

WyIR Reference Guide: **REMINDER RECALL**

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Reminder Recall: A Quick Overview

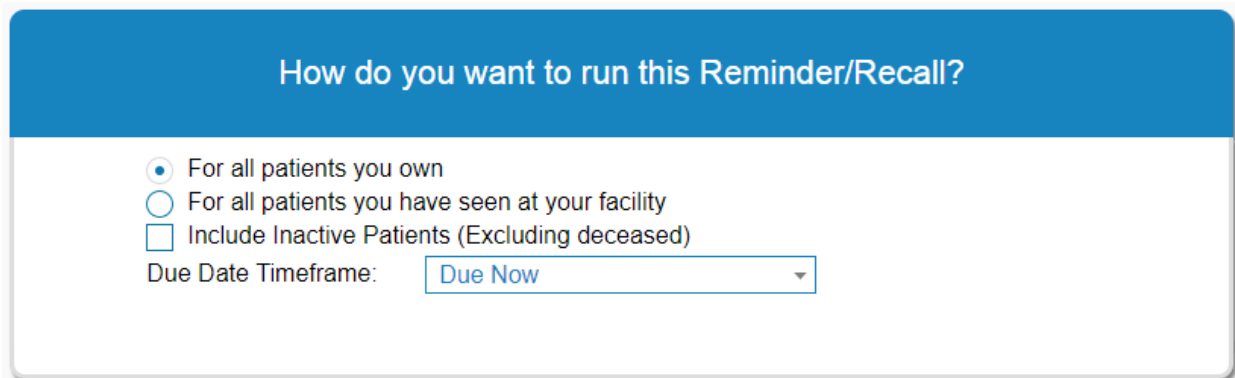
Immunization reminder recall functionality is a cost-effective way to identify and notify patients/guardians that they are due soon for immunization (reminder) or are overdue for an immunization (recall). Reminder recall systems are powerful ways to ensure optimal immunization rates. Research has also shown that patients and guardians rely heavily on provider reminders for immunization. It is recommended that patient reminder recall is run on a routine monthly basis.

You can use the WyIR to create reminder recall reports showing which patients are due or overdue for immunizations. The system can generate this information in several different formats, including patient phone lists, mailing labels, postcards, letters/mail merge letters, auto dialer files, and emails. Reminder recall can be utilized for patients in any age cohort.

How to get started

Click the **Reminder/Recall** option from the left side navigation menu, then click **Reminder/Recall**. The Reminder Recall page will open.

The next step is to select the appropriate options so that your search results meet your needs. There are a few different options:

A screenshot of a web form titled "How do you want to run this Reminder/Recall?". The form has a blue header bar with the title in white. Below the header, there are three radio button options: "For all patients you own" (selected), "For all patients you have seen at your facility", and "Include Inactive Patients (Excluding deceased)". Below these options is a label "Due Date Timeframe:" followed by a dropdown menu currently showing "Due Now".

How do you want to run this Reminder/Recall?

☒ For all patients you own

☐ For all patients you have seen at your facility

☐ Include Inactive Patients (Excluding deceased)

Due Date Timeframe: Due Now

- ♦ **Search for all patients you own**—When this is selected, you will receive a list of all your currently active patients.
- ♦ **Search for all patients you have seen at your facility**—When this is selected, you'll receive a list of all patients that have ever received a vaccination at your facility, even if they are currently owned by another facility.

You may also include patients that are inactive for your facility.

When **Due Now** menu option is selected, you can select for a custom date range, past due, due now, or due in the future.

The screenshot shows a web form titled "Who do you want to Contact?". It contains several input fields and options for filtering patients. The "Patient Location" section has two dropdown menus: "OUR FAKE ORGANIZATIO.x" (with a close button 'x') and "AFIX KIDS" (with a close button 'x'). Below these are "Organization (IRMS) Group" and "Facility Group" dropdowns. The "Patient Age Range" section has a radio button selected, followed by ">= # of" and "Select" dropdown, and "< # of" and "Select" dropdown. The "Patient Birth Date" section has a radio button unselected, followed by "From" and "Through" date input fields. The "Patient Gender" section has a "Limit To..." dropdown. Below these is a section "Exclude patients who were sent a notification in the last:" with a "# of" input field and radio buttons for "Days", "Weeks", "Months", and "Years". A green "Advanced" button is in the bottom right corner.

The next box on the Reminder/Recall page has selection options for the patients to be contacted.

- ◆ **Patient Location**— This should default to your facility and organization.
- ◆ **Patient Age Range**— This option is defaulted. Enter an age range either in months or years.
- ◆ **Patient Birth Date**—A specific birth date range can be selected
- ◆ **Patient Gender**

Patients who have previously been contacted can be excluded from the search results as well.

It is important to note how **Patient Age Range** works. For example: If you select 11 years through 18 years, the resulting report will show all patients that are 11 years 0 days through the day of their 18th birthday. This means only patients that have just turned 18 years on the day you search are included while any aged older than 18 years 1 day are left out. In order to reach all the 18 year old patients, you should enter 19 years as the highest age. There are also several other options to search by:

- ◆ Age range by months—if the intent is to capture all 11 year olds to 18 year olds, then search for 132 months to 228 months.
- ◆ Birthday date range—if the intent is the same (11-18 year olds) and today is 06/27/2018, then search for 06/28/1999 through 06/27/2017.

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Clicking on the green **Advanced** button will bring up options to limit your patient search.

