



# Vaccination Reminder/Recall – Flu & COVID



# Reminder/Recall

- Reminder/recall is a helpful tool for ensuring that patients who are due or overdue for vaccination are notified
  - **Reminder:** immunizations are coming due
  - **Recall:** immunizations are past due
- I-CARE can be utilized to see which patients are due/overdue for a flu or COVID dose
- There are two reports in I-CARE that can be utilized to generate vaccination reminder/recall letters
  - Customize Letters
  - Reminder/Recall



# Vaccination Recommendations/Schedules

- It is essential to understand vaccine recommendation and schedules for vaccines to understand when patients are due or overdue for vaccination
- Updated vaccination schedules can be found on CDC's website here: [Immunization Schedules | CDC](#)
- Examples of routine immunization schedules are included on the next slides
- It is important to stay up-to-date with recommended immunization schedules, including additional considerations such as medication conditions or other indications



**Table 1** Recommended Child and Adolescent Immunization Schedule for Ages 18 Years or Younger, United States, 2024

These recommendations must be read with the notes that follow. For those who fall behind or start late, provide catch-up vaccination at the earliest opportunity as indicated by the green bars. To determine minimum intervals between doses, see the catch-up schedule (Table 2).

Vaccine and other immunizing agents	Birth	1 mo	2 mos	4 mos	6 mos	9 mos	12 mos	15 mos	18 mos	19–23 mos	2–3 yrs	4–6 yrs	7–10 yrs	11–12 yrs	13–15 yrs	16 yrs	17–18 yrs		
Respiratory syncytial virus (RSV-mAb [Nirsevimab])	1 dose depending on maternal RSV vaccination status, See Notes			1 dose (8 through 19 months), See Notes															
Hepatitis B (HepB)	1 <sup>st</sup> dose	← 2 <sup>nd</sup> dose →			← 3 <sup>rd</sup> dose →														
Rotavirus (RV): RV1 (2-dose series), RVS (3-dose series)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	See Notes														
Diphtheria, tetanus, acellular pertussis (DTaP <7 yrs)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	3 <sup>rd</sup> dose			← 4 <sup>th</sup> dose →			5 <sup>th</sup> dose								
Haemophilus influenzae type b (Hib)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	See Notes		← 3 <sup>rd</sup> or 4 <sup>th</sup> dose, See Notes →												
Pneumococcal conjugate (PCV15, PCV20)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	3 <sup>rd</sup> dose			← 4 <sup>th</sup> dose →											
Inactivated poliovirus (IPV <18 yrs)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	← 3 <sup>rd</sup> dose →						4 <sup>th</sup> dose						See Notes		
COVID-19 (1vCOV-mRNA, 1vCOV-aP5)	1 or more doses of updated (2023–2024 Formula) vaccine (See Notes)																		
Influenza (IIV4)	Annual vaccination 1 or 2 doses										Annual vaccination 1 dose only								
Influenza (LAIV4)	Annual vaccination 1 or 2 doses										Annual vaccination 1 dose only								
Measles, mumps, rubella (MMR)					See Notes		← 1 <sup>st</sup> dose →				2 <sup>nd</sup> dose								
Varicella (VAR)					See Notes		← 1 <sup>st</sup> dose →				2 <sup>nd</sup> dose								
Hepatitis A (HepA)					See Notes		2-dose series, See Notes												
Tetanus, diphtheria, acellular pertussis (Tdap ≥7 yrs)													1 dose						
Human papillomavirus (HPV)													See Notes						
Meningococcal (MenACWY-CRM ≥2 mos, MenACWY-TT ≥2years)											See Notes					1 <sup>st</sup> dose			2 <sup>nd</sup> dose
Meningococcal B (MenB-4C, MenB-FHbp)											See Notes								
Respiratory syncytial virus vaccine (RSV [Abrysvo])											Seasonal administration during pregnancy, See Notes								
Dengue (DEN4CYD; 9–16 yrs)											Seropositive in endemic dengue areas (See Notes)								
Mpox																			

Range of recommended ages for all children
  Range of recommended ages for catch-up vaccination
  Range of recommended ages for certain high-risk groups
  Recommended vaccination can begin in this age group
  Recommended vaccination based on shared clinical decision-making
  No recommendation/not applicable

**Flu+** Two doses given at least 4 weeks apart are recommended for children age 6 months through 8 years of age who are getting an influenza (flu) vaccine for the first time and for some other children in this age group.



