

How to Use Reminder/Recall

Why Should I Use Reminder/Recall?

Reminder/Recall helps identify patients who are due or overdue for vaccines. Using Reminder/Recall helps keep your patients up-to-date with recommended vaccines and can help increase your clinic or organization's immunization rates.

What Do I Need to Get Started?

You need the **Run Reminder/Recall** permission on your Immunization Information System (IIS) user account. You may also want the **Manage Reminder/Recall** permission for more advanced options like saving templates. Reminder/Recall will not show up in your navigation menu if you do not have one of these permissions. Contact the Help Desk at 1-800-325-5599 or WAISHelpDesk@doh.wa.gov to add one or both of these permissions to your account.

Reminder/Recall is a three-step process:

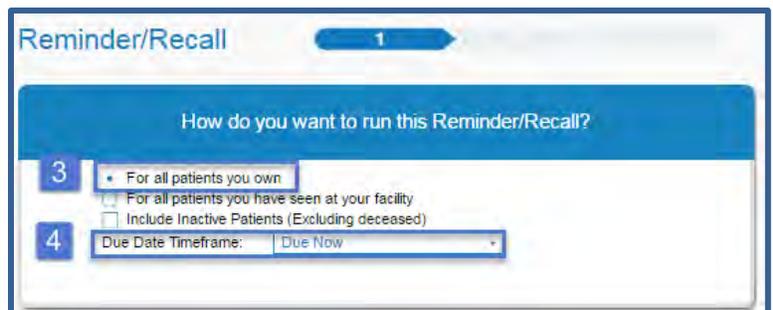
- 1 Setup your reminder/recall criteria.
- 2 Preview patient list and make changes (e.g. remove patients).
- 3 Choose your reminder/recall output.

Step One: Setup Your Reminder/Recall Criteria

1. Click on **Reminder/Recall** in your left menu to expand this menu item.
2. Click on **Reminder/Recall** to go to the first screen where you set up your report.
3. Choose to run reminder/recall **for all patients you own**. If you are a pharmacy or other organization that does not take ownership of patients, choose **for all patients you have seen at your facility**.
4. Choose a **Due Date Timeframe**:
 - **Due Now**: Patients who are currently due or past due for vaccines.
 - **Past Due**: Patients who are overdue for vaccines. Can choose from 1, 2, or 3 months past due.
 - **Coming Due**: Patients who are not yet due for vaccines. Can choose due in 1, 2, or 3 months.
 - **Custom**: Lets you set a specific timeframe (e.g. patients due for vaccines between 7/1/16 – 9/1/16).

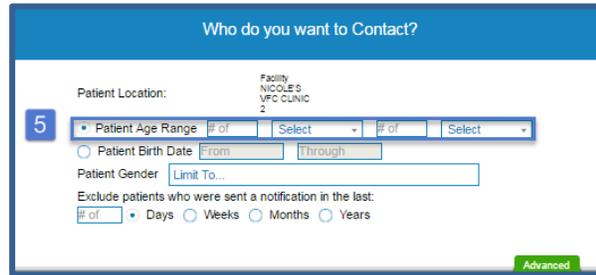


You only see these items if you have the **Manage Reminder/Recall** permission.

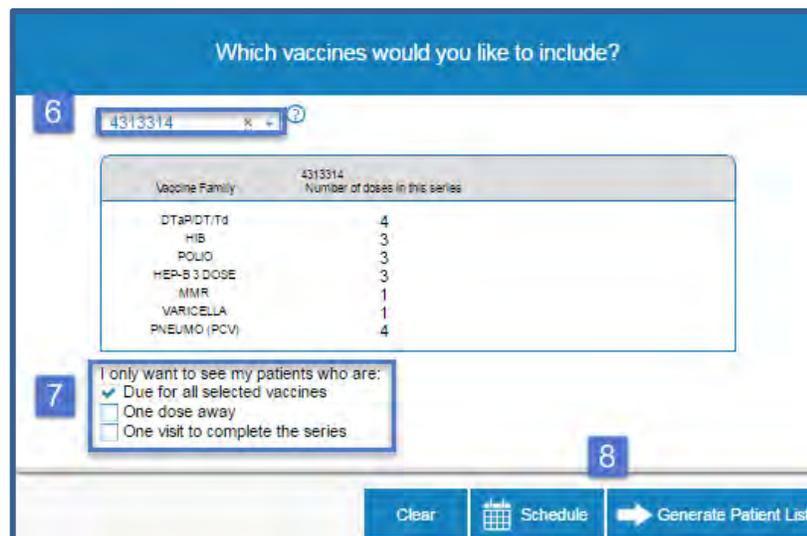


How to Use Reminder/Recall

5. Enter **Patient Age Range** or **Birth Date Range**. Choose from days, months, or years for the age range.
 - You can also limit patients by gender and exclude patients included on previous reminder/recall reports.
 - Click on the advanced button to view more options for limiting the patients included in your report.



