

# Reminder / Recall Training



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# **Introduction**

This is the Reminder/Recall Training Video Script. During the course of the video, you will learn, the differences between reminders and recalls, narrowing down your list, setting recall limits, using appointment dates, deferrals and specific dose number recalls, editing the reminder/recall list, and generating reminder/recall output.

# Section 1

## Setting the Reminder/Recall Target Date Range

In order for us to better understand the results that we get from CHIRP, we first should look at the differences between a Reminder and a Recall. The Reminder Recall system in CHIRP is an integrated system. The driving force behind what makes a Reminder and a Recall different is the date range supplied to CHIRP. A Reminder is generated when the date range supplied to CHIRP is today forward, and Recall is generated when the date range is today backward.

A Reminder will therefore only pull patients whose shots are not due. A Recall will pull patients whose shots were due sometime in the past. The dates that are used in the Reminder/Recall will be compared to the dates listed in the patient's forecast. If the patient does not have a forecasted vaccination date that falls within the Reminder/Recall date supplied, that patient will not be selected.

This is a very critical concept to understand. Here is an example. Say you have a child that was due on December 8th for a DTaP vaccination. (Illustration 1.1) You run a recall for the month of January for DTaP. Oddly enough, the child you suspected should be in your list doesn't appear. This is not because the child isn't still overdue for the vaccination, it's just

Patient			
Name:	RACHEL LAUREN PETERSON	SIIS Patient ID:	1054735
Date of Birth:	10/08/2004	Age:	13 weeks, 3 months, 0 yrs
Guardian:	DEWEY S PETERSON	Status:	Active

Vaccination Forecast				
The forecast automatically switches to the accelerated schedule when a patient is behind schedule.				
Vaccine Family	Dose	Recommended Date	Minimum Valid Date	Status
DTaP/DT/Td*	1	12/08/2004	11/19/2004	Past Due
HIB	2	02/08/2005	12/19/2004	Up to Date
PNEUMO (PCV7)	2	02/08/2005	12/29/2004	Up to Date
FLU	1	04/08/2005	04/08/2005	Up to Date
HEP-B 3 DOSE**	3	04/08/2005	03/25/2005	Up to Date
MMR	1	10/08/2005	10/08/2005	Up to Date
VARICELLA	1	10/08/2005	10/08/2005	Up to Date

(Illustration 1.1)

his forecasting date did not line up with the date range set in Reminder/Recall when you generated the list. This patient did not fall within our Target group. (Illustration 1.2) It is suggested that you

use a little broader Reminder/Recall date range and use some of the other filtering options discussed in the next section to reach your target group.

Select Reminder/Recall Patients							
Include?	ID	First Name	Middle Name	Last Name	Birthday	Guardian First Name	Phone Number
<input checked="" type="checkbox"/>	1035656	ALEX	RYAN	PETERSON	11/05/2004	DEWEY	(317)255-5834
<input checked="" type="checkbox"/>	490378	ALEX	A	PETERSON	11/26/2004	MICHAEL AND	(317)346-6451

**Generate Final Reminder Recall List**

Reminder/Recall Criteria Used	
Increment Recall Count?	No
Reminder/Recall Date	01/01/2005 to 01/31/2005
Maximum Recall Tries	20
Include Inactive Patients	No
Limit By Patient Birth Date Range / Patient Birth Range	No /
Limit By Facility / Facility Name	Yes / ISDH - TEST FACILITY
Limit By Physician / Physician Name	No /
Limit By Program / Program Code	No /
Limit By Health Plan / Health Plan Code	No /
Limit By Appointment Date Range	No /
Limit By Health District/Region / Health District/Region	No /
Person Running Reminder/Recall	
Vaccine Family Codes To Remind/Recall For	DTaP/DT/d*

**Return to Reminder Recall Menu**

(Illustration 1.2)

One final difference between Reminder and Recall, when performing a Recall you generally want to increment the patient's Recall Count. This is accomplished by leaving the option Do Not Increment Recall Count unchecked. However, when performing a Reminder or a test run Recall, make sure to check this option. (Illustration 1.3)

