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 and managing patient cohorts. 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 WAIISHelpDesk@doh.wa.gov to add permissions to your account.

Reminder/Recall is a Three Step Process:

Step One: Setup reminder/recall criteria

Step Two: Preview and edit patient list

Step Three: Choose reminder/recall output

Step One: Setup Reminder/Recall Criteria

1. Click on the **Reminder/Recall** heading in your left menu.
2. Click on the **Reminder/Recall** option to go to the set up screen.
3. Choose the run reminder/recall radio button **for all patients you own**. Pharmacies or other organizations that don't own patients should choose **for all patients you have seen at your facility**.

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

4. 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. 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 – 7/31/16).
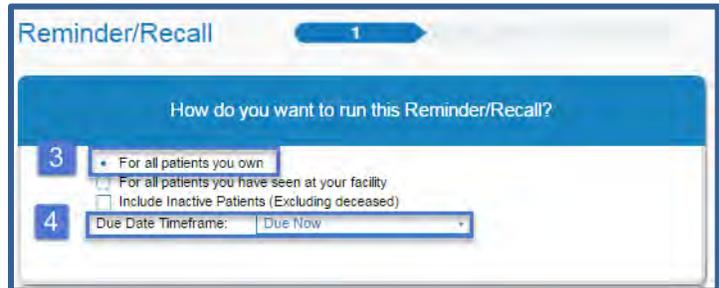
5. Enter **Patient Age Range** or **Birth Date Range**. In the **Patient Age Range**, you can set up an age range using days, months or years.
   - You can also limit patients by gender and exclude patients included on previous reminder/recall reports.
   - Click on the green advanced button to view more options for limiting the patients included in your report.
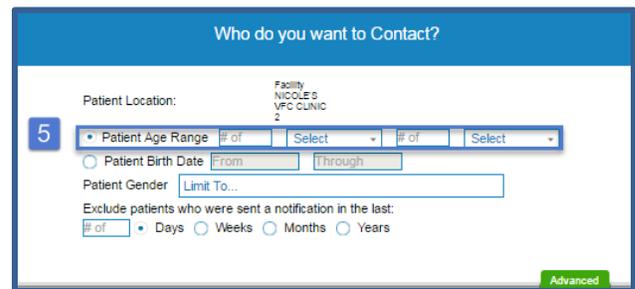
6. Select a **vaccine series** from the drop down box. Choose a pre-set vaccine series or select **Custom** and check the boxes next to each vaccine you want to include. You can also limit by a specific dose number (e.g. 3rd dose of HPV).

7. You can 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.
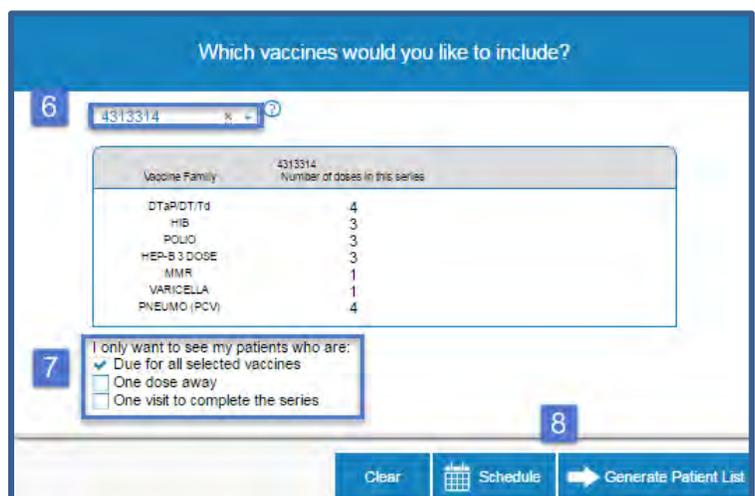
8. Click the **Generate Patient List** button or the **Schedule** button.
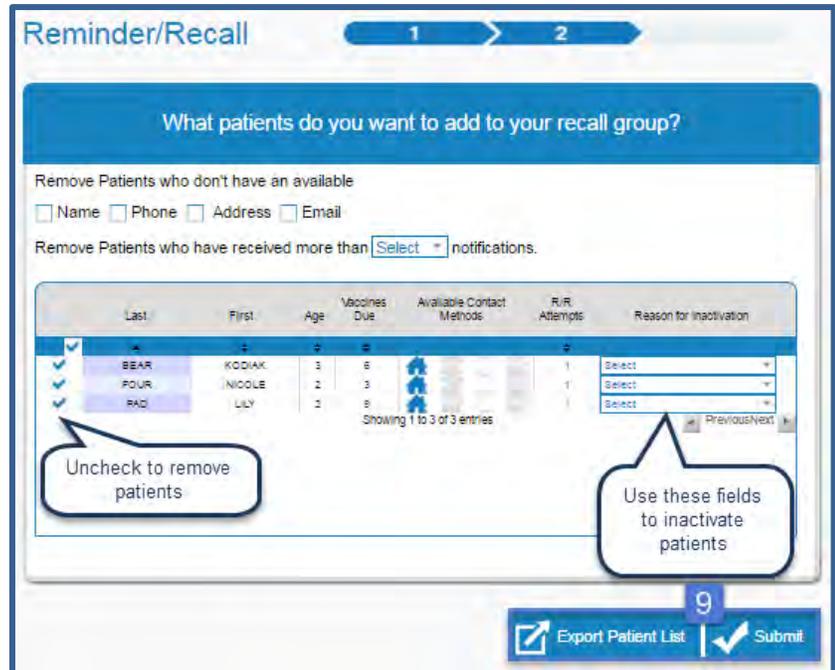   - **Generate Patient List** takes you to the preview patient list screen.
   - **Schedule** lets you set a specific time to run the reminder/recall report. You receive an email with a link that takes you to the reminder/recall report when it's done running.

