



# 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)



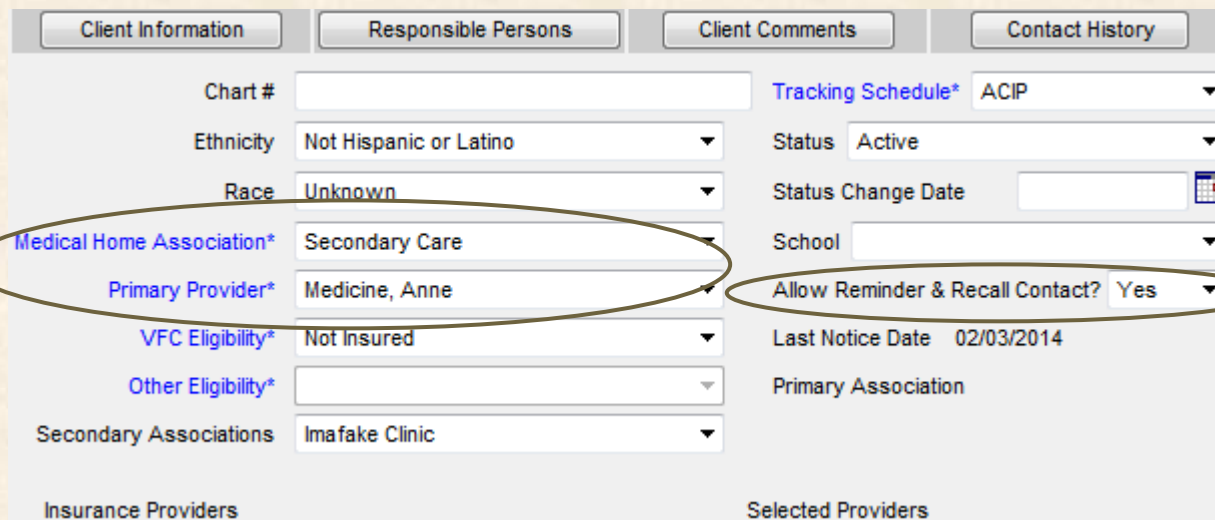
\* Read Only and Read Only with Consent imMTrax users do not have access to Reminder/Recall functions

# 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



The screenshot shows a web-based form for client information. At the top are four tabs: 'Client Information', 'Responsible Persons', 'Client Comments', and 'Contact History'. The 'Client Information' tab is active. The form contains several fields and dropdown menus. A large green checkmark is positioned to the right of the 'Status' field. Two brown ovals highlight specific fields: one around 'Medical Home Association\*' (set to 'Secondary Care') and another around 'Allow Reminder & Recall Contact?' (set to 'Yes'). Arrows point from the text boxes above and below the form to these highlighted areas. The 'Medical Home Association\*' field is also circled in blue. Other visible fields include 'Chart #', 'Ethnicity' (Not Hispanic or Latino), 'Race' (Unknown), 'Tracking Schedule\*' (ACIP), 'Status' (Active), 'Status Change Date', 'School', 'Primary Provider\*' (Medicine, Anne), 'VFC Eligibility\*' (Not Insured), 'Other Eligibility\*', 'Secondary Associations' (Imafake Clinic), 'Last Notice Date' (02/03/2014), and 'Primary Association'. At the bottom are sections for 'Insurance Providers' and 'Selected Providers'.

Client Information		Responsible Persons		Client Comments		Contact History	
Chart #		Tracking Schedule*		ACIP			
Ethnicity	Not Hispanic or Latino	Status		Active			
Race	Unknown	Status Change Date					
Medical Home Association*	Secondary Care	School					
Primary Provider*	Medicine, Anne	Allow Reminder & Recall Contact?		Yes			
VFC Eligibility*	Not Insured	Last Notice Date		02/03/2014			
Other Eligibility*		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

New Person  
Delete

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

1 of 1  
Next  
Previous

Last Name\* SOUP  
First Name POTATO  
Middle Name  
Relationship\* Unknown  
E-Mail  
Telephone 1 406 444 4444  
Extension 1 Type 1 Business  
Telephone 2 406 444 4444  
Extension 2 Type 2 Business

Street Address\* 5555 Montana Ave  
Other Address  
P.O. Box  
City\* Helena  
State\* MONTANA  
Zip\* 59601 +4  
County\* LEWIS & CLARK

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

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

☐ 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.

☒ 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<sup>st</sup> By: Last Name Ascending Sort 3<sup>rd</sup> By:

Sort 2<sup>nd</sup> By: First Name Ascending Sort 4<sup>th</sup> By:

Generate Cancel

# 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	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 ☒ 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 <sup>st</sup> By	Last Name ▼	Ascending ▼	Sort 3 <sup>rd</sup> By	▼	▼
Sort 2 <sup>nd</sup> By	First Name ▼	Ascending ▼	Sort 4 <sup>th</sup> By	▼	▼

Choose from:

- Last Name
- First Name
- School
- County
- 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							<input type="button" value="Refresh"/>
Started	Completed	Status	Clients	Target From	Target To		<input type="button" value="Cancel"/>
<a href="#">02/05/2014 01:03 PM</a>	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 <b>associated</b> with <i>Imafake Clinic/Imafake Clinic, Imafake Too Health Center.</i>	5
2	Clients that are <b>active</b> within <i>Imafake Clinic/Imafake Clinic, Imafake Too Health Center</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: <ul style="list-style-type: none"><li>• <b>Birthdate range</b> is not specified;</li><li>• <b>County</b> is not specified;</li><li>• <b>School</b> is not specified;</li><li>• <b>Provider</b> is not specified;</li><li>• <b>Weeks Since Last Notice</b> is not specified.</li><li>• Clients with the following <b>medical home association: Primary or Secondary</b>;</li></ul>	3
3	Clients that have one or more responsible persons that meet the following criteria regarding <b>address information</b> . <ul style="list-style-type: none"><li>• <b>City</b> is not specified</li><li>• <b>Zip Code</b> is not specified.</li></ul>	2
4	Clients that <b>Allow Sharing of Immunizations</b> .	2
5	Clients that have one or more responsible persons that <b>Receive Notices</b> .	2
6	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"><li>• Clients that are <b>Recommended or Overdue</b> for one or more vaccinations <b>as of 02/05/2014</b>;</li><li>• Use all <b>vaccine groups</b>;</li><li>• Use <b>CDC Schedule</b> for all clients.</li><li>• <b>Exclude Overdue Reminders</b> is not specified.</li></ul>	2
<b>Total Number of Clients Eligible for Reminder</b>		2
<b>Total Number of Responsible Persons Eligible for Reminder Mailings</b>		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
<a href="#">Reminder Letter</a>	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"/>
<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 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="#">Reminder/Recall Extract</a>	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
<a href="#">Reminder Letter</a>	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"/>
<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 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="#">Reminder/Recall Extract</a>	Reminder Recall extract file	Report Name <input type="text"/>

# Reminder and Recall Functions, Output

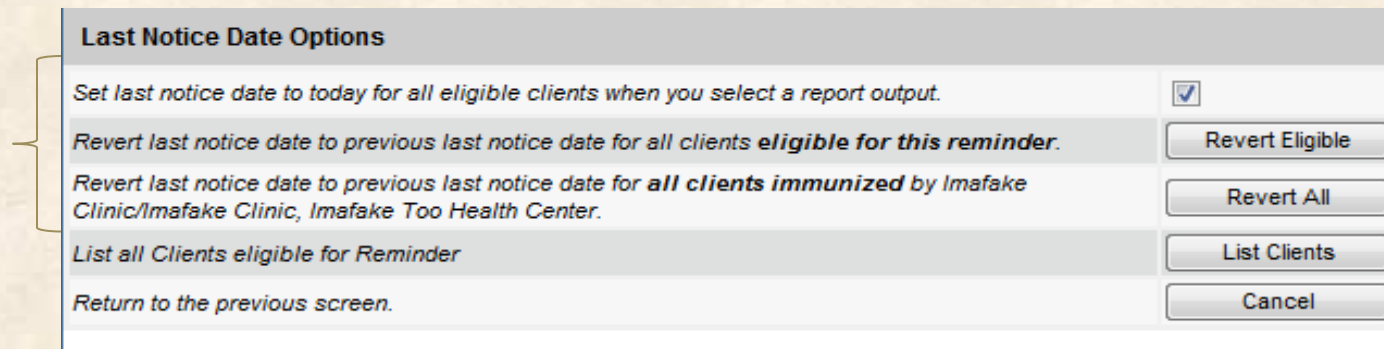
Once your selection has generated, follow the blue hyperlink to view and print.

Reminder Request Status						<a href="#">Refresh</a>
Started	Completed	Status	Clients	Target From	Target To	<a href="#">Cancel</a>
<a href="#">02/05/2014 01:03 PM</a>	02/05/2014 01:04 PM	100	2	02/05/2014	02/05/2014	
Reminder Output Status						
Name	Type	Requested	Started	Completed	Status	
<a href="#">Mailing Labels</a>	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	
<a href="#">Reminder Letter</a>	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 <b>eligible for this reminder</b> .	Revert Eligible
Revert last notice date to previous last notice date for <b>all clients immunized by Imafake Clinic/Imafake Clinic, Imafake Too Health Center</b> .	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	First Name	Middle Name	Date of Birth																							
<a href="#">SOUP</a>	BROCCOLI	CHEDDAR	01-JAN-10																							
<a href="#">SOUP</a>	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 5555 Montana Ave	Helena, MT 59601 Helena, MT 59601

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	

TOMATO SOUP-01/01/2009- 5 yrs	(406) 444-4444	5555 Montana Ave 5555 Montana Ave	Helena, MT 59601 Helena, MT 59601
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Vaccine	Recmd Day	Immunization Dates
DTPaP	03/01/2009	
Hep A	01/01/2010	
HepB	01/01/2009	
Influenza	03/01/2011 1) 02/01/2011	
MMR	01/01/2013 1) 02/01/2011	
Pneumococcal	03/01/2009	
Polio	03/01/2009	
Tdap > 7 years	01/01/2020	
Varicella	01/01/2013 1) 02/01/2011	

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 Address	City	State	Zip Code	Responsit	Responsit	Home Phc	Cell Phone	Business E	Email
2	4261709	SOUP	BROCCOLI	5555 Mont	Helena	MT	59601	POTATO	SOUP			(406)-444-4444	
3	4261708	SOUP	TOMATO	5555 Mont	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?

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(406) 444-2969  
mfunchess@mt.gov