Reminder/Recall	
<input checked="" type="checkbox"/>	Do Not Increment Recall Count (Run Recall)
<input checked="" type="checkbox"/>	Preview and Select Patients
<b>Reminder/Recall Date Range:</b>	<b>From:</b> 01/01/2005 <b>To:</b> 01/31/2005
<b>Maximum Recall Tries:</b>	20
<b>Valid Addresses:</b>	<input type="radio"/> Valid Addresses Only <input type="radio"/> Invalid Addresses Only <input checked="" type="radio"/> All Patients
<input type="checkbox"/>	Include Inactive Patients

(Illustration 1.3)

CHIRP keeps track of the number of Recall Tries or “Strikes” against a patient. We do not want to assign “Strikes” against a patient for Reminders or Recalls in the case of a trial run. How this is used will be explained later. A patient’s Recall Count will be reset to zero the next time the patient receives service from your or any other site. (Illustration 1.4)

<b>Other Info</b>			
Physician:		Health Plan Name:	
Facility:	ISDH - TEST FACILITY	HP Patient ID:	
Chart Number:	141 8907260001	HP Enroll Date:	
Next Appt. Date:		Birth Country:	United States
Block Recall:		Birth State:	INDIANA
Recall Attempts:	2	<b>Allergies/Comments:</b>	
Program/Mem.IDs:		High Risk:	
Monthly Income:		Number In Family:	
<b>Record Info</b>			
SIIS Patient ID:	490378	IRMS Owner:	1 - CLIENT_SERVER_INTERNAL_IRMS_ID
Entry Date:	06/05/2002 02:23:24	Last Update:	01/11/2005 10:04:46

(Illustration 1.4)

## Section 2

# Filtering Down the Target Group

Once you have set your target range for your Reminder or Recall, CHIRP gives you several different ways in which to narrow down or focus on the individuals you really want to notify.

The first option located directly under the target Reminder/Recall Date range is the Maximum Recall Tries. (Illustration 2.1) This filter checks to see if a patient has reached the maximum number of recall attempts or

Reminder/Recall	
<input checked="" type="checkbox"/>	Do Not Increment Recall Count (Run Recall)
<input checked="" type="checkbox"/>	Preview and Select Patients
<b>Reminder/Recall Date Range:</b>	<b>From:</b> <input type="text" value="01/01/2005"/> <b>To:</b> <input type="text" value="01/31/2005"/>
<b>Maximum Recall Tries:</b>	<input type="text" value="20"/> ▼
<b>Valid Addresses:</b>	<input type="radio"/> Valid Addresses Only <input type="radio"/> Invalid Addresses Only <input checked="" type="radio"/> All Patients
<input type="checkbox"/>	Include Inactive Patients

(Illustration 2.1)

not. If the patient has the selected number of “Strikes” or more, they will be excluded from the target group. It is suggested if a patient is not appearing in your target group that you feel should, try increasing the Maximum Recall Tries to 20. You can check to see how many strikes a patient has on him or her by going to their demographic page and looking under the section Other Info. Here you will see the field Recall attempts. (Illustration 2.2)

Next Appt. Date:		Birth Country:	United States
Block Recall:		Birth State:	INDIANA
Recall Attempts:	2	<b>Allergies/Comments:</b>	
Program/Mem.IDs:		High Risk:	
Monthly Income:		Number In Family:	

(Illustration 2.2)

You can also utilize a report called the “Recall for Inactivation Report” (Illustration 2.3) located under the report module, in the patients section, to give you a listing of all of your patients that have a specific number of strikes against them. The report requires you to select a patient’s birth date range, as well as the minimum number of strikes on a patient. The report will list for you all active patients that have at least the number of strikes you’ve specified and that fall

within the birth date range. Information included with this report is the patient's ID number, name, birth date and number of recall attempts.

You can then take this information and use it to inactivate patients that are not responding to your recall efforts.

Recall for Inactivation (by ownership)					
<b>Report Criteria</b>				<b>Report Date:</b> January 11, 2005	
<b>IRMS:</b> 1 - CLIENT_SERVER_INTERNAL_IRMS_ID					
<b>Facility:</b> All					
<b>Number of Recall Tries Greater than or Equal To:</b> 2					
<b>Birth Date Range:</b> 10/01/2004 to 01/01/2005					
<b>Total Patients Selected:</b> 1					
Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Tries
490378	ALEX	A	PETERSON	11/26/2004	2

(Illustration 2.3)

A feature that has been included that is helpful when running a mailing of the reminder recall system is the ability to have CHIRP validate the patient's address. (Illustration 2.4) Selecting this option prevents patients with incomplete or incorrect addresses from being included in the final output.

