

Reminder/Recall Report

Purpose of this document

Background: The reminder/recall report within WIR (Wisconsin Immunization Registry) facilitates timely intervention and ensures that clients receive necessary vaccinations according to recommended schedules.

The following user roles have access to the Reports panel and can run reminder/recall reports:

- IR Administrator

After reviewing this document, you should be able to:

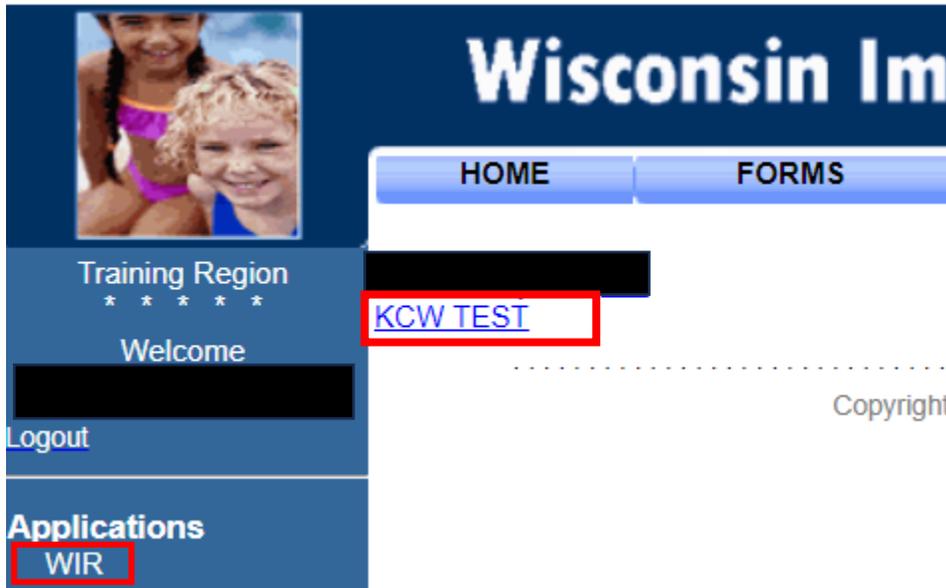
- Understand the purpose of and information included on the reminder/recall report.
- Run a reminder/recall report.
- Select appropriate report output options.

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The reports panel

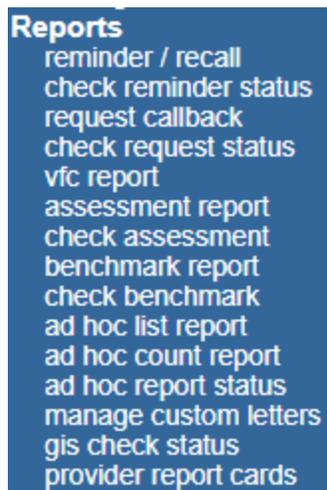
- Select the **WIR** application and then select your organization name from the list at the top of the screen.



- You should see the screen shown below.



Once there, you should see the Reports section on the left menu panel.



Reminder/recall report

- Used to generate reminder and recall notices for clients who are due or overdue for immunizations.
 - Reminder messages alert patients to the need for vaccines that will be due in the future.
 - Recall messages notify patients about vaccines that are overdue.
 - Both reminder and recall have been shown to improve immunization rates for children and adolescents in numerous [systematic reviews](#).
 - It is a relatively low-cost intervention with high cost-effectiveness compared with other recommended strategies.
- Output options include letters, cards, address labels, client lists, and downloadable text files.

1) **Important** considerations before running reminder and recall reports:

- a. Ensure your client base in WIR is up-to-date and includes only active clients that the provider still sees regularly.
- b. Inactivate clients in WIR database who have moved or transferred care.
 - i. To inactivate a client, find the client's record, go to **Edit Client**, and under the Client Information tab, change their Status to Inactive. If your organization is the Division of Public Health or a city or county public health department running a jurisdiction report, then the status should be changed to Moved Out of Jurisdiction.

