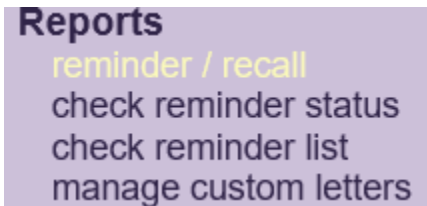**Immunization Registry Information System (IRIS)**
COVID-19 Vaccine Reminder and Recall Instructions
August 4, 2021

Reminder/Recall

The following are instructions to generate reminder and recall reports for patients who are due or past due for COVID-19 vaccines. Contact the IRIS Help Desk at 800-374-3958 with questions.

1. 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 Reminder/Recall request criteria previously run. Either option may be selected.

   a. If running a new report, type a name for the report such as "October 2020 COVID". The name field can only contain letters and numbers. No special characters can be used.

b. A previous report can also be run by selecting a previous report name from the dropdown menu. When selecting a previous reminder, the page will populate with the previous reminder/recall report options.

Reminder/Recall Request

Create New List ...

◯ Enter new Reminder Recall Request Criteria [＿＿＿＿＿＿＿＿] List Name

◉ Use a previous Reminder Recall Request List [SEPTEMBER 2020 COVI ✔]

3. Under the "Indicate the Tracking Schedule" section, select "Use Tracking Schedule Selected for All Patients" option and select the "ACIP" option from the dropdown menu.

Indicate the Tracking Schedule ...

◯ Use Tracking Schedule Associated with Each Patient

◉ Use Tracking Schedule Selected for All Patients [ACIP ✔]

4. Select "Use Vaccine Groups Selected" under the "Select Vaccine Group To Report On" section. Scroll through the vaccine list and double click the "COVID19" option to move to the right-hand box. Or select the "COVID19" option and select the "Add" button.

Select the Vaccine Group To Report on ...

◯ Use All Vaccine Groups

◉ Use Vaccine Groups Selected

| Adeno / Anthrax | [Add] [Remove] | COVID19 |

5. Select "Both" to run the report for Vaccines Due Now and Past Due. The **Vaccines Due Now** option refers to when the patient reaches the recommended due date for the immunization according to the vaccine schedule. The **Vaccines Past Due** option refers to when the patient reached the past due date for the immunization according to the vaccine schedule. The "Both" option allows all patients who have reached the recommended due date for the vaccine to be included in the reminder recall results.

The IRIS reminder recall report does not designate if the patient is due or past due for a specific dose in the vaccine series. This report indicates the patient is due or past due for **any** vaccine in the series (Dose 1 or Dose 2).

6. The Select Series Status Recall field indicates whether the report should be generated for patients who have not started a vaccine series (uninitiated), in progress, or complete.
   a. Selecting **Uninitiated** indicates the report will look for patients who are eligible for the vaccine but have not started the series.
   b. Selecting **In progress** indicates the report will look for patients who have started but not completed the vaccine series.
   c. Selecting **Complete** indicates the report will look for patients who have completed the vaccine series.

7. Scroll to the "Enter the Date Criteria" section. Enter a birth date range which will recall patients between 12 through 99 years of age. For example, if generating the report on August 1, 2021, the birth date range to enter would be from 08/01/1922 to 08/30/2009.

8. In the "Select the Vaccine Groups to Display" section, scroll through the vaccine list and double click the "COVID19" option to move to the right-hand box. Or select the "COVID19" option and select the "Add" button.

Select the Vaccine Groups to Display ...

○ Use All Vaccine Groups
● Use Vaccine Groups Selected

Adeno Anthrax	Add	COVID19
	Remove	

9. Select "Save & Generate" to generate the report and save the criteria for later use.

Specify How to Sort the Report Data ...

Sort 1st By	Last Name	Ascending	Sort 3rd By		
Sort 2nd By	First Name	Ascending	Sort 4th By		

[Save & Generate] [Generate] [Cancel]

10. The Reminder Request Status page will display. To refresh the status of the report, select the "Refresh" button. Once the status is at 100%, select the link under the "Started" column.

