

Virginia Assessment Feedback Incentive eXchange Program

Virginia Immunization Information System Quick Guide

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**For assistance navigating VIIS contact your VIIS
Consultant or:**

**VIIS Help Desk
804-864-7028**

viis_helpdesk@vdh.virginia.gov

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Introduction

The Virginia Immunization Information System (VIIS) is Virginia's statewide immunization registry that contains immunization data of persons of all ages. VIIS is a free, web-based system for data that documents all immunizations a person has received into one definitive, accurate record. The Virginia Division of Immunization staff can run assessment reports to help identify coverage rates of a particular clinic or provider. In order for these activities to produce accurate results, **client status** should be maintained and up-to-date. Clients can either have a status of *Active*, *Inactive* or *Permanently Inactive - deceased*. This document helps determine when and how clients should be active or inactive. It also covers how to add demographic information under the Responsible Person(s) which will be essential in generating information for some current reports and future enhanced reports.

All clients in the Immunization registry are classified as "Inactive" by default for a VIIS organization. Any client that could potentially need services from your clinic should be identified as "**Active**". Assigning an "Active" status to a client by a provider may be done in any of the following ways:

- A provider manually sets status to "Active" via user interface (UI) or electronic data exchange (DE).
- A provider conducts a vaccination event for the client and enters the administered vaccine into the UI or DE.
- A provider creates a new client's record in VIIS (this includes adding historical immunization information for a client).

Inactivating clients in VIIS will give you a more realistic assessment of your client's immunization rates. A client should be "**Inactive**" with a particular organization when:

- They have "*Moved or Gone Elsewhere*" (MOGE). This includes clients for whom you have documented in your charts/ Electronic Health Record (EHR) that you are certain they are going elsewhere for care and will not be returning for care at your health center.
- They are considered "*Lost to follow-up*". Clients for whom you have documented in your charts/EHR that you have made multiple unsuccessful attempts and cannot locate them.

When the client is deceased, he or she will be permanently inactivated from all organizations in VIIS. This should be done when a provider receives information that a client has died. A provider manually sets status to "**Permanently Inactive- Deceased**".

PLEASE NOTE: A provider may decide that a client who has not been seen in an extended period of time is no longer a client and should be changed to inactive. It is important to note that "an extended period of time" will vary by age group. In particular, adolescents and adults do not routinely visit providers as frequently as children. Reminder recalls and coverage assessments help identify those clients who have "slipped through the cracks" and are overdue for immunizations. **Therefore, it is important to err on the side of caution when choosing to inactivate clients who have not had a visit for an extended period of time.**

How to Activate/ Inactivate a Client in VIIS:

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by **Name**. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results
3. Click on the Find button.
 - a. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number.
4. You will arrive at the "Personal Information" screen, where you can view the client's demographic information.
5. Click on the **Client Information tab** right under the Personal Information section houses more demographic information.
 - a. Complete chart number, ethnicity and race as indicated by the client
 - b. The client's status should be set to **"Active"**
 - c. The client's status should be set to **"Inactive"** if they have moved or have not been seen at your practice for a set amount of time
 - d. Allow sharing of immunization data should be set to either **"Unknown"** or **"Yes"**
 - e. Allow reminder/ recall contact notices should be set to **"Yes"**
6. Click the Save button on the upper right section of this page

Personal Information

VIIS Id 8295933

Last Name MOUSE SSN [] - [] - []

First Name MICKEY Gender M F Unknown

Middle Name M Birth Date 01/08/2004

Mother's Maiden Last [] Ind City/County []

Mother's First Name [] Country of Birth UNITED STATES

Last Notice []

Last Updated by: Virginia Department of Health on 07/29/2015

Client Information Responsible Person(s) Client Comment(s)

Chart # [] Tracking Schedule ACIP

Ethnicity Not Hispanic or Latino Status Active

Race Other Race Allow Sharing of Immunization Data? Yes

Provider-PCP [] Allow Reminder and Recall Contact? Yes

School []

Eligibility

Verification Date 01/16/2008

Eligibility Insured, Vaccine covered

Note Please ensure eligibility information is correct.
This eligibility is used for all immunizations occurring on this date.