**Valid Addresses:**

Valid Addresses Only  
 Invalid Addresses Only  
 All Patients

(Illustration 2.4)

The next option is very useful following a vaccine shortage. Often times, patient records have been inactivated to prevent Recall during a vaccine shortage. By default, Reminder/Recall excludes inactive patients. There is no need to do this anymore. We recommend using the deferral option. This will be discussed in the next section. You can use the Include Inactive Patients Option to include your inactive patients. (Illustration 2.5)

Include Inactive Patients

(Illustration 2.5)

This will invariably increase the size of your target group, so be forewarned. However, Reminder/Recall will not include any patient who has the "Block

Other Info	
Health Plan Name:	--select--
HP Patient ID:	<input type="text"/>
HP Enroll Date:	<input type="text"/>
Physician:	--select--
Facility:	ISDH - TEST FACILITY
Next Appt. Date:	<input type="text"/>
Chart Number:	SIISCLIENT103
Birth Country:	--select--
Birth State:	--select--
Block Recall:	<input type="checkbox"/>
Allergies/Comments:	<input type="text"/>
Monthly Income:	<input type="text"/>
Number in Family:	<input type="text"/>

(Illustration 2.6)

Recall” checkbox (Illustration 2.6) marked in his or her demographic record. This is useful in preventing a reminder or recall being sent to a deceased patient. The “Block Recall” checkbox is located on the Demographics page in the “other” section.

You can also filter out patients based upon a birth date range. (Illustration 2.7) This is useful in targeting 2 year olds or 6 year olds, etc. Enter a beginning and ending date range for the age of the children you want to include. All others will be excluded.

Limit Reminder/Recall Group By:		
<input type="checkbox"/> Patient Birth Date	From: <input type="text"/>	To: <input type="text"/>

(Illustration 2.7)

If you belong to a large practice with many sites, you may have the option to filter your target group based upon facility site. (Illustration 2.8) If you are part of a single location, your name should already appear here. If you assign physicians to

<input type="radio"/> Facility	--select-- <input type="button" value="v"/>
--------------------------------	---

(Illustration 2.8)

your patient demographic records, then you can also filter your target group by selecting a primary care physician from the drop-down list. (Illustration 2.9) This

Limit Reminder/Recall Group By:		
<input type="checkbox"/> Patient Birth Date	From: <input type="text"/>	To: <input type="text"/>
<input type="radio"/> IRMS	--select-- <input type="button" value="v"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="radio"/> Facility	--select-- <input type="button" value="v"/>	
<input checked="" type="radio"/> Do Not Limit		
<input type="checkbox"/> Physician	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Program	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Health Plan	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> High Risk Category	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> State	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> County/Parish:	--select-- <input type="button" value="v"/>	
<input type="checkbox"/> Zip Code:	<input type="text"/>	
<input type="checkbox"/> Health District/Region	<input type="text"/>	
<input type="checkbox"/> Appointment Date	From: <input type="text"/>	To: <input type="text"/>
<input type="checkbox"/> Deferred Vaccinations Only		

(Illustration 2.9)

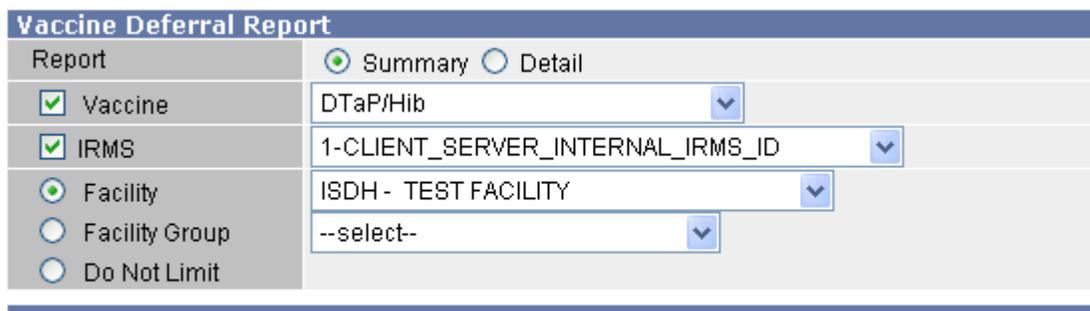
will allow you to see patients for just a particular physician. The State, County/Parish and Zip Code options are driven off of the patient’s demographic

record and not the location of your facility. CHIRP does not currently utilize the Program, Health Plan or Health District/Regions options. We will cover the Appointment date option in the next segment.

