

The **Reminder/Recall Request** functionality in ImmuNet is designed to help your organization generate reminder letters, mailing labels, patient query listings and custom letters. By referring to this **Reminder/Recall Request Quick Reference Guide**, you will be able to understand the following:

[Criteria for the Reminder/Recall Request](#)

[Reminder Request Status Page](#)

[Reminder Request Process Summary Page](#)

[Reminder Request Output Options](#)

Required Conditions for Reminder/Recall Request

Reminder/Recall notices can be generated for each patient, provided that the following conditions are met:

- The status is **Active** in the **Patient Information** Section for your organization.
- The **Allow Reminder and Recall Contact?** indicator in the **Patient Information** section is **Yes**.
- The patient has complete address information listed in the **Address Information** section.

On the left navigator, click on **Organization Reports** and click on **Reminder/Recall Request**.

- Patients**
- Organization Reports**
 - > AFIX Reports
 - > Ad Hoc Reports
 - > Doses Administered
 - > Provider Report Card
 - > **Reminder/Recall Request**
 - > Reminder/Recall Custom Letters

Criteria for the Reminder/Recall Request

Fill out each criteria:

Select Patient Population: This section is available only to State and Local County Public Health organizations. Users associated with these organizations can select patients based on their specific organization or that are residing in a specific county by selecting one of the following options:

- To generate a reminder for all patients associated with your organization select the top radio button.
- To generate a reminder for all patients within your county, select the second radio button.

- To generate a reminder for both patients associated with your organization or residing in your County, select the third radio button.

Reminder/Recall Request

Select Patient Population ...

Patients Associated with Baltimore City Health Clinic

Patients Residing in the City of Baltimore

Patients Associated with Baltimore City Health Clinic or Residing in City of Baltimore

Indicate the Tracking Schedule: ImmuNet only uses the tracking schedule recommended by the Advisory Committee on Immunizations Practices (ACIP). Therefore, selecting to use the tracking schedule associated with each patient or a uniform tracking schedule for all patients will be based on ACIP recommendations.

Reminder/Recall Request

[Report Status](#)

Indicate the Tracking Schedule ...

Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients ▼

Select the Vaccine Group(s)

- If you wish to include all vaccine groups in the search criteria, select the **Use All Vaccine Groups** option;
- If you choose to include only selected vaccine groups, mark the **Use Vaccine Groups Selected** option and select these groups by double clicking a group or highlighting a chosen group and pressing the **Add** button. Repeat for each group desired.

Select the Vaccine Group(s) ...

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno

Anthrax

BCG

Add>

<Remove

Note: By selecting specific vaccine groups, you will limit the search to only those patients who will be due/past-due for the selected immunizations. However, ImmuNet will provide a list of all immunizations for which the selected patients are due/past due.

Select the School & Primary Care Provider: These fields can only be utilized if the organization created a list of schools and physicians to populate the dropdown boxes on the patient demographic screen and has selected data from these fields in each of the patients records. Choosing a school or primary care provider allows you to narrow your search to only the patients assigned to a particular school or physician/clinic. If you do not wish to specify a school and/or provider, leave these fields blank.

- To choose a school, select a school name from the dropdown list as shown below. Note that these schools are maintained for each provider through the User Interface, using the manage schools menu item.
- To choose a primary care provider (PCP), select a physician or clinic name from the dropdown list.

Select the School & Primary Care Provider ...

School <input type="text"/>	Provider (PCP) <input type="text"/>
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Enter Additional Demographic Criteria: Entering a City, ZIP code or County will narrow your search to only the patients associated with the entered geographical area. The County option is only available to County public health organizations. If you do not wish to specify a City, ZIP code, or County, leave these fields blank.

- To enter a City, type the city name within the first field.
- To enter a ZIP code, enter the five-digit number in the next field.
- To enter a County, choose from the dropdown list in the third field.

Enter Additional Demographic Criteria ...

City <input type="text"/>	Zip Code <input type="text"/>	County <input type="text"/>
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Enter the Date Criteria

- **Target Date Range:** If you wish to utilize a target date range, the report will include those patients that are due/overdue for immunizations within your specified date range. To choose a target date range, enter the beginning date in the **From** text box and the ending date in the **To** text box in MM/DD/YYYY format, or use the calendar icon to select the desired dates. These dates can range from the past to the future; therefore, you have the capability to run a recall, reminder, or a combination of the two.

