

Reminder/Recall Report

1. A Reminder/Recall report will go through all patients belonging to your organization/facility who have vaccinations in their forecast, and compile them in a list, based from criteria you choose.
2. Log into <https://ohioimpactsiiis.org/> - on the left-hand side, look for a blue-tab that says “Reminder/Recall”, click this tab, then select “Reminder/Recall” from the dropdown.
 - a. If you are missing this tab, the “keymaster” for your site can add this permission to your account “run reminder/recall”

Organization (IRMS): COLUMBUS CITY HEALTH DEPT (7577) Date: June 17, 2019

Reports > Use Templates > See Patient Groups >

Reminder/Recall

1 2 3

How do you want to run this Reminder/Recall?

Include Inactive Patients (Excluding deceased)

Due Date Timeframe: 1 Month or More Past Due

3. This will bring you to the Reminder/Recall criteria page.
4. The first block of questions ask if you want to include inactive patients, and how “past due” do you want your patient list to be. – I recommend “Due in 1 Month or Less” – this will populate all patients who will have an upcoming shot in 1 month, and everyone who is past due.

Reminder/Recall

1 2 3

How do you want to run this Reminder/Recall?

Include Inactive Patients (Excluding deceased)

Due Date Timeframe: Due In 1 Month or Less

5. The second block of questions will ask specifics about the population.
- a. You will have you choose a “patient location” or facility, if you are an organizational user. If you are just a facility user, it will come pre-filled.
 - b. It will ask for a “Patient Age Range” and “Patient Birth Date” – I recommend completing at least one of these sections. Both age ranges are “through” the age range, so if you choose the older age to be 18 years, this will count everyone who is up to 18 years and 364 days old.
 - c. Then it will ask about notifications – if this is your first time running the report, don’t worry about that question, just leave it how it is.
 - d. There is an “Advanced” tab, that will drop down and add even more criteria to search for, however, only “Zip Code” is functional with Ohio, so I wouldn’t worry about the “Advanced” tab too much.

The screenshot shows a web form titled "Who do you want to Contact?". The form includes the following fields and options:

- Patient Location:** A dropdown menu with "COLUMBUS CITY HEALTH.x" selected.
- Patient Age Range:** A radio button is selected. It consists of a numeric input field containing "1", a unit dropdown menu set to "Months", and another numeric input field containing "18". Below this is a "Years" dropdown menu with a close button (x).
- Patient Birth Date:** An unselected radio button followed by "From" and "Through" input fields.
- Patient Gender:** A dropdown menu with "Limit To..." selected.
- Exclude patients who were sent a notification in the last:** A "# of" input field followed by radio buttons for "Days" (selected), "Weeks", "Months", and "Years".

An "Advanced" button is located in the bottom right corner of the form area.

Continues to next page!

6. The next block of questions is asking what vaccines you want to look for, regarding missing doses.
7. It is going to say “Select a series” – there will be 3 options. The “1 Tdap, 1 MVP, 1 HPV” option is the current AFIX/IQIP requirements for 13-15 year olds. The “Pediatric Series” are all the vaccines for 24-35 month olds.
8. The “Custom” option will let you choose what vaccines you are looking for.
 - a. When choosing custom, a dropdown of all common childhood/adolescent vaccines will populate.
 - b. Click the checkbox next to the vaccine you want to create a report for. If you want to find individuals missing a specific dose number, you can enter it in the “enter a dose number” column, but it seems more helpful to just click the vaccine without the specific dose number restrictions.

Which vaccines would you like to include?

CUSTOM x ?

Check the box to select vaccine(s):		Enter a dose number (optional):
<input type="checkbox"/>	DTaP/DT/Td	[]
<input type="checkbox"/>	HIB	[]
<input type="checkbox"/>	POLIO	[]
<input type="checkbox"/>	HEP-B 3 DOSE	[]
<input type="checkbox"/>	MMR	[]
<input type="checkbox"/>	VARICELLA	[]
<input type="checkbox"/>	MENINGOCOCCAL	[]
<input type="checkbox"/>	HEP-A	[]
<input type="checkbox"/>	FLU	[]
<input type="checkbox"/>	PNEUMO (PCV)	[]
<input type="checkbox"/>	HEP-B 2 DOSE	[]
<input checked="" type="checkbox"/>	PNEUMO (PPSV)	[]
<input type="checkbox"/>	ROTAVIRUS	[]
<input type="checkbox"/>	HPV	[]
<input type="checkbox"/>	ZOSTER	[]
<input type="checkbox"/>	Tdap	[]
<input type="checkbox"/>	MENINGOCOCCAL B, RECOMBINANT	[]
<input type="checkbox"/>	MENINGOCOCCAL B, OMV	[]

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

9. Click the “Generate Patient List” box at the bottom right-hand side.
10. This may take a few minutes to pull the data. Once finished, a list of patients will pull. You can inactivate patients, you do not want to include on the list if you want, by dropping down the “reason for inactivation” dropdowns, but its not necessary.

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"/>			<1	7	   	0	Select
<input checked="" type="checkbox"/>			1	6	   	0	Select
<input checked="" type="checkbox"/>			1	7	   	0	Select
<input type="checkbox"/>			1	6	   	0	Inactive
<input checked="" type="checkbox"/>			<1	5	   	0	Select
<input checked="" type="checkbox"/>			<1	5	   	0	Select
<input checked="" type="checkbox"/>			1	9	   	0	Select
<input checked="" type="checkbox"/>			1	10	   	0	Select
<input checked="" type="checkbox"/>			<1	6	   	0	Select
<input checked="" type="checkbox"/>			1	7	   	0	Select

Showing 1 to 10 of 189 entries

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 Export Patient List  Submit

- You can “Export Patient List” – which will create an excel spreadsheet of all the patients missing the selected vaccine and it will also show what other vaccines that patient is missing. If you decide to export into an excel it may take a minute or two to pull.
 - Personally, I feel like this option is the most helpful.
- Or you can click “Submit” which will bring you to a table of choices to contact patients. This isn’t necessarily the best way to contact/remind patients, because our contact info is not always up to date or accurate. But there are a few options to directly contact patients, such as Email, or to mass print reminder letters. Feel free to click around to see how these different options work or give me a call if there are any questions!