



REMINDER/RECALL Tools

imMTrax User Training

Montana Immunization Program

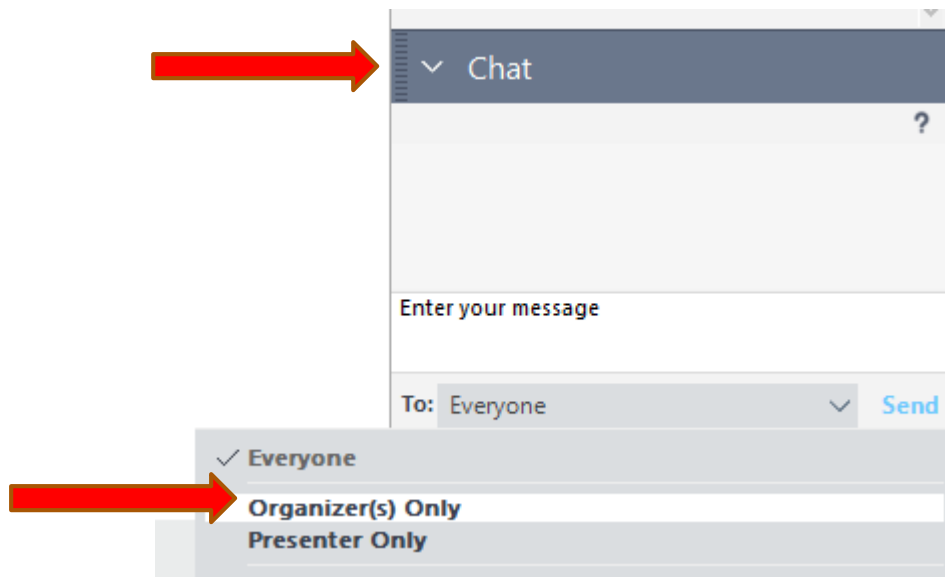
Last revised 5/2020

Housekeeping Items

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

To ask a question:

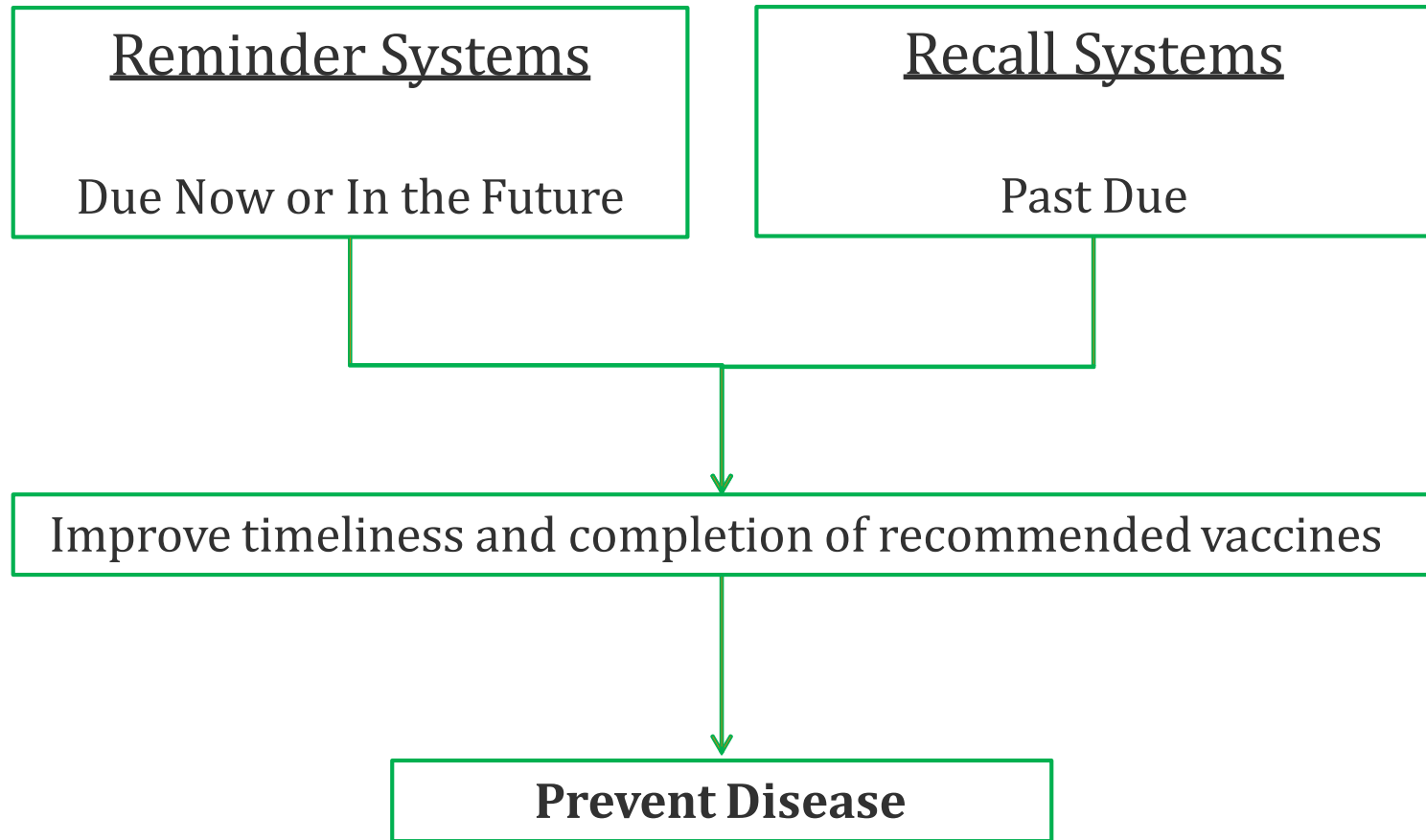
1. Send the host a message through the “Chat” function.



