IWeb
(v5.85.0)

Reminder Recall User Guide

What is included in this guide?

1. How do you select the patient list you want to include in reminder/recall?
2. How do you review the patient reminder/recall list?
3. How do you generate the notifications to send to the patients?

What is reminder/recall?

Reminder/recall is a system that allows providers to notify patients about upcoming or past due vaccinations.

Notifications can be generated in the following formats:

- Generate a patient list
- Print letters
- Generate auto-dialer content
- Generate mail-merge
- Create custom postcards
- Send email
- Print address labels

Who is this Quick Reference Guide for?

- This guide is meant for providers who want to improve vaccination rates by reminding patients of upcoming or past due vaccines.

When should reminder/recall be used?

- That decision is made by your clinic based on the size of your patient population. However often you choose to do it (weekly, monthly, etc.), it is helpful to include reminder/recall into your regular workflow.
- Reminder/recall can also be helpful to use when you have vaccine that is about to expire. This helps decrease wastage and ensures patients are up-to-date with vaccines.

Why do you care about reminder/recall?

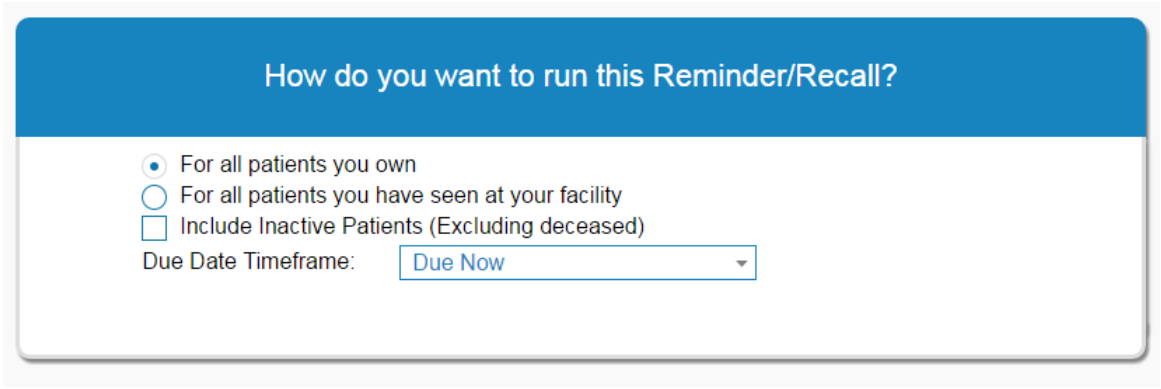
- It can help prevent disease by improving the timeliness and completion of recommended immunizations.
- It can help your practice improve your coverage rates.
- Viewing a patient list pulled from reminder/recall in the IIS can help you determine if your patient list is up-to-date.

How do you select the patient list you want to include in reminder/recall?