Client Information	Responsible Person(s)	Client Comment(s)
Chart # <input type="text"/>		Tracking Schedule <input type="text" value="ACIP"/>
Ethnicity <input type="text"/>		Status <input type="text" value="Inactive"/>
Race <input type="text"/>		Allow Sharing of Immunization Data? <input type="text" value="Yes"/>
Provider-PCP <input type="text" value="Doctor, Test"/>		Allow Reminder and Recall Contact? <input type="text" value="Yes"/>
School <input type="text" value="Jefferson School"/>		

- c. Each organization should establish a procedure for regularly inactivating clients to maintain an updated list of active clients.
- ### 2) Reminder and recall notices are generated for every responsible person associated with a client if the following conditions are met:
- a. The client is active under your organization with at least one immunization provided by the provider generating the notice.
 - b. The Allow Reminder and Recall Contact indicator on the Client Information tab is marked Yes.
 - c. The Allow Sharing of Immunization Data indicator on the Client Information tab is marked Yes.
 - d. The responsible person's Notices? checkbox in the Responsible Person(s) tab is checked.

Note: You can review these conditions by accessing the client's personal information by selecting **Manage Client** or **Manage Immunizations**, then selecting the **Edit Client** button.

Personal Information		Save
Last Name	TESTCLIENT	History/Recommend
First Name	ALI	Record Immunization
Middle Name		Reports
Suffix		Cancel
Mother's Maiden Last	TESTED	
Mother's First Name		
SSN		
Gender	<input type="radio"/> M <input checked="" type="radio"/> F <input type="radio"/> Unknown	
Birth Date	01/01/1990	
County		
Country of Birth	UNITED STATES	
Last Notice 02/26/2024		

Last Updated by: KCW TEST on 02/26/2024

Client Information	Responsible Person(s)	Client Comment(s)
Chart #		Tracking Schedule ACIP
Ethnicity		Status Active
Race		Allow Sharing of Immunization Data? Yes
Provider-PCP		Allow Reminder and Recall Contact? Yes
School		
Funding Programs/Eligibilities Eligibility Not Det/Unknown Medical Assistance No Insurance		Selected Programs/Eligibilities Insured, Vaccine covered
Insurance Providers AMERICAN DENTAL PLAN OF WISCONSIN Advocare Atrium Health Plan Inc		Selected Providers

Client Information Responsible Person(s) Client Comment(s)

Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary	Address Validation	
<input checked="" type="radio"/>	TESTCLIENT	ALI	Self	MADISON	Yes		Address found	New
								Copy
								Delete

Details for Responsible Person: ALI TESTCLIENT

Last Updated:

Address is deliverable

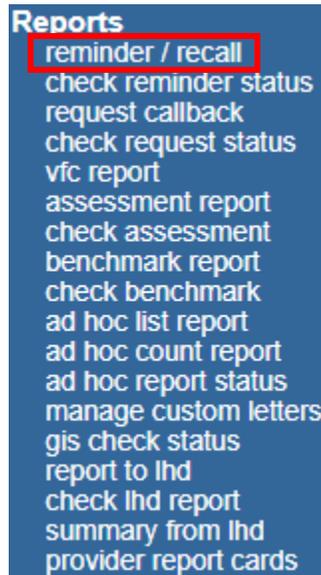
Last Name	TESTCLIENT	Street Address	1 W WILSON ST	Next			
First Name	ALI	Other Address		Cancel			
Middle Name		P.O. Box					
Relation	Self	City	MADISON				
Phone (prim)		State	WI	Zip	53703	+4	3445
Extension		Type		E-Mail			
Phone (sec)		Language	ENGLISH				
Extension		Type		Notices?	<input checked="" type="checkbox"/>	Primary?	<input type="checkbox"/>

3) Primary? Checkbox

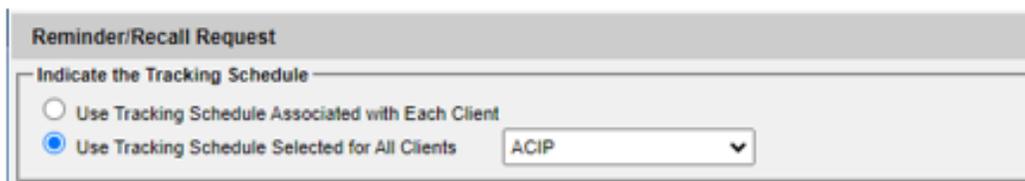
- a. **Important:** If the Primary? checkbox on the Responsible Person tab (as seen below) is checked on the client record, then WIR will use the address of the Primary Responsible Person when creating letters or other report output.
- b. If a Primary Responsible Person is not selected for the client, WIR will attempt to determine the primary address, prioritizing the last updated address. If addresses were updated on the same day, WIR first prioritizes the address of the responsible person with the Self relation, and then the addresses of other responsible person(s) on the client record.