*Note: If both the **From** and **To** dates are left blank, the system will find those patients who are due or overdue as of the date that you run the report.*

- **Birth Date Range:** To choose a birth date range, enter the beginning date in the **From** text box and the ending date in the **To** text box in MM/DD/YYYY format, or use the calendar icons to select the desired dates.

*Note: If the **From** date is unspecified for the **Birth Date Range**, the report will include the oldest patients in the system. If the **To** date is unspecified for the **Birth Date Range**, the system will use the date that you run the report for that field.*

Enter the Date Criteria ...

Target Date Range	From <input style="width: 80%;" type="text"/>		To <input style="width: 80%;" type="text"/>	
Birth Date Range	From <input style="width: 80%;" type="text"/>		To <input style="width: 80%;" type="text"/>	

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

Weeks Since Last Notice

Exclude patients more than Month(s) Overdue

Exclude from Today's Date Target From Date

- **Weeks Since Last Notice:** When a number is entered in this field, the report will include only those patients who have not received a reminder/recall notice within the specified number of weeks prior to the current date.

Note: Patients can be shared between organizations; therefore, another organization may have recently generated a reminder/recall notice for some patients.

- **Exclude Patients More Than:** To exclude patients who are overdue and who may have received several reminders already, provide a number of months from the dropdown list provided.
- **Exclude from:** If excluding patients overdue for a certain number of months, indicate the date from which patients should be excluded; choose either the current date or the Target **From** Date (uses the date from the field at the top of the section) by clicking the appropriate radio button. If no target date information is entered, patients will be excluded from the date the report was run.
- **Sorting Criteria:** This section allows you to specify how the data will be sorted. If a sort order is not specified, ImmuNet will sort the report results first by the patients last name in ascending order (A to Z), then by the first name in ascending order.
 - **Sort 1st By:** Choose a primary information field by selecting from the dropdown list provided.
 - **Ascending/descending order:** Choose how the primary field is sorted; choose either ascending (A to Z) or descending (Z to A) order from the dropdown list.

Note: You may also include additional ordering sequences for the second through fourth sorts.

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	▼	▼

Review all the above entered criteria and press the **Generate** button. Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports.

Reminder Request Status Page

While the data is being generated, the **Reminder Request and Output Status** page indicates the percentage of completion. Periodically press **Refresh** to update the status.

Reminder Request Status						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
05/08/2020 11:49 AM		44 %		05/08/2020	05/08/2020	

Reminder Output Status
<i>No Reminder Outputs Logged</i>

When the report is complete, the **Status** column will display 100 % and the date and time under the **Started** column will display as an [underlined link](#). You may click on the [blue underlined](#) date to go to the **Reminder Request Process Summary** page.

Reminder Request Status						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
<u>05/08/2020 11:49 AM</u>	05/08/2020 11:55 AM	100 %	6185	05/08/2020	05/08/2020	

Reminder Output Status
<i>No Reminder Outputs Logged</i>

Reminder Request Process Summary Page

This page lists the number of patients involved in the search and the criteria that were used to define the search. You can also create various reminder output options from this page.

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Patients
1	Patients associated with <i>IR Physicians</i> .	7789
2	Patients immunized by <i>IR Physicians</i> .	7505
3	Patients that are active within <i>IR Physicians</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. 	7349
4	Patients that have a Valid Address . Additional criteria includes: <ul style="list-style-type: none"> • City is not specified • Zip Code is not specified. 	6266
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> • Patients that are Recommended or Overdue for one or more vaccinations as of 05/08/2020; • Use the following vaccine groups: DTP/aP, HPV, HepB, MMR, Pneumococcal, Polio, Rotavirus, Tdap, Varicella and ; • Use ACIP for all patients. • Exclude Overdue Reminders is not specified. 	6185
<i>Total Number of Patients Eligible for Reminder</i>		6185

Reminder Request Output Options

This table allows you to choose how you would like to use the data from your query.

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Patient Query Listing	A list of patients based on the report criteria.	Report Name <input type="text"/>
Test	Custom Letter.	Report Name <input type="text"/>

*Note: You can go to other portions of ImmuNet or use other functions of your computer while you are waiting for any output option to process. To return to check the progress of your request, click on the **Report Status** button on the **Reminder/Recall Request** page. If you choose to stay at the **Reminder Request Status** page while your request is processing, press the **Refresh** button occasionally to check its status.*

- **Reminder Letters:** The reminder letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate a **Reminder Letter**, follow these steps:

1. Under the **Additional Input** column or the **Letter** section of the table, enter:
A report name in the appropriate field, if desired. If a report name is not indicated, the report will simply be named **Reminder Letter** on the **Reminder Report Status** page.