Reminder Request Status

Started	Completed	Limited	Status	Patients	Target From	Target To
09/30/2020 09:00 AM	09/30/2020 09:01 AM	100 %		26	09/30/2020	09/30/2020

11. The results page will display with eligible patients on the report. Users can generate a Reminder Letter, Reminder Card, Mailing Labels, Patient Query Listing, Extract Client Data, or Custom Reminder Letter by selecting the link for each output option.

Reminder Request Output Options

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

Once an output option is selected, the Reminder Request Status page will display. To refresh the status of the report, select the "Refresh" button. Once complete, a link will display. Select the link to view the output options.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Custom Letter	Jasper Report	09/30/2020 09:06 AM	09/30/2020 09:06 AM	09/30/2020 09:06 AM	Ready
Client XLS	Client XLS	09/30/2020 09:05 AM	09/30/2020 09:05 AM	09/30/2020 09:05 AM	Ready
Patient Query Listing	Jasper Report	09/30/2020 09:05 AM	09/30/2020 09:05 AM	09/30/2020 09:05 AM	Ready
Mailing Labels	Jasper Report	09/30/2020 09:05 AM	09/30/2020 09:05 AM	09/30/2020 09:05 AM	Ready
Reminder Card	Jasper Report	09/30/2020 09:05 AM	09/30/2020 09:05 AM	09/30/2020 09:05 AM	Ready
Reminder Letter	Jasper Report	09/30/2020 09:04 AM	09/30/2020 09:04 AM	09/30/2020 09:05 AM	Ready

Example of Output Options

Reminder Letter

1. If the **Reminder Letter** link is selected, a PDF of the Reminder Letter will display for each patient on the report, including the patient's immunization history and immunization due.

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
COVID-19	01/01/2021	COVID-19

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
COVID-19

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

Iowa Training Organization - Doctor's Office

Reminder Card

2. If the **Reminder Card** link is selected, a PDF of the Reminder Card will display for each patient on the report, which includes the patient's name, address and the provider organization's phone number.

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

Joey Training Org Testi
1234 FAKE AVENUE
DAVENPORT, IA 52803

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

Please bring your immunization
record to every visit.

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

Thank you,
Joey Training Org Testi

Address Correction Requested

Mailing Labels

3. If the **Mailing Labels** link is selected, it will open in a PDF and will include a Mailing Label for each patient on the report, which includes the patient's name and address. The labels can be used to send Reminder Letters.

IMMUNIZATION TEST   TYPHOID TESTING

12 TETANUS DRIVE   654 MERCY ST

NEWTON IA 50208   DES MOINES IA 50318

Patient List

4. If the **Patient List** link is selected, a PDF will display for each patient on the report, which includes the patient's name, phone number, address and immunizations due. If the patient was immunized previously, a list of previous immunization dates will be included.

TEST HYPHEN-IOWA - 02/13/1983   319-111-2222   123 Fake St   WATERLOO, IA 50702-

Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
COVID-19	02/01/2021	01/01/2021

Client XLS

5. If the **Client XLS** link is selected, an Excel spreadsheet will open. The spreadsheet will contain the patient's name, address, phone number, and immunization history. The excel spreadsheet will have a column for area code and phone number for providers using an autodialer to conduct follow up for reminder/recall.

	A	B	C	D	E	F	G	H	I	J	K
1	Client_ID	Last Name	First Name	Birth Date	Street Address Line	City Name	State Code	Zip	Area Code	Phone	Vaccine Name
2	557916	TEST	IRIS	2000-01-01	123 FAKE ST.	DES MOINES	IA	50314	515	2223333	COVID-19
3	803547	PATIENT	TEST	2000-10-10	123 FLEMING	STORY CITY	IA	50248	515	1112222	COVID-19

Custom Letter

6. If the **Custom Letter** link is selected, a PDF of the Custom Reminder Letter will display for each patient on the report. The letter includes the patient's immunization history and immunizations due.

321 FAKE ST.
DES MOINES, IA 50321

Dear : Test Patient

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
COVID-19

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

Thank you,

Joey Training Org Test
(563) 333-3333 x555555