1. Click Reminder/Recall in the IIS navigation menu on the left side of the screen.

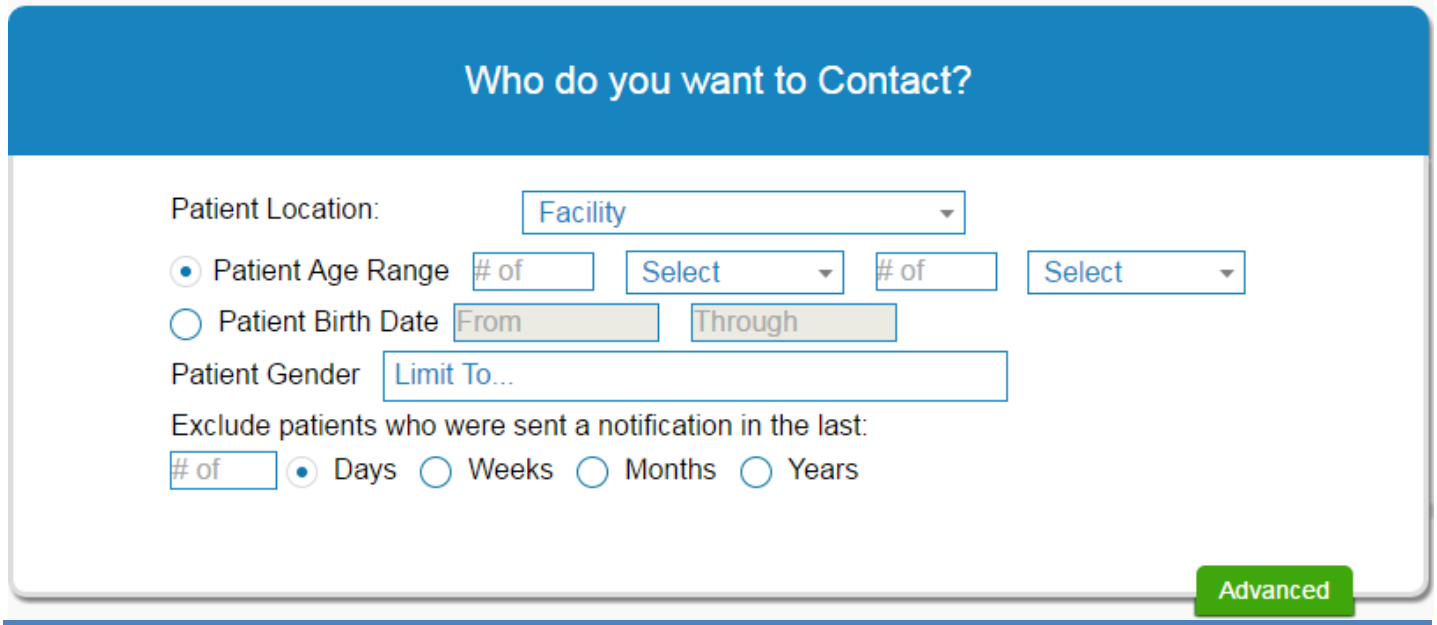
2. Click the Reminder/Recall link and the reminder/recall module will load on the screen.

3. Under the "How do you want to run this Reminder/Recall" section, select from the options on the page.



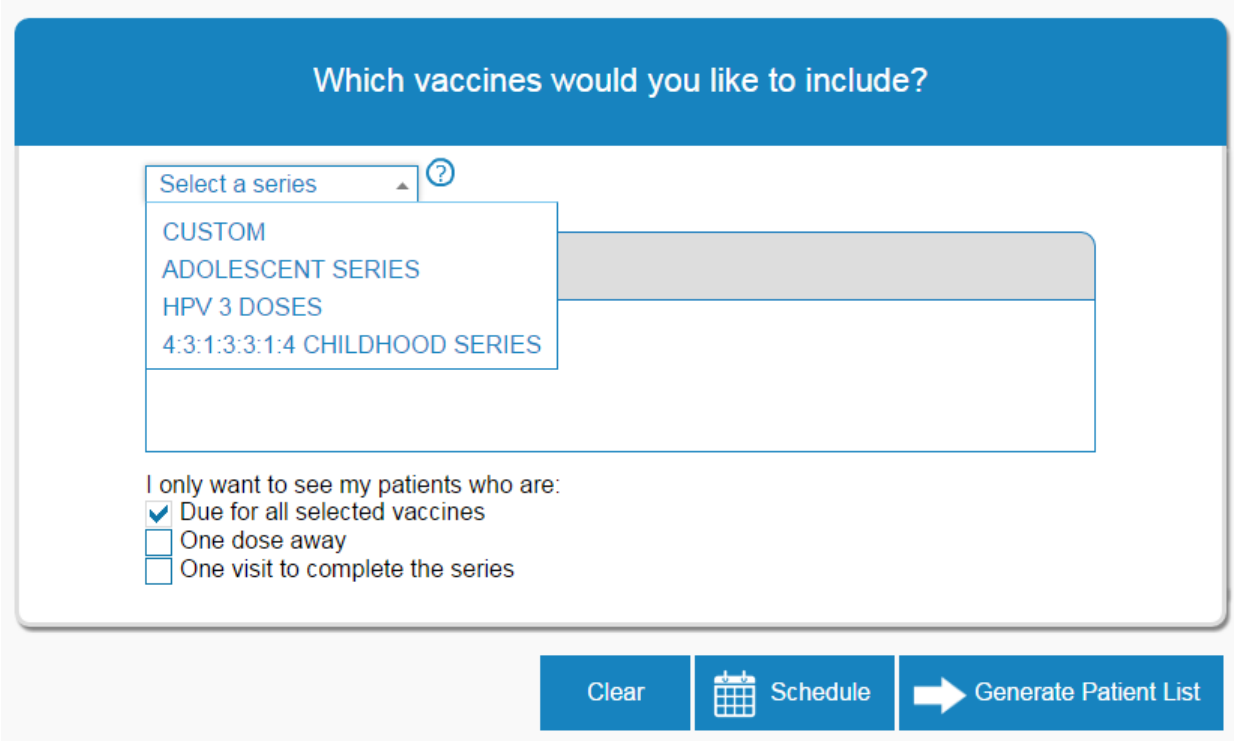
Field	Description
For all patients you own	A patient is considered to be under your organization/ facility's ownership if that is the last place where they received an administered vaccine in the IIS. Schools, pharmacies, and local health departments cannot own patients in the IIS.
For all patients you have seen at your facility	This pulls all of the patients that have received a record of an administered vaccine, a historical vaccine, or a demographic change from your organization/facility. This will generate a larger patient list than running by ownership.
Include Inactive Patients (excluding deceased)	If selected, patients flagged as inactive are included in the patient list, except for patients marked as deceased. If not selected, inactive patients are not included.
Due Date Timeframe	This determines which patients to include based on the Recommended Date column on the forecast.

