

Reminder/Recall Tools

A user guide to create Reminder/Recall reports for patients coming due or past due for vaccinations.

REMINDER/RECALLS MUST PROCESS OVERNIGHT

1. Navigate to the Reports page by selecting it from the main menu.



WELCOME TO THE
STATEWIDE IMMUNIZATION ONLINE NETWORK

Default Provider/Clinic

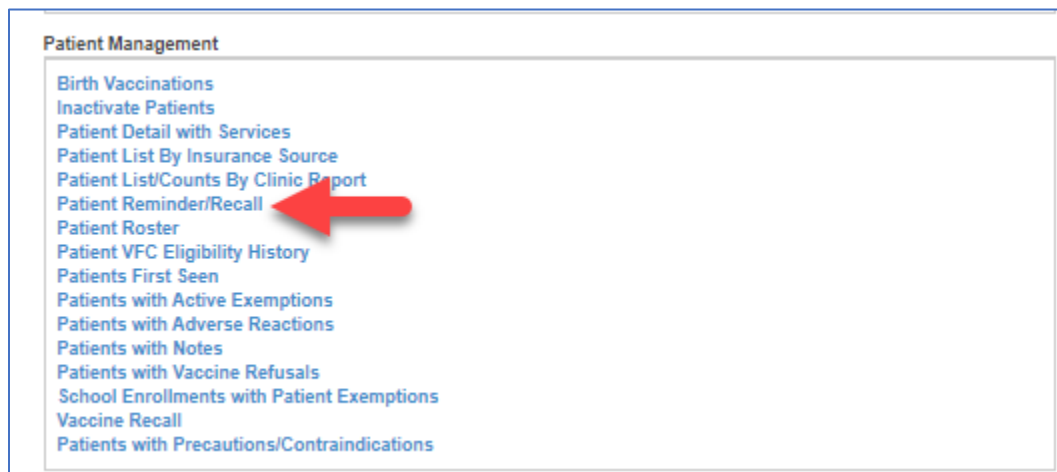
Provider/Clinic : BRITTANY TYPE 3 INVENTORY, BRIT TYPE 3 INVENTORY
SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

News

[03/29/2019] - Welcome to 19.6 Development

Welcome to 19.6 Development
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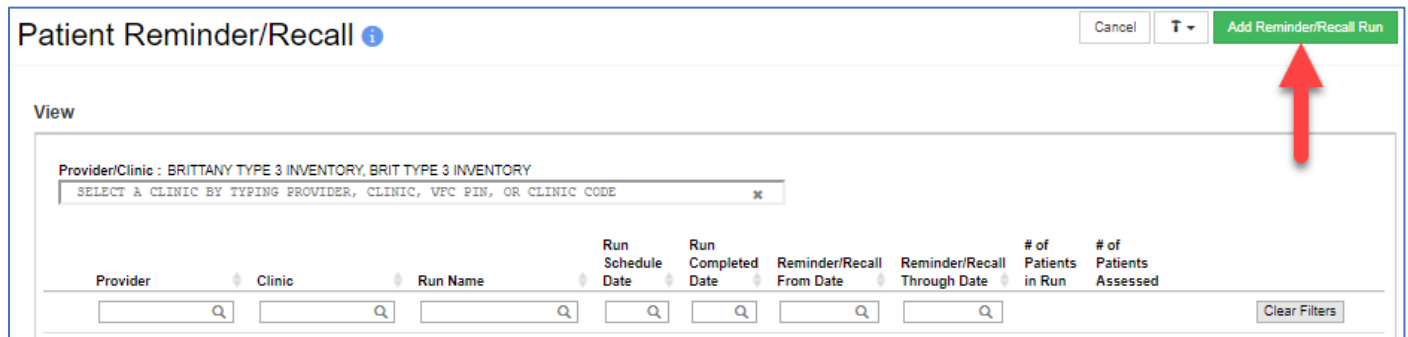
2. Under Patient Management, select "Patient Reminder/Recall".