**Table 1** Recommended Adult Immunization Schedule by Age Group, United States, 2024

Vaccine	19–26 years	27–49 years	50–64 years	≥65 years
COVID-19	1 or more doses of updated (2023-2024 Formula) vaccine (See Notes)			
Influenza inactivated (IIV4) or Influenza recombinant (RIV4)	1 dose annually			
Influenza live, attenuated (LAIV4)	1 dose annually			
Respiratory Syncytial Virus (RSV)	Seasonal administration during pregnancy. See Notes.			≥60 years
Tetanus, diphtheria, pertussis (Tdap or Td)	1 dose Tdap each pregnancy; 1 dose Td/Tdap for wound management (see notes)			
	1 dose Tdap, then Td or Tdap booster every 10 years			
Measles, mumps, rubella (MMR)	1 or 2 doses depending on indication (if born in 1957 or later)			For healthcare personnel, see notes
Varicella (VAR)	2 doses (if born in 1980 or later)		2 doses	
Zoster recombinant (RZV)	2 doses for immunocompromising conditions (see notes)		2 doses	
Human papillomavirus (HPV)	2 or 3 doses depending on age at initial vaccination or condition	27 through 45 years		
Pneumococcal (PCV15, PCV20, PPSV23)				See Notes
				See Notes
Hepatitis A (HepA)	2, 3, or 4 doses depending on vaccine			
Hepatitis B (HepB)	2, 3, or 4 doses depending on vaccine or condition			
Meningococcal A, C, W, Y (MenACWY)	1 or 2 doses depending on indication, see notes for booster recommendations			
Meningococcal B (MenB)	19 through 23 years	2 or 3 doses depending on vaccine and indication, see notes for booster recommendations		
Haemophilus influenzae type b (Hib)	1 or 3 doses depending on indication			
Mpox				

Recommended vaccination for adults who meet age requirement, lack documentation of vaccination, or lack evidence of immunity

Recommended vaccination for adults with an additional risk factor or another indication

Recommended vaccination based on shared clinical decision-making

No recommendation/ Not applicable

# Reminder/Recall Tools in I-CARE

- I-CARE is a great tool for determining if patients are due or overdue for vaccination
- I-CARE includes logic that shows if a patient is due for a vaccination on their individual patient record
- To look at population level data, there are two reports in I-CARE that can be utilized to generate vaccination reminder/recall letters for all patients
  - Customize Letters
  - Reminder/Recall

Group	<input checked="" type="checkbox"/>	# Vaccine	Lot Number	Date	Status
	<input type="checkbox"/>	<a href="#">Dose</a>			
	<input type="checkbox"/>	9: FLU	--	09/01/2023	⚠ Due
<a href="#">PNE</a>	<input type="checkbox"/>	<a href="#">1: pneumococcal polysaccharide PPV23</a>	L013428	10/03/2015	✓ Valid
	<input type="checkbox"/>	<a href="#">2: PNEUMOVAX 23</a>	MO38359	03/20/2017	✗ Invalid
	<input type="checkbox"/>	<a href="#">3: Prevnar 13</a>	X13847	10/22/2018	✓ Valid
	<input type="checkbox"/>	<a href="#">4: PREVNAR 20</a>	FJ2605	09/30/2022	✓ Valid
<a href="#">RSV</a>	<input type="checkbox"/>	1: RSV	--	04/10/2012	⚠ Due
<a href="#">Tdap</a>	<input type="checkbox"/>	<a href="#">1: BOOSTRIX</a>	57GJ2	09/09/2021	✓ Valid
<a href="#">Td</a>	<input type="checkbox"/>	1: Td	--	10/07/2021	⚠ Due
<a href="#">VAR</a>	<input type="checkbox"/>	1: VAR	--	04/10/1953	⚠ Due
<a href="#">ZOS</a>	<input type="checkbox"/>	1: ZOS	--	04/10/2002	⚠ Due
<a href="#">COVID-19</a>	<input type="checkbox"/>	<a href="#">1: Pfizer-BioNTech COVID-19 Vaccine</a>	EW0164 (317) <a href="#">317 Inventory</a>	05/01/2021	✓ Valid
	<input type="checkbox"/>	<a href="#">2: Pfizer-BioNTech COVID-19 Vaccine</a>	EW0164 (317) <a href="#">317 Inventory</a>	05/22/2021	✓ Valid
	<input type="checkbox"/>	<a href="#">3: Pfizer-BioNTech COVID-19 Vaccine</a>	33025BD (317) <a href="#">317 Inventory</a>	12/21/2021	✓ Valid
	<input type="checkbox"/>	4: COVID-19	--	09/12/2023	⚠ Due



