

Reminder/Recall in the IIS

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 and managing patient cohorts. Reminder/Recall will not show up in your left navigation menu if you do not have one of these permissions.

Contact your IIS System Administrator to add reminder/recall permissions to your account. If you are unsure whether your organization or clinic has a system administrator, contact the Help Desk at 1-800-325-5599 or WAIIHelpDesk@doh.wa.gov to find out.

Reminder/Recall is a Three Step Process:

Step One: Set up Reminder/Recall Criteria

Step Two: Preview and Edit Patient List

Step Three: Choose Reminder/Recall Output(s)

Step One: Set up Reminder/Recall Criteria

1. Click the **Reminder/Recall** option under the **Reminder/Recall** heading in your left menu.



2. When the Reminder/Recall screen opens, choose the **"For all patients you own"** radio button. Pharmacies or other organizations that do not own patients should choose **"For all patients you have seen at your facility"** option.

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3. Choose a **Due Date Timeframe** from the drop-down menu.

- **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. You can choose due in 1, 2, or 3 months.
- **Custom:** Lets you set a specific timeframe (e.g. patients due for vaccines between 1/1/25 – 1/31/25).

How do you want to run this Reminder/Recall?

☒ For all patients you own

☐ For all patients you have seen at your facility

☐ Include Inactive Patients (Excluding deceased)

Due Date Timeframe: Due Now

4. Enter a **Patient Age Range** or **Birth Date Range**.

- You can also limit patients by gender and exclude patients that were included on previous reminder/recall reports.
- Click on the green advanced button to view more options for limiting the patients included in your report.

Who do you want to Contact?

Patient Location: Facility NICOLE'S VFC CLINIC 2

☒ Patient Age Range >= # of Select < # of

Select

☐ Patient Birth Date From Through

Patient Gender Limit To...

Exclude patients who were sent a notification in the last:

of ☒ Days ☐ Weeks ☐ Months ☐ Years

Advanced

5. Select a **Vaccine Series** or **Custom** from the drop-down box. The **Custom** option allows you to check the boxes next to each vaccine you want to include. You can also limit by a specific dose number (e.g. 4th dose of DTaP).

Which vaccines would you like to include?



CUSTOM x ?



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6. You can also choose to limit your report to patients who are:
 - **Due for all selected vaccines:** Patients due for any vaccines in the selected series.
 - **One dose away:** Patients who are one dose away from completing the selected series.
 - **One visit to complete the series:** Patients who are one visit away from completing the series.
7. Click the **Generate Patient List** or the **Schedule** button.
 - **Generate Patient List** takes you to the screen where you can preview your reminder/recall list.
 - **Schedule** lets you set a specific time to run the reminder/recall report. You receive an email with a link that takes you to the reminder/recall report when it's done running.

I only want to see my patients who are:

☒ Due for all selected vaccines
☐ One dose away
☐ One visit to complete the series

Clear  Schedule  Generate Patient List

Step Two: Preview & Edit Patient List





1. Review and edit your patient list.
 - Remove patients who do not 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 in the first column to remove a patient from your final reminder/recall report.
 - Choose a **Reason for Inactivation** from the drop-down box. This automatically removes the patient from your final report and inactivates the patient so they do not appear on future reports.

What patients do you want to add to your recall group?

Remove Patients who don't have an available

☐ Name
 ☐ Phone
 ☐ Address
 ☐ Email

Remove Patients who have received more than Select notifications.

	Last	First	Age	Vaccines Due	Available Contact Methods	R/R Attempts	Reason for Inactivation
<input checked="" type="checkbox"/>	PATIENT	TEST	2	6	   	0	Select

Showing 1 to 1 of 1 entries

Previous Next

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

2. 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.


Step Three: Choose Reminder/Recall Output(s)

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, contact information 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 a text file you can copy into Excel and upload into an auto-dialer system.
- **Generate Mail-Merge:** Produces a file 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.

1. Select an output option by clicking on the appropriate icon.


What do you want to do with your selected recall group?



Generate A Patient List



Print Letters



Generate Auto-Dialer Content

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2. A pop-up screen will appear with instructions on how to run the selected output.
3. Check the **Make this count towards number of recall attempts** box if you want to track attempts.
4. Click the **Save as Template** button if you enter a custom message in one of the outputs and want to access this message later.
5. Click the **Run** button to view, print, or save your selected reminder/recall output.

Reminder/Recall

Instructions

Notes:
Selecting to generate a patient list will display the reminder recall criteria, total patients from the generated final patient list, and list of vaccines due for each patient.

Click **Run** to generate the patient recall list.

Check to count this as an attempt.

☐ Make this count towards number of recall attempts

Save as Template

Run

Sample Patient List Output

Report Criteria							Report Date: November 19, 2024
Organization: EVOSS TEST ORG Recall Date: 01/01/1900 through 11/19/2024 Birth Date Range: 12/20/2021 through 11/19/2022 Include Inactive Patients: No State: All High Risk Category: All Deferred Vaccinations Only: No Vacc. Groups: DTaP/Tdap/Td, Hib, Polio, HepB, MMR, Varicella, Pneumococcal							Facility: VOSSTESTFAC1 Health Plan: All Physician: All Program: All County/Parish: All Zip Code: All District/Region Number: All
Total Patients Selected: 1							
Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	Chart Number
11973981	TEST		PATIENT	11/01/2022	ERIN	(360)571-2540	
Vaccine Group Name		Dose Number	Recommended Date		Minimum Date		
Hib		1	01/01/2023		12/13/2022		
Pneumococcal		1	01/01/2023		12/13/2022		
MMR		1	11/01/2023		11/01/2023		
Varicella		1	11/01/2023		11/01/2023		
DTaP/Tdap/Td		2	02/16/2024		02/16/2024		
Polio		2	02/16/2024		02/16/2024		



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