

# Running Reminder/Recall in ALERT IIS

The ALERT IIS Reminder/Recall Report allows your clinic to pull a list of patients that are not up-to-date on their immunizations in ALERT IIS and contact them to schedule immunization visits. This guide provides step-by-step instructions for running the Reminder/Recall Report to improve COVID-19 immunization rates but can be applied to any immunization series. The example below addresses the completion of the COVID-19 series for adults ages 18 to 64 years old. For further assistance with this report contact the ALERT IIS help desk at 800-980-9431 or [alertiis@state.or.us](mailto:alertiis@state.or.us).

**NOTE:** Before starting reminder/recall, please read the “[Manage Your Active Patient List in ALERT/IIS](#)” guide. Accurate patient lists make reminder recall much more effective.

**Step 1:** From the Reports menu on the left-hand side, select “Reminder/Recall”.

The screenshot shows the ALERT IIS web application interface. The left-hand navigation menu is visible, with 'reminder / recall' highlighted in red and a red arrow pointing to it. The main content area shows announcements, release notes, and inventory reports.

**announcements:**

- 06/26/2015 ~ [Vaccine Accountability Report available to Super Users](#)
- 10/03/2014 ~ [new announcement](#)
- 09/15/2014 ~ [Do-it-yourself Password Reset is HERE](#)
- 03/12/2014 ~ [Immunize Oregon 2014 Round Tables](#)
- 11/20/2012 ~ [New State-Supplied Vaccine Ordering Functionality](#)
- 04/13/2011 ~ [ALERT IIS Manual Coming Soon](#)

**release notes:**

- 12/06/2020 ~ [Release Version 5.8.0](#) COVID-19, order tiers, HL7, report fixes  
[more release notes](#)

**Vaccine Order/Transfer Notification ...**

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	No Order Notification		
Transfer(s)	1	0	2

**Active Inventory that is Going to Expire or Expired Lots with a Quantity ...**

Site Name	Trade Name	Lot Number	Funding Source	On Hand	Exp Date
LAByrinth Medical Center	Fluzone	012010	State-Supplied	20	12/15/2021

**Inventory that is Running Low by Vaccine Group ...**

Vaccine Group	Funding Source	Quantity On Hand
No vaccine groups have a low inventory.		

**Inventory that is Running Low by Trade Name ...**

Trade Name	Funding Source	Quantity On Hand
Pediarix	State-Supplied	0

**Step 2: Select Patient Population** allows you to choose which patients the reminder/recall includes. It is easiest to select “Patients Associated with Your Clinic”. Should you need to further specify other filter options are available.

**Select Patient Population ...**

Patients Associated with LAByrinth Medical Center

Remove out of state addresses

Patients Residing in Selected County

Patients Associated with LAByrinth Medical Center or Residing in Selected County

Available Counties

Patients Associated with ROSTER LIST

Patients Associated with Selected Organization(s)

**Organization Name**

LABYRINTH MEDICAL CENTER

**Selected Organization(s)**

Add >

Add All >>

< Remove

<< Remove All

**Step 3: Select “Enter new Reminder Recall Request Criteria”.** Enter the name of your reminder recall criteria in the box provided. This will allow you to save your reminder recall settings to use and edit at a later date. Saved reminder recall settings will appear in the “Use a previous Reminder Recall Request Criteria” drop-down menu. In this example, we are setting up a new reminder recall named “COVID-19”.

**Reminder/Recall Request**

**Create New List ...**

Enter new Reminder Recall Request Criteria  List Name

Use a previous Reminder Recall Request Criteria

**Step 4: Indicate the tracking Schedule** that will be used for the Reminder Recall. Select “Use Tracking Schedule Selected for All Patients” and pick “ACIP” from the drop-down menu. The ACIP schedule should always be used when running reminder recall because all national assessment standards are based upon the ACIP schedule.

Indicate the Tracking Schedule ...

Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients ACIP ▾

**Step 5: Select the vaccines that you want to run the Reminder/Recall for** by highlighting the vaccine name and clicking add. In this example, we’ve selected COVID-19. ALERT will return all patients missing at least one dose from the vaccine groups that you select.

Select the Vaccine Groups for Recall ...