You can type additional information up to a maximum of 400 characters in the **Free Text** field. Any message typed in this field will be included as a closing statement for each of the letters generated in your report.

You can also include a telephone number in the **Phone #** field. This phone number will appear in the closing statement for each of the letters generated in your report.

2. Click on [Reminder Letter](#), which is underlined and in **blue** text. Your report will be listed on the **Reminder Request Status** page.
3. Once the status shows **Ready** and the report name is underlined and appears in **blue**, your letters are ready to be viewed. Click on the report name to view or print the letters in Adobe Acrobat Reader®.

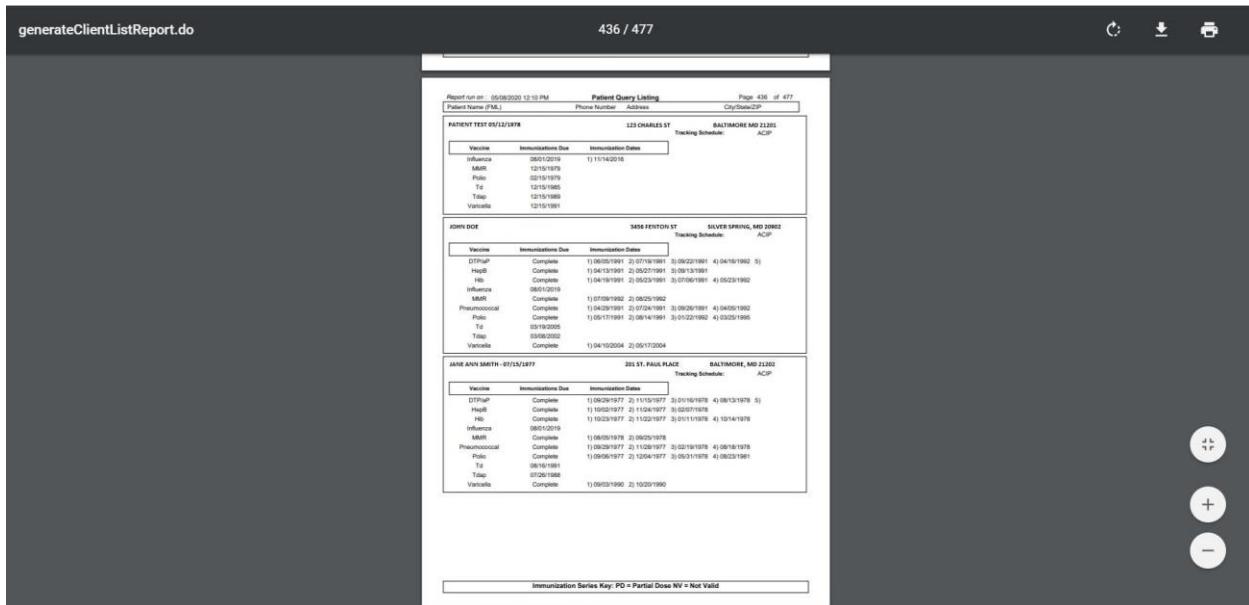
- **Mailing Labels:** This output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

1. Click on the link for **Mailing Labels**, which is underlined and in **blue** text.
2. Your request will be listed on the **Reminder Request Status** page.
3. Once the report name is underlined and appears in **blue** text, your labels are ready. Click on the report name to view or print the labels in Adobe Acrobat Reader®.

- **Patient Query Listing:** This list displays contact information for those patients identified as being due/overdue in the **Reminder/Recall Output** in a report format. This report lists every patient that

was returned in the report query process. To generate a **Patient Query Listing**, complete the following steps:

1. Click on the link **Patient Query Listing**, which is underlined and in **blue** text.
2. Your request will be listed on the **Reminder Request Status** page.
3. Once the report name is underlined and appears in **blue** text, your report is ready. Click on the report name to view or print the report in Adobe Acrobat Reader®.



