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:

0 Immunization Reminder/Overdue Letters and Cards

0 Mailing Labels

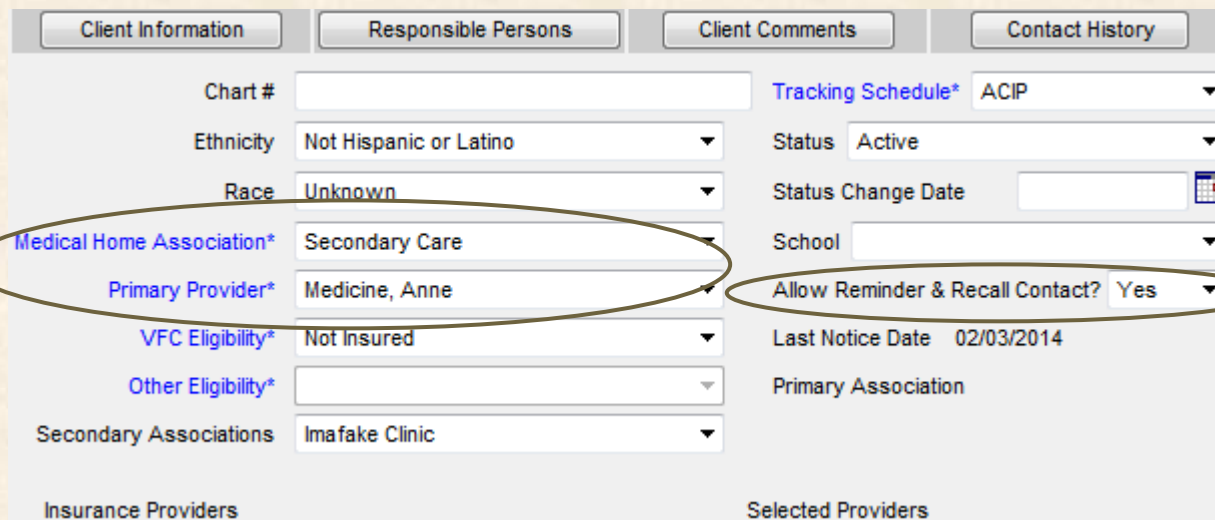0 Client Lists (available in downloadable spreadsheet or report formats)

* 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 <u>Yes</u>
- 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 # _____   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

Recall Notices? is checked and saved

Reminder and Recall Funstions,
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 and Recall Functions,
Selecting Parameters

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

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

Reminder and Recall Functions,
Selecting Parameters

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

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

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.

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 *Imafake Clinic/Imafake Clinic, Imafake Too Health Center*.	5
2	Clients that are **active** within *Imafake Clinic/Imafake Clinic, Imafake Too Health Center* and **allow Reminder & Recall Contact**. Additional criteria includes: • **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**. • **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: • 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 <u>any</u> 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		
		Free Text	Schedule your appointment today	
		Phone #	406-444-4444	
Reminder Card	Standard Reminder Card (4x5).	Report Name		
		Free Text		
		Phone #		
Mailing Labels	Avery Mailing Labels.	Report Name		
Client Query Listing	A list of clients based on the report criteria.	Report Name		
Reminder/Recall Extract	Reminder Recall extract file	Report Name		

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

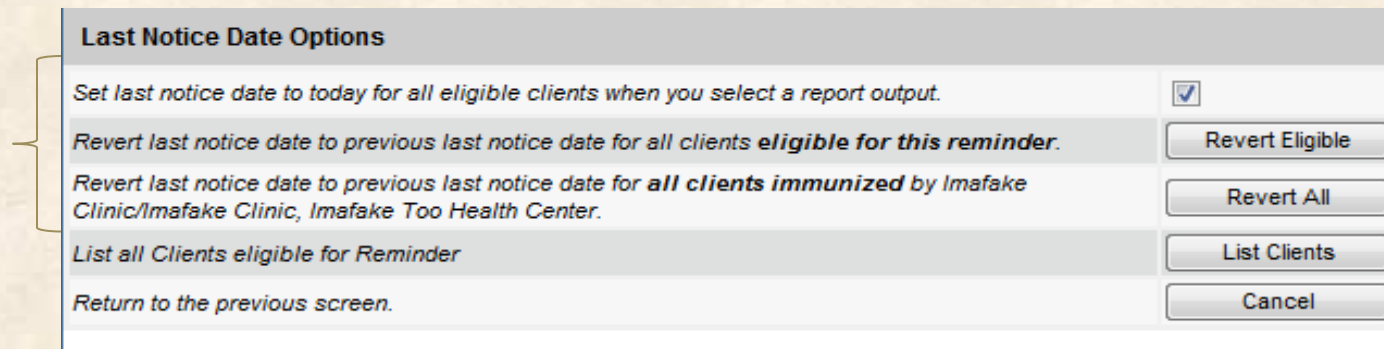| Output	Description	Additional Input	
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		Phone #	
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Reminder/Recall Extract	Reminder Recall extract file	Report Name	

Reminder and Recall Functions,
Output

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

Select the original hyperlink to create multiple formats or revised outputs

Reminder and Recall Functions, Results

Additional options impacting future outputs

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 <u>all clients eligible</u> for this reminder

Revert last notice date to previous last notice date for <u>all clients</u> 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 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

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

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
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.

For a Lifetime Immunize of Good Health

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

sample client query listing

sample Reminder/Recall Extract

Questions?

Montana Department of Health and Human Services

Public Health and Safety Division

Immunization Program

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