Client Information	Responsible Person(s)	Client Comment(s)						
Responsible Person Listing								
Select	Last Name	First Name	Relationship	City	Notices	Primary	Address Validation	New
<input type="radio"/>	TESTCLIENT	KATELYN	Self	MADISON	No		Multiple	Copy
<input checked="" type="radio"/>	TESTCLIENT	MARY	Mother	MADISON	Yes	Yes	Street	Delete
Details for Responsible Person: MARY TESTCLIENT								
Last Updated:				Address has been found in US postal data				
Last Name	TESTCLIENT			Street Address	1 West Wilson St			Next
First Name	MARY			Other Address	Apt 8			Cancel
Middle Name				P.O. Box				
Relation	Mother			City	MADISON			
Phone (prim)				State	WI	Zip	53703 +4	
Extension				E-Mail				
Phone (sec)				Language	ENGLISH			
Extension				Notices?	<input checked="" type="checkbox"/>			
				Primary?	<input checked="" type="checkbox"/>			

- 4) Select **Reminder/Recall** under the Reports section on the left menu panel.



- 5) On the Reminder/Recall Request screen, ensure accurate report generation by adjusting the following criteria for the report. Failure to modify these criteria will result in the report running with default settings. Each section is detailed below.
- Tracking Schedule
 - Always select **Use Tracking Schedule Selected for All Clients** and select **ACIP** from the dropdown menu.
 - This selection ensures that all clients undergo evaluation based on the ACIP schedule in WIR, which is the standard schedule.
 - It is possible that a client could have been inadvertently switched to another schedule, and then that individual would be evaluated differently from the remainder of the cohort. This could cause incorrect notices to be sent.



The image shows a screenshot of the 'Reminder/Recall Request' form. The section 'Indicate the Tracking Schedule' contains two radio button options. The first option is 'Use Tracking Schedule Associated with Each Client' and is unselected. The second option is 'Use Tracking Schedule Selected for All Clients' and is selected with a blue radio button. To the right of this selected option is a dropdown menu with 'ACIP' selected and a downward arrow.

- Vaccine Group
 - Select the trade names(s) to be evaluated by choosing the vaccine group and selecting **Add**, which will move the vaccine group to the designated box on the right.
 - Once the vaccine group(s) have been selected, then Select Trade Name(s) and Select Dose Criteria sections will become accessible.
 - Choose the trade name(s) to be evaluated.
 - Next choose the dose criteria.

1. If the goal is to know who needs to start a vaccine series, do not add a number to the box on the right.
2. To identify those who have received the first dose but require the second, input 1 into the box on the right and select the button next to Next Dose in Series. Repeat this process for subsequent doses.

Select the Vaccine Group(s)

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno
Anthrax
BCG

Add >

HPV

< Remove

Select the Trade Name(s)

Use All Trade Names

Use Trade Names Selected

Cervarix
Gardasil

Add >

Gardasil 9

< Remove

Select Dose Criteria

Next Dose in Series

2
3
4

Add >

1

< Remove

- c. School & Primary Care Provider
 - i. Utilize these fields to narrow down the criteria by specific school or provider within a practice.
 - ii. These fields are often left blank but can provide more focused targeting when filled.
- d. Additional Demographic Criteria
 - i. Similarly, criteria can be narrowed down by city or zip code if desired.
 - ii. These fields are often left blank but can provide more focused targeting when filled.

