

Reference Guide: COVID-19 Vaccination Reminder Recall

December 2020 / Version 1

Reminder Recall: A Quick Overview

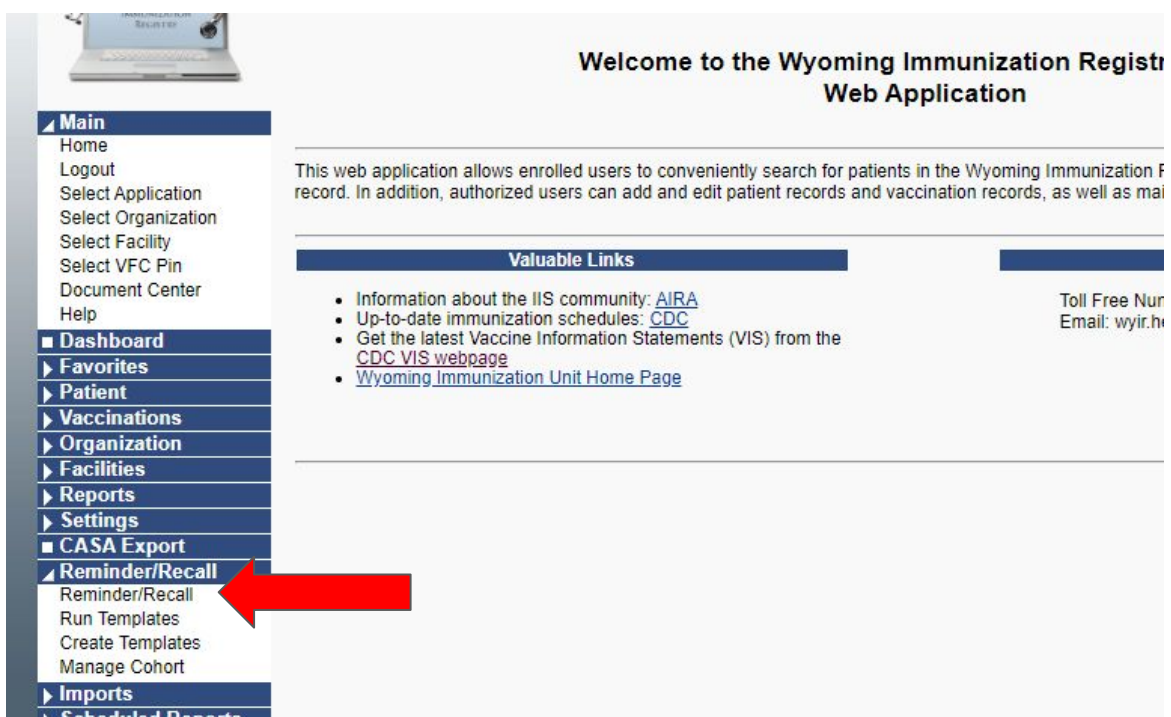
Immunization reminder recall functionality is a way to identify and notify patients that they are due soon for immunization (reminder) or are overdue for an immunization (recall). Reminder recall systems are powerful ways to ensure vaccine series completion and optimal immunization coverage rates. Research has also shown that patients rely heavily on provider reminders for immunization.

Receiving the second dose of a COVID-19 vaccine series is vital for full protection and vaccine efficacy. Key points:

- Patients must receive the same COVID-19 vaccine brand for both doses. Products are not interchangeable.
- Provide the COVID-19 Vaccination Record Card to all patients with information filled out completely.
- Verbally remind patients that they must return at the appropriate interval for their second dose.
- Perform reminder recall for the second dose using the WylR, EHR, or another system to obtain the patient list.