# Step 1: Accessing I-CARE

1. Navigate to the [IDPH Web Portal](#)



2. Log in using your username and password

3. Select the “Applications”  
drop-down > Production Apps  
> [I-CARE](#)





# Step 2: Navigating to Reports

**I-CARE**  
Illinois Comprehensive Automated Immunization Registry Exchange

Search I-CARE... Patients ▾

Home ▾ Patients ▾ Site ▾ **Reports** Quick Assist Admin

**Welcome to I-CARE**  
The Illinois Comprehensive Automated Immunization Registry Exchange (I-CARE) is a web-based system developed by the Illinois Department of Public Health to link IDPH's immunization registry to the state.

[New users start here »](#)

News/Announcements Site Dashboard Immunization Schedules Immunization Links Contacts

Select View: Active Archive Admin

On the I-CARE landing page, navigate to the “Reports” tab on the menu in the upper left-hand corner



## COVID Fact Sheet Updates (Updated 10/19)

News

Published: 10/19/2023 3:00 PM

The following COVID-19 Recipient/Caregiver Fact Sheets have been updated by the CDC and are now available...





# Step 3: Finding Reminder/Recall Reports

Once on the “Reports” page, navigate to the **Reminder/Recall** section to find the two reports we want to run

Customize Letters

Reminder Recall

## Coverage Level Reports

[Coverage Level Report](#) – Generate a standard coverage level report.

[Coverage Level Patient List](#) – Generate a list of patients that match the search criteria.

[Coverage Level Adolescent](#) – Generate adolescent immunization coverage levels on active patients which match the search criteria, with People 2020 Goals.

[Coverage Level Childhood](#) – Generate childhood immunization coverage levels on active patients which match the search criteria, with People 2020 Goals.

[MenB Coverage Levels](#) – Generate MenB coverage levels on active patients which match the search criteria.

## COVID Reports

[COVID Aggregate Report](#) – Generate a COVID Aggregate report.

[COVID Duplicate Doses](#) – Generate a list of COVID Duplicate doses.

[COVID Exclusions](#) – Report that helps identify incorrect COVID immunization data.

[COVID Immunization Activity](#) – Generate a summary list of all patient COVID-19 immunizations given that match the search criteria.

[COVID Immunizations Due](#) – Generate a list of all patient COVID-19 immunizations due that match the search criteria.

## Ad Hoc Reports

[Ad-Hoc](#) – Generate a list of site patients (and immunizations, if desired) that match the search criteria.

## Reminder/Recall Reports

[Customize Letters](#) – Edit Reminder/Recall letter & postcard text for the site.

[Reminder Recall](#) – Generate Reminder/Recall letters/postcards for patients that match the search criteria.



# Step 4: Customize Letter Report

- This report lets providers design their own letters to send to patients
- Letters can be used to provide a reminder for patients who are due or overdue for a vaccine
- New letters can be added here OR existing letters can be edited or added in a new language

The screenshot shows the I-CARE system interface for customizing letter reports. The navigation bar includes Home, Patients, Site, Reports, Quick Assist, and Admin. The current report is titled "Reminder/Recall Letters" and is specifically for "Reminder Letter".

I-CARE strongly advises sites to use the "Refresh List" functionality to clean up their patient lists before generating Reminder / Recall letters. See information.

Multiple languages may be entered for each letter. Letters will print in the primary language of the patient if available, or English if not. To add a new letter, click the "Add New Letter" button. To edit a letter, click the language of the letter you wish to edit. To add a new language to an existing letter, click the "Add Language" link for the letter.