How to Add a Responsible Person(s)

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results
3. Click on the Find button
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number
5. You will arrive at the "Personal Information" screen, where you can view the client's demographic information
6. Click on the **Responsible Person(s)** tab
7. In this section, fill in the following:
 - a. **Last and First names for the Responsible Person**
 - b. **Relationship to Client** (Select "Self" if entering the client's information)
 - c. **Phone number**
 - d. **Email Address**
 - e. **Full Mailing Address**
 - f. Check the Notices box
 - g. Check the Primary box for relationships identified as "Self" , "Guardian", "Mother" or "Father"
8. Click on the Next button to add a new entry and repeat Step 7 above.
9. Click the **Save** button on the upper right section of this page

Personal Information

VIIS Id 167205

Last Name MOUSER SSN [] - [] - []

First Name MIKE Gender M F Unknown

Middle Name [] Birth Date 06/30/2001

Mother's Maiden Last LIKELY Ind City/County []

Mother's First Name BRENDA Country of Birth UNITED STATES

Last Notice 08/18/2010

Save

 History/Recommend
 Record Immunization
 Reports
 Cancel

Last Updated by: Infant Jesus Children's Clinic on 09/21/2009

Client Information

Responsible Person(s)

Client Comment(s)

Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	MOUSER	BRENDA	Mother	WHOVILLE	Yes	Yes

New
 Copy
 Delete

Details for Responsible Person: BRENDA MOUSER (Last Updated: 09/21/2009 01:16:10 PM)

Last Name MOUSER Street Address 852 Park Ave

First Name BRENDA Other Address []

Middle Name [] P.O. Box []

Relation Mother City WHOVILLE

Telephone [] - [] - [] State VA Zip 22546 +4 []

Extension [] Language ENGLISH

E-Mail [] Notices? Primary?

Next

 Cancel

Note - In order to generate letters, cards, or labels for a client, that client must have one responsible person with a full address and phone number.

How to Update a Responsible Person(s)

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number.
5. You will arrive at the "Personal Information" screen, where you can view the client's demographic information.
6. Click on the **Responsible Person(s)** tab.
7. In this section, verify the following information is accurate and up to date for each responsible person(s) entry:
 - a. **Last and First names for the Responsible Person**
 - b. **Relationship to Client** (Select "Self" if this segment contains the client's information)
 - c. **Phone number**
 - d. **Email Address**
 - e. **Full Mailing Address**
 - f. Check the **Notices** box if it is unchecked
 - g. Check the **Primary** box for relationships identified as "Self", "Guardian", "Mother" or "Father" if it is unchecked
8. Click the **Save** button on the upper right section of this page.

Please Note: There can only be 4 responsible person(s) saved in this section. Please update existing entries and delete invalid and/or duplicate contacts.

Personal Information

VIIS Id 167205

Last Name MOUSER SSN - -

First Name MIKE Gender M F Unknown

Middle Name Birth Date 06/30/2001

Mother's Maiden Last LIKELY Ind City/County

Mother's First Name BRENDA Country of Birth UNITED STATES

Last Notice 08/18/2010

Last Updated by: Infant Jesus Children's Clinic on 09/21/2009

Client Information **Responsible Person(s)** Client Comment(s)

Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	MOUSER	BRENDA	Mother	WHOVILLE	Yes	Yes

Details for Responsible Person: BRENDA MOUSER (Last Updated: 09/21/2009 01:16:10 PM)

Last Name MOUSER Street Address 852 Park Ave

First Name BRENDA Other Address

Middle Name P.O. Box

Relation Mother City WHOVILLE

Telephone State VA Zip 22546 +4

Extension Language ENGLISH

E-Mail Notices? Primary?

Note - In order to generate letters, cards, or labels for a client, that client must have one responsible person with a full address and notices for that responsible person checked. Please see our help for more information.

How to Add a Client Comment(s)

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number.
5. You will arrive at the "Personal Information" screen, where you can view the client's demographic information.
6. Click on the **Client Comment(s) tab**.
7. At the bottom of the client comments tab, click on the '**Client Comment**' pick list to display the available comments.
8. Select a comment from the list.
9. You should enter an 'Applies-To Date'. This would be a date that applies to the comment. Do not guess on the date the comment occurred. Although this is not a required field it is highly recommended.
10. To add additional comments click on the **Next** button to add the current selection and select a new comment.
11. You must save the record to save any added comments. Click on the **Save** button in the upper right hand corner to save the record with the new comments.