How to get started with WylR Reminder Recall

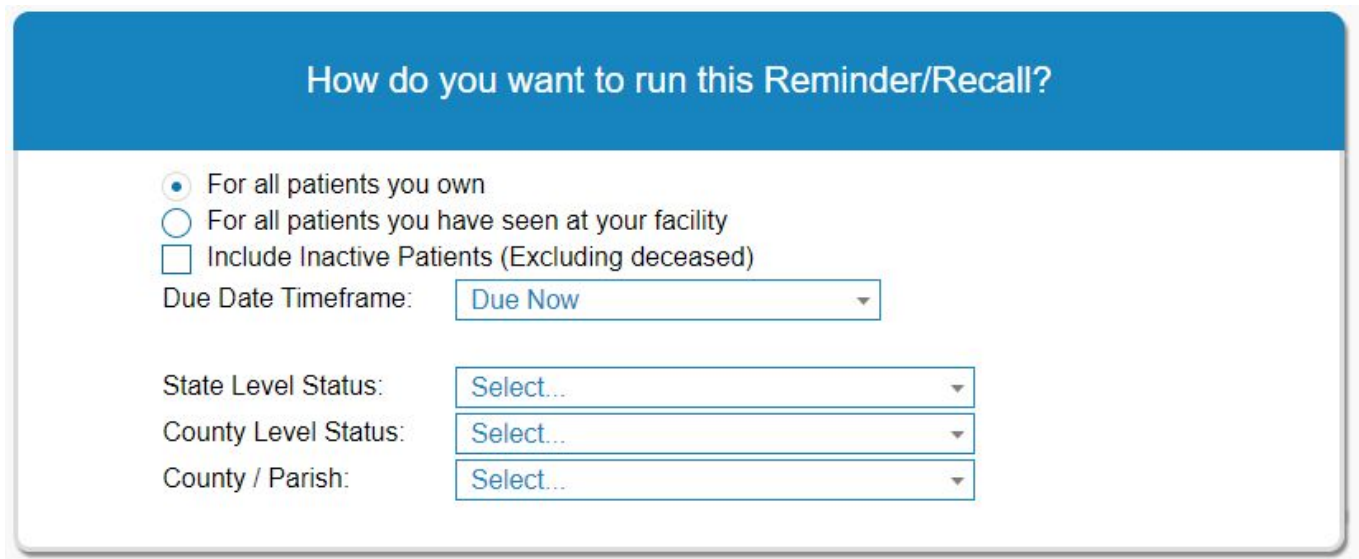
Click the **Reminder/Recall** option from the left side navigation menu, then click **Reminder/Recall**. The Reminder Recall page will open.



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



The screenshot shows a form titled "How do you want to run this Reminder/Recall?". It contains three radio buttons for patient selection: "For all patients you own" (selected), "For all patients you have seen at your facility", and "Include Inactive Patients (Excluding deceased)". Below these is a "Due Date Timeframe:" label and a dropdown menu currently set to "Due Now". Further down are three labels for location selection: "State Level Status:", "County Level Status:", and "County / Parish:", each followed by a "Select..." dropdown menu.

- **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. **This one is recommended for COVID-19 vaccine patients.**

You may also include patients that are inactive for your facility. **It is recommended to select this to ensure all COVID-19 vaccine recipients at your facility are included.**

When the **Due Now** menu option is selected, you can select for a custom date range, past due, due now, or due in the future. It is recommended to keep it at the defaulted Due Now.

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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 has 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.

The screenshot shows a web form titled "Who do you want to Contact?". It contains several input fields and options for patient selection. The "Patient Location" section has four dropdown menus: "Organization", "Facility", "Organization Group", and "Facility Group". The "Patient Age Range" section has a radio button selected, followed by a range selector with fields for ">= # of", a "Select" dropdown, and "< # of". Below this is another "Select" dropdown. The "Patient Birth Date" section has a radio button and two input fields labeled "From" and "Through". The "Patient Gender" section has a "Limit To..." input field. At the bottom, there is a section for excluding patients: "Exclude patients who were sent a notification in the last:" followed by a "# of" input field and radio buttons for "Days", "Weeks", "Months", and "Years". A green "Advanced" button is located in the bottom right corner of the form.