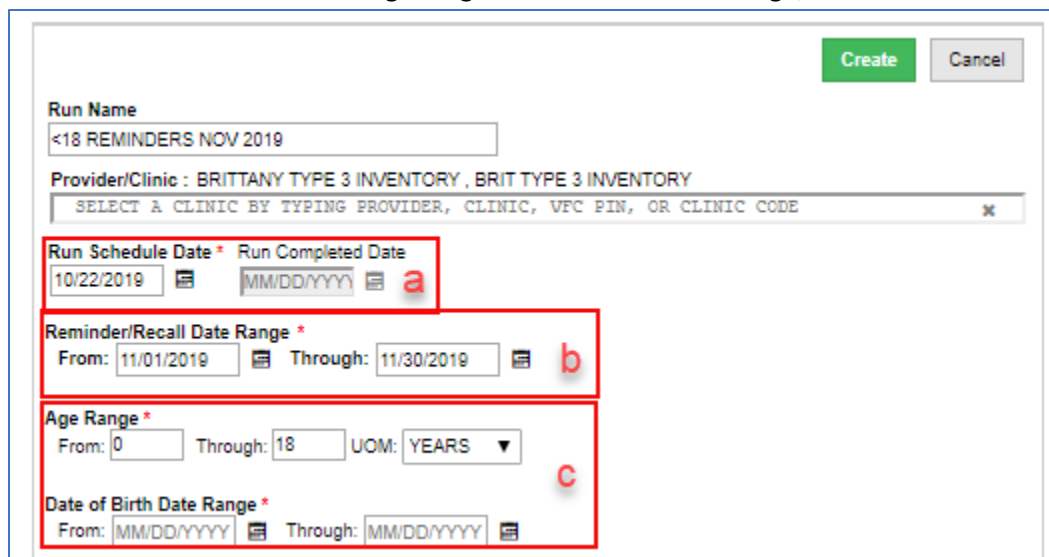
Patient Management

- Birth Vaccinations
- Inactivate Patients
- Patient Detail with Services
- Patient List By Insurance Source
- Patient List/Counts By Clinic Report
- Patient Reminder/Recall**
- Patient Roster
- Patient VFC Eligibility History
- Patients First Seen
- Patients with Active Exemptions
- Patients with Adverse Reactions
- Patients with Notes
- Patients with Vaccine Refusals
- School Enrollments with Patient Exemptions
- Vaccine Recall
- Patients with Precautions/Contraindications

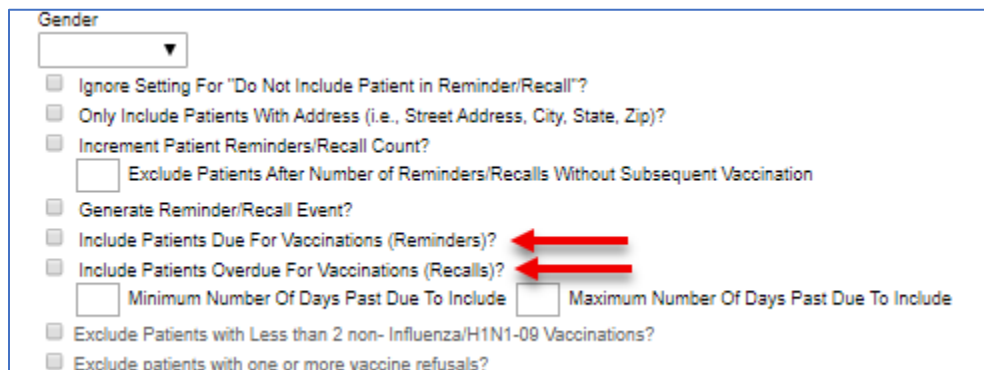
3. On this page you'll see existing reminder/recalls that you can view and utilize for reports, or you can create a new one by selecting "Add Reminder/Recall Run" at the top of the screen.