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

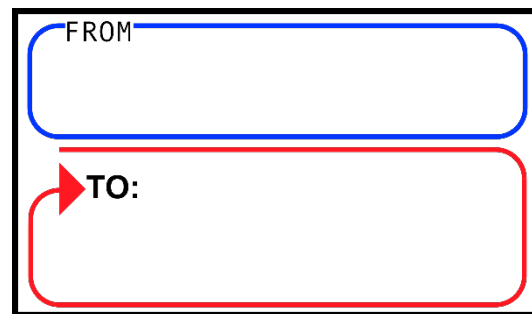
Reminder and Recall



Reminder 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!



A form with two fields: "FROM" and "TO:". The "FROM" field is outlined in blue and the "TO:" field is outlined in red. There is a red arrow pointing from the "TO:" field back to the "FROM" field, suggesting a return path or a link between the two fields.

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

Reminder and Recall Functions: Required Conditions

- o Client imMTrax consent is Yes
- o Client is owned by your facility (run by ownership) or Client has been owned by your site (run by service)
- o 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**

Only clients currently or previously owned will be included

Patient Demographic Master View			
Record Info			
SIIS Patient ID	1310723		
Organization Owner	89812 - ABCD		
Facility Owner	-		
Entry Date	05/05/2020	Last Update:	05/06/2020
Entered By	SARAH KEPPEM	Last Updated By:	SARAH KEPPEM
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Cascade)		
Patient			
Last Name:	PICKLES	Race:	White
First Name:	DILL	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
Birth Date:	11/20/2019	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
Sex:	MALE	Nationality:	--select--
Mother Maiden Name:	PICKLES	Passport #:	
VFC Status:	--select--	Visa #:	
Military:	<input type="checkbox"/>	Reminder/Recall Publicity Code:	--select--
Comments:			
Consented: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined			
Address			
Primary Address			
Address 1:	1258 NORTH HIGHLAND AVE	Address 2:	
City:	GREAT FALLS	State:	MT
Zip Code:	59404		
Country:	United States	County/Parish:	CASCADE
Phone Number(s)			
Phone Number:	Extension:	Phone Use Code:	Equipment Type:
(406)123-4567		Primary residence number	Y