**Action:** [Add New Letter](#) \*ADD NEW LETTER HERE

**Site:** IMMUNIZATION PROGRAM AT WSCDC

Letter Name	Status	Language	
COVID-19 Reminder (booster)	Inactive Inactive	<a href="#">English</a> <a href="#">Spanish</a>	*EDIT EXISTING LETTER HERE <a href="#">Add Language</a>
Flu Recall	Inactive Inactive	<a href="#">English</a> <a href="#">Spanish</a>	<a href="#">Add Language</a> *ADD LANGUAGE HERE
Flu Reminder	Inactive Inactive	<a href="#">English</a> <a href="#">Spanish</a>	<a href="#">Add Language</a>
Monkeypox Reminder	Active	<a href="#">English</a>	<a href="#">Add Language</a>
TEST	Active	<a href="#">English</a>	<a href="#">Add Language</a>
VFC Reminder Letter	Active	<a href="#">English</a>	<a href="#">Add Language</a>



# Customize Letters Content

- **Letter:** Title of your letter (e.g. Pediatric Flu Vaccine Reminder)
- **Salutation:** Greeting (e.g. Hello, Dear Resident, Dear Parent/Guardian)
- **Body:** Unique content that site wants to share with patients or parents/guardians
- **Signature:** Site or Provider Name
- **Save letter once complete**

The screenshot shows a web application interface for editing a custom letter. The navigation bar includes 'Home', 'Patients', 'Site', 'Reports', 'Quick Assist', and 'Admin'. The page title is 'Reminder Recall Custom Letter'. A 'Letter Edit' tab is active. The form fields are:

- Site:** IMMUNIZATION PROGRAM AT WSCDC
- Letter:** (Empty text box)
- Language:** English
- Status:** Active
- Salutation:** (Empty text box)
- Body:** (Rich text editor with a toolbar containing Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, and Unlink icons)
- Signature:** (Empty text box)

At the bottom, there is a 'Select an Action:' label with 'Save' and 'Cancel' buttons.

# Step 5: Reminder/Recall Report

- The reminder/recall report lets providers generate letters that match a specific search criteria
- \*Note: ensure that you are choosing the correct type of report
- Ensure that you fill out all relevant fields
- Select “Submit Background Report” once finished

Report: **Reminder Recall Reports**

Criteria

**Report Type:**  Reminder - Send reminder notices (for immunizations due)  
 Recall - Send recall notices (for immunizations past due)

**County:**

**Zip Code:**

**Group:**

**Site:** IMMUNIZATION PROGRAM AT WSCDC

**Date of Birth:**    
From To

**Immunization Date:**    
From To

**Groups:**  All  DTP  HIB  HAV  HBV  HPV  FLU  H1N1  MMR  MEN  MEN-B  PNE  
 POL  ROT  RSV  Tdap  Td  VAR  ZOS  COVID-19  ORTHOPOX  Other

**Patient Status:**  Active  Inactive  Inactive-Lost to follow-up  Inactive-Moved or gone elsewhere  
 Inactive-Permanently inactive (deceased)  Other/unspecified  Unknown

**Report Notification:**  E-mail  None

**Notification Email:**

**Select an Action:**

\*CAN CHOOSE PATIENTS IN SPECIFIC ZIPCODE

\*CAN CHOOSE CERTAIN AGE GROUP (E.G. PEDIATRIC PATIENTS)

\*CAN CHOOSE CERTAIN VACCINE (E.G. FLU)



# Reminder/Recall Background Report

- You will receive an email when the report is completed. This will generate options for providers to send out reminder types such as letters and postcards.
- Select which reminder type you would like to send
- Select which letter you would like to send from the drop-down
- You also will have the option to include immunization due dates
- **Select “Print” when finished to generate letters**

**Background Report:** Reminder - Letters, Postcards, Labels 1673944833

**Background Status:** --

**Status Date:** 11/13/2023 10:12:13 AM

Criteria

**Select an Action:**

**Select Reminder Type:**  Address Labels (Avery 5160)  Patient List Export  Letters  Postcards

**Letter to Print:**   Include Immunize

**Report:**

**Background Parameters:**

- VFC Reminder Letter
- TEST
- Flu Reminder
- Monkeypox Reminder
- Flu Recall**
- COVID-19 Reminder (booster)

Group Id Admin:  
Group Name:  
Site Id Admin: 193  
Site Name: IMMUNIZATION PROGRAM AT WSCDC  
Dob From: 1923-10-10T00:00:00  
Dob To: 2023-05-02T00:00:00  
Shot From:  
Shot To:  
Vaccine Groups:  
Patient Status:  
Background Notify Code: EMAIL



