



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.

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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 Reason for Inactivation drop down. **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 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**

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 number of recall attempts** box if you want to track reminder/recall attempts.
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.