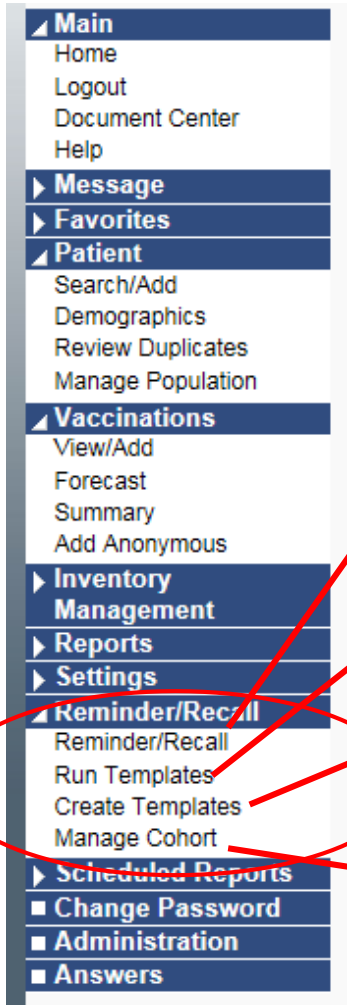
Reminder/Recall Publicity Code is saved as R/R-any method or default value (--select--)

Client has adequate contact information saved

Patient Demographics Edit			
Patient Status			
State Level:	Active	Organization Level:	Active
County Level:	Active (Cascade)		
Patient			
Last Name:	PICKLES	Race:	White
First Name:	DILL	Ethnicity:	--select--
Middle Name:		Language:	--select--
Suffix:	--none--		
Birth Date:	11/20/2019	Medicaid #:	
Birth File #:		Birth Order:	Single Birth
Sex:	MALE	Nationality:	--select--
Mother Maiden Name:	PICKLES	Passport #:	
VFC Status:	--select--	Visa #:	
Military:	<input type="checkbox"/>	Reminder/Recall Publicity Code:	--select--
Comments:			
Consented: <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Undetermined			
Address			
Address 1			
1258 NORTH HIGHLAND AVE			
City:	GREAT FALLS	State:	MT
Country:	United States	Zip Code:	59404
County/Parish:	CASCADE	Email:	
Phone Number(s)			
Phone Number:	Extension:	Phone Use Code:	Equipment Type:
(406)123-4567		--select--	--select--
			Primary <input checked="" type="radio"/>

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?

Who?

Which?

Reminder/Recall

1

2

3

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:

State Level Status:

County Level Status:

County / Parish:

Who do you want to Contact?

Patient Location: Facility

Patient Age Range Months Months

Patient Birth Date From Through

Patient Gender

Exclude patients who were sent a notification in the last:

of Days Weeks Months Years

Advanced

Which vaccines would you like to include?

Vaccine Group	4-3-1-4-3-1-4 Number of doses in this series
DTaP/DT/Td	4
HIB	4
POLIO	3
HEP-B 3 DOSE	3
MMR	1
VARICELLA	1
PNEUMO (PCV)	4

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?

- o For all patients you own (by ownership)
- o For all patients you have seen at your facility (by service)
- o Include Inactive Patients (patient status=inactive)
- o Due Date Timeframe

The screenshot shows a web-based form titled "How do you want to run this Reminder/Recall?". It features three radio button options for patient selection, a checked checkbox for including inactive patients, and a dropdown menu for the due date timeframe. The dropdown menu is currently open, showing a search bar and a list of options including "Due Now", "Custom", "3 Months or More Past Due", "2 Months or More Past Due", "1 Month or More Past Due", "Due Now", "Due In 1 Month or Less", "Due In 2 Month or Less", and "Due In 3 Month or Less".

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:

Due Now

Custom

3 Months or More Past Due

2 Months or More Past Due

1 Month or More Past Due

Due Now

Due In 1 Month or Less

Due In 2 Month or Less

Due In 3 Month or Less

Reminder and Recall Functions: Selecting Parameters

Choose who you want to contact?

- o Patient age range or patient birth date
- o Limit patient gender
- o Exclude patients who were sent a notification in last?

Who do you want to Contact?

Patient Location: Facility
KIDS
CLUB

Patient Age Range

Patient Birth Date

Patient Gender

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

Advanced

Reminder and Recall Functions, Selecting Parameters

Choose which vaccines you would like to include?

o 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)

o Custom

The screenshot shows a digital interface for selecting vaccine parameters. At the top, a blue header bar contains the text "Which vaccines would you like to include?". Below this, there is a dropdown menu with the placeholder text "Select a series" and a question mark icon. The dropdown menu is open, showing four options: "CUSTOM", "4-3-1-4-3-1-4", "1-1-1 (1 HPV, 1 TDAP, 1 MCV4)", and "3-1-2 (2/3 HPV,1 TDAP,2 MCV4)". The "CUSTOM" option is currently selected and highlighted with a grey background. To the right of the dropdown menu, there is a grey rectangular button.

