Reminder/Recall Notices

From the Reports menu option, you may generate reminder and recall notices, which include letters, cards, address labels, client listings, and downloadable text files.

Generation of reminder and recall notices
Reminder and recall notices are generated for every responsible person associated with a client, given that the following conditions are met:

- The status "Active" on the Client Information tab is checked for your organization.
- The "Allow Reminder and Recall Contact?" indicator on the Client Information tab is checked.
- The responsible person's "Notices?" indicator in the Responsible Person(s) tab is checked.
- The responsible person has sufficient name and address information listed in the Responsible Person(s) tab.

Reminder/Recall Requests:

To select and submit reminder/recall criteria for clients, you will need to fill in the Reminder Request screen, an online form. Follow these steps to generate reminder/recall requests:

1. Click Request Reminder under Reports on the menu panel.

2. *Select Client Population: The county section is only available to county public health organizations:*
    a. Indicate whether you wish to include clients associated with your organizations, clients residing in selected counties below, or clients associated with your organization or residing in selected counties by clicking the appropriate radio button.
    b. If you choose to include clients residing in selected counties below, or clients associated with your organization or residing in selected counties, select these counties by double clicking a county or highlighting a chosen county and pressing. Do this for each group desired.

3. Tracking Schedule: In the top section of the Reminder/Recall

Reminder/Recall Notices

Indicate the Tracking Schedule ...

- (•) Use Tracking Schedule Associated with Each Client
- ( ) Use Tracking Schedule Selected for All Clients [_____ ▼]

    a. Indicate whether you wish to use the tracking schedule associated with each client or a uniform tracking schedule for all clients by clicking the appropriate radio button. If you choose to use one tracking schedule for all clients, choose the appropriate schedule from the pick list provided.

    ***In the case you've created an alternate ACIP schedule, you should select "Use Tracking Schedule Associated with Each client"

4. Vaccine groups:

Select the Vaccine Group(s) ...

- (•) Use All Vaccine Groups
- ( ) Use Vaccine Groups Selected   [Adeno / Anthrax / BCG ▲▼] [Add >] [< Remove] [_____]

In the vaccine groups section of the screen:
    a. Indicate whether you wish to include all vaccine groups in the search criteria or if you wish to include only selected groups by clicking the appropriate radio button.
    b. If you choose to include only selected vaccine groups, select these groups by double clicking a group or highlighting a chosen group and pressing [Add >]. Do this for each group desired.

Note: This will limit the search to only those clients who will be due/past-due for the selected immunizations. However, GRITS will provide a list of all immunizations the selected clients has received.

5. School/Primary Care Provider:

Select the School & Primary Care Provider ...

School [_____ ▼]   Provider (PCP) [_____ ▼]

Choosing a school or primary care provider allows you to narrow your search to only the clients assigned to a particular school or physician/clinic. If you do not wish to specify a school and/or provider, leave these fields blank.
    a. To choose a school, select a school name from the pick list provided.
    b. To choose a primary care provider, select a physician or clinic name from the pick list provided.

6. Additional Demographic Criteria:

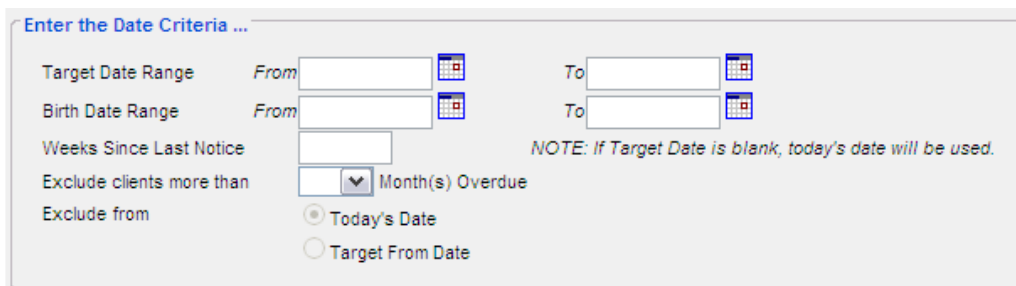**Enter Additional Demographic Criteria ...**