4. Under the "Who do you want to contact?" section, select from the options on the page.



Field	Description
Patient Location	Filter patients by organization or facility.
Patient Age Range Patient Birth Date	Only one of these two options can be selected. Patient age range is the default. For Patient Age Range, enter the number of days, months, or years (and select which one from the drop-down lists) for the starting and ending age range. Note that you cannot enter a number that is zero or less. For Patient Birth Date, enter the starting birthdate in the From field and the ending birthdate in the Through field.
Patient Gender	Select one or more gender options using the drop-down list.
Exclude patients who were sent a notice in the last...	**To exclude patients who were sent a reminder/recall notification in a specific timeframe, enter a number and then select days, weeks, months, or years from the drop-down list.**

5. Under the "Which vaccines would you like to include?" section, select from the options on the page, then click Generate Patient List.

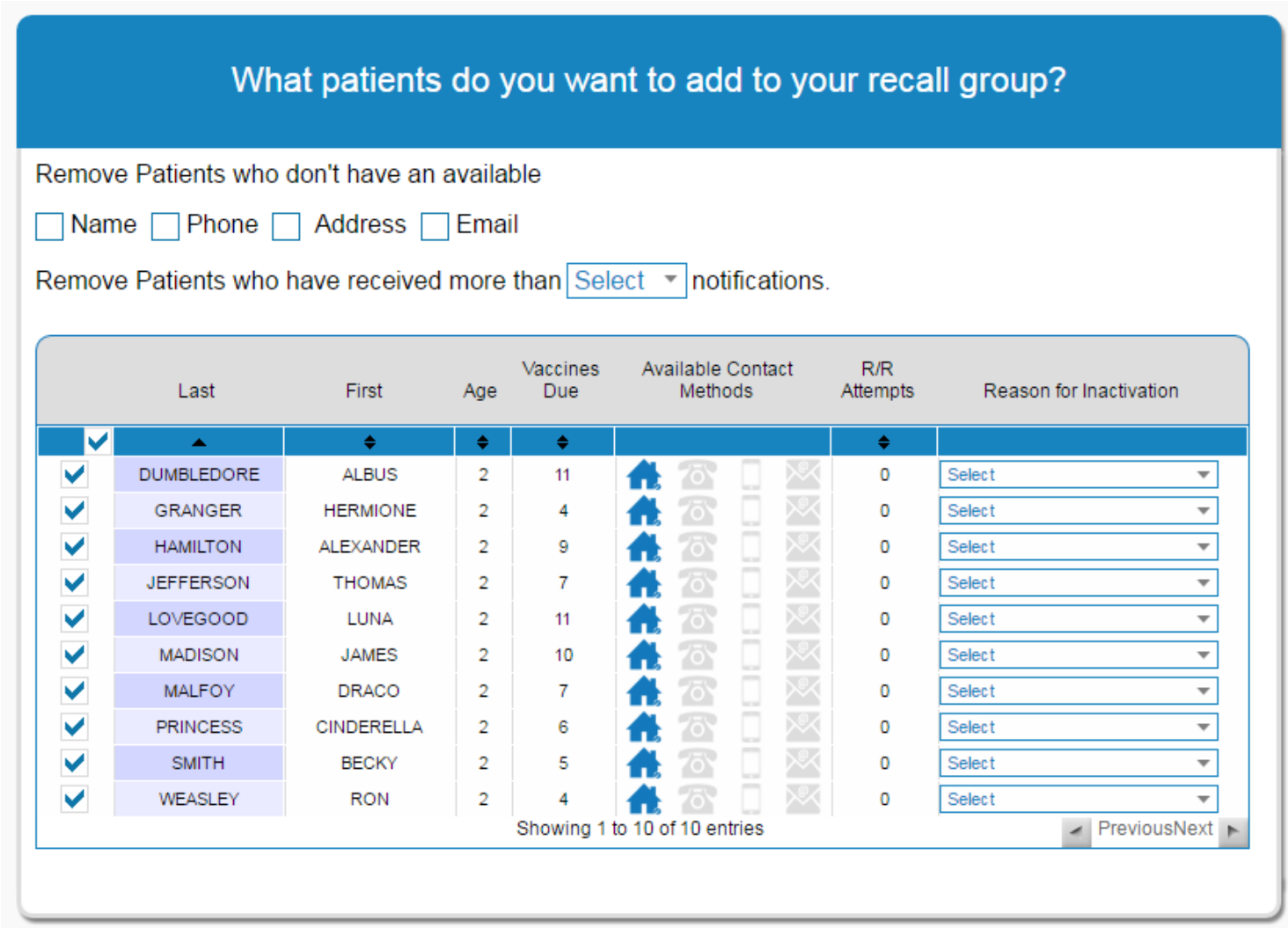


Field	Description
Select a series	Select a vaccine series from the drop-down menu. A list of vaccines that makes up the series appears in the box below the drop-down menu.
I only want to see my patients who are...	Select a vaccination status for patients that applies to the selected vaccines: • Due for all selected vaccines (default) - Reminder/recall returns a list of patients who are due for one or more of the selected vaccines. • One Dose Away - Reminder/recall returns a list of patients who are one dose away from completing the required number of doses for the selected series. • One Visit to Complete the Series - Reminder/recall returns a list of patients who are one visit away from completing the entire vaccine series, which could include multiple vaccines that could be completed in one visit.

Congratulations, you have just generated a reminder/recall patient list!

How do you review the patient reminder/recall list?

