

Reminder/Recall Templates —WyIR Quick Reference Guide—Reminder/Recall Templates

1. Configure Personal Settings

A. Click upon **Settings/Personal** in the Navigation Menu.



B. Ensure that Increment Recall Count is listed as “Unchecked;” change the Maximum Recall Tries to “3,” and **Save**.

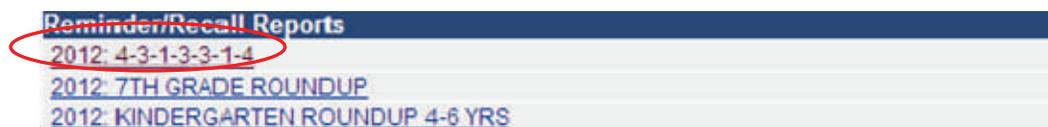
User Preferences click to update	
Feature	Status:
Always use defaults on patient edit	Enabled
Default Patient Search Version	Simple
Default Patient Search Field	First Name
Automatic City / State / Zip Code / County Population	Enabled
Use Arrow Navigation on Vaccination View/Add screen	Enabled
Vaccine List Sort Order	Expiration Date
Default Application	Standard
Set Low Inventory Quantity For Orders	0
Increment Recall Count	Unchecked
DTT Decrement Vaccine Inventory Default	Checked
Default Reminder/Recall screen	Advanced
Maximum Recall Tries	3

NOTE: Once the internal processes for use of the recall are defined, one may opt to Check the “Increment Recall Count” button. By selecting this option, and limiting the recall tries to “3,” providers will ensure that resources are not applied to contacting a patient for follow-up after three attempts. Just be sure that only one staff uses the “Increment Recall Count” functionality so as to not inadvertently inactivate a patient

2. Run It Monthly!

A. Within the Navigation Menu, click upon the **[Reminder Recall/Run Templates]** link; a window similar to the following will then appear.

B. Be sure 1. the “Include Global Searches” button is checked; 2. the “Do Not Limit” button is selected next to facility; and then 3. click on the **[Search]** Button; a screen similar to the following will appear:



C. Click on the desired report Hyperlink; a screen similar to the following will appear:

D. Click upon the **[Run Report]** button; review the output options on the next page.

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Which output to use?

The ideal Reminder/Recall approach will account for the staffing resources as well as material resources needed to support an effort.

If staff resources are limited, but material resources are not, the mailings (Output 2) may present a more effective way to send the message.

If material resources are limited, but staffing resources are not, it may be more cost effective to produce a patient listing (Output 1) for staff to make calls during any downtime in their daily schedule.

Regardless of which method is used, there is a tool available that will allow providers to see how effective their choice of method in conducting a reminder/recall is—the Reminder/Recall Success Report.

Output 1— Patient Listing

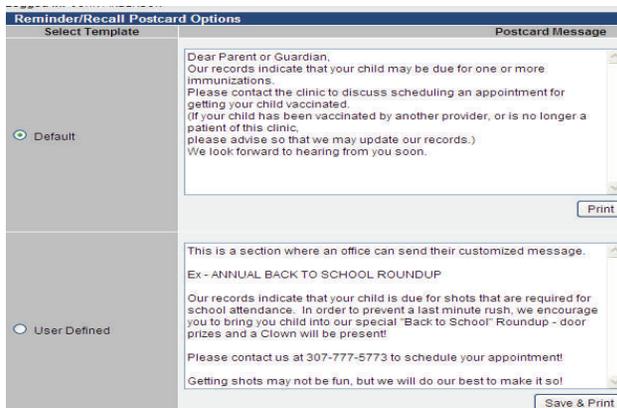
This output provides a listing of patients that are in need of vaccines as defined in the reminder/recall template. The phone number is useful for contacting the parent/guardian.