4. Complete the fields with the information you're looking to pull in a report.
 - a. The report will run over night for the date selected in the Run Schedule Date.
 - b. The Reminder/Recall Date range is the range in which you are searching for patients with vaccinations due.
 - c. Make sure to select either the age range or the date of birth range, not both.



- d. Also be sure to select one of the options here for reminder or recall. It is not recommended that you choose both reminder and recall because the results on the report cannot be differentiated.



- The Vaccine Series and Optional Dose section of the report allows you to narrow down which vaccine the patients in your search are due or overdue for. You can specify dose number for vaccines with a series or leave it blank to include any of the doses in the series.

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

<input type="checkbox"/>	Vaccine Series	Dose Number
<input checked="" type="checkbox"/>	DTaP / TD / Tdap	<input type="text"/>
<input checked="" type="checkbox"/>	Hep A	<input type="text"/>
<input checked="" type="checkbox"/>	Hep B	<input type="text"/>
<input checked="" type="checkbox"/>	Hib	<input type="text"/>
<input checked="" type="checkbox"/>	HPV	<input type="text"/>
<input checked="" type="checkbox"/>	Influenza	<input type="text"/>
<input checked="" type="checkbox"/>	Meningococcal	<input type="text"/>
<input checked="" type="checkbox"/>	MMR	<input type="text"/>
<input checked="" type="checkbox"/>	Pneumococcal	<input type="text"/>
<input checked="" type="checkbox"/>	Polio	<input type="text"/>
<input checked="" type="checkbox"/>	Rotavirus	<input type="text"/>
<input checked="" type="checkbox"/>	Varicella (CPOX)	<input type="text"/>
<input checked="" type="checkbox"/>	Zoster	<input type="text"/>

- Click "Create" once all fields have been completed

Run Name

Provider/Clinic : BRITTANY TYPE 3 INVENTORY , BRIT TYPE 3 INVENTORY

Run Schedule Date * **Run Completed Date**

Reminder/Recall Date Range *
From: **Through:**

Age Range *
From: **Through:** **UOM:**

Date of Birth Date Range *
From: **Through:**

- This will create the report to be run. It runs over night on the day selected for the “Run Schedule Date” in the report details. You’ll see the report populated on the list of current reports but the “Run Completed Date” will be blank until the report runs.

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/> BRITTANY TYPE 3 INVENTORY	BRIT TYPE 3 INVENTORY	<18 REMINDERS NOV 2019	10/22/2019	

- Coming back to the page on or after the scheduled run date, you’ll see the run completed date is now populated. You can click “View” to review the details of the report.

View

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Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed		
<input type="radio"/> BRITTANY TYPE 3 INVENTORY	BRIT TYPE 3 INVENTORY	<18 REMINDERS NOV 2019	10/22/2019	10/22/2019	11/01/2019	11/30/2019	3	23	<input type="checkbox"/>	Reprocess View
<input type="radio"/> BRITTANY TYPE 3 INVENTORY	BRIT TYPE 3 INVENTORY	18 YEARS OR YOUNGER 8.2019	10/18/2019	10/18/2019	01/01/2019	10/18/2019	22	23	<input type="checkbox"/>	Reprocess View

- Select the radio button for the report you’d like to view results for.

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Provider	Clinic	Run Name	Run Schedule Date
<input checked="" type="radio"/> BRITTANY TYPE 3 INVENTORY	BRIT TYPE 3 INVENTORY	<18 REMINDERS NOV 2019	10/22/2019
<input type="radio"/> BRITTANY TYPE 3 INVENTORY	BRIT TYPE 3 INVENTORY	18 YEARS OR YOUNGER 8.2019	10/18/2019

- Choose an export option from the bottom of the page to view the results. Each option is a different export format.

Unvaccinated Report	Report	Extended Report
Dymo Labels	Avery Labels	Postcard
Full Extract	Auto-Dialer Email Extract	Auto-Dialer Phone Number Extract