

## 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 2-year-old immunization rates, but can be applied to any age group of vaccine series. The example below addresses completion of the 4:3:1:3:3:1:4 series by 2 years of age (4 DTaP, 3 Polio, 1 measles, 3 Hib, 3 Hep B, 1 Varicella, and 4 Pneumococcal). 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.

**NOTE:** Reminder recall should be run in Internet Explorer set to “Compatibility View”. Known issues exist with Firefox and Chrome.

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

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organization MEDICAL CLINIC • user Rex Larsen • role Standard User

announcements:

- NEW 02/01/2016 ~ [February 2016 ALERT IIS recall reports now available](#)
- NEW 12/10/2015 ~ [ALERT IIS Software Release Sunday 12/13](#)
- NEW 09/28/2015 ~ [Forgot Password Button](#)
- NEW 06/26/2015 ~ [Vaccine Accountability Report available to Super Users](#)
- NEW 10/23/2014 ~ [Changes to security settings for ALERT IIS website](#)
- 04/20/2011 ~ [New Users! Welcome to Oregon's ALERT IIS - Please Read!](#)

release notes:

- NEW 12/15/2015 ~ [Release Version 4.0.0](#) Release Notes [more release notes](#)

Vaccine Order/Transfer Notification ...

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

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
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**Step 2: 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 “19 month”.

**NOTE:** There are several options of when you can run reminder recall to improve immunization rates at 24 months of age. Two recommended ages for reminder/recall are 13 and 19 months of age. 13 month reminder/recall ensures that kids have completed all of the shots they were supposed to have received during the first year of life. When kids are missing multiple vaccines in a series such as DTaP the vaccine schedule may require 6 months between doses to bring them up to date. Running reminder/recall at 13 months ensure that patients don’t fall too far behind. 19 month reminder recall allows your clinic to catch up kids who missed doses at the 15 or 18 month well child visit.

**Reminder/Recall Request**

Create New List ...

Enter new Reminder Recall Request Criteria  List Name

Use a previous Reminder Recall Request Criteria

**Step 3: 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

**Step 4: 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 all of the vaccines included in the 4:3:1:3:3:1:4 series (DTaP, Polio, measles, Hib, Hep B, Varicella, and Pneumococcal). ALERT will return all patients missing at least one dose from the vaccine groups that you select.

**Select the Vaccine Group To Report on ...**

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno  
Anthrax

Add  
Remove

DTP/aP  
HepB  
Hib

**Step 5: 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 kids as it can.

Vaccines Due Now  
 Vaccines Past Due  
 Both

**Step 6: 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.

Select Subpotent Recall ...  
 Use Subpotent Vaccinations

Select the School & Primary Care Provider ...  
School  Provider (PCP)

Enter Additional Demographic Criteria ...  
City  Zip Code  County

**Step 7: 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 a birth date range. In this example, we are recalling patients who are at least 19 months old on today's date.

**NOTE:** If your clinic is going to implement regular reminder recall it is simplest to recall an entire birth month at a time. There is no need to calculate exact birth date ranges, as long as the kids in the recall cohort are all at least the target age. For this example I would recall all kids born in July 2014 this month, and then at the beginning of next month, recall all kids born in August 2014. This ensures that all patients have their records reviewed after they turn 19 months old.

**Enter the Date Criteria ...**

Target Date Range	From	<input type="text"/>		To	<input type="text"/>	
Birth Date Range	From	07/01/2014		To	07/31/2014	

*NOTE: If Target Date is blank, today's date will be used.*

**Step 8: 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.

**Select the Vaccine Groups to Display ...**

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno		Add	<input type="text"/>
Anthrax		Remove	

**Step 9: 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.

Specify How to Sort the Report Data ...

Sort 1 <sup>st</sup> By	Last Name	Ascending	Sort 3 <sup>rd</sup> By		
Sort 2 <sup>nd</sup> By	First Name	Ascending	Sort 4 <sup>th</sup> By		

Save & Generate   Generate   Cancel

**Step 10: 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.

- Reports
  - reminder / recall
    - check reminder status
    - check reminder list
    - manage custom letters
    - check request status
    - vaccine eligibility
    - check vaccine elig status
    - group patients
    - check group status
    - assessment report
    - check assessment
    - benchmark report
    - check benchmark
    - ad hoc list report
    - ad hoc count report
    - ad hoc report status

**Step 11: Reports in ALERT IIS run in the background and will not complete until you click the “Refresh” button.**

organization PEDIATRIC CLINIC PC • user Rex Larsen • role Standard User

Reminder Request Status

Started	Completed	Status	Patients	Target From	Target To	Cancel
03/04/2016 10:18 AM		QUEUE		03/04/2016	03/04/2016	

Refresh

**Step 12:** Once it's ready, the status will show "100%" and the time and date will turn into a blue hyperlink

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<b>Reminder Request Status</b>						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
<a href="#">03/04/2016 10:24 AM</a>	03/04/2016 10:24 AM	100 %	47	03/04/2016	03/04/2016	

**Step 13:** 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. One common vaccine to focus on for patients under two is DTaP.

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<b>Reminder Request Process Summary</b>					
<b>Reminder Request Criteria</b>					
Step	Criteria Evaluated at this Step				Patients
1	Patients associated with [redacted] PEDIATRIC CLINIC PC.				22692
2	Patients immunized by [redacted] PEDIATRIC CLINIC PC.				21190
3	Patients that are active within [redacted] PEDIATRIC CLINIC PC and allow Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none"> <li>• Patients born between 07/01/2014 and 07/31/2014;</li> <li>• School is not specified;</li> <li>• Provider is not specified.</li> </ul>				63
4	Patients that have a Valid Address. Additional criteria includes: <ul style="list-style-type: none"> <li>• City is not specified;</li> <li>• Zip Code is not specified.</li> </ul>				63
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> <li>• Patients that are Due Now or Past Due for one or more vaccinations as of 03/04/2016;</li> <li>• Use the following vaccine groups: MMR, DTP/aP, HepB, Hib, Polio, PneumoConjugate and Varicella;</li> <li>• Use ACIP for all patients.</li> </ul>				47
<b>Total Number of Patients Eligible for Reminder</b>					<b>47</b>

**Step 14:** 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.

Preview Patients

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

Increment Eligible

Increment last notice date for **all patients immunized by**  PEDIATRIC CLINIC PC.

Increment Immunized

Return to the previous screen.

Cancel

**Step 15:** 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="#">Starkey, Richard</a>	07/07/2000	800 NE OREGON ST	PORTLAND	97232
<a href="#">Zimmerman, Robert</a>	05/24/1998	800 NE OREGON ST	PORTLAND	97232
<a href="#">Elliott, Cass</a>	09/19/1996	800 NE OREGON ST	PORTLAND	97232

**Step 16:** 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 clinics 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 in 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 XML 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 19 Month. 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" value="555-123-4567"/>
<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 XML format.	Report Name <input type="text"/>
<a href="#">19 Month</a>	Custom Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/>