City [_____]   Zip Code [_____]   County [_____ ▼]

Reminder/Recall Notices

Entering a city and/or ZIP code will narrow your search to only the clients within the entered geographical area. However, by entering a county, you will expand your search to all responsible persons who reside in the selected county. If you do not wish to specify a city, ZIP code or county, leave these fields blank.

    a. To enter a city, type the city name within the first field.
    b. To enter a ZIP code, enter the five-digit number in the next field.
    c. To enter a county, choose from the pick list in the third field.

7. Date Criteria

8. Date Criteria

    a. <u>Target Date Range</u>: When a target date is specified, the report will include those clients that are due/overdue for immunizations within the 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.

       Note: If target date range is left blank today's date will be used.

        i. If the From date is unspecified for the Target Date Range, the system will use the date that you run the report.
        ii. If the To date is unspecified for the Target Date Range, the system will use the date that you run the report.
        iii. If both the From and To dates are left blank, the system will find those clients who are due or overdue as of the date that you run the report.

    b. <u>Birth Date Range</u>: When a birth date range is specified, the report will return those clients who have a birth date that falls within the range entered. 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.

        i. If the From date is unspecified for the Birth Date Range, the report will include the oldest clients in the system.
        ii. If the To date is unspecified for the Birth Date Range, GRITS will use today's date.

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

    d. <u>Exclude clients more than X Month(s) Overdue</u>: If the user selects a number of months the system will exclude clients overdue by more than the number of months you have selected. When the user selects to exclude clients more than X months overdue, the user can also specify either of the following:

e. Exclude from Today's Date: Excluding from Today's Date will exclude any clients overdue more than X months from today's date.
f. Exclude from Target From Date: Excluding from Target From Date will exclude any clients overdue more than X months from any target date you have specified.

Note: Clients are shared between organizations; therefore, another organization may have recently generated a notice for the client.

Note: 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: Clients are shared between organizations; therefore, another organization may have recently generated a notice for the client.

9. Sorting Criteria:

This section allows you to specify how the data will be sorted. If a sort order is not specified, GRITS will sort the report results first by the client's last name in ascending order (A to Z), then by the first name in ascending order.
a. Sort 1st By: Choose a primary information field by selecting from the pick list provided.
b. Ascending/descending order: Choose how the primary field is sorted; choose either ascending (A to Z) or descending (Z to A) order from the pick list.
c. Complete additional ordering sequences for the second through fourth sorts.

10. Generate the report: Press the button. Depending upon the number of clients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data are being generated, the Request and Output status page indicates the percentage of completion. Periodically press to update the status. You may work in other areas of the system while waiting for the reminder/recall request to complete. You may check the status of your request by clicking on Check Reminder Status under the Reports menu.

Waiting for reminder requests
Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in the GRITS application while the report is being created and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu

Reminder/Recall Notices

panel. Likewise, you may close out of GRITS and return to the status screen by clicking on the Check Reminder Status link after logging in again.

Summary Screen

Step	Criteria Evaluated at this Step	Clients
	Reminder Request Process Summary	
1	Clients **associated** with *District ▓▓▓▓ County Health Department.*	29458
2	Clients **immunized** by *District ▓▓▓▓ County Health Department.*	29038
3	Clients that are **active** within *District ▓▓▓▓ County Health Department* and allow **Reminder & Recall Contact.** Additional criteria includes: • **Birthdate range** is not specified; • Clients that **reside in the following county: DeKalb;** • **School** is not specified; • Clients that are associated with the following **provider: Decatur County Health Department;** • **Weeks Since Last Notice** is not specified. • **Client gender is not specified**	3
4	Clients that have one or more responsible persons that **Receive Notices.** Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	3
5	Clients that **Allow Sharing of Immunizations.**	3
6	Clients that meet the following criteria regarding vaccination status: • Clients that are **Recommended or Overdue** for one or more vaccinations **between July 01, 2013 to August 01, 2013;** • Use the following **vaccine groups: DTP/aP, Td and Tdap;** • Use **tracking schedule** associated with each client. • **Exclude Overdue Reminders** is not specified.	3
	Total Number of Clients Eligible for Reminder	**3**

