REMINDER/RECALL Tools

imMTrax User Training
Montana Immunization Program

Last revised 5/2020
Housekeeping Items

All participants are muted upon entering the presentation. Please do not put the line on hold.

To ask a question:
1. Send the host a message through the “Chat” function.
Webinar Objectives:

- Define reminder and recall terms
- Discuss required conditions for reminder/recall output
- Discuss on-demand reminder/recall workflow
- Discuss reminder/recall scheduling workflow
- Discuss creating reminder/recall templates
- Discuss manage cohorts
- Demos of reminder/recall workflows
Reminder and Recall

Reminder Systems
Due Now or In the Future

Recall Systems
Past Due

Improve timeliness and completion of recommended vaccines

Prevent Disease
Reminder and Recall Functions

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

- Immunization Reminder/Overdue Letters and Cards
- Mailing Labels
- Client Lists
- More!

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

- Client imMTrax consent is Yes
- Client is owned by your facility (run by ownership) or Client has been owned by your site (run by service)
- Reminder/Recall Publicity Code saved as default value (--select--) or Reminder/Recall-any method

*One phone number must be marked as Primary, in order for Phone to be an available contact method*
Reminder and Recall Functions: Navigating Options

- **Reminder/Recall**: choose parameters to generate new client or mailing lists
- **Run Templates**: generate reminder/recall based on saved template
- **Create Templates**: create templates to save and run on-demand
- **Manage Cohort**: generate reminder/recall based on saved cohort/parameters
How do you want to run this Reminder/Recall?
- For all patients you own
- For all patients you have seen at your facility
- Include Inactive Patients (Excluding deceased)
  Due Date Timeframe: 1 Month or More Past Due

State Level Status:
Select:

County Level Status:
Select:

County / Parish:
Select:

Who do you want to Contact?
- Patient Location: PARTNERS IN PEDIATRICS
  Facility:
- Patient Age Range: 0 Months to 24 Months
- Patient Birth Date: from __ to __
- Patient Gender: Limit To:

Exclude patients who were sent a notification in the last:
- # of: Days Weeks Months Years

Which vaccines would you like to include?
- 4-3-1-4-3-1-4

Vaccine Group:
- DTP / DTaP:
  Number of doses in this series:
  4
- MR:
  4
- IPV:
  4
- HIB:
  3
- PCV:
  3
- MMR:
  1
- VARICELLA:
  1
- PNEUMOCOCCAL:
  2

I only want to see my patients who are:
- Due for all selected vaccines
- One dose away
- One visit to complete the series

Clear  Schedule  Generate Patient List
Reminder and Recall Functions: Selecting Parameters

Choose how you want to run this Reminder/Recall?

- For all patients you own (by ownership)
- For all patients you have seen at your facility (by service)
- Include Inactive Patients (patient status=inactive)
- Due Date Timeframe
Reminder and Recall Functions: Selecting Parameters

Choose who you want to contact?
- Patient age range or patient birth date
- Limit patient gender
- Exclude patients who were sent a notification in last?

Who do you want to Contact?

Patient Location:
- Patient Age Range
  - Select
- Patient Birth Date
  - From
  - Through
- Patient Gender
  - Limit To...

Exclude patients who were sent a notification in the last:
- # of
  - Days
  - Weeks
  - Months
  - Years
### Reminder and Recall Functions

**Selecting Parameters**

Choose which vaccines you would like to include?

- **CUSTOM**
- **4-3-1-4-3-1-**
- **1-1-1- (1 HPV, 1 TDAP, 1 MCV4)**
- **3-2-1 (2/3 HPV, 2 MCV4, 1 TDAP)**
- **CUSTOM**
Reminder and Recall Functions

Selecting Parameters

Choose which patients to see:

- *Due for all selected vaccines
- One dose away
- One visit to complete the series

I only want to see my patients who are:

- [ ] Due for all selected vaccines
- [ ] One dose away
- [ ] One visit to complete the series

*Recommend to keep as the default value of due for all select vaccines
Reminder and Recall Functions:
Selecting Parameters

- Clear choices - clear parameters
- Schedule - run later
- Generate Patient List - run now
Reminder and Recall Functions:
Generate Patient List

Reason for Inactivation - user can change patient status to inactive (will not change ownership). Patient will be removed from patient list if Include Inactive Patients was not checked.

Submit - advance to available output options (letter, postcard, etc.)

Export Patient List - generate patient list based on parameters (excel file)
Reminder and Recall Functions: Submit, Available Output Options

imMTrax provides available contact methods based on information available in patient records.

a. Generate a Patient List: Pulls a list of patients, contact information, and due or overdue vaccines.
b. Print Letters: Produces a letter with each patient’s name at the top.
c. Generate Auto-Dialer Content: Produces a text file you can copy into excel and upload into an auto-dialer system.
d. Generate Mail-Merge: Produces a file you can use with any mail merge program.
e. Create Custom Post Cards: Creates a postcard size image and message that can be edited.
f. Create Avery 8387 Post Cards: Produces a file to print on Avery 8387 postcards.
g. Print Labels: Produces a file to print on Avery 5160 mailing labels.
h. Save as a Patient Group (Cohort): Save your patient group to reminder/recall later.
i. Send Email: Send a standard or custom email message to any patients with email addresses in the IIS.
Reminder and Recall Functions: Submit, Available Output Options

Select an output option. Instructions will display, some output options will also display a Message tab.

- **Make this count towards number of recall attempts** - if checked, this will increase the Recall Attempts field in patient demographic field by 1.

- **Save As Template** - save your reminder/recall parameters. Access this template under Run Templates.

- **Run** - generate selected output option.
Reminder/Recall Tools: Schedule

Select which output option you would like to schedule.
Reminder/Recall Tools: Schedule

Select when to run this reminder/recall

Search and select using last name which user can access this reminder/recall

(you have to search and select yourself)

Check box next to user name and click Select User

Option to check make this count towards number of recall attempts
Reminder/Recall Tools: Schedule

Select Schedule

Search Report Jobs-
Review scheduled reminder/recall by you

Received Reports-
Review scheduled reminder/recall by another user
R/R Tools: Create Template

Select Create Templates → Add New Design.
R/R Tools: Create Template

Enter Report Name → Select Parameters → Save Report

How?

Who?

Which?
R/R Tools: Review Template

- Edit.
- Copy.
- Delete.
- Run.
- Schedule.

New template saved successfully.

Create Reminder/Recall Reports

Search Results
Select Run Templates → Select template.

Select Run Report.
Option to Select Preview and check Increment Recall Count.
Select Manage Cohort → Select Search → Select cohort.

Select Run Reminder/Recall.
Option to Inactivate (cohort) and Save as Recall Attempt.
Reminder/Recall Success Report
Questions?

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Thank you for attending!