*These are the vaccines for which you want to conduct reminder/recall.*

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno  
Anthrax

Add Remove

COVID-19

**Step 6: Select either “Vaccines Due Now”, “Vaccines Past Due, or “Both”.** “Vaccines Due Now” will include any vaccines that the patient is currently in the recommended age range for. “Past Due” includes vaccines that a patient is still eligible to receive, but that a patient is older than the recommended age range for. “Both” includes all vaccines that a patient is eligible to receive. We recommend selecting “Both” to ensure that your reminder recall covers as many individuals as it can.

Vaccines Due Now

Vaccines Past Due

Both

**Step 7: Leave the next three fields blank**, they apply to specialty reminder recall lists only. The “Use Subpotent Vaccinations” applies to vaccines that have been marked as subpotent due to a temperature excursion or other damage to the vaccine. The “School and Primary Care Provider” section allows you to limit the recall population to patients assigned to a specific school, or primary care provider in ALERT. This feature only works if your clinic’s Super User has set this up in ALERT IIS and will be blank otherwise. “Additional demographic Criteria” can be used to limit your recall population by city, zip code, or county.

The screenshot shows a form section titled "Select Subpotent Recall ...". It contains three main areas: 1. A checkbox labeled "Use Subpotent Vaccinations" which is currently unchecked. 2. A section titled "Select the School & Primary Care Provider ..." containing two dropdown menus: "School" and "Provider (PCP)". 3. A section titled "Enter Additional Demographic Criteria ..." containing three input fields: "City" (text), "Zip Code" (text), and "County" (dropdown).

**Step 8: Select a date range.** You may filter patients by either target date, or birth date. Entering a target date will return patients with vaccines that are due, past due, or both within the target date range you select. Entering a Birth date range will return patients who were born within the range you select. For this example, we will be using Age Range, we are recalling patients who are 18 to 64 years old on today’s date.

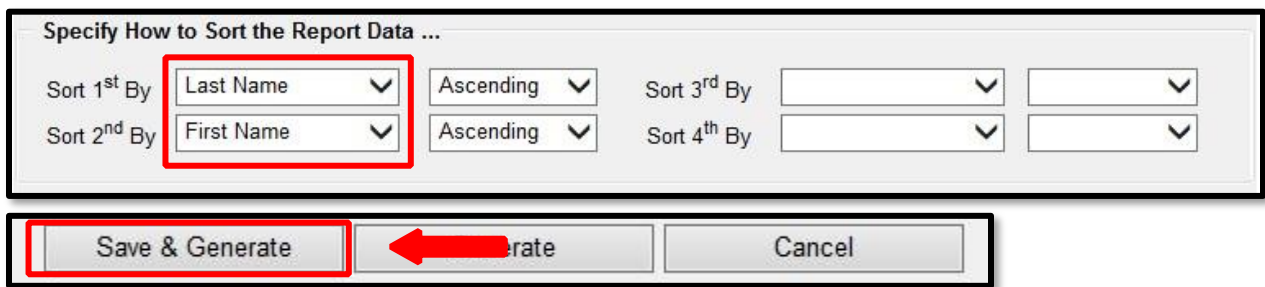
**NOTE:** If your clinic is going to implement regular reminder recall it is simplest to recall a smaller age range. For example, you could recall by birth date all individuals turning 18 years of age in the last month. This ensures that all patients have their records reviewed.

The screenshot shows two form sections. The top section is titled "Enter the Target Date ..." and contains a "Target Date Range" with "From:" and "Through:" fields, each with a calendar icon. A note below reads: "NOTE: If Target Date is blank, today's date will be used." The bottom section is titled "Select Age or Birth Date Range ..." and contains two radio button options: "Birth Date Range" (unselected) and "Age Range" (selected). The "Age Range" option is highlighted with a red box. It includes "From:" and "Through:" fields, each with a number input and a "Years" dropdown menu. The "From:" field contains the number "18" and the "Through:" field contains the number "64".

**Step 9: Select the vaccine groups you would like to display.** Select “Use All Vaccine Groups”. Patients on the reminder recall list may be missing doses from vaccine groups in addition to the vaccines you selected in Step 4. Selecting this feature will list all doses a patient is missing, rather than just those you have selected previously.

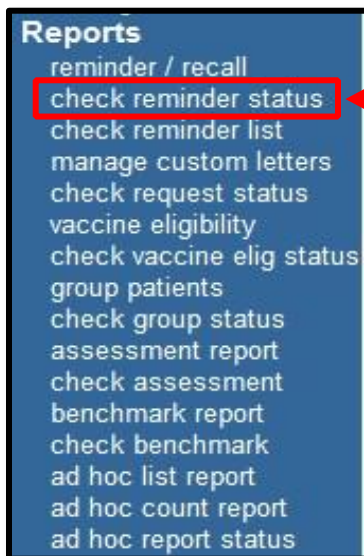


**Step 10: Specify how you would like your list sorted.** The default selection is to sort alphabetically by last name. You can also sort by first name, school, provider, or county.



