

1. Configure Personal Settings

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



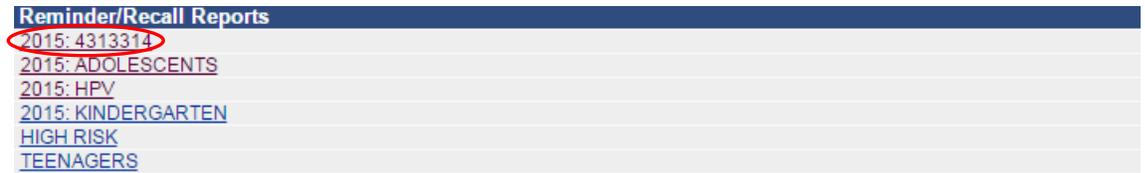
B. Ensure that Increment Recall Count is listed as “Unchecked;” change the Maximum Recall Tries to “3,” and **Save**.

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

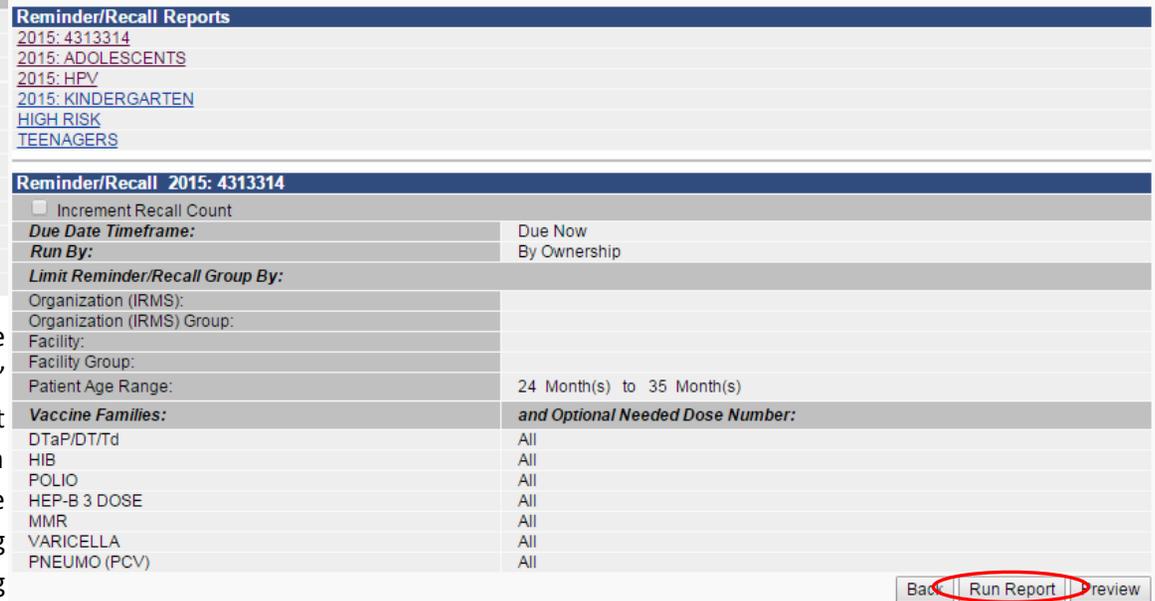
NOTE: Once the internal processes for use of the recall are defined, one may opt to check the “Increment Recall Count” button. If checked, a tally will be maintained on the patient to indicate the number of times they have been included in a recall. When the patient returns for an immunization, the tally 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.



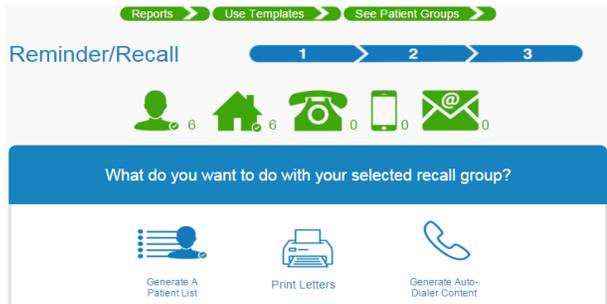
B. Select the template you wish to use by clicking on the Hyperlink—a window similar to the following will present next:



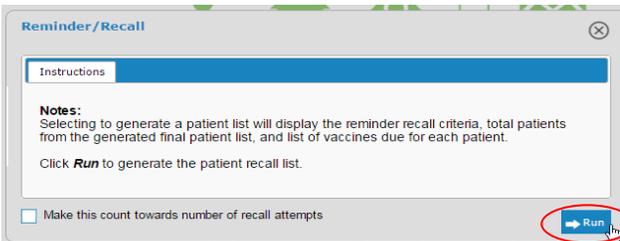
C. Click on the [**Run Report**] button; review the output options on the next page.

Which output to use:

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



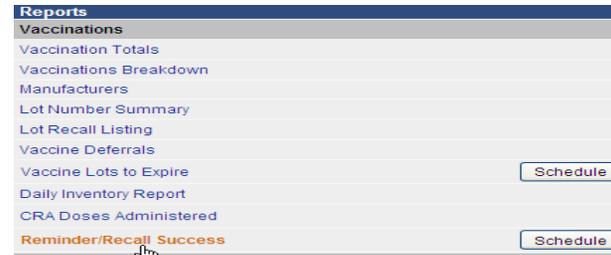
Based on the “counts” of options presented, the user may need to tailor their Reminder/Recall approach to balance staffing resources, material resources, and the HIPAA considerations for sending Protected Health Information (PHI) in a secure manner. At a minimum, provider/organizations should consider 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:



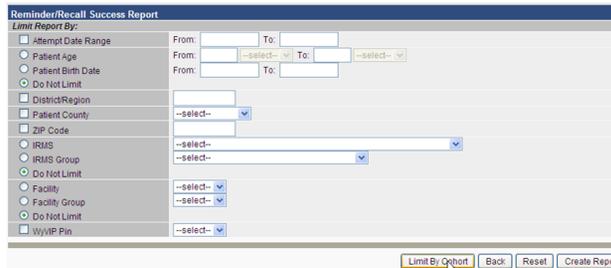
The Patient Recall Group Listing by Ownership, which provides a list of patients and a phone number to contact the guardian/patient.

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.

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 Date: June 10, 2013

Report Criteria: Organization (ORBS): 10111 - 01102AVG 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 06/10/2013

Total Patients Selected: 6

Patient ID	First Name	Middle Name	Last Name	BirthDate	# 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.