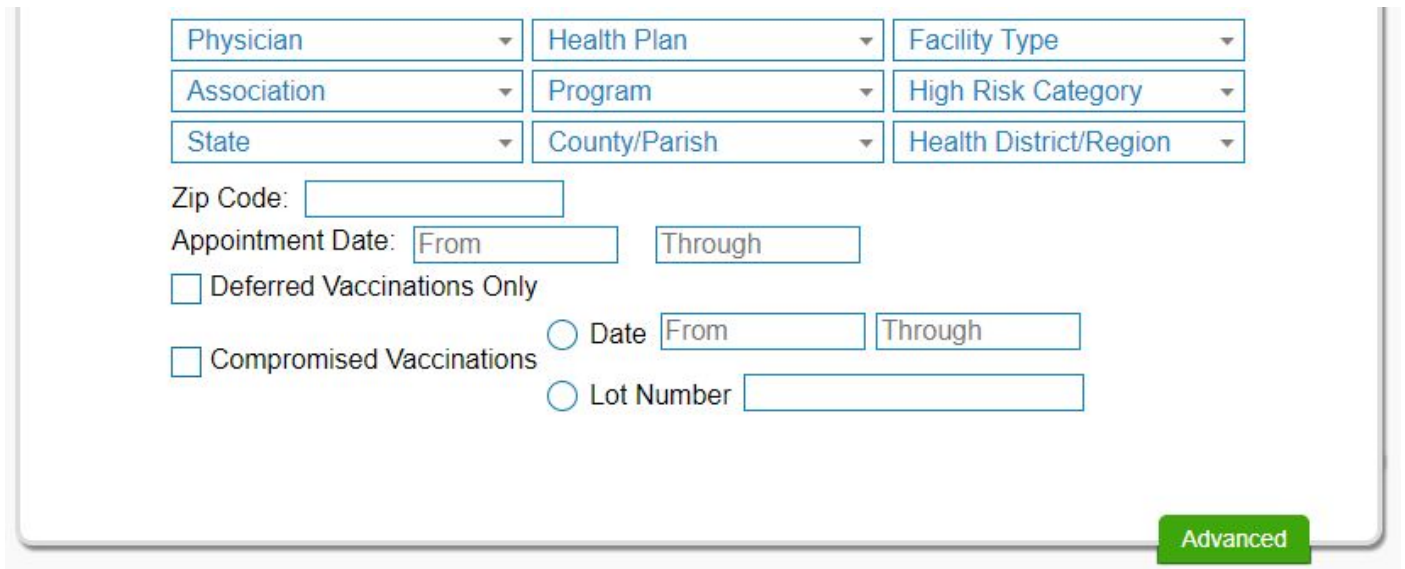
It is important to note how the **Patient Age Range** works. For example: If you select 11 years through 18 years, the resulting report will show all patients that are 11 years 0 days through the day of their 18th birthday. This means only patients that have just turned 18 years on the day you search 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.



The screenshot displays a search interface with the following elements:

- A 3x3 grid of dropdown menus for filtering: Physician, Health Plan, Facility Type, Association, Program, High Risk Category, State, County/Parish, and Health District/Region.
- A Zip Code input field.
- Appointment Date filters: "From" and "Through" input fields.
- Two checkboxes: "Deferred Vaccinations Only" and "Compromised Vaccinations".
- Radio button options for "Date" (with "From" and "Through" fields) and "Lot Number" (with an input field).
- A green "Advanced" button in the bottom right corner.

For COVID-19 vaccination, it is recommended to leave all these fields at their default to ensure all patients needing a second dose are accounted for on the patient list.

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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. Select this option and choose COVID-19 vaccine and put “2” in the dose number field.

Remember, COVID-19 vaccine products are not interchangeable and have different administration schedules. Use caution to ensure patients are receiving the correct vaccine and are recalled at an appropriate interval.

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

- Due for all selected vaccines (default and recommended option);
- One dose away; or
- One visit to complete the series.

The screenshot shows a web form titled "Which vaccines would you like to include?". At the top is a blue header with the title in white. Below the header is a white box containing a dropdown menu labeled "Select a series" with a question mark icon to its right. Below the dropdown is a large, empty rectangular box with a light gray header and a white body. At the bottom of the white box is a section titled "I only want to see my patients who are:" followed by three checkboxes: "Due for all selected vaccines" (checked), "One dose away", and "One visit to complete the series". Below the white box is a blue footer bar with three buttons: "Clear", "Schedule" (with a calendar icon), and "Generate Patient List" (with a right-pointing 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.