Another feature is the ability to recall patients who have been deferred a vaccination due to shortages or other issues. A vaccination deferral must be set in the patient's vaccination screen in order for the patient to be included in the target group. (Illustration 2.10)



With this option, you have the “Vaccine Deferrals” report (Illustration 2.12) in the “Report Module” under the Vaccinations section. To run this report, Summary or Detail will need to be selected. (Illustration 2.11)



(Illustration 2.11)

Then select the Vaccine. If you are part of a large practice, you will have to choose the Facility. If you are only one facility, your facility information will already be populated. The Summary report will give you a total of deferrals for each dose number. The Detail report will give you this list, and include patient ID, Name, and Date deferred.

Something to remember when running a reminder recall, patients marked with a deferral will show in all reminder recalls if they fall within the date range. If you run the search with the Vaccine Deferrals checked, ONLY the patients with Deferrals defined will be included.

<b>Vaccine Deferrals Summary Report</b>	
Count of Deferred Vaccinations Given	
<b>Report Criteria:</b>	<b>Report Date:</b> January 11, 2005
Vaccine:	DTaP/Hib
IRMS:	1 - CLIENT_SERVER_INTERNAL_IRMS_ID
Facility:	ISDH - TEST FACILITY
<b>ISDH - TEST FACILITY</b>	
Dose 1	1

(Illustration 2.12)

The last filter gives you the ability to target your group based upon the antigen and/or dose number needed. This feature can be useful after the occurrence of a vaccine shortage and can be used in conjunction with the vaccination deferral option. Remove the checks from the antigens that you do not wish to target, to exclude those patients. (Illustration 2.13) You may now also specify which dose number of the antigens you have left selected, in order to pinpoint your reminder or recall efforts. Please be aware that specifying multiple antigens with specific doses will increase the amount of time that is required for the reminder/recall engine to run. Using this function with the deferral option will generate a list of patients that you have specifically deferred, but remember, not only must the vaccination date due fall within the reminder/recall date range specified, but all other filters specified above must also comply.

<b>Vaccine Families:</b>	<b>and Optional Needed Dose Number:</b>
<input checked="" type="checkbox"/> DTaP/DT/Td*	<input type="text" value="1"/>
<input type="checkbox"/> HIB	<input type="text"/>
<input checked="" type="checkbox"/> POLIO	<input type="text"/>
<input checked="" type="checkbox"/> HEP-B 3 DOSE**	<input type="text" value="2"/>
<input checked="" type="checkbox"/> MMR	<input type="text"/>
<input checked="" type="checkbox"/> VARICELLA	<input type="text"/>
<input type="checkbox"/> FLU	<input type="text"/>
<input type="checkbox"/> PNEUMO (PCV7)	<input type="text"/>

\* DTaP or DT should be given to patients under 7 years old. Td should be given to patients 7 years old or older.  
 \*\* If an adolescent has already begun the routine 3 dose Hep-B schedule, they should not be changed to the 2 dose schedule.

(Illustration 2.13)

# Section 3

## Using Appointment Dates

The final filter option that you have available is a very powerful tool, and can be used in a lot of creative ways. The Appointment Date range (Illustration 3.1) can be set to select a group of patients based upon an appointment date that has been set in their demographic page.

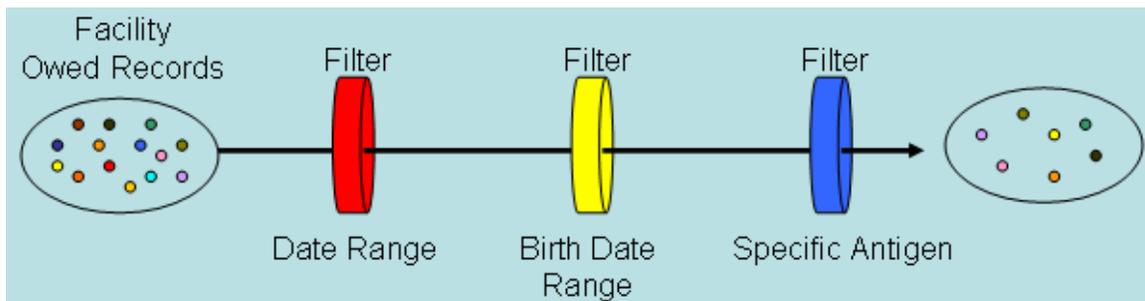


(Illustration 3.1)

This will allow you to access only those patients who have an appointment that falls within the range that you specify. An important point that needs to be emphasized, the patient still must have one or more vaccinations that fall within the Reminder/Recall date range.

