

Custom Letters for Reminder/Recall in ALERT IIS

Setting up a custom letter for reminder/recall in ALERT IIS is easy!
First, click on “manage custom letters” in the Reports menu:



This will bring up a list of any letters you have created and a link to create a new custom letter. This is our first letter so our only option is to create a new one:

Manage custom letters
(there are no letters for this provider organization)
[New Custom Letter](#)

From here, it’s as easy as choosing a few options and filling in blanks. This guide suggests text for each field but it’s ultimately up to you what goes in there.

The first option is the number of blank lines at the top of the letter. This will vary based on whether you use letterhead and if you will be including the patient address to be displayed through a windowed envelope. A good place to start is 10, but you’ll find what works best for your needs through a little trial and error.

Top Margin
Number of blank lines at the top of the letter: 10

You can choose whether to include the patient’s address. You’ll want to check this if you’re using windowed envelopes. You also have the option to address letters to the patient or their parent/guardian using the dropdown menu.

Patient Address
Include a name with the patient address: To the parent/guardian of patient name
 Include patient address

The salutation is the opening line of your letter. You can use “dear”, “to”, or whatever you want, followed again by the name of either the patient or their parent/guardian. Though it says “Responsible person” it will not insert their name, but instead will refer to them as the parent/guardian of the patient, just as in the address.

Salutation
Enter a salutation for the letter: To
Include a name at the end of the salutation: Responsible person

Paragraph 1 should say that the patient is due or past-due for vaccines. It is divided into two parts so you can include the name of the patient or responsible person, but it will display as one continuous sentence with the name in between. You also have the option not to include a name, in which case, just complete the first part and choose “(no name)”.

Paragraph 1

First Part

According to our records, your child

Include a name between the first and second parts of this paragraph: Patient name

Second Part

is due for immunizations. Below is their full immunization history:

Immunization History

Include immunization history

Paragraph 2 addresses the vaccines that are due, followed by the option to include immunization recommendations. That should be checked so they know what vaccines they will need.

Paragraph 2

Your child is due for the following vaccines:

Immunization Recommendations

Include immunization recommendations

Paragraph 3 is the concluding paragraph. End your letter however you wish.

Paragraph 3

Please call our office to schedule an appointment at your earliest convenience. If our records are incomplete, please bring this to our attention so we may correct them.

The closing will insert the clinic name and phone number from your clinic’s ALERT IIS profile. If you want a different name or phone number to display, leave those blank and type your own closing at the end of Paragraph 3 above.

Closing

Enter a closing for the letter: Regards,

Include provider organization name in the closing

Include provider organization phone number in the closing

Finally, name the letter so for future reference and click “Save”.

Name and save the custom letter

Name the custom letter Training letter

Save Cancel

This letter will now appear under “manage custom letters”. Clicking its name will allow you to edit the letter.

Manage custom letters

[Training letter](#) Delete

[New Custom Letter](#)

You've now set up a custom letter for use with reminder/recall! Here is a sample of what this letter looks like given the text and options we chose:

To Parent/Guardian of Robert Zimmerman
 800 NE OREGON ST
 PORTLAND, OR 97232

} **Patient Address**

To Parent/Guardian of Robert Zimmerman, ← **Salutation**

Paragraph 1

According to our records, your child, Robert Zimmerman is due for immunizations. Below is their full immunization history:

Immunization Record		Tracking Schedule: ACIP	
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	07/24/1998	1 of 5	DTaP, NOS
	09/24/1998	2 of 5	DTaP, NOS
	11/24/1998	3 of 5	DTaP, NOS
	05/24/2000	4 of 5	DTaP, NOS
	05/24/2003	5 of 5	DTaP, NOS
HPV	05/24/1999	Not Valid	HPV, NOS
	05/24/2000	Not Valid	HPV, NOS
	05/24/2009		Td (adult), NOS
Meningo	05/24/1999	Not Valid	Meningococcal, NOS
Td/Tdap	05/24/2009	Booster	Td (adult), NOS

} **Immunization History**

Your child is due for the following vaccines: ← **Paragraph 2**

Immunizations Due
HepA, NOS
HepB, NOS
HPV, Quadrivalent
Meningococcal, NOS
MMR
Polio, NOS
Varicella

} **Immunization Recommendations**

Paragraph 3

Please call our office to schedule an appointment at your earliest convenience. If our records are incomplete, please bring this to our attention so we may correct them.

Regards,
 Scott's Clinic
 (971) 673-0300

} **Closing**

Refer to the "Reminder/Recall in ALERT IIS" guide for a tutorial on running reminder/recall. For questions, contact the ALERT IIS Help Desk at (800) 980-9431.