generateClientListReport.do 436 / 477

Report run on: 05/08/2023 12:10 PM Patient Query Listing Page: 436 of 477

Patient Name (FNL)	Phone Number	Address	City/State/Zip
PATIENT TEST 05/13/1978	123 CHARLES ST	BALTIMORE MD 21201	ACIP
Vaccine	Immunizations Due	Immunization Dates	
Influenza	08/01/2019	1) 11/14/2018	
MMR1	12/15/1978		
Polio	08/16/1978		
Td	12/15/1980		
Tdap	12/15/1980		
Varicella	12/15/1981		
JOHN DOE	3456 EYENOW ST	SILVER SPRING, MD 20852	ACIP
Vaccine	Immunizations Due	Immunization Dates	
DTaP4a	Complete	1) 08/03/1991 2) 07/18/1991 3) 08/22/1991 4) 04/18/1992 5)	
HepB	Complete	1) 04/13/1991 2) 05/23/1991 3) 08/13/1991	
HiB	Complete	1) 04/18/1991 2) 05/23/1991 3) 07/06/1991 4) 05/23/1992	
Influenza	08/01/2019		
MMR1	Complete	1) 07/08/1992 2) 08/25/1992	
Phenoxycoccal	Complete	1) 04/28/1991 2) 07/04/1991 3) 08/28/1991 4) 04/03/1992	
Polio	Complete	1) 05/17/1991 2) 08/14/1991 3) 01/22/1992 4) 03/25/1996	
Td	05/15/2001		
Tdap	05/08/2002		
Varicella	Complete	1) 04/10/2004 2) 05/17/2004	
JANE ANNE SMITH - 07/13/1977	201 ST. PAUL PLACE	BALTIMORE, MD 21202	ACIP
Vaccine	Immunizations Due	Immunization Dates	
DTaP4a	Complete	1) 08/28/1977 2) 11/15/1977 3) 01/16/1978 4) 08/13/1978 5)	
HepB	Complete	1) 10/02/1977 2) 11/24/1977 3) 02/07/1978	
HiB	Complete	1) 08/23/1977 2) 11/02/1977 3) 01/11/1978 4) 10/14/1978	
Influenza	08/01/2019		
MMR1	Complete	1) 08/01/1978 2) 08/25/1978	
Phenoxycoccal	Complete	1) 08/28/1977 2) 11/28/1977 3) 02/15/1978 4) 08/18/1978	
Polio	Complete	1) 08/08/1977 2) 12/04/1977 3) 05/21/1978 4) 08/23/1981	
Td	08/16/1981		
Tdap	07/26/1988		
Varicella	Complete	1) 08/23/1990 2) 10/23/1990	

Immunization Series Key: PD = Partial Dose NV = Not Valid

- **Custom Letter:** The custom letter output option allows you to generate a customized letter for each patient returned on your query. ImmuNet allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:
 1. Click on **Reminder/Recall Custom Letters** under **Organization Reports** on the menu panel.
 2. Click the underlined **New Custom Letter** link.
 3. At the **Create New Custom Letter** page, enter the following:
 - **Top Margin:** Choose the number of blank lines you would like at the top of the letter from the dropdown list provided.
 - **Include Patient Address:** Check the box to include the patient's address at the top of the letter.
 - **Salutation:** Enter a greeting, then choose a name option from the dropdown list provided.
 - **Paragraph 1:** In the field marked **First Part**, enter desired text.

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- **Immunization History:** Check the box to include the patient's immunization history in the letter.
 - **Paragraph 2:** Enter more text in this field, if desired.
 - **Immunization recommendations:** Check this box to include the immunizations recommended for the patient in the letter.
 - **Paragraph 3:** Enter text in this field, if desired.
 - **Closing:** Enter a closing word or statement in this field.
 - **Name and Save the Custom Letter:** Enter a name for the letter in the field provided. When the letter is complete, press **Save**.
4. Go to the **Reminder Request Output Options** page and click the link with the name of the custom letter. The letter will begin generating immediately.
 5. Your report will be listed on the **Reminder Request Status** page; the table will show the name of the request, the date and time it was started, and the status of the request.
 6. Once the report name is underlined and appears in **blue**, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.

Please refer to the [ImmuNet User Manual](#) (pages 118 – 129) for more detailed instructions on generating **Reminder/Recall Requests**.

To learn how to navigate ImmuNet, click on '**Resources**' then click [ImmuNet Quick Reference Guide](#) and [ImmuNet Training Videos](#).

Contact **ImmuNet Support** ([here](#)) with any questions.