



# Immunization Registry Information System (IRIS) Reminder/Recall Instructions May 2017

## Reminder/Recall

The following instructions allow IRIS users to generate reminder/recall reports for patients who are due or past due for specific immunizations. If you have questions regarding these reports, call the IRIS Help Desk at 800-374-3958.

1. After logging into IRIS, select the 'reminder/recall' link found in the Reports section of the menu panel.
2. The Reminder/Recall request screen will display two options. The first option allows the user to create a new Reminder/Recall request criteria, name and save the list for later use. The second option allows providers to use a previously created Reminder/Recall request. Select either option.
3. Select 'Use Tracking Schedule Selected for All Patients' radio button under the tracking schedule section and select 'ACIP' from the dropdown menu.
4. The reminder/recall report can be run for all or specific vaccines.
  - a. If running the report for all vaccines, select 'Use All Vaccine Groups'.
  - b. If running the report for specific vaccines, select 'Use Vaccine Groups Selected'. Scroll through the list and either select the vaccine(s) to run the report for and select 'Add' or double click the vaccine, which will move it to the box on the right.
5. The report can also be run for vaccines due now, vaccines past due or both. The best option is to select 'Both' to run the report for vaccines due now and past due.

**Reminder/Recall Request**

**Create New List ...**

Enter new Reminder Recall Request Criteria  List Name

Use a previous Reminder Recall Request List

**Indicate the Tracking Schedule ...**

Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients

**Select the Vaccine Group To Report on ...**

Use All Vaccine Groups

Use Vaccine Groups Selected

Vaccines Due Now

Vaccines Past Due

Both

6. The next section allows data to be filtered to show patients who are due or past due for vaccines by school, primary care physician, city, zip code or county. If you do not want the data to be filtered, the fields can be left blank.
7. The 'Enter the Date Criteria' section allows users to filter by a specific immunization due date or by birth date. The best option is to run the report by a specific birth date range which can be broken down by pediatric patients, adolescents or adults. The 'From' field contains the oldest birth date being returned, and the 'To' field is the youngest birth date being returned.
  - a. Example: if the report was generated for all two year olds as of January 26, 2016, the 'From' field would be 01/26/2013 and the 'To' field should contain 01/26/2014.
8. Next, complete the 'Select the Vaccine Groups to Display'. Usually this should match the option selected above.
  - a. If running the report for all vaccines, select 'Use All Vaccine Groups'.
  - b. If running the report for specific vaccines, select 'Use Vaccine Groups Selected'. Scroll through the list and either select the vaccine(s) to run the report for and select 'Add', or double click the vaccine, which will move it to the box on the right.
9. Select 'Save & Generate' to generate the report and save the criteria for later use.

**Select the School & Primary Care Provider ...**

School  Provider (PCP)

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**Enter Additional Demographic Criteria ...**

City  Zip Code  County

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**Enter the Date Criteria ...**

Target Date Range From  To

Birth Date Range From  To

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

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**Select the Vaccine Groups to Display ...**

Use All Vaccine Groups  
 Use Vaccine Groups Selected

Encephalitis  
 Hib  
 HPV

DTP/aP  
 HepA  
 HepB

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**Specify How to Sort the Report Data ...**

Sort 1<sup>st</sup> By   Sort 3<sup>rd</sup> By

Sort 2<sup>nd</sup> By   Sort 4<sup>th</sup> By

10. The Reminder Request Status page will display. To refresh the status of the report, select the 'Refresh' button or click the check reminder status link under the reports section of the menu panel. Once the status is at 100%, select the link under the 'Started' column.

Reminder Request Status							Refresh
Started	Completed	Limited	Status	Patients	Target From	Target To	Cancel
<a href="#">01/26/2016 11:49 AM</a>	01/26/2016 11:49 AM	100 %		3	01/26/2016	01/26/2016	

11. The results page will display with eligible patients on the report. Several output options are available, including Reminder Letter, Reminder Card, Mailing Labels, Patient Query Listing, Extract Client Data, or Custom Reminder Letter. Select the link for the preferred output option.

Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Iowa Training Organization - Doctor's Office November 14th, 2013"/> Phone # <input type="text" value="1-800-374-3958"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name <input type="text"/>
<a href="#">Extract Client Data</a>	Extract client data in XLS format.	Report Name <input type="text"/>
<a href="#">Testing</a>	Custom Letter.	Report Name <input type="text"/>

The Patient Query Listing may be helpful to identify which patients have started a vaccine series, such as HPV.

12. Once an output option is selected, the Reminder Request Status page will display or a new window will open. To refresh the status of the report, select the 'Refresh' button. Once complete, there will be a link to view the output option.