Select the School & Primary Care Provider

School

Provider (PCP)

Enter Additional Demographic Criteria

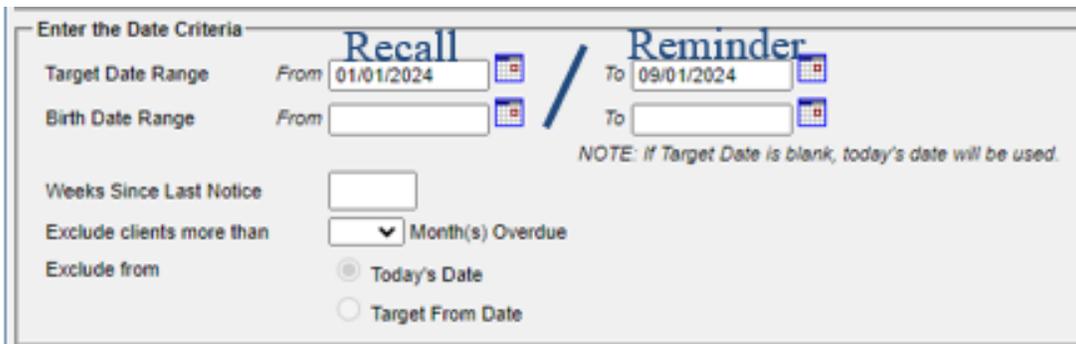
City

Zip Code

- e. Date Criteria
 - i. Target Date Range
 1. Consider the blue slash between the From and To dates to represent today's date. Any date prior to today, or to the left of the slash, indicates a dose that was due prior to today and is categorized as a recall.
 2. A date after today, to the right of the slash, is a dose that is approaching due and is categorized as a reminder.

ii. Birth Date Range

1. A birth date range is beneficial when targeting an age cohort that may be overdue for vaccinations. For example, per ACIP, HPV vaccination is due between ages 11 and 12. Running a reminder/recall report for all 13-year-olds who have not initiated the series can be valuable.
2. In such a case, the provider must determine the actual birthdates of the oldest and youngest 13-year-olds in the cohort and enter them into the designated fields.



The screenshot shows a form titled "Enter the Date Criteria" with two main sections: "Recall" and "Reminder".

- Recall Section:** "Target Date Range" with "From" date 01/01/2024 and "To" date 09/01/2024. "Birth Date Range" with "From" and "To" empty date pickers.
- Reminder Section:** "Target Date Range" with "From" and "To" empty date pickers. "Birth Date Range" with "From" and "To" empty date pickers.

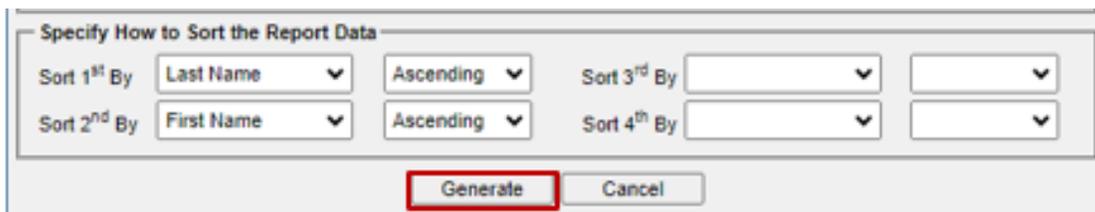
Additional fields include:

- "Weeks Since Last Notice": empty text box.
- "Exclude clients more than": dropdown menu set to "Month(s) Overdue".
- "Exclude from": radio buttons for "Today's Date" (selected) and "Target From Date".

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

f. How to Sort the Report Data

- i. While this section allows for sorting data, it is often easier to leave it blank and sort the data after the report is exported to Excel as the sort functions in Excel give the user more options.
- ii. Select **Generate** once the configuration is complete.



The screenshot shows a form titled "Specify How to Sort the Report Data" with four sorting criteria:

- Sort 1st By: Last Name (dropdown), Ascending (dropdown)
- Sort 2nd By: First Name (dropdown), Ascending (dropdown)
- Sort 3rd By: (empty dropdown), (empty dropdown)
- Sort 4th By: (empty dropdown), (empty dropdown)

At the bottom, there are two buttons: "Generate" (highlighted with a red box) and "Cancel".