Here's an example of how the Reminder/Recall system works. (Illustration 3.2) First we take all the children your facility owns. Second, we apply filters to narrow down the kids we don't want to see. The Reminder/Recall Date range is required. We'll also use the Birth Date range filter, and Specific Antigen. When we generate the list, what we get are just the Patient's that meet all the criteria.

Using the appointment date option in the patient demographic screen in conjunction with Reminder/Recall can be useful in several different ways. One way this can be beneficial, is to forecast, not only the number of patients that you'll be seeing at a particular clinic, but also the amount of vaccine that may need to be on hand.



(Illustration 3.2)

# Section 4

## Editing the Reminder/Recall List

The CHIRP Reminder Recall System offers you the ability to preview the target group of patients, and then remove any that you do not wish, prior to the final list being generated. This is accomplished by selecting, at the top of the Reminder Recall Screen, the Preview and Select Patients checkbox. (Illustration 4.1)



(Illustration 4.1)

After you press the Run Reminder Recall button, the system will generate a preliminary list, and display the results of all the patients selected on the screen along with checkboxes next to each name. (Illustration 4.2) You may then go through and remove the checks from the patients that you do not want to include in the final list. Once you have edited the list, you then select the Generate Final Reminder Recall List button at the bottom, to compile the final list. This will take you to the output options page.

Select Reminder/Recall Patients							
Include?	ID	First Name	Middle Name	Last Name	Birthdate	Guardian First Name	Phone Number
<input checked="" type="checkbox"/>	1047837	JOHN	J	ABBOTT	07/14/2003		(317) 298-8288
<input checked="" type="checkbox"/>	213901	HANEEN	NABIL	ABDULLA	08/15/1999	BOTHAYNA	
<input type="checkbox"/>	97628	ADAM	M	ABNER	01/25/1993	JAMES	(765) 552-9387
<input checked="" type="checkbox"/>	1048988	JENNIFER		ABOYTES	11/04/2003		(317) 631-0012
<input type="checkbox"/>	837029	BRILEY	RENEE'	ABRAHAM	01/23/2000	KARA & BRIA	(812) 522-2673
<input checked="" type="checkbox"/>	478157	TAVARES	ANTIONE	ABRAMS	05/02/1999	BRANDYE	
<input checked="" type="checkbox"/>	1046026	ESRAA	A	ABUKHADJEH	01/21/2003	SHIRIN	(317) 431-8658
<input checked="" type="checkbox"/>	1050903	JACK		ACA	01/24/2004		
<input checked="" type="checkbox"/>	1048234	BRYANT		ACEVEDO	01/05/2004	SCARLETT	(317) 388-0250

(Illustration 4.2)

# Section 5

## Output Options

CHIRP gives you several options for producing output from your Reminder and Recall Lists. The first option is the patient list. (Illustration 5.1) This option generates a report style listing of the targeted patients, sorted by their last name. Information included on this report is the patient ID. Seen here in the form of a barcode. The patient's full name is next followed by the birth date. You also receive the guardian's first name and the contact phone number. Below each patient you will see listed the vaccinations that matched the target criteria and what dose it is, when the recommended time is for them, as well as the minimum date allowed.

Total Patients Selected: 17

Bar Code/ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number
	RUDY		ALVAREZ	01/13/2003	STACY	(317)931-8195
<b>Vaccine Family Name</b>						
	<b>Dose Number</b>		<b>Recommended Date</b>		<b>Minimum Date</b>	
	MMR	1	01/13/2004		01/13/2004	
	VARICELLA	1	01/13/2004		01/13/2004	
	AMARIONNA		AVERITTE	01/19/2003		(317)636-0124
<b>Vaccine Family Name</b>						
	<b>Dose Number</b>		<b>Recommended Date</b>		<b>Minimum Date</b>	
	MMR	1	01/19/2004		01/19/2004	
	VARICELLA	1	01/19/2004		01/19/2004	
	SAMUEL		AYAD	01/21/2003		(317)571-1627
<b>Vaccine Family Name</b>						
	<b>Dose Number</b>		<b>Recommended Date</b>		<b>Minimum Date</b>	
	MMR	1	01/21/2004		01/21/2004	
	VARICELLA	1	01/21/2004		01/21/2004	

(Illustration 5.1)

It might be good to point out at this time that CHIRP's Reminder Recall system utilizes the recommended dates from the vaccine forecast for its evaluation, not the minimum dates.