Please Note: Any comment selected will appear under "The Client Comment Listing" section as well as on the clients' immunization record. Most comments consist of **Allergies, Immunity, History of Disease, Medical Exemptions, Counter-Indications, Refusal of Vaccine** and/or **Vaccine Unavailability**

Personal Information

VIIS id 8295933

Last Name SSN - -

First Name Gender M F Unknown

Middle Name Birth Date

Mother's Maiden Last Ind City/County

Mother's First Name Country of Birth

Last Notice

Last Updated by: Virginia Department of Health on 03/17/2016

Client Information Responsible Person(s) **Client Comment(s)**

Client Comment Listing 1-1 of 1

Select	Date	Client Comment
<input checked="" type="radio"/>	05/05/2010	History of Chicken Pox/Varicella
<input type="radio"/>		

Detail for Client Comment ...

Client Comment

Applies-To Date

How to Edit a Client Comment(s)

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number.
5. You will arrive at the "Personal Information" screen, where you can view the client's demographic information.
6. Click on the **Client Comment(s) tab**.
7. The comment you would like to update is listed in the **Client Comment Listing section**
8. Click on the 'Select' circle next to the comment you would like to update to select it.
9. The information for the comment will appear at the bottom of the screen.
10. Now you can either select a different comment from the 'Client Comment' pick list or change the 'Applies-To Date' if there is one.
11. To add additional comments click on the **Next** button to add the current selection and select a new comment.
12. You must save the record to save any updated or added comments. Click on the **Save** button in the upper right hand corner to save the record with the updated/new comments.

Personal Information

VIIS Id 8295933

Last Name MOUSE SSN [] - [] - []

First Name MICKEY Gender M F Unknown

Middle Name M Birth Date 01/08/2004

Mother's Maiden Last [] Ind City/County []

Mother's First Name [] Country of Birth UNITED STATES

Last Notice []

Last Updated by: Virginia Department of Health on 03/17/2016

Client Information Responsible Person(s) **Client Comment(s)**

Client Comment Listing 1-1 of 1

Select	Date	Client Comment
<input checked="" type="radio"/>	05/05/2010	History of Chicken Pox/Varicella
<input type="radio"/>		

Details for Client Comment ...

Client Comment: History of Chicken Pox/Varicella

Applies To Date: 05/05/2010

Buttons: Save, History/Recommend, Reports, Cancel, New, Delete, Next, Cancel

How to Print Client Report(s)

1. From the "VIIS Home" page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother's Name or Phone Number.
5. You will arrive at the "Personal Information" screen, where you can view the client's demographic information.
6. Update the **Client Information Tab**, **Responsible Person(S) Tab** and the **Client Comment(s) tab**
7. Click on the **Reports tab**.
8. The reports you can select are found under the **Reports Available for this Client** section
9. Select **Confidential Immunization** to avoid sharing records with too much patient health information
10. A PDF document will pop up. Click on the **Print** icon that appears when you hover at the bottom of the PDF page
11. Click the **Back** button at the top left side of the page to exit

Client Information						VFC Eligible: N
Client Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Tracking Schedule	Chart #	
MICKEY M. MOUSE	01/08/2004	M		ACIP		
Address	123 CHEESE WAY, MECHANICSVILLE, VA 23111 (703) 559-5546					
Comments	{1 of 1} .. 05/05/2010 ~ History of Chicken Pox/Varicella					
Reports Available for this Client						
Report	Description	Additional Information				
Vaccine Administration	Displays demographics, contact information, immunization history, as well as immunizations available.	Site	[Dropdown]			
		Language	ENGLISH [Dropdown]			
Official Immunization	Displays demographics, registry data, contact information, as well as detailed immunization history.	None				
Confidential Immunization	Displays demographics and detailed immunization history. No address or contact information is displayed.	None				
Immunizations Needed	Displays demographics, contact information, immunization history, as well as immunizations needed.	None				
Report Viewing Requirements						
	<p>Registry reports are best viewed with Adobe Acrobat Reader 9.3 or later. Earlier versions of Adobe may work, but there will be formatting differences. If you do not have a qualifying version, click the Adobe image to the left to download the current version of Acrobat Reader. In addition, you may find helpful guidelines at the Adobe Support Site for configuring Acrobat Reader to work with your browser. Configuration guidelines may be found at: http://www.adobe.com/support/downloads/detail.jsp?ftplD=4634.</p>					
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How to a Run a Reminder/Recall Report

The Reminder Request exists so that a user is able to generate mailing reports, address labels, or a client listing for clients in their organization. Read further to find out how to use criteria to improve the results of your report. The filters Reminder/Recall Report can be selected if desired however clients will only be included if the information is populated on their record.