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Scheduling Reminder Recall Reports

Scheduling a reminder recall report will set the report to be run at a date and time you specify. If you selected the **Schedule** button, you will be taken to the following screen:

The screenshot shows a web interface titled "Reminder/Recall" with a progress bar at the top indicating steps 1, 2, and 3. Below the progress bar are five icons with counts: a person icon (59), a house icon (58), a telephone icon (0), a smartphone icon (0), and an email icon (0). The main heading asks, "What do you want to do with your selected recall group?". Below this heading are seven options, each with an icon and a label: "Generate A Patient List" (person icon), "Generate Auto-Dialer Content" (telephone icon), "Generate Mail-Merge" (envelope icon), "Create Custom Post Cards" (postcard icon), "Create Avery 8387 Postcards" (Avery 8387 postcard icon), "Print Labels" (printer icon), and "Generate An Export File" (person icon with a plus sign).

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 WylIR user the report can be accessed by. Once you have completed all the fields, hit **Schedule**. The pop-up will close.

The screenshot shows a "Reminder/Recall Scheduler" window. At the top are two tabs: "Scheduler" and "Instructions". Under the "Scheduler" tab, there is a "Scheduler:" section with a "Run now" checkbox. Below this are five dropdown menus for scheduling: "Hour", "Minute", "Day of Month", "Month", and "Day of Week". There is also a "Run once:" checkbox. Below the scheduling options is a section titled "Report can be accessed by:". Under this section is a "Search User:" section with "First Name:" and "Last Name:" input fields and a "Search" button. Below the search fields is a "Search Results" section with a note: "(Select the users listed below and click on 'Select Users'):". There is a "Show 10 entries" dropdown and a "Search:" input field. Below this is a table with headers: "Select User", "First Name", "Last Name", "Organization", "Facility", and "Email Address". The table content is "No data available in table". Below the table is a "Showing 0 to 0 of 0 entries" message and a "Select Users" button. Below the "Select Users" button is a "Selected Users" section with a note: "(Report will be sent to users listed below):". There is a "Show 10 entries" dropdown and a "Search:" input field. Below this is another table with the same headers as the first table. The table content is "No data available in table". Below the table is a "Showing 0 to 0 of 0 entries" message and a "Remove Users" button. At the bottom of the window is a checkbox labeled "Make this count towards number of recall attempts" and a "Schedule" button.

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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 entries Search:

Report Name	Report Type	Report Date	
REMINDERRECALL_PATIENTLISTING	HTML	07/02/2018 01:43:54 PM	Delete

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"/>			11	6		0	Select
<input checked="" type="checkbox"/>			23	5		0	Select
<input checked="" type="checkbox"/>			17	4		0	Select
<input checked="" type="checkbox"/>			20	7		6	Select
<input checked="" type="checkbox"/>			21	4		0	Select
<input checked="" type="checkbox"/>			12	5		0	Select
<input checked="" type="checkbox"/>			20	6		1	Select
<input checked="" type="checkbox"/>			13	7		0	Select
<input checked="" type="checkbox"/>			11	9		4	Select
<input checked="" type="checkbox"/>			11	8		7	Select

Showing 1 to 10 of 59 entries

PreviousNext

Export Patient List Submit

Export Patient List will export the patient 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 a software interface for managing COVID-19 vaccination reminder/recall. At the top, a progress bar indicates the current step is 1 of 3. Below this, a summary bar features five green icons with corresponding counts: a person icon (59), a house icon (58), a telephone icon (14), a smartphone icon (2), and an email icon (2). The main area is titled "What do you want to do with your selected recall group?" and contains a grid of nine action options, each with a blue icon and text label:

- Generate A Patient List (person icon)
- Print Letters (printer icon)
- Generate Auto-Dialer Content (telephone handset icon)
- Generate Mail-Merge (envelope icon)
- Create Custom Post Cards (postcard icon)
- Create Avery 8387 Postcards (Avery 8387 postcard icon)
- Print Labels (printer icon)
- Save As a Patient Group (Cohort) (group of people icon)
- Send Email (email icon)

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

It is recommended to use **Generate A Patient List**. From this list, patients can be contacted via telephone by your facility staff. Utilizing methods such as telephone will be the quickest way to ensure patients receive the second dose on time.

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