# Reminder/Recall Letters

- A PDF of unique reminder/recall letters will be generated after selecting “Print”
- You now have a list of personalized letters to send out to patients who have upcoming vaccines or who are overdue for vaccines
- These personalized letters can then be sent to patients for vaccination reminder or recall

11/13/2023

PROVIDER SITE  
ADDRESS  
CHICAGO, IL

PATIENT NAME  
PATIENT ADDRESS

Hello,

Our records indicate that you are overdue for your annual influenza vaccination. In order to further assist we need you to reach out to your provider to make an appointment. It is important to receive the recommended vaccination at the recommended intervals as set forth by the Center for Disease Control. We thank you for your efforts as we work toward improved health outcomes for all our residents.

COVID-19 06/02/2023  
FLU 10/27/2022

Chicago Department of Public Health



# Reminder/Recall Address Labels

- Address labels to mail the personalized reminder/recall letters can also be created in I-CARE
- Using the same background report generate in **Step 5**, you can select the option for “Address Labels” and then hit “Print”
- This will create a PDF document of labels with patient Name and Address that can be printed onto labels

**Background Report:** Reminder - Letters, Postcards, Labels 1673969874

**Background Status:** --

**Status Date:** 11/13/2023 11:00:52 AM

Criteria

**Select an Action:**

**Select Reminder Type:**  Address Labels (Avery 5160)  Patient List Export  Letters  Postcards

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**Report:** Reminder - Letters, Postcards, Labels

**Background Parameters:** Report Type: RECALL  
County Code Admin:  
Zip Code Admin:  
Group Id Admin:  
Group Name:  
Site Id Admin: 193  
Site Name: IMMUNIZATION PROGRAM AT WSCDC  
Dob From: 2019-11-13T00:00:00  
Dob To: 2023-11-13T00:00:00  
Shot From:  
Shot To:  
Vaccine Groups: FLU  
Patient Status:  
Background Notify Code: EMAIL



# Reminder/Recall Patient List

- I-CARE can also be utilized to generate a list of patients who are due/overdue for vaccines
- This list can be utilized by sites to reach out to patients via email, telephone, text message, EMR message, etc. to remind them of these upcoming or overdue vaccination
- This functionality can be useful if you do not need the personalized letters





# Step 1: Generate & Export Patient List

- Navigate to the same Reminder/Recall Background report generated in **Step 5**
- A list of patients who are due/overdue for vaccinations can be generated using this same report
- On the background report, select “Patient List Export” and then “Print”
- This will generate an Excel file with relevant patient information that can be downloaded and used in a mail merge to create unique letters

Background Report: **Reminder - Letters, Postcards, Labels** 🔒 1673969874

Background Status: --

Status Date: 11/13/2023 11:00:52 AM

Criteria

Select an Action: **Print** Return

Select Reminder Type:  Address Labels (Avery 5160)  Patient List Export  Letters  Postcards

---

**Report:** Reminder - Letters, Postcards, Labels

**Background Parameters:**

Report Type: RECALL  
County Code Admin:  
Zip Code Admin:  
Group Id Admin:  
Group Name:  
Site Id Admin: 193  
Site Name: IMMUNIZATION PROGRAM AT WSCDC  
Dob From: 2019-11-13T00:00:00  
Dob To: 2023-11-13T00:00:00  
Shot From:  
Shot To:  
Vaccine Groups: FLU  
Patient Status:  
Background Notify Code: EMAIL



## Step 2: Edit & Save Excel File

- The exported Excel file will act as the list of individuals you are sending letters to
- Open the Excel file
- Add column names to relevant fields such as Name, Address, Email, Zip code, etc.
- Save Excel sheet
- This file can be used to reach out to patients, send text reminders, etc.

The screenshot shows the Microsoft Excel interface. The ribbon is set to 'Home', and the 'Font' group is active. The spreadsheet contains the following data:

	A	B	C	D	E	F
1	NAME	ADDRESS	CITY	ZIPCODE		
2	JOHN DOE	123 State St	Chicago	60610		
3	JANE DOE	456 Michigan Ave	Chicago	60601		
4						
5						
6						
7						
8						
9						