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Step Two: Preview & Edit Patient List

The second reminder/recall screen lets you preview and make the following changes to your patient list:

- 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 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 don't appear on future reports.

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.

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.

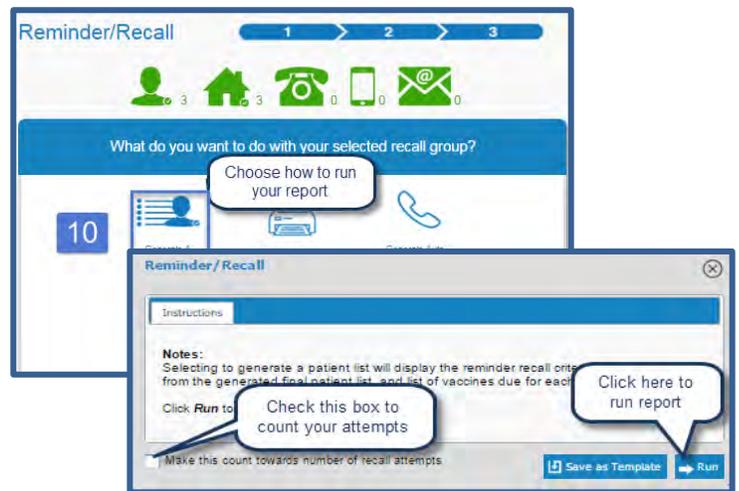## Step Three: Choose Reminder/Recall Output

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, 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 WAIIS.

10. Click on a reminder/recall output.
11. A pop-up screen appears with instructions on how to run the selected output.
12. Check the **Make this count towards number of recall attempts** box if you want to track attempts.
13. Click the **Run** button to get your selected reminder/recall output.

Reminder/Recall 1 > 2 > 3

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

Choose how to run your report

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Reminder/Recall

Instructions

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

Click **Run** to...

Check this box to count your attempts

Click here to run report

☐ Make this count towards number of recall attempts   Save as Template   Run

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Patient Recall Group Listing by Ownership

Report Criteria   Report Date: July 15, 2016

Organization (IRMS): NICOLE'S TEST   Facility: NICOLE'S VFC CLINIC 2
Recall Date: 01/01/1900 through 07/15/2016   Health Plan: All
Birth Date Range: 09/16/2012 through 07/15/2014   Physician: All
Include Inactive Patients: No   Program: All
State: All   County/Parish: All
High Risk Category: All   Zip Code: All
Deferred Vaccinations Only: No   District/Region Number: All
Vacc. Families: DTaP/DT/Td, HEP-B 3 DOSE, HIB, MMR, PNEUMO (PCV), POLIO, VARICELLA

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		09/26/2013		08/23/2013
PNEUMO (PCV)			4		05/25/2014		05/25/2014
VARICELLA			1		07/11/2016		07/11/2016