

Quick Reference Guide: Reminder Recall Module

Last Revised: 11/2024

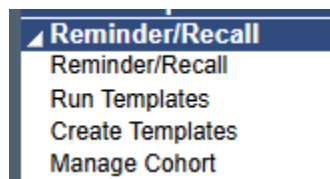
Overview

Immunization reminder recall is a way to identify and notify patients and guardians that they are due soon for an immunization (reminder) or are overdue for an immunization (recall). Reminder recall systems are powerful ways to ensure optimum immunization coverage rates. Research has also shown that patients and guardians rely heavily on provider reminders for the next immunization dose. Reminder recalls should take place on a routine basis, at least quarterly.

You can use the Wyoming Immunization Registry (WyIR) to create reminder recall reports showing when patients are due or overdue for immunizations. The WyIR can generate this information in several different formats, including patient phone lists, mailing labels, postcard and letter templates, and auto-dialer files. The reminder recall module 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 choose “Reminder/Recall.” The Reminder Recall page will open.



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

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:

State Level Status:

County Level Status:

County / Parish:

- Search for all patients you own: When this is selected, you will receive a list of all the currently active patients “owned” by your facility.
- Search for all patients you have seen at your facility: When this is selected, you’ll receive a list of all patients who have ever received an immunization at your facility, even if another facility currently owns them.

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

When the “Due Date Timeframe” menu option is selected, you can select a custom date range, past due, due now, or due in the future.

The patient list can further be tailored by state and county status. Selecting an option in these menus is not required.

Who do you want to Contact?

Patient Location:

Patient Age Range

Patient Birth Date

Patient Gender

Exclude patients who were sent a notification in the last:
 Days Weeks Months Years

[Advanced](#)

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

- Patient Location: This should default to your facility and organization.
- Patient Age Range: This option is the default selection. Enter an age range in either months or years (see note below).
- Patient Birth Date: A specific birth date range can be selected.
- Patient Gender

Previously contacted patients can also be excluded from the search results.

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 18 years 0 days. This means only patients who have just turned 18 on the day you searched are included, while any patients older than 18 years 1 day are excluded. 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- to 18-year-olds, then search for 132 months to 228 months.
- Birthday date range: If the intent is the same as above, and today is 06/27/2018, then search for 06/28/1999 through 06/27/2017.

Clicking the green “Advanced” button will bring up options to limit your patient search.



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Physician ▾	Health Plan ▾	Facility Type ▾
Association ▾	Program ▾	High Risk Category ▾
State ▾	County/Parish ▾	Health District/Region ▾
Employer ▾	Campaign ▾	Population Group ▾

Zip Code:

Appointment Date: From Through

Deferred Vaccinations Only

Compromised Vaccinations Date From Through

Lot Number

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

The recommended option for the Reminder Recall module is “Custom.” This option will allow you to customize a list of vaccines and doses.

You can also select “Custom” to see patients who are:

- Due for all selected vaccines
- One dose away from completing a vaccine series
- Able to complete the vaccine series in one visit

Which vaccines would you like to include?

Select a series ?

I only want to see my patients who are:

- Due for all selected vaccines
- One dose away
- One visit to complete the series

Clear |
 Schedule |
 Generate Patient List






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

Scheduling reminder recall reports


If you select the “Schedule” button, you will be taken to the following screen:


Reminder/Recall


1 > 2 > 3









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 an option. A scheduling screen will pop up. Here, you will choose when you want the reminder recall report to run. You may also select a WylR user who should receive the report. Once you have completed all the fields, select “Schedule.” The pop-up will close.

Reminder/Recall Scheduler ✕

Scheduler
Instructions

Scheduler:
 Run now

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 entries Search:

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

Showing 0 to 0 of 0 entries

Select Users

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

Show entries Search:

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

Showing 0 to 0 of 0 entries

Remove Users

Make this count towards number of recall attempts

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.



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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

Generating a patient list

If "Generate Patient List" is 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"/>	[Redacted]	[Redacted]	13	1	<input type="checkbox"/> Home <input type="checkbox"/> Phone <input type="checkbox"/> Mobile <input type="checkbox"/> Email	0	<input type="text" value="Select"/>

Showing 1 to 1 of 1 entries



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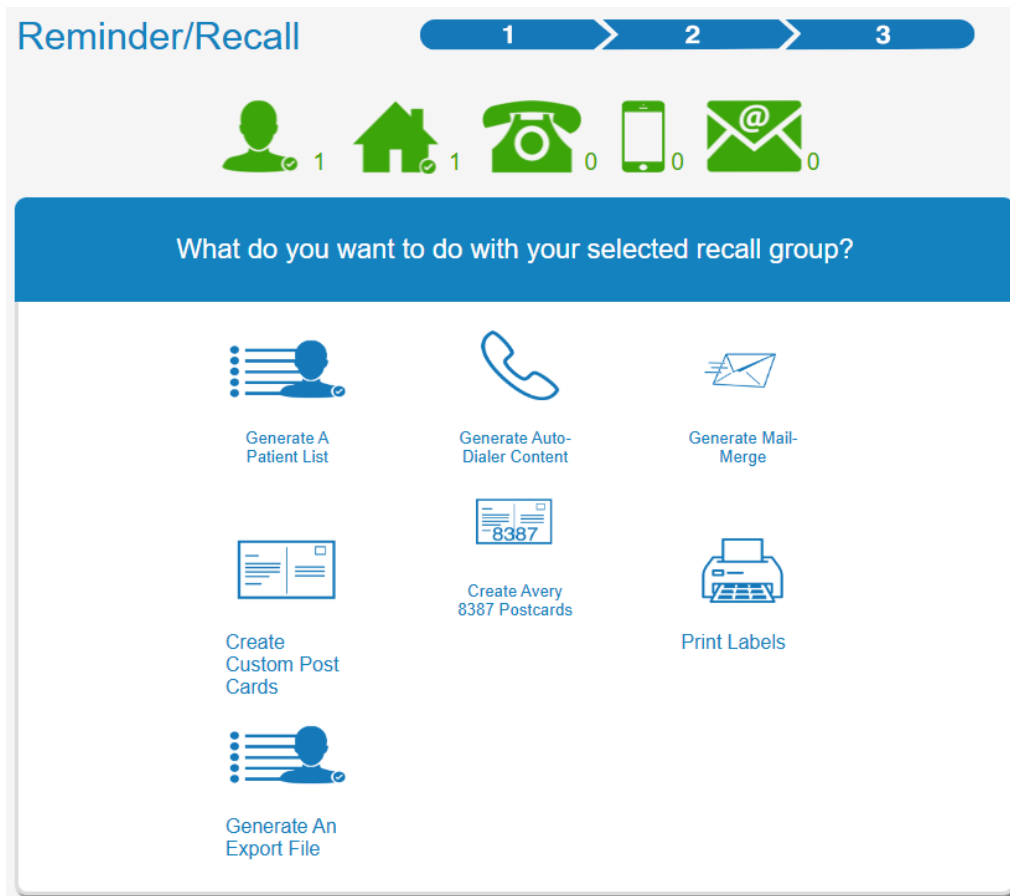
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“Export Patient List” will export the list as an Excel spreadsheet.

“Submit” will take you to the next screen.

Patients without specific contact information (e.g., telephone number, or email address) 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:



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

Questions? Please contact the WyIR Help Desk at 833-231-1451 or wyr.helpdesk@wyo.gov