

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. Once checked, a tally will be maintained on the patient to indicate the number of times they have been included in a recall. When the patient returns for an immunization, the tally will be restarted. The count is useful in determining which patients to mark as “Moved or Gone Elsewhere” using the “Recall for Inactivation Report,” which is detailed in the next page.

2. Run It Monthly!

A. Within the Navigation Menu, click upon the **[Reminder/Recall-Reminder/Recall]** link; a window similar to the following will then appear; click the highlighted “[here](#)” link to navigate to the “simple” search.

B. At the “simple” search screen, enter the appropriate date range for the following searches:

- Children (1 day to 35 months)**
- Kindergarten (4 yrs to 6 yrs)**
- Adolescents (13 yrs to 18 yrs)**

C. Click on the **[Run]** Button; the next screen displayed, the Reminder/Recall Output Select, is presented on the next page.

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. At a minimum, provider/organizations should consider running either a patient phone call list or a postcard to send to the address of the patient.

Reminder/Recall Output Select

There are 145 patients in your recall group.
There are 117 patients with valid addresses in your recall group.

I want to: -- SELECT A TASK -- Run

- Generate a Patient List
- Print Avery 5160 Mailing Labels
- Print Avery 8387 Postcards
- Print Custom Postcards
- Print Letters
- Generate Auto-dialer Content
- Generate Mail-Merge Content
- Create Email Reminder List
- Save Group as a Cohort

Generate a Patient List which contains a phone number for contacting the parent/guardian.

Total Patients Selected: 3

Bar Code/ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	Chart Number
	BOBBY		BOO	09/09/2009	BOBBY	(307)822-5555	

Vaccine Family Name	Dose Number	Recommended Date	Minimum Date
HEP-B 3 DOSE	1	09/09/2009	09/09/2009

Print Avery 8387 Postcards using the template in the WyIR.

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
8101 YELLOWSTONE ROAD STE 420
CHEYENNE, WY 82002

How to measure success:

- 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 in <= 30 days	Success Rate	# Returned in <= 60 days	Success Rate	# Returned in <= 90 days	Success Rate
02/28/2011	PATIENT LISTING	23	1	4%	2	8%	2	8%
02/28/2011	PATIENT LISTING	123	5	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	165	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.

How to inactivate non-responsive patients:

Within the Navigation Menu, under Reports, click on Reports Module; the **Recall for Inactivation** report is located under Patients in the upper right hand section of the page.

By running the report monthly following the Reminder/Recall process, patients may be identified that may be inactivated from future reminders.

Recall for Inactivation (by ownership)

Report Criteria: Report Date: June 10, 2013

Organization (ORBS): 10111 - WYOMING DEPT OF HEALTH
Facility: All
District / Region: All
Number of Recall Times Greater than or Equal To: 2
Birth Date Range: 01/01/2010 to 09/10/2013

Total Patients Selected: 6

Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Times	Date	Type
14847	TONY		SLY	01/01/2012	3	01/09/2013	PATIENT LISTING
14834	GEORGE		WASHINGTON	01/01/2011	3	01/09/2013	PATIENT LISTING

Best Practices: After 3 reminders, inactivate the patients that are non-responsive by searching, selecting, editing, and then changing the patient's Inactive status to "Moved or Gone Elsewhere," checking the "Block Recall" box, then saving.

Inactive	Moved or Gone Elsewhere
WyVIP Status:	Uninsured
Block Recall:	<input checked="" type="checkbox"/>