1. Clicking Generate Patient List takes you to the second step, reviewing the list of patients.



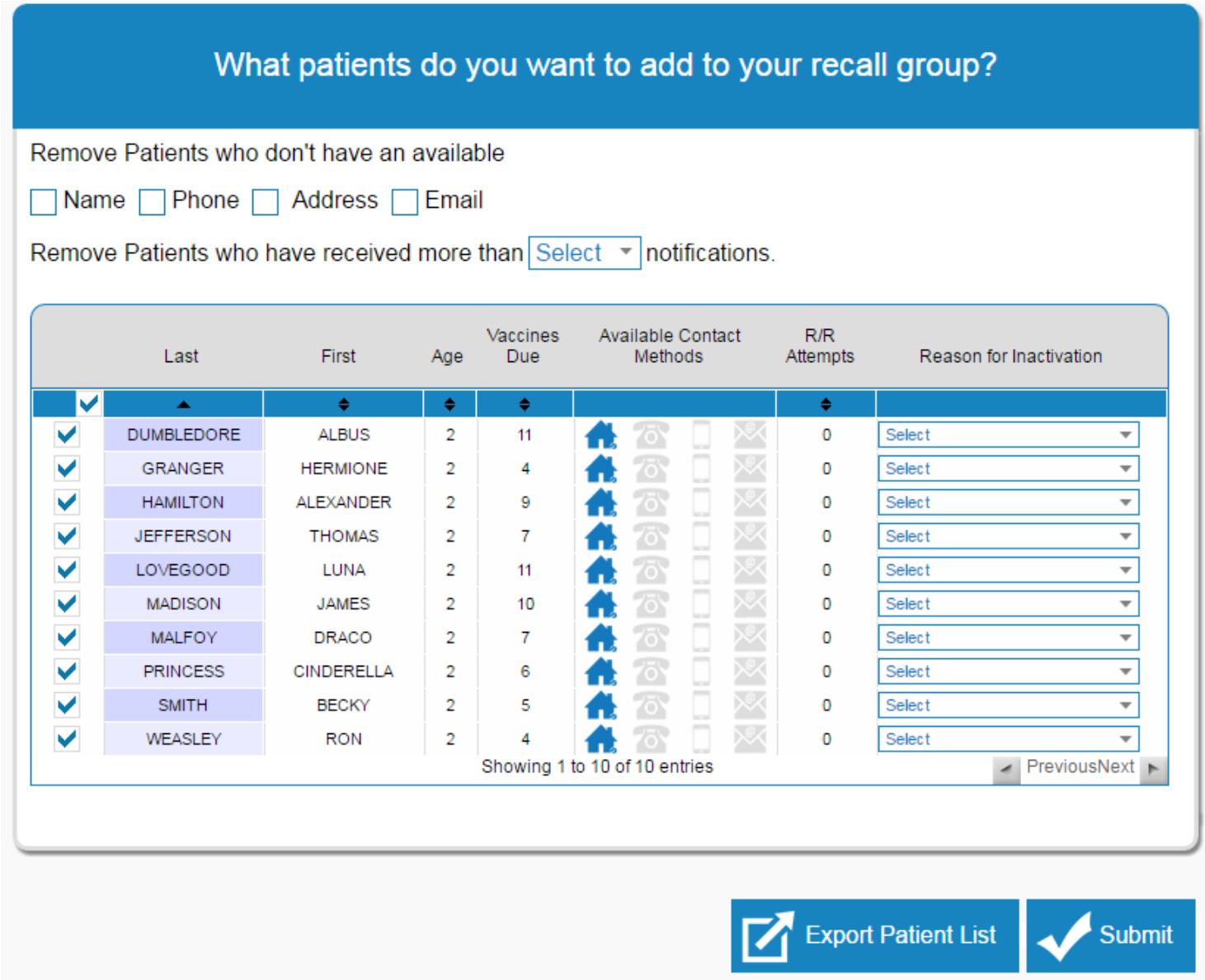
2. You can remove categories of patients from the list by selecting one of the Remove options at the top.

3. The list of patients retrieved appears below the Remove options. To see more information about a patient, hover the mouse over the patient's name.

4. To remove a patient from the list, click the checkbox on the left side of the patient's name to remove the checkmark, or select a Reason for Inactivation (which will also deselect the patient from the list). Removed patients will appear greyed out.

(If a reason for inactivation is selected, the patient is removed from the list and their Patient Status on the demographics page is changed to Inactive once you click Submit).

