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**.


NOTE: Once the internal processes for use of the recall are defined, one may opt to check the "Increment Recall Count" button. If 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 on the next page.

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.
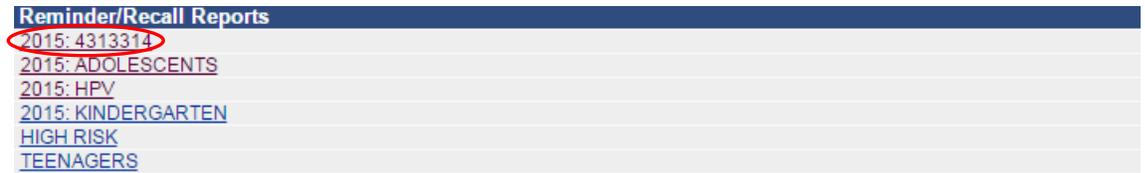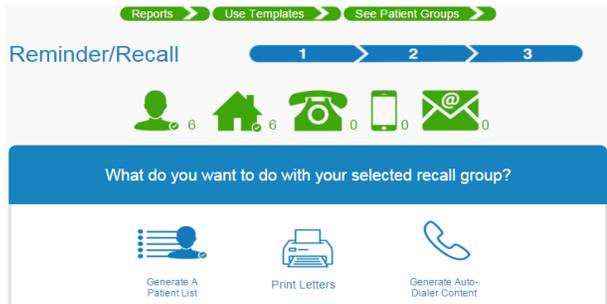

B. Select the template you wish to use by clicking on the Hyperlink—a window similar to the following will present next:
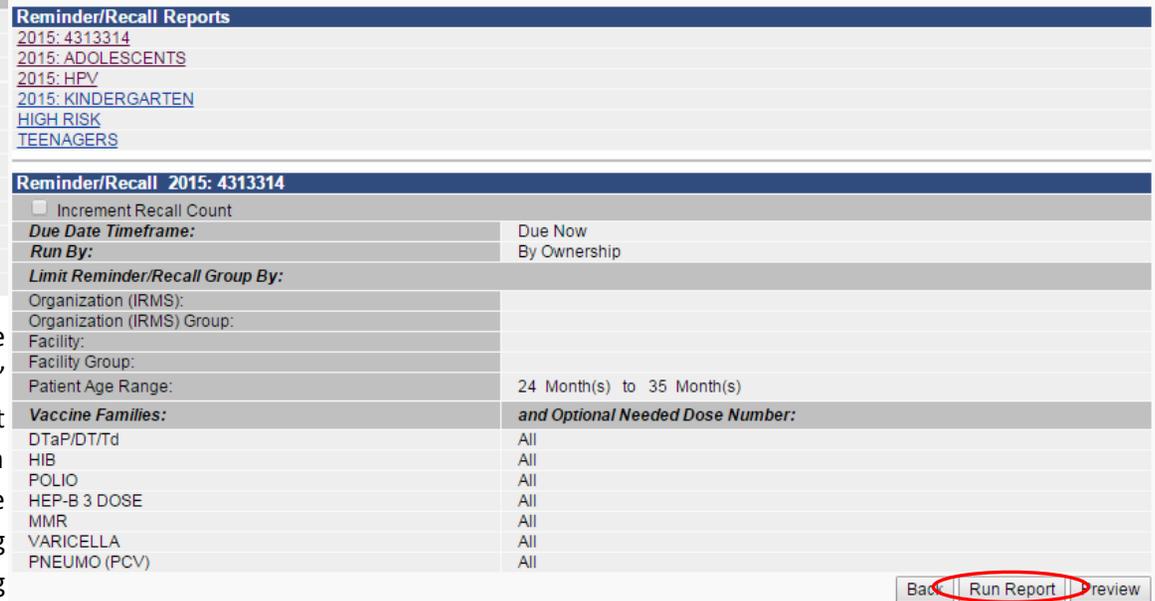

C. Click on the **[Run Report]** button; review the output options on the next page.

Which output to use:

The next Reminder/Recall screen details the potential output options for the user:


Based on the "counts" of options presented, the user may need to tailor their Reminder/Recall approach to balance staffing resources, material resources, and the HIPAA considerations for sending Protected Health Information (PHI) in a secure manner. At a minimum, provider/ organizations should consider running either a patient phone call list quarterly. After selecting the **"Generate a Patient List"** icon as presented above, a pop-up similar to the following is presented next:
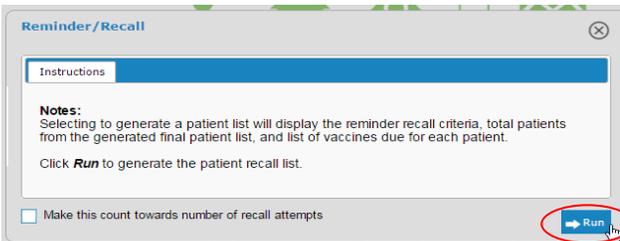

The Patient Recall Group Listing by Ownership, which provides a list of patients and a phone number to contact the guardian/patient.

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.
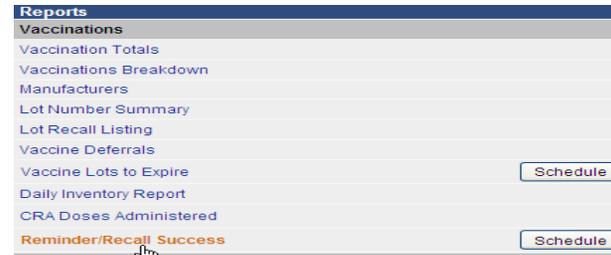
B. Click on the highlighted report; a page similar to the following will appear:
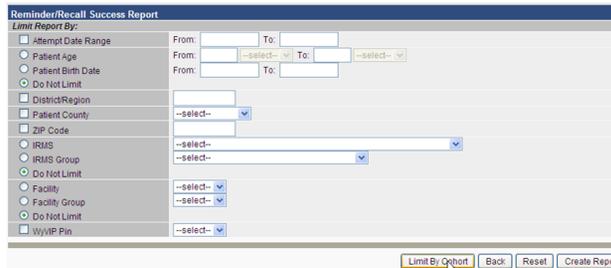
C. Enter the desired information, then click **Create Report,** which displays the outcomes of the efforts.

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.

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.