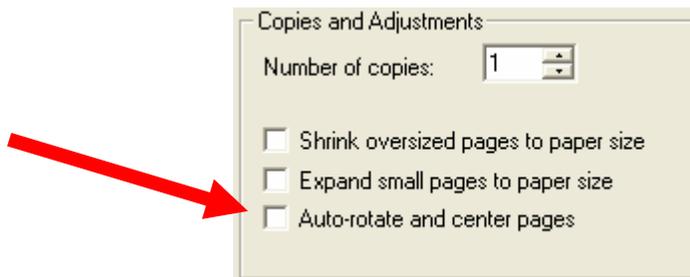
Also, if you do not see the barcode displayed in the first column of the report, then you will need to download and install the barcode fonts supplied under the Document Center, off of the main CHIRP page.

The next output option is the creation of mailing labels for the patients. (Illustration 5.2) The mailing labels utilized here are the Avery Style 5160 labels. These sheets contain 30 labels with 3 columns of 10 labels each.

To the parents of: RUDY ALVAREZ 3532 WINTHROP AV INDIANAPOLIS, IN 46205	To the parents of: AMARIONNA AVERITTE 1561 YANDES ST INDIANAPOLIS, IN 46202	To the parents of: SAMUEL AYAD 9637 MAPLE DR INDIANAPOLIS, IN 46280
To the parents of: KAROLYN DENNIS 2011 E MARYLAND ST INDIANAPOLIS, IN 46201	To the parents of: ROSA DEPAZ 4741 E WASHINGTON STA INDIANAPOLIS, IN 46201	To the parents of: DIAMOND MCKINSTRY 3416 N CAPITOL AV INDIANAPOLIS, IN 46208
To the parents of: DAKOTA MCLERNON 58 TRI SAB LANE INDIANAPOLIS, IN 46227	To the parents of: IVAN VENANCIO-CRUZ 1417 LAFAYETTE AVE LEBANON, IN 46052	To the parents of: JADA WARD INDIANAPOLIS, IN

(Illustration 5.2)

When you select this output, the labels will be generated using Adobe Acrobat. You will need to have Acrobat Reader 5.0 or greater installed on your system prior to running these labels. Once the labels appear on your screen, you will notice on the label itself, that it is addressed to the parent of and then the patient's name. Select from the FILE Menu Option, Print. The print dialog box will appear. Over on the right hand side of the dialog box, in Reader version 5.0, are three options under the section – Copies and Adjustments. (Illustration 5.3)



(Illustration 5.3)

On version 6.0 and higher, may be different. We are looking for any option that will adjust the page setup. For the best fit, make sure that the only checkbox marked in this section is the one labeled – Auto Rotate and Center Pages. Checking the other boxes could cause the labels to print outside of the label boundaries.

CHIRP also gives you an option to generate postcards, (Illustration 5.6) complete with a predefined message or customized message, the patient's mailing address, as well as your facility or the facility that they should be seen at and its address and phone number. On the Reminder Recall Output page under the section Postcards, fill in the address information as well as the contact phone number that you would

Postcards (Avery 8387)	
<i>Please enter the Facility Return Address information below:</i>	
Facility Name:	<input type="text"/>
Street:	<input type="text"/>
City, State Zip Code:	<input type="text"/>
Phone Number:	<input type="text"/>

[select](#)  
[preview](#)

like to appear for the clinic. (Illustration 5.4)

If you would like to customize the message to appear on the postcards, click the preview link. A new window will appear that shows you the contents of the default postcard message, and a place for you to type in your alternate customized message. (Illustration 5.5)

Reminder/Recall Postcard Options

Select Template

Postcard Message

Default

User Defined

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

Print

Save & Print

Return to Reminder Recall Output

(Illustration 5.5)

Be aware of HIPAA stipulations when creating custom messages to be sent out on the postcards. Once you have completed the message, make sure to click the option for User Defined then select the Save and Print button. To pick the default cards, keep the option on default and click the PRINT button, or return to the Reminder Recall Output Screen and Click the Select link. The sheets of postcards will be generated on your screen. (Illustration 5.6) The Postcards are generated using the Avery Style Postcards 8387. Each sheet will contain 4 postcards that are perforated and can be separated after printing. Be sure to follow the directions at the bottom of the Reminder/Recall Output page for specific settings before printing. Once the cards appear on the screen select the FILE menu, click on PRINT and the print dialog box will appear. Make sure the postcard sheets are in the printer before clicking PRINT.