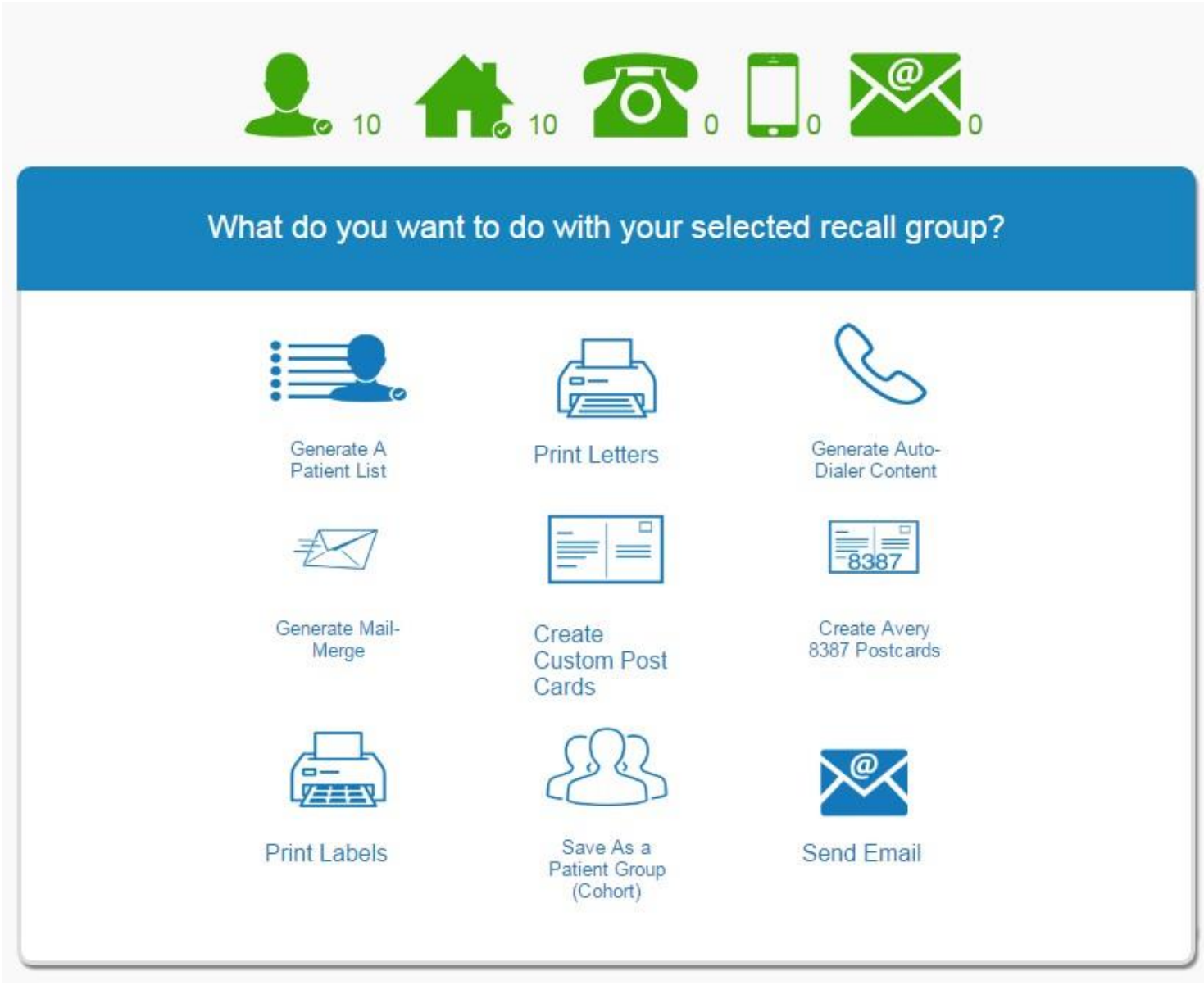
5. To re-add a patient to the list, click the checkbox (after which a checkmark appears).



Congratulations, you have reviewed your reminder-recall patient list!

How do you generate the notifications to send to patients?

1. After you click Submit on the patient list page, the action page opens. At the top of the page are icons with numbers next to them, showing how many total patients are included, along with how many mailing addresses, telephone numbers, cell phone numbers, and email addresses are available for the list of patients.
2. On the action page are icons that represent the different types of notifications to send to patients. Each icon is a link you can click to generate that type of file.



Reminder Recall User Guide

Generate A Patient List

This action generates an HTML file that displays a detailed list of your patients, including their vaccination forecast.

Create Avery 8387 Postcards

This action generates a reminder/ recall postcard for each patient on the patient list, which can be printed on Avery 8387 postcards. You can define the dimensions of the postcard and the message content.

Print Letters

This action generates a reminder-recall letter for each patient on the patient list.

Print Labels

This action generates a PDF file that can be printed on Avery 5160 labels or similar.

Generate Auto-Dialer Content

This action generates an HTML file that can be used with any external auto-dialer application.

Save As a Patient Group (Cohort)

This action saves your final patient reminder/recall list as a patient group (cohort) that you can use again for reminder/recall notifications. If the patient list represents a specific service population that you intend to send notifications to on a regular basis, saving the list as a cohort can save time and effort.

Generate Mail-Merge

This action generates a text file that can be used with any external mail-merge application.

Send Email

This action generates a reminder/ recall email for each patient on the patient list.

Congratulations, you have generated notifications for your reminder/recall patient list!