- 6) Example: Run a reminder/recall report to identify all clients associated with provider KCW Test who are due or overdue for their first HPV vaccine in the date range 01/01/2024 to 09/01/2024.
- Note: Since the example aims to identify those due or overdue for their *first* vaccine of the series, do not add a vaccine series number to the box on the right in the Select Dose Criteria section.
 - WIR will pull clients with no vaccine history of HPV.

Reminder/Recall Request

Indicate the Tracking Schedule

Use Tracking Schedule Associated with Each Client

Use Tracking Schedule Selected for All Clients ACIP v

Select the Vaccine Group(s)

Use All Vaccine Groups

Use Vaccine Groups Selected

Encephalitis
HepA
HepB

Add >
< Remove

HPV

Select the Trade Name(s)

Use All Trade Names

Use Trade Names Selected

Cervarix
Gardasil

Add >
< Remove

Gardasil 9

Select Dose Criteria

Next Dose in Series

1
2
3

Add >
< Remove

v

Select the School & Primary Care Provider

School v Provider (PCP) v

Enter Additional Demographic Criteria

City Zip Code

Enter the Date Criteria

Target Date Range From 01/01/2024 📅 To 09/01/2024 📅

Birth Date Range From 📅 To 📅

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

Weeks Since Last Notice

Exclude clients more than v Month(s) Overdue

Exclude from Today's Date Target From Date

Specify How to Sort the Report Data

Sort 1st By Last Name v Ascending v Sort 3rd By v

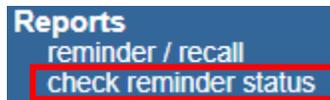
Sort 2nd By First Name v Ascending v Sort 4th By v

Generate
Cancel

- 7) Select the **Generate** button. Depending upon the number of clients associated with your provider organization, it may take up to several hours or more to generate the data for the reports.
 - a. While the data is being generated, the Reminder Request and Output status page will indicate the percentage of completion. Periodically select the **Refresh** button to update the report status. You may continue working in other areas of WIR or log out of WIR while waiting for the reminder/recall request to complete.

Important: Please note that only one reminder/recall report can be run at a time. Additionally, reminder/recall reports will be available for 72 hours. It is recommended as a best practice to export your results immediately and save the necessary information.

- b. You can check the status of your request by selecting **Check Reminder Status** under the Reports section.



- 8) When the report is complete, you can navigate to the results screen by selecting the blue underlined date under the Reminder Request Status section.

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
02/26/2024 08:32 AM	02/26/2024 08:32 AM	100 %	12	01/01/2024	09/01/2024

- 9) The results screen is divided into three sections:
 - a. The Reminder Request Process Summary section lists the number of clients involved in the search and the criteria that were used to define the search to narrow it down to the final cohort requested.

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Clients
1	Clients associated with <i>KCW TEST</i> .	378
2	Clients immunized by <i>KCW TEST</i> .	309
3	Clients that are active within <i>KCW TEST</i> and allow Reminder & Recall Contact . Additional criteria include <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. 	309
4	Clients that have one or more responsible persons that Receive Notices . Additional criteria include <ul style="list-style-type: none"> • City is not specified • Zip Code is not specified. 	17
5	Clients that Allow Sharing of Immunizations .	17
6	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> • Clients that are Recommended or Overdue for one or more vaccinations between 01/01/2024 to 09/01/2024; • Use the following vaccine groups: HPV; • Use all trade names; • Use all series; • Use ACIP for all clients. • Exclude Overdue Reminders is not specified. 	12
Total Number of Clients Eligible for Reminder		12



- b. The Reminder Request Output Options section provides options for displaying the report results. To view the report output, add any additional input required (i.e., free text) then select the blue underlined name of the output to generate the selected letter, card, mailing label, or list. Further discussion of each output option is provided below, under the section [Reminder/recall report outputs](#).
- i. **Important:** To create only one letter or output option for each client, check the Click here to export only one address per client checkbox at the top of this section. This option ensures that the letter/output will only be created for the primary responsible person’s address, and not for any other responsible person’s address on the client record.
 - ii. Regardless of the options selected under the client’s Responsible Person(s) tab or on the Reminder Request Output Options page, WIR will only produce one letter or output option per address. If a client has multiple responsible persons selected to receive notices, and all reside at the same address, WIR will produce only one letter or output option for that address.

