

Reminder/Recall

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.

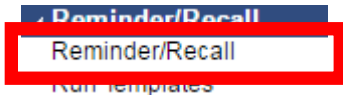
Why do you care about reminder/recall?

- 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 TennIIS can help you determine if your patient list is up-to-date.

Reminder/Recall

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

1. Click **Reminder/Recall** in the TennIIS 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.

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:

| 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 TennIIS. Schools, pharmacies, and local health departments cannot own patients in TennIIS. |
| 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. |

Reminder/Recall

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

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

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

| Field | Description |
|---|--|
| Patient Location | Filter patients by organization or facility. |
| Patient Age Range Patient Birth Date | <p>Only one of these two options can be selected. Patient age range is the default.</p> <p>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.</p> <p>For Patient Birth Date, enter the starting birthdate in the From field and the ending birthdate in the Through field.</p> |
| 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. |

Advanced

Advanced view options include physician, health plan, facility type, association, program, high risk category, state, county, region, zip code, appointment date, deferred vaccinations only, compromised vaccinations, and do not include confidential vaccinations. These allow you to apply more filters when selecting the patient list.

Reminder/Recall

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

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

Which vaccines would you like to include?

Select a series
?

CUSTOM

ADOLESCENT SERIES

HPV 3 DOSES

4:3:1:3:3:1:4 CHILDHOOD 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

| 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... | <p>Select a vaccination status for patients that applies to the selected vaccines:</p> <ul style="list-style-type: none"> 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!

Reminder/Recall

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.

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 Select notifications.

| | Last | First | Age | Vaccines Due | Available Contact Methods | R/R Attempts | Reason for Inactivation |
|-------------------------------------|------------|------------|-----|--------------|---------------------------|--------------|-------------------------|
| <input checked="" type="checkbox"/> | ▲ | ▼ | ▼ | ▼ | | ▼ | |
| <input checked="" type="checkbox"/> | DUMBLEDORE | ALBUS | 2 | 11 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | GRANGER | HERMIONE | 2 | 4 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | HAMILTON | ALEXANDER | 2 | 9 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | JEFFERSON | THOMAS | 2 | 7 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | LOVEGOOD | LUNA | 2 | 11 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | MADISON | JAMES | 2 | 10 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | MALFOY | DRACO | 2 | 7 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | PRINCESS | CINDERELLA | 2 | 6 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | SMITH | BECKY | 2 | 5 | | 0 | Select ▼ |
| <input checked="" type="checkbox"/> | WEASLEY | RON | 2 | 4 | | 0 | Select ▼ |

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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).

Reminder/Recall









































How do you review the patient reminder/recall list?

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"/> | ▲ | ▼ | ◆ | ◆ | | ◆ | |
| <input checked="" type="checkbox"/> | DUMBLEDORE | ALBUS | 2 | 11 |     | 0 | Select |
| <input checked="" type="checkbox"/> | GRANGER | HERMIONE | 2 | 4 |     | 0 | Select |
| <input checked="" type="checkbox"/> | HAMILTON | ALEXANDER | 2 | 9 |     | 0 | Select |
| <input checked="" type="checkbox"/> | JEFFERSON | THOMAS | 2 | 7 |     | 0 | Select |
| <input checked="" type="checkbox"/> | LOVEGOOD | LUNA | 2 | 11 |     | 0 | Select |
| <input checked="" type="checkbox"/> | MADISON | JAMES | 2 | 10 |     | 0 | Select |
| <input checked="" type="checkbox"/> | MALFOY | DRACO | 2 | 7 |     | 0 | Select |
| <input checked="" type="checkbox"/> | PRINCESS | CINDERELLA | 2 | 6 |     | 0 | Select |
| <input checked="" type="checkbox"/> | SMITH | BECKY | 2 | 5 |     | 0 | Select |
| <input checked="" type="checkbox"/> | WEASLEY | RON | 2 | 4 |     | 0 | Select |

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Export Patient List



Submit

6. To export the list of patients, click **Export Patient List** and follow the prompts.

7. When finished with the patient list, click **Submit** to save the changes. The next page is where you can select an action to use with the list.

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

Reminder/Recall

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.



What do you want to do with your selected recall group?



Generate A
Patient List



Print Letters



Generate Auto-
Dialer Content



Generate Mail-
Merge



Create
Custom Post
Cards



Create Avery
8387 Postcards



Print Labels



Save As a
Patient Group
(Cohort)



Send Email

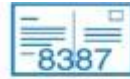
Reminder/Recall

How do you generate the notifications to send to patients?



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!