For a client to be included in the report they must:

1. Be active with your organization and allow contact reminder notices
2. Have a full mailing address for a responsible person with notices checked.

Note: Clients must also have been immunized by your organization to be included in this report.

1. From the “VIIS Home” page, click on Reports in the left menu bar.
2. Select the “**Reminder Recall**” hyperlink
3. You will land on the **Reminder/Recall Request** screen.
 - a. This page is used to select and submit the client, immunization, date, and sort order criteria used to determine which clients must be contacted resulting from being overdue for immunizations.

Selecting Tracking Schedule

4. Choosing a tracking schedule will determine the set of recommended immunizations and corresponding dates that will be compared to each clients immunization history. If the client is overdue for any vaccinations according to the selected tracking schedule, then he or she will be included in the reminder report outcome, given all other report criteria is met.
 - a. Within the '**Indicate the Tracking Schedule ...**' section, select the '**Use Tracking Schedule Associated with Each Client**' option, or select the '**Use Tracking Schedule Selected for All Clients**' option.
 - b. If the '**Use Tracking Schedule Selected for All Clients**' option is selected, then choose a tracking schedule to base the entire reminder report on by selecting a tracking schedule from the pick list.

Note: VIIS only contains the ACIP Tracking schedule, no selection is needed.

Selecting Vaccine Groups

5. Choosing vaccine groups allows you to single out any given vaccines within the selected tracking schedule. If the client is overdue for any of the selected vaccine groups according to the selected tracking schedule, then he or she will be included in the reminder report outcome, given all other report criteria is met.
 - a. Within the '**Select the Vaccine Group(s) ...**' section, select the '**Use All Vaccine Groups**' option, or select the '**Use Vaccine Groups Selected**' option.
 - b. If the '**Use Vaccine Groups Selected**' option is selected, choose the vaccine groups to include. Scroll though the vaccine group list and either double-click on the desired vaccine group name, or click on the vaccine group name and then click the **Add>** button. All selected vaccine groups will appear in the right list box in **green** font.

Note: To *remove* any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click on the selected vaccine group name from the right list box and then click the **<Remove** button.

Selecting a School or Primary Care Provider (Optional Field)

6. Choosing a school or primary care provider allows you to look only at those clients who have been assigned to a particular school or physician. If the client has been assigned to the selected school or to the selected physician, then he or she will be included in the reminder report outcome, given all other report criteria is met.
 - a. To choose a school, within the '**Select the School & Primary Care Provider ...**' section, select a school name from the 'School' pick list.
 - b. To choose a primary care provider, within the '**Select the School & Primary Care Provider ...**' section, select a physician name from the 'Provider (PCP)' pick list.

Entering/Selecting Additional Demographic Information

7. Entering and or selecting additional demographic information allows you to look at only those clients who match specific demographic information within their records. If the client has a specific city, zip code, or county associated with their record then he or she will be included in the reminder report outcome, given all other report criteria is met.
 - a. To enter in a specific city, within the '**Enter Additional Demographic Information ...**' section, **type in** the name of the city in the text box labeled 'City'.
 - b. To enter in a specific zip code, within the '**Enter Additional Demographic Information ...**' section, **type in** the first five digits of the clients zip code in the text box labeled 'Zip Code'.
 - c. To choose a county, within the '**Enter Additional Demographic Information ...**' section, **select** a county from the 'County' pick list.

Selecting Dates

8. Date criteria can be entered as a Target Date Range, a Birth Date Range, and a number of Weeks since Last Notice, as described in the table below. None of this information is required to run the report.