Reminder Request Output Options

Click here to export only one address per client

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Please call our office at 608-266-9691 to schedule your first HPV vaccine. We look forward to hearing from you."/> Phone # <input type="text"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Custom Letter	Custom Letter.	Report Name <input type="text"/>
Phone List	Produces a list of responsible party home phone numbers.	Report Name <input type="text"/>
Cellphone List	Produces a list of responsible party cellphone numbers.	Report Name <input type="text"/>
Email List	Produces a list of responsible party email addresses.	Report Name <input type="text"/>

- c. Last Notice Date Options section:
- i. The checkbox in this section is checked by default.
 - ii. When checked, the last notice date located at the bottom of the Personal Information section of the client record will be set to the report date.
 - iii. By keeping the box checked and setting the last notice date today, this group of clients will be excluded from reminders if a provider runs them again in a week.
 - iv. Utilizing this feature helps in tracking who has and has not received notices, preventing providers from sending multiple messages to the same group of individuals.
 - v. The Revert Eligible button will revert the last notice date on the client record to the previous last notice date for all clients eligible for this reminder.

- vi. The Revert All button, however, will revert the last notice date on the client record to the previous last notice date for all clients immunized by KCW TEST in this example.

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 KCW TEST.

Return to the previous screen.

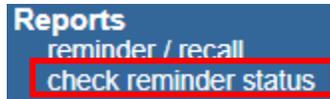
The last notice date can be found at the bottom of the Client Record to the right of the Mother's Maiden Name.

Mother's Maiden Last Country of Birth UNITED STATES

Mother's First Name Last Notice 07/18/2023

Reminder/recall report outputs

- 1) While the report data is being generated, the Reminder Request and Output status page will indicate the percentage of completion. Periodically select the **Refresh** button to update the report status. You may continue working in other areas of WIR or log out of WIR while waiting for the report output to generate.
- 2) You can check the status of the reminder/recall report outputs by selecting **Check Reminder Status** under the Reports section.



- 3) When the output is complete, you can navigate to the Reminder Output Status section and select the blue underlined report name of the file to open it.

Reminder Request Status

Started	Completed	Status	Clients	Target From	Target To
02/26/2024 08:32 AM	02/26/2024 08:32 AM	100 %	12	01/01/2024	09/01/2024
02/23/2024 11:23 AM	02/23/2024 11:24 AM	100 %	0	01/01/2024	09/01/2024

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Reminder Letter	Reminder Letter	02/26/2024 08:39 AM	02/26/2024 08:39 AM	02/26/2024 08:39 AM	Ready

Output options

Reminder letter

- Standard form letter with space for the provider organization’s letterhead.
 - Cannot add an electronic image of the letterhead; space must be left for printing on letterhead separately.
 - Includes client’s immunization history and recommended immunizations with due dates.
 - No changes can be made to the body of the letter, but an optional free text and/or phone number can be added at the end of the letter.

Dear Mother Testclient,

Our records indicate that Sadie Testclient, has received the following immunizations:

Immunizations History		
Immunization	Date Administered	Series
DTP/aP	05/25/2013	1 of 5
HepB	05/25/2013	1 of 3
Polio	05/25/2013	1 of 5

Our records also show that Sadie may be due for the following immunizations. If Sadie received these or other immunizations from another health care provider, please call our office so that we can update Sadie’s record. Otherwise please take Sadie to a health care provider to receive them.

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
HepB	06/22/2013
DTP/aP	Max Age Exceeded
Polio	08/01/2013
COVID-19	10/01/2013
HepA	04/01/2014
MMR	04/01/2014
Varicella	04/01/2014
Td	04/01/2020
Influenza	08/01/2023
HPV	04/01/2024
Pertussis/Tdap	04/01/2024

Please call our office at 608-266-9691 to schedule your first HPV vaccine. We look forward to hearing from you.

Custom letters

- Customized form letter for the responsible person for each client on the report.
- Created through **Manage Custom Letters** in the left menu panel.
- Allows modifications to the body of the letter. Refer to the [Creating Custom Letters](#) section of this guide.