6. Select a **vaccine series** from the drop down box. Choose a pre-set vaccine series or select **custom** and check the boxes next to each vaccine you want to include. You can also limit by a specific dose number (e.g. 3rd dose of HPV).
7. Choose which patients you want to see on your report. Select one or more of the following options:
 - a. **Due for all selected vaccines:** Patients due for any vaccines in the selected series.
 - b. **One dose away:** Patients who are one dose away from completing the selected series.
 - c. **One visit to complete the series:** Patients who are one visit away from completing the series.
8. Click the **Generate Patient List** button or the **Schedule** button.
 - a. **Generate Patient List** takes you to the third reminder/recall screen where you choose an output.
 - b. **Schedule** lets you set a specific time to run the reminder/recall report. You will receive an email with a link that takes you to the reminder/recall report when it's done running.



Vaccine Family	4313314 Number of doses in this series
DTaP/DT/Td	4
HIB	3
POLIO	3
HEP-B 3 DOSE	3
MMR	1
VARICELLA	1
PNEUMO (PCV)	4

How to Use Reminder/Recall

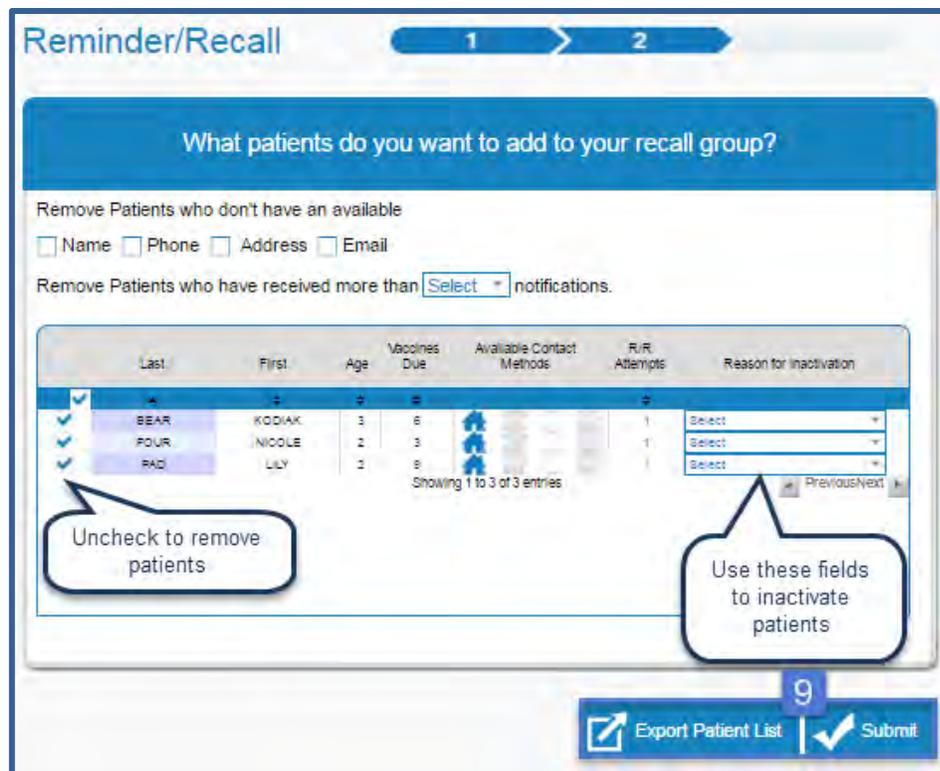
Step Two: Preview Patient List

The second reminder/recall screen lets you preview the patient list and limit your final list by additional criteria.

- Remove patients who don't have an available name, phone number, mailing address or email.
- Remove patients who have received more than a certain number of notifications. You can only use this option if you track reminder/recall attempts.
- Uncheck the box next to a specific patient's name to remove that patient.
- Choose a **Reason for Inactivation** from the drop down box. This will automatically remove the patient from your final list and inactivate the patient so you do not own them anymore.

9. Click the **Submit** or **Export Patient List** button.

- Submit:** Takes you to the third reminder/recall screen where you select an output.
- Export Patient List:** Produces an excel file including the names, contact information, and list of vaccines due for each patient.