Total Patients Selected: 3

Bar Code/ID	First Name	Middle Name	Last Name	Birthdate	Guardian F.N.	Phone Number	Chart Number
	BOBBY		BOO	09/09/2009	BOBBY	(07)822-5555	
Vaccine Family Name	Dose Number	Recommended Date	Minimum Date				
HEP-B 3 DOSE	1	09/09/2009	09/09/2009				
DTaP/DTTd	1	11/09/2009	10/21/2009				
HB	1	11/09/2009	10/21/2009				
POLIO	1	11/09/2009	10/21/2009				
PNEUMO (PCV)	1	11/09/2009	10/21/2009				
MMR	1	09/09/2010	09/09/2010				
VARICELLA	1	09/09/2010	09/09/2010				

Output 2 — Postcards/Letters

A. Select **Preview** to review the possible message available for display upon the postcard/letter. Note that you can customize THE message within the **User Defined** area.



B. Choose **Select** to see how the message displays prior to printing (postcard example shown).

RETURN SERVICE REQUESTED



Dear Parent or Guardian,
Our records indicate that your child may be due for one or more immunizations.
Please contact the clinic to discuss scheduling an appointment for getting your child vaccinated.
(If your child has been vaccinated by another provider, or is no longer a patient of this clinic, please advise so that we may update our records.)
We look forward to hearing from you soon.

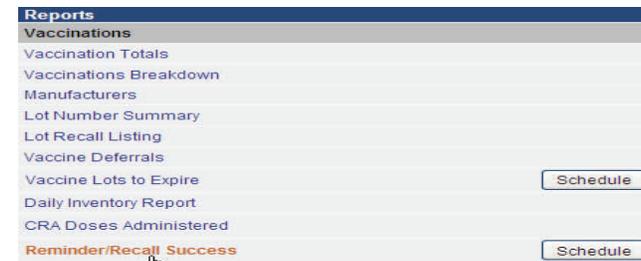
To the Parent/Guardian of:

BOBBY BOO
6101 YELLOWSTONE ROAD STE 420
CHEYENNE, WY 82002

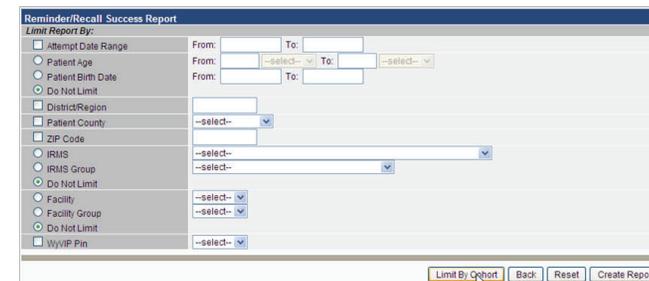
Note: The barcode is displayed in offices using scanners so that they can easily locate the patient in the WyIR.

Reminder/Recall Success Report

A. Within the Navigation Menu, under Reports, click on Reports Module; the **Reminder/Recall Success** report is located in the upper left hand portion of the page.



B. Click on the highlighted report; a page similar to the following will appear:



C. Enter the desired information, then click **Create Report**, which displays the outcomes of the efforts.

Date	Attempt Type	# Recalled	# Returned	Success Rate	# Returned	Success Rate	# Returned	Success Rate
				in <= 30 days			in <= 60 days	in <= 90 days
02/20/2011	PATIENT LISTING	23	1	4%	2	6%	2	6%
02/28/2011	PATIENT LISTING	123	6	4%	8	6%	8	6%
02/28/2011	PATIENT LISTING	146	7	4%	10	6%	10	6%
02/28/2011	PATIENT LISTING	99	3	3%	3	3%	7	7%
02/28/2011	PATIENT LISTING	185	8	4%	13	7%	14	7%
02/28/2011	EMAIL	284	11	3%	16	5%	21	7%
03/04/2011	PATIENT LISTING	62	1	1%	2	3%	2	3%

D. Review the report for the effectiveness of the process; consider changing the output if the one that was used is ineffective.