Reminder and Recall Functions

Selecting Parameters

Choose which patients to see:

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

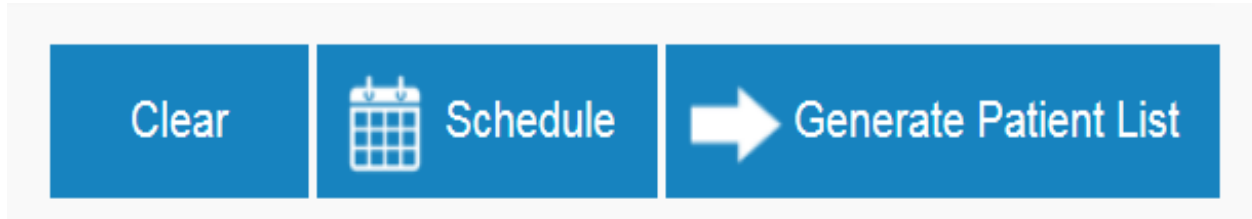
I only want to see my patients who are:

- 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

What patients do you want to add to your recall group?

Remove Patients who don't have an available
 Name Phone Address Email

Remove Patients who have received more than notifications.

	Last	First	Age	Vaccines Due	Available Contact Methods	R/R Attempts	Reason for Inactivation
<input checked="" type="checkbox"/>	CAT	MOLLY	2	8		0	Inactive
<input checked="" type="checkbox"/>	ICECREAM	MINT	19	9		0	Select Deceased Inactive
<input checked="" type="checkbox"/>	SKIES	SUNNY	17	4		0	Select
<input checked="" type="checkbox"/>	SUNFLOWER	SALLY	18	8		0	Select
<input checked="" type="checkbox"/>	SUNFLOWER	SALLY	18	7		1	Select

Showing 1 to 5 of 5 entries

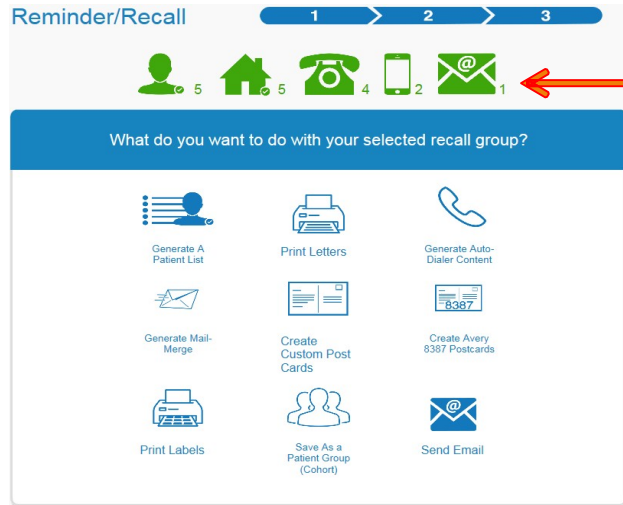
[Export Patient List](#) [Submit](#)

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

Message Instructions

Facility Return Address Information:

KIDS CLUB Phone Number

Street City, State Zip Code

Custom Postcard Settings:

Width: 6 Height: 4.25 Font Size: 10 pt Align: Left Center

Preview Postcard Message:

Default Output Language: English

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations. Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

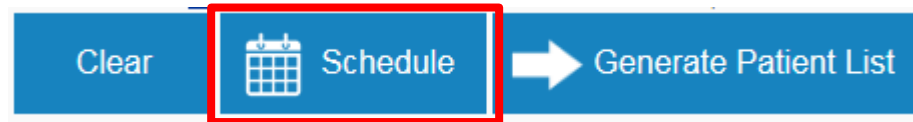
Make this count towards number of recall attempts

Save as Template Run

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






Run- generate selected output option.

Reminder/Recall Tools: Schedule










Reminder/Recall

1 > 2 > 3

What do you want to do with your selected recall group?