**Step 11: Click Save & Generate.** This will generate your reminder recall list and save the criteria you have set so that you can use them at a later date. You should be redirected to the Reminder Request status page which can be accessed by selecting “**Check Reminder Status**” in the reports menu on the left hand side of the screen.

**NOTE:** When using previously saved reminder recall criteria, the only thing you will have to change is the birth date range. All other reminder recall criteria can be re-used for future recalls.



**Step 12:** Reports in ALERT IIS run in the background and will not complete until you click the “Refresh” button.

Reminder Request Status						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
09/20/2021 12:05 PM		QUEUE		09/20/2021	09/20/2021	

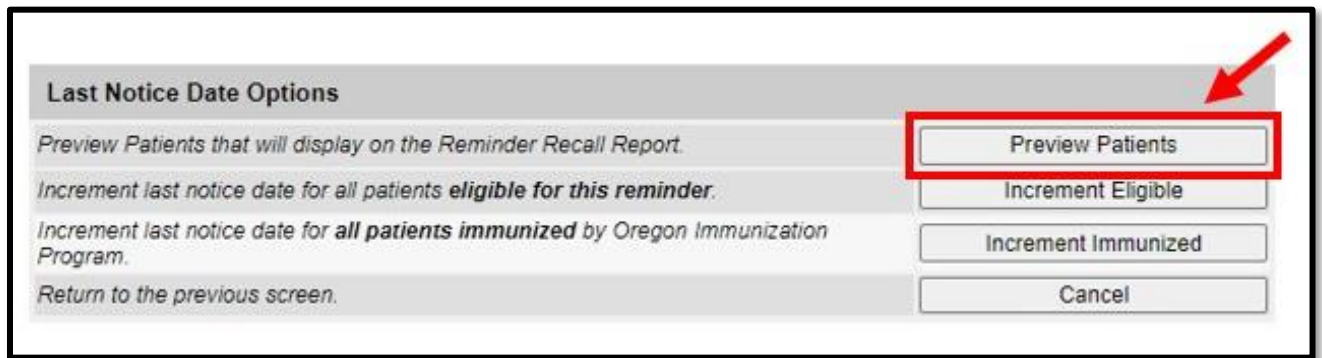
**Step 13:** Once it’s ready, the status will show “100%” and the time and date will turn into a blue hyperlink

Reminder Request Status						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
<a href="#">09/20/2021 12:05 PM</a>	09/20/2021 02:00 PM	100 %	4983	09/20/2021	09/20/2021	

**Step 14:** This is the final stage of generating reminder/recall. First, you can review the process summary which shows how it narrowed down your clinic population to those who will receive notices. This can be a useful step if your recall list is too large. If that happens, consider narrowing down the recall criteria to the vaccines that your patients are least likely to be up-to-date for. To find this information, you can run an ALERT IIS Assessment report.

Reminder Request Process Summary		
Reminder Request Criteria Name: C19		
Step	Criteria Evaluated at this Step	Patients
1	Patients <b>associated</b> with <i>Oregon Immunization Program</i> .	416024
2	Patients <b>immunized</b> by <i>Oregon Immunization Program</i> .	414538
3	Patients that are <b>active</b> within <i>Oregon Immunization Program</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>• Patients <b>with age range from: 18 Years to: 64 Years</b>;</li> <li>• <b>School</b> is not specified;</li> <li>• <b>Provider</b> is not specified.</li> </ul>	149133
4	Patients that have a <b>Valid Address</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>• <b>City</b> is not specified;</li> <li>• <b>Zip Code</b> is not specified.</li> </ul>	145790
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> <li>• Patients that are <b>Due Now or Past Due</b> for one or more vaccinations as of 09/20/2021;</li> <li>• Use the following <b>vaccine groups: COVID-19 and</b> ;</li> <li>• Use <b>tracking schedule</b> associated with each patient.</li> </ul>	4983
<b>Total Number of Patients Eligible for Reminder</b>		<b>4983</b>

**Step 15:** Before you finalize reminder/recall, you might find it helpful to review the patients who will receive notices. Scroll to the bottom of the screen and click the “Preview Patients” button.