Indiana State Dept of Health  
2. North Meridian St.  
Indianapolis, IN. 46204  
(317)555-1111

RETURN SERVICE REQUESTED

To the Parent/Guardian of:

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

RUDY ALVAREZ  
3632 WINTHROP AV  
INDIANAPOLIS, IN 46205

Indiana State Dept of Health  
2. North Meridian St.  
Indianapolis, IN. 46204  
(317)555-1111

RETURN SERVICE REQUESTED

To the Parent/Guardian of:

Dear Parent or Guardian,

Our records indicate that your child may be due for one or more immunizations.

Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated. (If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)

We look forward to hearing from you soon.

AMARIONNA AVERITTE  
1561 YANDES ST  
INDIANAPOLIS, IN 46202

(Illustration 5.6)

The next option can only be used at selected sites that have the ability to use a program known as an Auto-dialer. This option generates a file that you will have to save on to your local hard drive and then import into your Auto-dialer software. (Illustration 5.7)



(Illustration 5.7)

The latest addition to Reminder/Recall output is the ability to submit them by email. (Illustration 5.8)

 A form titled "Email Reminders" with a subtitle "Please enter the Facility Return Address information below:". The form contains four input fields: "Facility Name:", "Street:", "City, State Zip Code:", and "Phone Number:". To the left of the form is a vertical gray bar containing the word "select" in red text with a thin red underline.

(Illustration 5.8)

Notice on the patient demographic page, a place to enter the guardian's email address. (Illustration 5.9)

 A form titled "Address" with a blue header. It contains several input fields: "P.O. Box:" and "Physical Address:" (with a radio button for "P.O. Box"); "Street:" (with "7490 MALLARD CT" entered); "City:" (with "INDIANAPOLIS" entered); "Country:" (with "United States" selected in a dropdown); "State:" (with "IN" selected in a dropdown); "ZIP Code:" (with "46260" entered); "County/Parish:" (with "--select--" selected in a dropdown); "District/Region:"; "Phone Number:" (with "(317)255-5834" entered); "Extension:"; "Email:"; and "School:". A red arrow points to the "Email:" field. A blue link "Click to select" is located at the bottom right of the form.

(Illustration 5.9)

This can be a home or work address or anywhere the guardian would be able to check his or her own personal email. When you select this option, only those patients who have email addresses will receive notification. Once again, you have the option of specifying the return Facility Address information and contact phone number. (Illustration 5.8) The generic message that appears is the same as what appears on the postcards. (Illustration 5.6) Once you click select, you will receive a listing of all the patients who have been sent an email notification.

If for some reason an email address is incorrect, you will not be notified. At this time, there is no way to track receipt of the emails sent.

A final feature about the reminder recall system is the ability to come back during the same session and review the last reminder/recall performed. This appears as a link at the bottom of the main reminder/recall screen. (Illustration 5.10) You will see the words “Click HERE to go to previous results”. Please note this only remains during your current session. Once you log out of CHIRP, the previous reminder/recall session is removed.



(Illustration 5.10)

## **Conclusion**

This concludes the Reminder Recall Training Video. If you need further assistance please contact the CHIRP Support Center at 888-227-4439 or via email at [chirp@isdh.state.in.us](mailto:chirp@isdh.state.in.us).

We are always glad to help.

## **NOTE**

The last frame of the Video has a link. Clicking on this link, while connected to the Internet, will take you to a Certification. Enter your name and facility. You can print this in Black and White, or color.



# CHIRP SUPPORT CENTER

Immunization Program, 6A-22  
2 North Meridian St.  
Indianapolis, IN. 46204  
1-888-227-4439  
[chirp@isdh.state.in.us](mailto:chirp@isdh.state.in.us)  
<https://chirp.isdh.state.in.us>