-  Generate A Patient List
-  Generate Auto-Dialer Content
-  Generate Mail-Merge
-  Create Custom Post Cards
-  Create Avery 8387 Postcards
-  Print Labels
-  Generate An Export File

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

The screenshot shows the 'Reminder/Recall Scheduler' window with the following elements:

- Scheduler:** Run now ; Time: 8 A.M. :00; Day: 1; Frequency: Month; Day of Week: Day of Week.
- Search User:** Last Name: Barber; Search button.
- Search Results:** Table with columns: Select User, First Name, Last Name, Organization, Facility, Email Address. One entry: TRAINING, BARBER, ABCD, KIDS CLUB, MBARBER@MT.GOV. A 'Select Users' button is circled in orange.
- Selected Users:** Table with columns: Select User, First Name, Last Name, Organization, Facility, Email Address. One entry: TRAINING, BARBER, ABCD, KIDS CLUB, MBARBER@MT.GOV. A checkbox next to 'Select User' is circled in orange.
- Bottom:** 'Remove Users' button, 'Make this count towards number of recall attempts' checkbox (circled in orange), and 'Schedule' button.

Option to check make this count towards number of recall attempts

Reminder/Recall Tools: Schedule

Select Schedule

Scheduler Status: Running

User Scheduled Tasks

Organization (IRMS)	Username	Name	Schedule	Next Run Time	
18505	STAFF1	Reminder/Recall	Every Thursday at 11:30 AM	12/27/18 at 11:30 AM	Delete

[View Log](#)

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.

The screenshot displays a web application interface for creating reminder/recall reports. On the left is a navigation menu with the following items: Main, Message, Favorites, Patient, Vaccinations, Inventory Management, Reports, Settings, and Reminder/Recall. The 'Reminder/Recall' section is expanded, and 'Create Templates' is highlighted with a red circle. An orange arrow points from this menu item to the 'Add New Design' button in the main content area.

The main content area is titled 'Create Reminder/Recall Reports' and contains a form with the following fields:

- Reminder/Recall Report Name:
- User Name:
- Organization (IRMS):
- Organization (IRMS) Group:
- Facility: KIDS CLUB
- Facility Group:
- VFC Pin:
- Include Global Searches:

Below the form is a 'Search Results' table with the following columns: Action, User, Reminder/Recall Report Name, and Global Search. The 'Add New Design' button is circled in red, and a 'Back to Search' button is located to its right.

R/R Tools: Create Template

Enter Report Name → Select
Parameters → Save Report

How?

How do you want to run this Reminder/Recall?

Specify Report Name
Report Name:

- For all patients you own
- For all patients you have seen at your facility
- Include Inactive Patients (Excluding deceased)

Due Date Timeframe:

Who?

Who do you want to Contact?

Patient Location:

- Patient Age Range:
- Patient Birth Date:
- Patient Gender:

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

Advanced

Which?

Which vaccines would you like to include?

I only want to see my patients who are:

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

Back Clear **Save Report**

R/R Tools: Review Template

◀ Main
Home
Logout
Document Center
Help

▶ Message

▶ Favorites

▶ Patient
Search/Add
Demographics
Review Duplicates
Manage Population

▶ Vaccinations
View/Add
Forecast
Summary
Add Anonymous

▶ Inventory Management

▶ Reports

▶ Settings






▶ Reminder/Recall
Reminder/Recall
Run Templates
Create Template
Manage Cohort


• **New template saved successfully.**


Create Reminder/Recall Reports


Reminder/Recall Report Name:	
User Name:	
Organization (IRMS):	18505 - ABCD
Organization (IRMS) Group:	
Facility:	KIDS CLUB
Facility Group:	
VFC Pin:	
Include Global Searches:	


Search Results


Action	User	Reminder/Recall Report Name	Global Search
    	STAFF1	TEST TEMPLATE	




 **-Edit.**

 **-Copy.**

 **-Delete.**

 **-Run.**

 **-Schedule.**

R/R Tools: Run Template

Select Run Templates → Select template.

The screenshot shows a navigation menu on the left with the following items: Main (Home, Logout, Document Center, Help), Message, Favorites, Patient (Search/Add, Demographics, Review Duplicates, Manage Population), Vaccinations (View/Add, Forecast, Summary, Add Anonymous), Inventory Management, Reports, Settings, and Reminder/Recall (Reminder/Recall, Run Templates, Create Templates, Manage Cohort). The 'Reminder/Recall Reports' header and 'TEST TEMPLATE' link are circled in red. A large red arrow points downwards from the 'Run Templates' option.

