	List Clients
Return to the previous screen.	Cancel

Set last notice date to today for all eligible clients when you select a report (default)

Revert last notice date to previous notice date for all clients eligible for this reminder

Revert last notice date to previous last notice date for all clients immunized by your organization

Reminder and Recall Functions, Results

To view the listing of eligible clients, select *List all Clients eligible for Reminder*.

Last Notice Date Options

Set last notice date to today for all eligible clients when you select a report output.

Revert last notice date to previous last notice date for all clients **eligible for this reminder**.

Revert last notice date to previous last notice date for **all clients immunized by Imafake Clinic/Imafake Clinic, Imafake Too Health Center**.

List all Clients eligible for Reminder

Return to the previous screen.

Generate Reminder Letter Report (CSV format) for the clients listed below

Index	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Last Name																										
SOUP	BROCCOLI		CHEDDAR		01-JAN-10																					
SOUP	TOMATO		01-JAN-09																							

Selecting *Generate Report* will populate all information into a spreadsheet

Reminder and Recall Functions, Output

Dear Potato Soup,

Our records indicate that Broccoli Cheddar Soup has received the following immunizations:

Immunizations History		
Immunization	Date Administered	Series
HepB	01/01/2010	1 of 3
HepB	02/01/2010	2 of 3
HepB	07/01/2010	3 of 3
MMR	01/15/2011	1 of 2
Polio	03/15/2010	1 of 4
Rotavirus	03/15/2010	1 of 3
Rotavirus	05/15/2010	2 of 3

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

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
DTP/aP	03/01/2010
Hep A	01/01/2011
Hib	03/01/2010
Influenza	07/01/2010
MMR	01/01/2014
Pneumococcal	03/01/2010
Polio	05/15/2010
Tdap > 7 years	01/01/2021
Varicella	01/01/2011

The number for our office is: 406-444-4444

Schedule your appointment today

sample letter

Warm Greetings,

This postcard is a friendly reminder.

Don't forget to contact your Doctor to schedule routine vaccinations (shots) for you and your family.



The Number for our office is: 406-444-4444

Reminder/Recall Functions Are Awesome!

sample card

POTATO SOUP
BROCCOLI CHEDDAR SOUP
5555 MONTANA AVE
HELENA MT 59601

POTATO SOUP
TOMATO SOUP
5555 MONTANA AVE
HELENA MT 59601

sample address labels

Reminder and Recall Functions, Output

Report run on: 02/05/2014 01:15 PM **Client Query Listing** Page 1 of 1

Client Name (F.M.L.)-DOB-Age	Phone Number	Address	City/State/ZIP																														
BROCCOLI CHEDDAR SOUP-01/01/2010- 4 yrs	(406) 444-4444	5555 Montana Ave	Helena, MT 59601																														
		5555 Montana Ave	Helena, MT 59601																														
<table border="1"> <thead> <tr> <th>Vaccine</th> <th>Recmd Day</th> <th>Immunization Dates</th> </tr> </thead> <tbody> <tr><td>DTPaP</td><td>03/01/2010</td><td></td></tr> <tr><td>Hep A</td><td>01/01/2011</td><td></td></tr> <tr><td>Hib</td><td>03/01/2010</td><td></td></tr> <tr><td>Influenza</td><td>07/01/2010</td><td></td></tr> <tr><td>MMR</td><td>01/01/2014</td><td>1) 01/15/2011</td></tr> <tr><td>Pneumococcal</td><td>03/01/2010</td><td></td></tr> <tr><td>Polio</td><td>05/15/2010</td><td>1) 03/15/2010</td></tr> <tr><td>Tdap > 7 years</td><td>01/01/2021</td><td></td></tr> <tr><td>Varicella</td><td>01/01/2011</td><td></td></tr> </tbody> </table>				Vaccine	Recmd Day	Immunization Dates	DTPaP	03/01/2010		Hep A	01/01/2011		Hib	03/01/2010		Influenza	07/01/2010		MMR	01/01/2014	1) 01/15/2011	Pneumococcal	03/01/2010		Polio	05/15/2010	1) 03/15/2010	Tdap > 7 years	01/01/2021		Varicella	01/01/2011	
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sample client query listing

42405-02-05-14-13-15-53.csv [Read-Only]

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ImMTrax I	Client Last	Client First	Street Ad	City	State	Zip Code	Responsi	Responsi	Home Phc	Cell Phon	Business f	Email
2	4261709	SOUP	BROCCOLI	5555 Mon	Helena	MT	59601	POTATO	SOUP			(406)-444-4444	
3	4261708	SOUP	TOMATO	5555 Mon	Helena	MT	59601	POTATO	SOUP			(406)-444-4444	
4													

sample Reminder/Recall Extract

Montana Department of Health
and Human Services

Public Health and Safety
Division

Immunization Program

Questions?

Michelle Funchess, IIS Training and Support

(406) 444-2969

mfunchess@mt.gov