

Run Reminder/Recall Quick Reference Guide

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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.



- 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.

Patient Location:	Facility KIDS CLUB
Patient Age Range 6 Years ×	Months × -
O Patient Birth Date From	Through
Patient Gender FEMALE ×	(

7. Select a Vaccine Series or Custom.

Whic	h vaccines would you l	ike to include?
4-3-1-4-3-1-4 ×	√② 7	
	4-3-1-4-3-1-4	
Vaccine Family	Number of doses in this series	
DTaP/DT/Td	4	
HIB	4	
POLIO	3	
HEP-B 3 DOSE	3	
MMR	1	
VARICELLA	1	
VARICELLA		

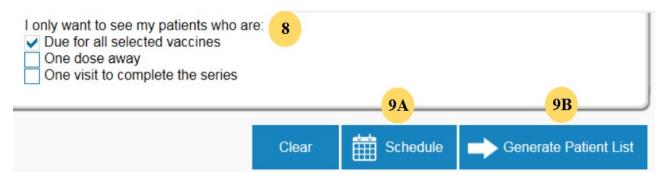
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a. If you select Custom, you are required to check the box next to each vaccine you want to include.

Which vaccine	es would you like to include?
Check the box to select vaccine(s):	Enter a dose number (optional):
□ DTaP/DT/Td □ HIB ✓ POLIO □ HEP-B 3 DOSE □ MMR □ VARICELLA □ MENINGOCOCCAL □ HEP-A ✓ FLU	

i. Option to enter a specific dose number in the Enter a dose number column.

- 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.



Step Two:

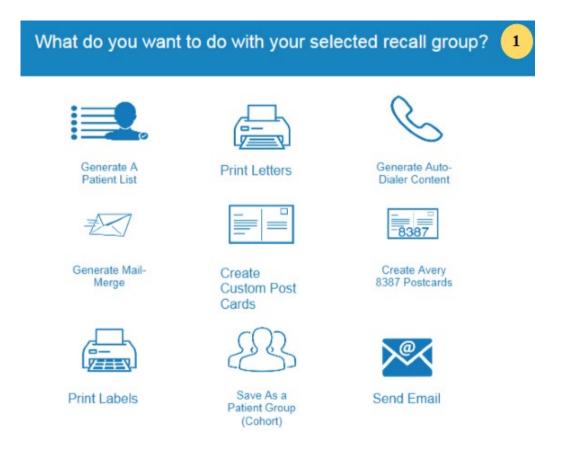
- **1.** Review Patient List.
- 2. Option to edit patient list:
 - **a.** Remove patients who do not have an available name, phone number, mailing address, or email.
 - **b.** Remove patients who have received more than a certain number of notifications.
 - **c.** Uncheck the box in the first column 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.

					ole 2A	availat	don't have an	Patients who	emove
						Emai	Address	Phone	Name
		2B	ations	ect 🔹 notific	than Sele	d more	have received	Patients who	emove
			unono.	noune					
for Inactivation	Reason	R/R Attempts		Available Con Methods	Vaccines Due	Age	First	Last	2C
		٠			\$	+	+	•	
	Select	0	\sim	1 2 0	8	2	MOLLY	CAT	~
-	0.1.1	0		1 2 0	7	18	TEST	TEST	~
	Select			1 to 2 of 2 entries	Showing				
	Select		S	1 to 2 of 2 entities	onoming				

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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.



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- 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.

Instructions		
Notes: Selecting to generate a pai	tient list will display the re	minder recall criteria, total patient
the generated final patient Click Run to generate the	list, and list of vaccines d	ue for each patient.