Date Criteria	Description
Target Date Range	When these dates are specified, the report will only return those clients that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.
Birth Date Range	When these dates are specified, the report will only return those clients who have a birth date that falls between the birth date range entered.
Weeks Since Last Notice	When a number of weeks is specified here, the system will look at the clients who have had a notice generated in that last number of weeks and exclude them from the report.
Exclude clients more than X months overdue	If you select a number of months the system will exclude clients overdue by more than what you have selected. Example: You select 6 months, all clients overdue for any vaccines by more than 6 months will not show on the report.
Exclude from: Today's Date	The "Exclude from" option works with the "Exclude clients more than X months overdue" option. Once you select to exclude clients more than X months old you can

	also specify whether you want to exclude from Today's Date . Excluding from Today's Date will exclude any clients overdue X months more from today's date.
Exclude from: Target From Date	The "Exclude from" option works with the "Exclude clients more than X months overdue" option. Once you select to exclude clients more than X months old you can also specify whether you want to exclude from the Target From Date . Excluding from Target From Date will exclude any clients overdue X months more from any target date range you have specified. NOTE: <i>If target date range is left blank today's date will be used.</i>

Note: The last notice date for a client can be viewed in the **Edit/Enter New Client** screen. This date is the last date a reminder report (letter, card, mailing label or client list) was generated for that client.

- a. Enter the Target Date Range in the *From* and *To* text boxes in the format MM/DD/CCYY, or click on the calendar icon to set the date.
- b. Enter the Birth Date Range in the *From* and *To* text boxes in the format MM/DD/CCYY, or click on the calendar icon to set the date.

For either date range, the <i>From</i> date, <i>To</i> date, or both dates can be left unspecified, described as follows:	
--	If the To date is unspecified for the Target Date Range, the report date range will include the <i>From</i> date up to and including today's date.
--	If the To date is unspecified for the Birth Date Range, the report date range will include the <i>From</i> date and all days in the future up to and including today's date.
--	If both dates are left unspecified for the Target Date Range, then today's date will be entered for both <i>From</i> and <i>To</i> .
--	If both dates are left unspecified for the Birth Date Range, then all dates up to and including today's date will be considered.

- c. Enter a number of weeks in Weeks Since Last Notice. All clients who have a notice generated within the number of weeks specified will be excluded from the report.
Example: *Little Johnny had a notice generated 1 week ago. For Weeks Since Last notice you enter 2 weeks. Little Johnny will be excluded from the report because he has had a notice sent in the last 2 weeks.*
- d. Enter a number of months from which you wish to exclude clients from. If you enter 1 month all clients overdue for any vaccine past 1 month will be excluded from the report.
- e. Enter whether you wish to exclude clients overdue more than X month's from **Today's Date** or the **Target From Date**.

Selecting Sort Order

9. The Sort Order will determine the sequence which the clients are listed for whatever report output is selected.
 - a. Within the 'Specify How to Sort the Report Data ...' section, choose the primary information field to sort the report on by selecting the information field name from the 'Sort 1st By' pick list.
 - b. Then choose how to sort the information field selected in step one by selecting

Ascending or Descending from the second 'Sort 1st By' pick list.

- c. Repeat steps one and two for any additional ordering sequences using the 'Sort 2nd By', 'Sort 3rd By', and 'Sort 4th By' pick lists.
- d. If the sort order is not specified, the system will default to ordering the report results first by last name ascending and second by first name ascending.

Report Criteria Submission	
Button	Description
	When the Generate button is clicked, a query executes in the database according to the report criteria selected. Depending on the number of clients associated with the provider organization that submitted the report request, the query may take several minutes to complete. After clicking on Generate , you will be redirected to the <u>Check Reminder Status</u> screen where you can monitor the progress of the report query.

Note:

- After submitting your report by clicking on the Generate button you can work in any area of the system without interrupting your report or causing system problems. To check on the status of your report click on the **Check Reminder Status** link in the **Menu Panel** on the left hand side of the page.
- Note: If you do not want to set filters, click **Generate** at the bottom of the screen. The report will run using the current date as the target.

How to a Understand the Reminder/Recall Summary Page

The Reminder Request Process Summary & Reminder Request Output Options screen is used to see the step by step details of the reminder request, such as how many clients exist in the organization and how many will be included in the report. This screen is also for selecting the final format of the report to be printed resulting from the submission of a report query from the **Request Reminder** screen.

Once the report has run, you can view how many clients were included in the report based on the filters. Output options are listed at the bottom to select how you want to view the results.