Select Run Report.

Option to Select Preview and check Increment Recall Count.

Reminder/Recall Reports	
TEST TEMPLATE	
Reminder/Recall TEST TEMPLATE	
<input type="checkbox"/> Increment Recall Count	
Due Date Timeframe:	Due Now
Limit Reminder/Recall Group By:	
Organization (IRMS):	ABCD
Organization (IRMS) Group:	
Facility:	KIDS CLUB
Facility Group:	
Patient Age Range:	
Vaccine Families:	and Optional Needed Dose Number:
unable to retrieve	All
Back	Run Report Preview

Manage Cohort

Select Manage Cohort → Select Search → Select cohort.

The screenshot shows the 'Manage Cohorts' interface. On the left is a navigation menu with categories: Main, Message, Favorites, Patient, Vaccinations, Inventory Management, Reports, Settings, and Reminder/Recall. The 'Manage Cohort' option under 'Reminder/Recall' is circled in red. The main area is titled 'Manage Cohorts' and contains a 'Search/Add Cohort' section with input fields for Cohort Name, User Name, and Status (set to 'Active'), and a radio button for Facility (set to 'KIDS CLUB'). 'Reset' and 'Search' buttons are at the bottom right, with 'Search' circled in red. Below is a 'Search Results' table with columns: Select, Cohort Name, Created By, Creation Date, and Status. Two rows are shown: 'TEST' and 'TEST COHORT', both created by 'STAFF1' on '12/27/2018' and with status 'Active'. The 'Select' column contains red double-headed arrows, with the first one circled in red. A large red arrow points from the table to the text below. Below the table is the text: 'To create new Cohort run Reminder/Recall and save results as a Cohort'.

Select	Cohort Name	Created By	Creation Date	Status
-->	TEST	STAFF1	12/27/2018	Active
-->	TEST COHORT	STAFF1	12/27/2018	Active

To create new Cohort run Reminder/Recall and save results as a Cohort

Select Run Reminder/Recall.

Option to Inactivate (cohort) and Save as Recall Attempt.

The screenshot shows the 'Cohort View' interface. It displays details for the 'TEST COHORT' with a size of 10. The 'Cohort Criteria' section shows: Due Date Timeframe (01/01/1900 to 12/27/2018 Due Now), Organization (IRMS) 18505, Facility (KIDS CLUB), Facility Type, and Vaccine Family Codes (DTaP/DT/Td, HEP-B 3 DOSE, HIB, MMR, PNEUMO (PCV), POLIO, VARICELLA). The 'Cohort Info' section shows: Created By (STAFF1), Creation Date (12/27/2018), and Status (Active). The 'Reminder/Recall History' section has columns for Date, Type, and # Sent. A checkbox labeled 'Save as Recall Attempt' is circled in red. At the bottom right, 'Inactivate' and 'Run Reminder/Recall' buttons are circled in red.

Date	Type	# Sent
------	------	--------

Save as Recall Attempt

Inactivate Run Reminder/Recall

Reminder/Recall Success Report

Reminder/Recall Success Report	
<i>Limit Report By:</i>	
<input checked="" type="checkbox"/> Attempt Date Range	From: 05/01/2020 Through: 05/18/2020
<input type="checkbox"/> Patient Age	From: <input type="text"/> --select-- Through: <input type="text"/> --select--
<input type="checkbox"/> Patient Birth Date	From: <input type="text"/> Through: <input type="text"/>
<input type="checkbox"/> Do Not Limit	
<input type="checkbox"/> District/Region	<input type="text"/>
<input type="checkbox"/> Patient County	--select--
<input type="checkbox"/> ZIP Code	<input type="text"/>
<input type="checkbox"/> Organization	ABCD
<input type="checkbox"/> Do Not Limit	
<input type="checkbox"/> Facility	TRAINING CLINIC
<input type="checkbox"/> Do Not Limit	
<input type="checkbox"/> VFC PIN	--select--

Montana Department of Health
and Human Services
Public Health and Safety Division
Immunization Program

Questions?

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Thank you for attending!