The screenshot shows the 'Reminder/Recall' interface. At the top, there are two progress indicators, '1' and '2'. Below them is a blue header with the text 'What patients do you want to add to your recall group?'. Underneath, there are two filter sections: 'Remove Patients who don't have an available' with checkboxes for Name, Phone, Address, and Email; and 'Remove Patients who have received more than' followed by a 'Select' dropdown menu and the word 'notifications.'. Below the filters is a table with the following columns: Last, First, Age, Vaccines Due, Available Contact Methods, R/R Attempts, and Reason for Inactivation. The table contains three rows of patient data: BEAR KODIAK (Age 3, Vaccines Due 6), FOUR NICOLE (Age 2, Vaccines Due 3), and RAD LILY (Age 2, Vaccines Due 6). Each row has a checkbox in the 'Last' column and a 'Reason for Inactivation' dropdown menu. A callout bubble points to the checkboxes with the text 'Uncheck to remove patients'. Another callout bubble points to the 'Reason for Inactivation' dropdowns with the text 'Use these fields to inactivate patients'. At the bottom of the table, it says 'Showing 1 to 3 of 3 entries' and 'PreviousNext'. At the bottom of the interface, there are two buttons: 'Export Patient List' and 'Submit', with a '9' in a blue circle above them.



Tip: The **Vaccines Due** column (shown above) includes any vaccines the patient needs, it is not limited to the number of vaccines due for the vaccine series you selected.

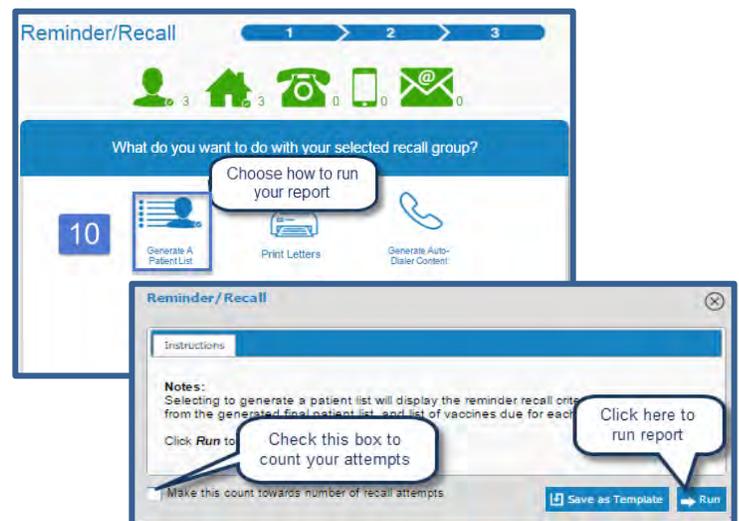
How to Use Reminder/Recall

Step Three: Choose Your Reminder/Recall Output

This is the third and final reminder/recall screen. Choose from the following output options based on how you want to contact patients:

- **Generate a Patient List:** Pulls a list of patients and their due or overdue vaccines.
- **Print Letters:** Produces a letter with each patient's name at the top. You can customize the letter.
- **Generate Auto-Dialer Content:** Produces an excel file with information you can upload into an auto-dialer system.
- **Generate Mail-Merge:** Produces a file that you can use with any mail merge program.
- **Create Custom Post Cards:** Lets you set the postcard size and edit the message.
- **Create Avery 8387 Post Cards:** Produces a file sized to print on Avery 8387 postcards.
- **Print Labels:** Produces a file sized to print on Avery 5160 mailing labels.
- **Save as a Patient Group (Cohort):** Lets you save your patient group to recall later.
- **Send Email:** Lets you send a standard or custom email message to any patients with email addresses in the IIS.

- Click on the reminder/recall output you want to run.
- A pop-up screen will appear with instructions on how to run the selected output.
- To count reminder/recall attempts, check the **Make this count towards number of recall attempts** box.
- Click the **Run** button to get your selected reminder/recall output.



Patient Recall Group Listing by Ownership							
Report Criteria Organization (IRMS): NICOLE'S TEST Recall Date: 01/01/1900 through 07/15/2016 Birth Date Range: 09/18/2012 through 07/15/2014 Include Inactive Patients: No State: All High Risk Category: All Deferred Vaccinations Only: No Vacc. Families: 0TapID/TIG, HEP-B 3 DOSE, HIB, MMR, PNEUMO (PCV), POLIO, VARICELLA				Report Date: July 15, 2016 Facility: NICOLE'S VFC CLINIC 2 Health Plan: All Physician: All Program: All County/Parish: All Zip Code: All District/Region Number: All			
Total Patients Selected: 3							
Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	Chart Number
6190144	KODIAK		BEAR	05/25/2013	YAYA		
Vaccine Family Name		Dose Number		Recommended Date		Minimum Date	
HIB		1		07/25/2013		07/06/2013	
POLIO		2		09/28/2013		08/23/2013	
PNEUMO (PCV)		4		05/25/2014		05/25/2014	
VARICELLA		1		07/11/2016		07/11/2016	

For questions, contact the WAIS Help Desk at 1-800-325-5599 or WAISHelpDesk@doh.wa.gov.