Output options include:

- Reminder Letter
- Reminder Card
- Mailing Labels
- Client Query Listing
- Customized Letter

Reminder Request Process Summary		
Step	Criteria Evaluated at this Step	Clients
1	Clients associated with Virginia Department of Health.	96074
2	Clients immunized by Virginia Department of Health.	89577
3	Clients that are active within Virginia Department of Health and allow Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none"> • Clients born between 01/01/2000 and 01/01/2010; • County is not specified; • School is not specified; • Provider is not specified; • Weeks Since Last Notice is not specified. 	11562
4	Clients that have one or more responsible persons that Receive Notices. Additional criteria includes: <ul style="list-style-type: none"> • Clients that have at least one responsible person that receives notices that resides in the following city: Richmond • Zip Code is not specified. 	40
5	Clients that Allow Sharing of Immunizations.	39
6	Clients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> • Clients that are Recommended or Overdue for one or more vaccinations as of 03/23/2016; • Use the following vaccine groups: DTP/aP; • Use tracking schedule associated with each client. • Exclude Overdue Reminders is not specified. 	1
Total Number of Clients Eligible for Reminder		1

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Client Query Listing	A list of clients based on the report criteria.	Report Name <input type="text"/>
Fairfax.co	Custom Letter.	Report Name <input type="text"/>

Note - in order to generate letters, cards, or labels for a client, that client must have one responsible person with a full address and notices for that responsible person checked. Please see our help for more information.

Last Notice Date Options	
Set last notice date to today for all eligible clients when you select a report output.	<input checked="" type="checkbox"/>
Revert last notice date to previous last notice date for all clients eligible for this reminder.	<input type="button" value="Revert Eligible"/>
Revert last notice date to previous last notice date for all clients immunized by Virginia Department of Health.	<input type="button" value="Revert All"/>
Return to the previous screen.	<input type="button" value="Cancel"/>

Note: to be HIPAA compliant, the Reminder Card must be mailed in an envelope.

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 is formatted to allow 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 or the Letter section of the table, enter:
 - A report name in the appropriate field, if desired.
 - Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field.
 - A telephone number in the appropriate field, if desired.

Reminder Request Output Options			
Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Report Name	05/01/2001 Reminder
		Free Text	Time for your shots!
		Phone #	(555) 555-5555

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.
 - You have the option of moving to other portions of VIIS 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.
 - If you choose to stay at the Reminder Request Status screen while your request is processing, press **Refresh** 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 Reader®.
5. To print the letters, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **BACK** 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.

Custom Letter

The custom letter output option allows you to generate a customized form letter for the responsible person(s) for each client returned on your query. To create a new custom letter, refer to the "Creating Custom Letters" section of this chapter.

To generate a custom letter from the Reminder Request Process Summary screen, follow these steps:

1. Enter a report name for the custom letter you wish to generate. Click the link with the name of the custom letter. The letter and mailing labels will begin generating immediately.
2. 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.

- You have the option of moving to other portions of VIIS 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.
 - If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.
3. 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 Reader®.
 4. To print the letters, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
 5. To print additional notices, press the Back 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

NOTE: *In order to comply with HIPAA requirements, cards must be mailed in envelopes.*

The card output option allows you to generate a standard (4x6 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.

<u>Reminder Card</u>	Standard Reminder Card (4x5).	Report Name	05/01/2001 Card
		Free Text	Call the number below to schedule your child's immunizations.
		Phone #	(555) 555-5555

1. 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. • You have the option of moving to other portions of VIIS 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.
 - d. If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** 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 Reader®.
 5. To print the cards, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.
 6. To print additional notices, press the **BACK** 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:

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 VIIS 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 Reader®.
5. To print the labels, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **Back** 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.

Client Query Listings

The Client Query Listing is produced for the provider organization administrator's records. This report lists every client that was returned in the report query process, along with the phone number and address of every responsible person associated with each client. Insufficient addresses or telephone numbers on this report represent missing information on a responsible person.

To generate a Client Query Listing, follow these steps:

1. Under the Additional Input column for the Client Query Listing section of the table, enter a report name, if desired.
2. Click on Client Query Listing, 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.
 - You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
 - If you choose to stay at the Reminder Request Status screen while your request is processing, press Refresh occasionally to check the status.
4. Once the report name is underlined and appears in blue, your report is ready. Click on the report name to view or print the report in Adobe Reader®.
5. To print the report, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.
6. To print additional notices, press the **Back** 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.

Last Notice Date Options

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 **Revert Eligible**. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for the recipients of this reminder.
3. Set the last notice date to reflect the previous last notice date for all clients immunized by your organization by pressing **Revert All**. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for all clients immunized by your organization.
4. Return to the previous screen. Press **Cancel** to return to the Reminder Request Status screen.