

Run Reminder/Recall Quick Reference Guide



Note: Reminder/Recall helps identify patients who are coming due, due now, or overdue for vaccines.

Required Conditions:

1. Patient consent is Yes.
2. Patient demographic field Reminder/Recall Publicity Code is set to “Reminder/Recall- any method” or default value “—set—.”
3. Patient is currently owned by your facility (by ownership) or has a recorded administered immunization by your facility (by service).

Optional Conditions:

1. In order for a phone number to be listed as an available contact method, one listed phone number must be designated as Primary in the patient record.

Reminder/Recall is a Three-Step Process:

Step One: Select Parameters

Step Two: Preview Patient List

Step Three: Choose Reminder/Recall Output(s)

Step One:

1. Select Reminder/Recall, located under the Reminder/Recall panel.
2. Select “*For all patients you own*” or “*For all patients you have seen at your facility.*”
3. Option to select *Include Inactive Patients*.
 - a. If unchecked, only patients with an Active Patient Status will be included in the output options.
4. Select Due Date Timeframe criteria.
 - **Due Now:** Patients who are currently due or past due for vaccines.
 - **Past Due:** Patients who are overdue for vaccines.
 - **Coming Due:** Patients who are not yet due for vaccines.
 - **Custom:** Select a specific timeframe.

[Main](#)
[Home](#)
[Logout](#)
[Document Center](#)
[Help](#)
[Message](#)
[Favorites](#)
[Patient](#)
[Vaccinations](#)
[Inventory Management](#)
[Reports](#)
[Settings](#)
[Reminder/Recall](#)

[Reports](#) [Use Templates](#) [See Patient Groups](#)

Reminder/Recall

1 2 3

How do you want to run this Reminder/Recall?

For all patients you own 2
 For all patients you have seen at your facility
 Include Inactive Patients (Excluding deceased) 3
 Due Date Timeframe: 4

5. Enter a Patient Age Range or Patient Birth Date.
6. Option to select a Patient gender or Exclude patients who were sent a notification in the last customizable time frame.

Who do you want to Contact?

Patient Location: Facility
 Patient Age Range 5
 Patient Birth Date
 Patient Gender 6
 Exclude patients who were sent a notification in the last:
 Days Weeks Months Years

7. Select a Vaccine Series or Custom.

Which vaccines would you like to include?

7

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

- a. If you select Custom, you are required to check the box next to each vaccine you want to include.
 - i. Option to enter a specific dose number in the Enter a dose number column.

Which vaccines would you like to include?

7 CUSTOM x ?

	Check the box to select vaccine(s):	Enter a dose number (optional):
	<input type="checkbox"/> DTaP/DT/Td	<input type="text"/>
	<input type="checkbox"/> HIB	<input type="text"/>
7A	<input checked="" type="checkbox"/> POLIO	3
	<input type="checkbox"/> HEP-B 3 DOSE	<input type="text"/>
	<input type="checkbox"/> MMR	<input type="text"/>
	<input type="checkbox"/> VARICELLA	<input type="text"/>
	<input type="checkbox"/> MENINGOCOCCAL	<input type="text"/>
	<input type="checkbox"/> HEP-A	<input type="text"/>
	<input checked="" type="checkbox"/> FLU	<input type="text"/>

- 8. Option to select I only want to see my 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.
- 9. Select Schedule or Generate Patient List.
 - a. **Schedule** allows you to set a specific time to run the reminder/recall report.
 - b. **Generate Patient List** takes you to Step Two of the reminder/recall process.

I only want to see my patients who are: **8**

Due for all selected vaccines

One dose away

One visit to complete the series

9A

9B

Clear

Schedule

Generate Patient List

Step Two:

1. Review Patient List.
2. Option to edit patient list:
 - a. Remove patients who do not have an available name, phone number, mailing address, or email.
 - b. Remove patients who have received more than a certain number of notifications.
 - c. Uncheck the box in the first column to remove a patient from your reminder/recall outputs.
 - d. Change patient status from active to inactive in the Reason for Inactivation dropdown. **Patient status should only be changed to inactive if the patient has moved or gone elsewhere (MOGE).**
 - i. If you checked Include Inactive Patients during Step One, patients with an updated inactive patient status will still appear on reminder/recall output options.
3. Click Export Patient List or Submit.
 - a. **Export Patient List** opens an Excel file with patient names, contact information, and a list of all vaccines due for each patient.
 - b. **Submit** takes you to Step Three of the reminder/recall process.

What patients do you want to add to your recall group? 1

Remove Patients who don't have an available 2A

Name Phone Address Email

Remove Patients who have received more than Select notifications. 2B

2C	Last	First	Age	Vaccines Due	Available Contact Methods	R/R Attempts	Reason for Inactivation
<input checked="" type="checkbox"/>	CAT	MOLLY	2	8		0	Select
<input checked="" type="checkbox"/>	TEST	TEST	18	7		0	Select

Showing 1 to 2 of 2 entries

2D 3A 3B PreviousNext

Export Patient List Submit

Step Three:

1. Select an output option by clicking on the appropriate icon. A pop-up screen will appear with instructions on how to run the selected output.
 - a. **Generate a Patient List:** Pulls a list of patients, contact information, and due or overdue vaccines.
 - b. **Print Letters:** Produces a letter with each patient's name at the top.
 - c. **Generate Auto-Dialer Content:** Produces a text file you can copy into excel and upload into an auto-dialer system.
 - d. **Generate Mail-Merge:** Produces a file you can use with any mail merge program.
 - e. **Create Custom Post Cards:** Creates a postcard size image and message that can be edited.
 - f. **Create Avery 8387 Post Cards:** Produces a file to print on Avery 8387 postcards.
 - g. **Print Labels:** Produces a file to print on Avery 5160 mailing labels.
 - h. **Save as a Patient Group (Cohort):** Save your patient group to reminder/recall later.
 - i. **Send Email:** Send a standard or custom email message to any patients with email addresses in the IIS.

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

1



Generate A
Patient List



Print Letters



Generate Auto-
Dialer Content



Generate Mail-
Merge



Create
Custom Post
Cards



Create Avery
8387 Postcards



Print Labels



Save As a
Patient Group
(Cohort)



Send Email

2. Check the **Make this count towards the number of recall attempts** box if you want to track reminder/recall attempts and run the **Reminder/Recall Success** report.
3. Click **Save as Template** or **Run**.
 - a. **Save As Template** will save the output as a template.
 - b. **Run** allows you to view, print, or save your selected reminder/recall output.