Reminder Request Status							Refresh
Started	Completed	Limited	Status	Patients	Target From	Target To	Cancel
<a href="#">12/05/2014 11:15 AM</a>	12/05/2014 11:15 AM	100 %		5	12/05/2014	12/05/2014	

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">Custom Letter</a>	Custom Letter	12/05/2014 11:16 AM	12/05/2014 11:16 AM	12/05/2014 11:16 AM	Ready
<a href="#">Client XLS</a>	Client XLS	12/05/2014 11:16 AM	12/05/2014 11:16 AM	12/05/2014 11:16 AM	Ready
<a href="#">Patient List</a>	Patient List	12/05/2014 11:16 AM	12/05/2014 11:16 AM	12/05/2014 11:16 AM	Ready
<a href="#">Mailing Labels</a>	Mailing Labels	12/05/2014 11:16 AM	12/05/2014 11:16 AM	12/05/2014 11:16 AM	Ready
<a href="#">Reminder Card</a>	Reminder Card	12/05/2014 11:16 AM	12/05/2014 11:16 AM	12/05/2014 11:16 AM	Ready
<a href="#">Reminder Letter</a>	Reminder Letter	12/05/2014 11:15 AM	12/05/2014 11:15 AM	12/05/2014 11:15 AM	Ready

**Below are examples of each output option.**

1. If the **Reminder Letter** link is selected, it will open in a PDF and there will be a Reminder Letter for each patient on the report, including the patient's immunization history and vaccinations they are due to receive.

Dear Parent/Guardian of Test Zehner,

Our records indicate that Test Zehner, has received the following immunizations:

Immunizations Record		Tracking Schedule: ACIP
Immunization	Date Administered	Series
HPV	08/21/2013	1 of 3

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

Immunizations Due
HPV, NOS

The number for our office is: 1-800-374-3958

Iowa Training Organization - Doctor's Office  
November 14th, 2013

2. If the **Reminder Card** link is selected, it will open in a PDF and there will be a Reminder Card for each patient on the report, which details the patient's name, address and the provider organization's phone number.

12/05/2014

The person listed below is due for an immunization:  
Test Zehner

You can contact us at:  
(909) 576-8345

Please bring your immunization record to every visit.

Thank you,  
Joey Training Org Testi

Joey Training Org Testi  
1234 FAKE AVENUE  
DAVENPORT, IA 52803

To the parent/guardian of  
Test Zehner  
123 FAKE ST.  
DES MOINES, IA 50310

Address Correction Requested

3. If the **Mailing Labels** link is selected, it will open in a PDF and there will be a Mailing Label for each patient on the report, which details the patient's name and address. The labels are intended to accompany the Reminder Letters.

To the Parent/Guardian of: KYLER K ZEHNER 321 FAKE ST. DES MOINES IA 50321	To the Parent/Guardian of: SAM K ZEHNER 321 FAKE ST. DES MOINES IA 50321
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4. If the **Patient List** link is selected, it will open in a PDF and there will be a listing for each patient on the report, which includes the patient's name, phone number, address, immunizations due, and if the patient was immunized previously, the previous immunization dates will display. Notice how the example below shows the patient's first dose of HPV administered.

KYLER K ZEHNER - 01/01/2000	321 FAKE ST.	DES MOINES, IA 50321
<b>Tracking Schedule:</b>		ACIP
<b>Vaccine</b>	<b>Immunizations Due</b>	<b>Immunization Dates</b>
HPV	07/28/2014	1) 01/28/2014

5. If the **Client XLS** link is selected, it will open in an Excel spreadsheet. The spreadsheet will contain the patient's name, address, phone number, and immunization history.

	B	C	H	I	J	K	N	O	R	AK
1	Last Name	First Name	Street Address Line	City Name	State Code	Zip	Area Code	Phone	Immunization Date	Vaccine Name
7	ZEHNER	KYLER	321 FAKE ST.	DES MOINES	IA	50321	515	333-6666	2013-09-24	HPV
12	ZEHNER	TEST	123 FAKE ST.	DES MOINES	IA	50310	515	444-5555		

6. If the **Custom Letter** link is selected, it will open in a PDF and there will be a Custom Reminder Letter for each patient on the report, including the patient’s immunization history and what vaccinations they are due to receive.

321 FAKE ST.  
DES MOINES, IA 50321

Dear Kyler K Zehner,

Below is a copy of your immunization record:

Immunization Record		Tracking Schedule:ACIP
Immunization	Date Administered	Series
No immunizations recorded.		

Our records indicate you are due for the following immunizations:

Immunizations Due
HPV, Quadrivalent

If you have any questions, please feel free to contact us.

Thank you,  
Joey Training Org Test  
(563) 333-3333 x555555