

# Basic Reminder/Recall - ~~VAC TRAK~~ Quick Reference Guide – Basic Reminder/Recall

## Background

Reminder/Recall allows you to notify patients about due or past due vaccinations. This is an effective, evidence-based strategy to improve and sustain vaccination coverage rates in target populations.

**Recommendation:** *Reminder/Recall should be done at least monthly.*

Reminder/Recall results will only include patients that are “owned” by an organization in VacTrAK. An organization takes “ownership” of a patient when they add data to a patient record (demographic or vaccination, either by manual or electronic methods). Most providers “own” patients as their medical home; exceptions include pharmacies, permanent fund dividend, and vital statistics.

An **IRMS Client** or **Facility Client** user type can access Reminder/Recall menu/options if they have been assigned **Run Reminder/Recall permissions**. This user permission may be requested by contacting VacTrAK Support.

## Performing Reminder/Recall

This basic reminder/recall quick reference guide only covers the Reminder/Recall menu option. It does not cover other advanced reminder/recall features.

Reminder/Recall is available in the navigation menu sidebar. Click on Reminder/Recall in the menu to view Reminder/Recall options.

Select **Reminder/Recall** from the list.



Select the following parameters. DO NOT select Increment Recall Count (first parameter).

**Due Now** from the date due timeframe list.

**All Patients** from valid address options.

Enter **Patient Age** into range parameter fields. Please note range is “TO” not thru.

## Recommendation

*2 months to 36 months (helps keep children on time);*

*11 years to 14 years (for adolescents)*

Select vaccine families for remind/recall. Please note that results will be based upon ACIP schedule recommendations.

For patients 2 to 35 months select:

DTaP	Hib	Polio
Hep B 3 dose	MMR	Varicella
Pneumo (PCV)	Rotavirus	Flu (only during flu season)
Hep A		

For patients 11 to 12 years select:

Meningococcal	HPV	Tdap
Flu (only during flu season)		

**CAUTION:** Selection of other limit parameters may result in an incomplete reminder/recall data set if specified parameter data is not populated within a patient record in VacTrAK.

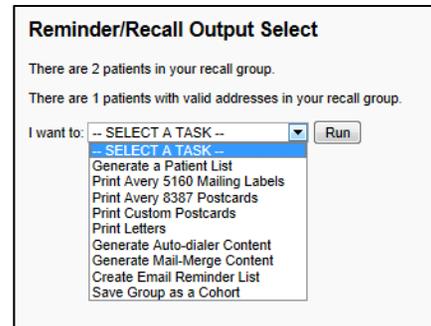
**NOTE:** An IRMS Client user may limit Reminder/Recall group by a facility name if desired.

Click the **Run Reminder/Recall** button in the lower right hand corner of the window.

From this next screen, you can select your desired output option:

**Patient List** output only provides name of patient and vaccines due, no contact information and is in PDF format (cannot manipulate the data).

**Mail Merge & the four Print** options only include patient address information, no vaccine information.



**Recommendation:** *Print labels, postcards or letters.*

See more information on the other side of this guide to learn more about these output options.

Once the output option is selected, click the **Run** button to the right of the output task dropdown list.

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## Print Avery 8387 Postcards

Display will show facility return address information. You may edit return address field data as needed.

Select View/Edit Output Message to show the default message or create your own custom message by selecting the user defined box and entering in your own message. Note: Any user defined message created is not saved in VacTrAK for re-use later.

Select the **Run** button to the right of the dropdown list to generate the output.

In order for your data to print out with the correct spacing (to fit Avery 8387 postcards), configure the Page Setup in the browser by selecting File→Page Setup from the menu. Select the following parameters:

Orientation: Landscape  
 Margins: Top 0.75" Bottom 0.25"  
 Left 0.25" Right 0.25"  
 Header: Empty  
 Footer: Empty

## Print Avery 5160 Mailing Labels

If your facility already developed a letter or you want to develop a letter using other word-processing software, then printing mailing labels from VacTrAK will help quicken the process of addressing envelopes.

Select the **Run** button to the right of the dropdown list to generate the output.

In order for your data to print out with the correct spacing (to fit Avery 5160 labels), configure Print in the browser by selecting File→Print from the menu. Select the following parameters:

Page Scaling: NONE  
 Auto-Rotate: UNCHECKED  
 Center: UNCHECKED  
 Header: Empty  
 Footer: Empty

## Print Letters

Display will show facility return address information. You may edit return address field data as needed.

Select View/Edit Output Message to show the default message or create your own custom message by selecting the user defined box and entering in your own message. Note: Any user defined messages created is not saved in VacTrAK for re-use later.

Select the **Run** button to the right of the dropdown list to generate the output.

At this point, you may need to make adjustments to the page setup if the letter will be fit into an envelope that has an address window display. Configure Page Setup from the menu or window bar using the following parameters:

For envelope types Size 10 Envelope with single window on left or Size 9 Envelope with double windows on left.

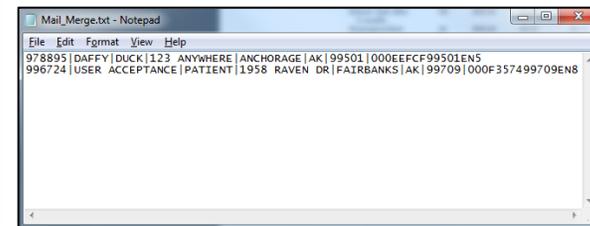
Orientation: Portrait  
 Margins: Top 1.0" Bottom 1.0"  
 Left 1.0" Right 1.0"  
 Header: Empty  
 Footer: Empty

From the print window select a printer then click on the **Print** button in the lower portion of window.

Note: You may need to adjust letter fold accordingly to display address(s) properly when using window envelopes.

## Generate Mail Merge Content

This output will generate patient address information in a text file using the “pipe” data field delimiter. This address data can then be imported into Microsoft Word to create personalized letters using the applications mail merge feature. Refer to Microsoft Word’s online help for instructions regarding “Mail Merge”.



## Email Reminders

This feature may not generate a complete reminder recall data set if email field data is not complete within patient demographic records in VacTrAK.

## Autodialer File

Data generated in this type of output type is intended for use with external auto-dialer applications. Several companies offer autodial services.

This feature may not generate a complete reminder recall data set if phone number field data is not complete within patient demographic records in VacTrAK.