**Last Notice Date Options**

Preview Patients that will display on the Reminder Recall Report.

Increment last notice date for all patients **eligible for this reminder**.

Increment last notice date for **all patients immunized** by Oregon Immunization Program.

Return to the previous screen.

Preview Patients

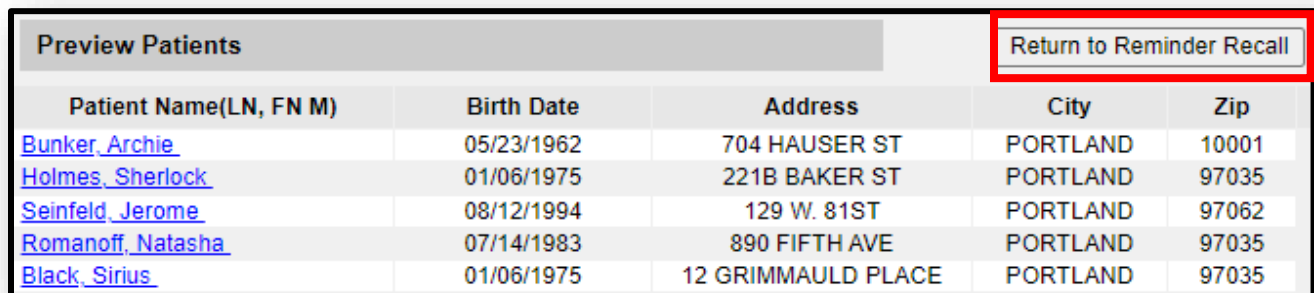
Increment Eligible

Increment Immunized

Cancel

**Step 16:** From the “Preview Patients” screen you can click on the patient name to view and edit the patient record and contact information. You can also inactivate patients from this list if they are no longer at your clinic. Click on “Return to Reminder Recall” to return to the previous screen.

**NOTE:** The patient preview will only be available for 24 hours after you generate the reminder/recall. You can use this feature to recall patients with phone calls if you are going to do it the same day that you run the report.



**Preview Patients**

Return to Reminder Recall

Patient Name(LN, FN M)	Birth Date	Address	City	Zip
<a href="#">Bunker, Archie</a>	05/23/1962	704 HAUSER ST	PORTLAND	10001
<a href="#">Holmes, Sherlock</a>	01/06/1975	221B BAKER ST	PORTLAND	97035
<a href="#">Seinfeld, Jerome</a>	08/12/1994	129 W. 81ST	PORTLAND	97062
<a href="#">Romanoff, Natasha</a>	07/14/1983	890 FIFTH AVE	PORTLAND	97035
<a href="#">Black, Sirius</a>	01/06/1975	12 GRIMMAULD PLACE	PORTLAND	97035

**Step 17:** Reminder Recall output options. You can use reminder recall to send recall letters and postcards, or call patients using ALERT IIS information or looking them up in your EHR. For additional help with outputs please contact the ALERT IIS helpdesk or review our tip sheet on custom letters.

- Use the “Reminder Letter” feature to send a basic form letter to each patient including their immunization history, and doses that they are currently due for. Make sure to enter your clinic’s phone number so that patients will know what number to call when scheduling appointments.
- Use the “Reminder Card” feature to send a postcard to patients with the immunizations that they are due to receive. Make sure to verify that this doesn’t violate your clinic’s privacy policies before you use this option.
- Use the “Mailing Labels” option to print address labels to save time on addressing envelopes.

- Use the “Patient Query Listing” to generate a PDF of patients, their contact information, and the doses that they need to be up to date. This is a useful feature if you are going to call patients using the contact information in ALERT.
- Advanced Excel users can use the “Extract Client Data” to import the reminder recall information into Excel in an XLSX format. For questions about this feature please contact the ALERT IIS help desk.
- If you have added a custom letter to your reminder recall report, it will appear here as well. In this example, the custom letter is named COVID-19. Custom letters allow you to write the text, pick which information is included, and develop the format for a reminder recall letter. We recommend this over the “Reminder Letter” feature. If you have questions about creating custom letters, please refer to our “Custom Letters for Reminder/Recall in ALERT IIS” guide.

Reminder Request Output Options		
Output	Description	Additional input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name <input type="text"/>
<a href="#">Extract Client Data</a>	Extract client data in XLSX format.	Report Name <input type="text"/>
<a href="#">COVID-19StatewideR/R.kl</a>	Global Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>
<a href="#">Statewide recall</a>	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>