When the report is complete, you may click on the blue underlined date to go to the Reminder Request Process Summary screen. The Summary screen lists the number of clients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Last Notice Date Options

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 Eligible
Revert last notice date to previous last notice date for **all clients immunized** by *District 8-2 Decatur County Health Department.*	Revert All
Return to the previous screen.	Cancel

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

1. Set the last notice date to today's date. This is the default option and is indicated by a check mark.

2. Set the last notice date to reflect the previous last notice date for all clients eligible for this reminder by pressing. Use this option if you wish to revert the last notice date to the previous last notice date for all clients eligible for the reminder.

Note: the date of the notice created today will be ignored.

3. Set the last notice date to reflect the previous last notice date for all clients immunized by your organization by pressing. Use this option if you wish to revert the last notice date to the previous last notice date for all clients immunized by your organization, to include clients not eligible for this reminder.

Note: the date of the notice created today will be ignored.

4. Return to the previous screen. Press to return to the Reminder Request Status screen.

Reminder/Recall Output Options

Reminder Request Output Options		
Output	**Description**	**Additional Input**
Reminder Letter	Standard Reminder Letter.	Report Name [ ] Free Text [ ] Phone # [ ]
Reminder Card	Standard Reminder Card (4x5).	Report Name [ ] Free Text [ ] Phone # [ ]
Mailing Labels	Avery Mailing Labels.	Report Name [ ]
Client Query Listing	A list of clients based on the report criteria.	Report Name [ ]

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Letters

The letter output option allows you to generate a standard form letter for the responsible person(s) for each client returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the client's immunization history, recommended immunizations and due dates, and up to two lines of free text and/or a telephone number. To generate letters, follow these steps:

1. Under the Additional Input column for the Letter section of the table, enter:
   a. A report name in the appropriate field, if desired.
   b. Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field.
   c. A telephone number in the appropriate field, if desired.

2. Click on Reminder Letter, which is underlined and in blue text.

3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

    a. You have the option of moving to other portions of GRITS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.

    b. If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

4. 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 Acrobat Reader®.

5. To print the letters, press the printer icon on the Adobe® toolbar.

        Press in the Print dialog box.

6. To print additional notices, press the button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Cards

The card output option allows you to generate a fold-over (8x5 inch) postcard, printed one card per page. The body of the card includes the client's recommended immunizations and due dates, up to two lines of free text, and a telephone number. To generate reminder cards, follow these steps:

1. Under the Additional Input column for the Cards section of the table, enter:
   a. A report name in the appropriate field, if desired.
   b. Additional information in the Free Text field, if desired. You may include a maximum of 275 characters in this field.
   c. A telephone number in the appropriate field, if desired.

2. Click on Reminder Card, which is underlined and in blue text.

3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   a. You have the option of moving to other portions of GRITS or using other functions of your computer while you are waiting for your cards to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

4. Once the report name is underlined and appears in blue, your cards are ready. Click on the report name to view or print the cards in Adobe Acrobat Reader®.

5. To print the cards, press the printer icon on the Adobe® toolbar.
   Press in the Print dialog box.

6. To print additional notices, press the button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Labels

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

Reminder/Recall Notices

1. Under the Additional Input column for the Labels section of the table, enter a report name, if desired.

2. Click on Mailing Labels, which is underlined and in blue text.

3. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
   a. You have the option of moving to other portions of GRITS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

4. Once the report name is underlined and appears in blue, your labels are ready. Click on the report name to view or print the labels in Adobe Acrobat Reader®.

5. To print the labels, press the printer icon on the Adobe® toolbar. Press in the Print dialog box.

6. To print additional notices, press the button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.