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:

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

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.

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:

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.
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.

**Generating a Patient List**

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

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

![Reminder/Recall Screen](image)

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.