A collection of search filters for patient search. It includes dropdown menus for Physician, Health Plan, Facility Type, Association, Program, High Risk Category, State, County/Parish, and Health District/Region. Below these are input fields for Zip Code, Appointment Date (From and Through), and checkboxes for Deferred Vaccinations Only and Compromised Vaccinations. There are also radio buttons for Date (From and Through) and Lot Number.

The final box on the first screen is where you will select which vaccines you would like to include.

- ♦ **Custom**— This option will allow you to customize a list of vaccines and doses. This is the recommended option for reminder recall activities in the WyIR

You can also select if you want to see patients who are:

- ♦ Due for all selected vaccines;
- ♦ One dose away; or
- ♦ One visit to complete the series.

A screen titled "Which vaccines would you like to include?". It features a dropdown menu labeled "Select a series" with a help icon. Below the dropdown is a large empty rectangular box. At the bottom, there is a section titled "I only want to see my patients who are:" with three checkboxes: "Due for all selected vaccines" (checked), "One dose away", and "One visit to complete the series". At the very bottom, there are three buttons: "Clear", "Schedule" (with a calendar icon), and "Generate Patient List" (with a right arrow icon).

After making your selections, click the **Schedule** or **Generate Patient List** buttons. More information about what each option does is on the following pages of this reference guide.

Scheduling Reminder Recall Reports

If you selected the **Schedule** button, you will be taken to the following screen:

Reminder/Recall

1 2 3

56 49 0 0 0

What do you want to do with your selected recall group?

- Generate A Patient List
- Generate Auto-Dialer Content
- Generate Mail-Merge
- Create Custom Post Cards
- Create Avery 8387 Postcards
- Print Labels
- Generate An Export File

After selecting the option you desire, the scheduling screen will pop-up. Here you will select when you want the reminder recall report to run and the WyIR user the report can be accessed by. Once you have completed all the fields, hit **Schedule**. The pop-up will close.

Scheduler Instructions

Scheduler:

Run now ☒

Hour Minute Day of Month Month Day of Week

Run once: ☒

Report can be accessed by:

Search User:

First Name: Last Name:

Search

Search Results (Select the users listed below and click on 'Select Users':)

Show 10 entries Search:

Select User	First Name	Last Name	Organization	Facility	Email Address
No data available in table					

Showing 0 to 0 of 0 entries

First Previous Next Last

Select Users

Selected Users (Report will be sent to users listed below):

Show 10 entries Search:

Select User	First Name	Last Name	Organization	Facility	Email Address
No data available in table					

Showing 0 to 0 of 0 entries

First Previous Next Last

Remove Users

☐ Make this count towards number of recall attempts

Schedule

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To find your reports, click the **Scheduled Reports** option from the left side navigation menu, then click **Received Reports**. The Scheduled Reports Received page opens. An email notification will also be sent to users who were selected to receive the report.

Scheduled Reports Received

Show 10 entries Search:

Report Name	Report Type	Report Date
REMINDERRECALL PATIENTLISTING	HTML	07/02/2018 01:43:54 PM

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Generating a Patient List

If **Generate Patient List** was selected, this screen will appear:

What patients do you want to add to your recall group?

Remove Patients who don't have an available
☐ Name ☐ Phone ☐ Address ☐ Email

Remove Patients who have received more than notifications.

Last	First	Age	Vaccines Due	Available Contact Methods	R/R Attempts	Reason for Inactivation
<input checked="" type="checkbox"/>		16	3		0	Select
<input checked="" type="checkbox"/>		12	8		0	Select
<input checked="" type="checkbox"/>		18	8		3	Select
<input checked="" type="checkbox"/>		18	4		2	Select
<input checked="" type="checkbox"/>		15	10		0	Select
<input checked="" type="checkbox"/>		17	4		1	Select
<input checked="" type="checkbox"/>		16	10		0	Select
<input checked="" type="checkbox"/>		14	5		0	Select
<input checked="" type="checkbox"/>		18	6		6	Select
<input checked="" type="checkbox"/>		14	5		0	Select

Showing 1 to 10 of 56 entries

PreviousNext

Export Patient List Submit

Export Patient List will export the list as an Excel spreadsheet.

Submit will take you to the next screen.

Patients who do not have specific contact information (such as a telephone number or email) can be excluded from the patient lists. Patients can also be inactivated from this screen using the drop down box.

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Upon selecting **Submit**, this screen will appear:

The screenshot displays the 'Reminder/Recall' interface. At the top, a progress bar indicates three steps, with step 2 being the current active step. Below the progress bar, there are five green icons representing different data sources: a person (56), a house (49), a telephone (0), a smartphone (0), and an email envelope (0). The main content area is titled 'What do you want to do with your selected recall group?' and contains seven blue action buttons arranged in three rows. The first row includes 'Generate A Patient List', 'Generate Auto-Dialer Content', and 'Generate Mail-Merge'. The second row includes 'Create Custom Post Cards', 'Create Avery 8387 Postcards', and 'Print Labels'. The third row includes 'Generate An Export File'.

Reminder/Recall

1 2 3

56 49 0 0 0

What do you want to do with your selected recall group?

Generate A Patient List

Generate Auto-Dialer Content

Generate Mail-Merge

Create Custom Post Cards

Create Avery 8387 Postcards

Print Labels

Generate An Export File

Select the action you prefer, and follow the on screen instructions.

Still have questions? Contact the **Clinical Consultant** at 307-777-8981 for further assistance.