Reminder card

- Standard 4x5 inch mailing card, recommended to be placed in an envelope and mailed out for client confidentiality.
- Printed one card per page.
- Includes client's recommended immunizations and due dates.
- Optional free text and/or phone number can be added.

Mailing labels

- 30 labels per page formatted for Avery Mailing Labels #5160.
- Prints in the same order as the reminder letters or cards.

Client query listing

- Can use PDF and Excel spreadsheet in tandem to complete phone/email outreach to client or primary responsible person.
- Excel spreadsheet lists contact information for every client that was returned in the report along with the primary responsible person's contact information including phone and email if available.
- Incomplete or blank lines on this report represent missing contact information for a responsible person.
- File type options: EXCEL, PDF, or TEXT.

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Client List	EXCEL PDF TEXT	02/26/2024 09:04 AM	02/26/2024 09:04 AM	02/26/2024 09:04 AM	Ready

- EXCEL spreadsheet output: Opens .xls file in EXCEL.

	A	B	C	D
1	Client First Name	Client Middle Name	Client Last Name	Client DOB
2	ALI		TESTCLIENT	02/01/2013
3	BOB		TESTCLIENT	01/01/2012
4	CLAIRE		TESTCLIENT	02/01/2012

E	F	G	H
Responsible Person First Name	Responsible Person Middle Name	Responsible Person Last Name	Responsible Person Phone Number
MARY		TESTCLIENT	(608)-266-9691
JOHN		TESTCLIENTEST	(608)-254-6626
GEORGE		TEST	(608)-222-3434

I	J	K
Responsible Person Street Address	Responsible Person City/State/ZIP	Responsible Person Email
1 W WILSON ST	MADISON, WI 53703-3445	
2 W Larson St	MADISON, WI 53702-0001	
101 vicky circle	MADISON, WI 53703	

- PDF file output: Displays as a .pdf file in your web browser or Adobe Acrobat; including vaccine history and recommendations.
 - Displays entire client record including all vaccines administered in each series, not just the most recent.
 - Also shows doses that were Not Valid when administered by adding (NV) after the vaccination date.
 - The due date for the next vaccine is in the Recmd Day column.

KATELYN DELTA TESTCLIENT - 03/18/1977		78 Joe St 1234 George St	MADISON, WI 53711 MADISON, WI 53711
Vaccine	Recmd Day	Immunization Dates	
Anthrax	04/02/2024	1) 09/01/2023 2) 09/16/2023 3) 10/02/2023	
COVID-19	03/14/2022	1) 03/01/2021 2) 03/23/2021 3) 01/17/2022	
HPV	Max Age Exceeded	1) 07/15/2023 (NV) 2) 10/17/2023 (NV)	
HepA	02/25/2012	1) 08/25/2011	
HepB	09/21/2010	1) 08/24/2010	
Hib	Max Age Exceeded	1) 10/28/2010 (NV) 2) 12/29/2010 (NV) 3) 08/25/2011 (NV)	
Influenza	08/01/2024	1) 10/13/2023 2) 10/17/2023 (NV) 3) 11/03/2023 (NV)	
MMR	05/11/1978	1) 04/13/1978 2) 04/13/1978	
Pertussis/Tdap	Complete	1) 04/20/2011 2) 11/25/2011	
Pneumo-Poly	03/18/2042	1) 10/28/2010 2) 12/29/2010 (NV) 3) 02/15/2011 (NV)	
Polio	02/20/2023	1) 06/15/2022 2) 07/15/2022 3) 08/20/2022	
Rabies	11/08/2023	1) 11/01/2023	
Rotavirus	Max Age Exceeded	1) 10/28/2010 (NV) 2) 12/29/2010 (NV)	
Td	11/25/2021	1) 04/20/2011 2) 11/25/2011	
Varicella	History Of Disease		

- Text file output: Opens .txt file in Notepad.

Client First Name	Client Middle Name	Client Last Name	Client DOB	Responsible Person First Name	Responsible
ALI	TESTCLIENT	MARY	02/01/2013	TESTCLIENT	1 W WILSON ST MADISON, WI 53703-3445

Phone list

- List responsible party home phone numbers only.
- No other client information is included.
- Duplicate phone numbers appear only once on the list.
- Does not include phone extensions.
- File type options: EXCEL, PDF, or TEXT.

