Reminder/Recall

-WyIR Quick Reference Guide-

Reminder/Recall

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.

Reminder/Recall Reports		
2015: 4313314		
2015: ADOLESCENTS		
2015: HPV		
2015: KINDERGARTEN		
HIGH RISK		
TEENAGERS		

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

	Reminder/Recall Reports		
	2015: 4313314		
	2015: ADOLESCENTS		
	2015: HPV		
	2015: KINDERGARTEN		
	HIGH RISK		
	TEENAGERS		
	Reminder/Recall 2015: 4313314		
	Increment Recall Count		
	Due Date Timeframe:	Due Now	
	Run By:	By Ownership	
	Limit Reminder/Recall Group By:		
	Organization (IRMS):		
	Organization (IRMS) Group:		
e	Facility:		
.,,	Facility Group:		
ť	Patient Age Range:	24 Month(s) to 35 Month(s)	
nt	Vaccine Families:	and Optional Needed Dose Number:	
	DTaP/DT/Td	All	
а	HIB	All	
	POLIO	All	
e	HEP-B 3 DOSE	All	
	MMR	All	
g	VARICELLA	All	
-	PNEUMO (PCV)	All	
g			Bac Run Report Preview

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

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Which output to use:

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:

Reminder/Recall	\otimes
Instructions	
Notes: Selecting to generate a patient list will display the reminder recall criteria from the generated final patient list, and list of vaccines due for each pat Click <i>Run</i> to generate the patient recall list.	, total patients tient.
Make this count towards number of recall attempts	Run hry

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:

The next Reminder/Recall screen details the 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.

Reports		50
Vaccinations		
Vaccination Totals		
Vaccinations Breakdown		Pa
Manufacturers		D
Lot Number Summary		-
Lot Recall Listing		Pa
Vaccine Deferrals		P
Vaccine Lots to Expire	Schedule	
Daily Inventory Report		Pa
CRA Doses Administered	C	R
Reminder/Recall Success	Schedule	R

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

minder/Recall Success Report	
nit Report By:	
Attempt Date Range	From: To:
Patient Age	From: -select- V To: -select- V
Patient Birth Date	From: To:
Do Not Limit	
District/Region	
Patient County	select V
ZIP Code	
RMS	select 💌
IRMS Group	select V
Do Not Limit	
> Facility	select 💌
Facility Group	select 💌
Do Not Limit	
WyVIP Pin	select V
	Limit By Ophort Back Reset Create Repo

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

	Date	Attempt Type	# Recalled	# Returned in <	Success Rate = 30 days	# Returned in <	Success Rate = 60 days	# Returned in <	Success Rate = 90 days
	02/28/2011	PATIENT LISTING	23	1	4%	2	8%	2	8%
	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%
ς.	02/28/2011	EMAIL	284	11	3%	16	5%	21	7%
)	03/04/2011	PATIENT LISTING	82	1	195	3	3%	3	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.

	Patients
	Daily Patient Immunization List
	Patient Detail
	Patient Totals
	Patient Breakdown
\langle	Recall for Inactivation
ile	Race and Ethnicity Correlation
lar	Updated Patients Labels

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

			Recall for In	nactivation (by own	nership)				
Report Criteria							Report Date: June 10, 2		
	Organization (BBLS, 10:11, 10:10,006,CBF OT PLK,TH Rolling, 20, Marken (BBLS, 20, 20, 20, 20, 20, 20, 20, 20, 20, 20								
Fotal Patients	Selected: 8								
Patient ID	First Name	Middle Name	Last Name	Birthday	# of Recall Tries	Date	Туре		
4847	TONY		SLY	01/01/2012	3	01/29/2013	PATIENT LISTING		
4934	GEORGE		WASHINGTON	01/01/2011	1	01/29/2013	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	\checkmark
WyVIP Status:	Uninsured	\checkmark
Block Recall:		