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Phone List	EXCEL PDF TEXT	02/26/2024 09:25 AM	02/26/2024 09:25 AM	02/26/2024 09:25 AM	Ready

Cellphone list

- Lists responsible person cellphone numbers only.
- No other client information is included, so privacy issues not a concern.
- Duplicate phone numbers appear only once on the list.
- Does not include any phone extensions.
- Providers may use for texting multiple clients at once, or third-party dialer system that sends messages on provider's behalf.
- File type options: EXCEL, PDF, or TEXT.

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Cellphone List	EXCEL PDF TEXT	02/26/2024 09:26 AM	02/26/2024 09:26 AM	02/26/2024 09:26 AM	Ready

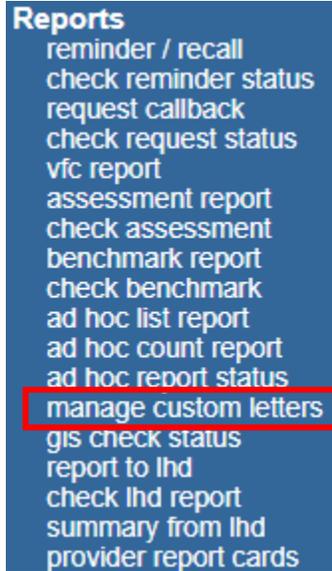
Email list

- Lists responsible person email addresses only.
- No other client information included, so privacy issues not a concern.
- Duplicate email addresses appear only once on the list.
- File type options: EXCEL, PDF, or TEXT.

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Email List	EXCEL PDF TEXT	02/26/2024 09:27 AM	02/26/2024 09:27 AM	02/26/2024 09:27 AM	Ready

Creating custom letters

- 1) Select **Manage Custom Letters** under the Reports section on the left menu panel.



- 2) To review or edit existing letters, select the blue underlined name of the custom letter. To create a new custom letter, select the blue **New Custom Letter** link.



- 3) On this page, you can fully customize the top margin, primary address, salutation, paragraphs, immunization history, immunization recommendations, and closing of the letter.

Top Margin
Number of blank lines at the top of the letter: <input type="text" value="3"/> ▼
Primary Address
<input type="checkbox"/> Include primary address
Salutation
Enter a salutation for the letter: <input type="text" value="Dear"/>
Include a name at the end of the salutation: <input type="text" value="Responsible person"/> ▼
Paragraph 1
First Part
<input type="text" value="The following patient has received the following immunizations."/>
Include a name between the first and second parts of this paragraph: <input type="text" value="Client name"/> ▼
Second Part
<input type="text"/>
Immunization History
<input checked="" type="checkbox"/> Include immunization history
Paragraph 2
<input type="text" value="We also recommend the following immunizations:"/>
Immunization Recommendations
<input checked="" type="checkbox"/> Include immunization recommendations
Paragraph 3
<input type="text" value="Please contact our office to make an appointment as soon as possible."/>
Closing
Enter a closing for the letter: <input type="text" value="Thank you!"/>
<input checked="" type="checkbox"/> Include provider organization name in the closing
<input checked="" type="checkbox"/> Include provider organization phone number in the closing
Name and save the custom letter
Name the custom letter: <input type="text" value="Custom Letter"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>

- 4) Example custom letter output (PDF) can be generated by selecting **Custom Letter** from the Reminder Request Output Options screen:

Dear Mary Testclient,

The following patient has received the following immunizations. Ali Testclient

Immunizations History		
Immunization	Date Administered	Series
HepA	02/01/2024	1 of 3
HepB	02/01/2024	1 of 3

We also recommend the following immunizations:

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
Polio	04/01/2013
COVID-19	08/01/2013
MMR	02/01/2014
Varicella	02/01/2014
Td	02/01/2020
Influenza	08/01/2023
HPV	02/01/2024
Meningo	02/01/2024
Pertussis/Tdap	02/01/2024
HepA	03/01/2024
HepB	03/01/2024

Please contact our office to make an appointment as soon as possible.

Thank you!

KCW TEST

(123) 456-7890