ALERT IIS Reminder/Recall Report Handout

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What is the Reminder/Recall Report?

The ALERT IIS Reminder/Recall Report provides a list of patients that are due or overdue for a recommended vaccine. This list can be used to contact your patients to schedule immunization visits. It is accessible to Standard and Super Users.

This report can be combined with the Assessment and Benchmark reports for better patient reporting.

TIP: For best results, update your active patient list using the [Ad Hoc List report](#) in ALERT IIS.
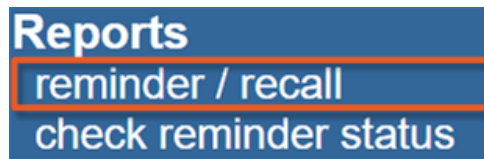
Why Run the Reminder/Recall Report?

Using the reminder/recall report support immunization quality improvement work. It helps raise immunization coverage levels and reduces missed opportunities to vaccinate.

TIP: Make running the report a natural part of your work; bundle it with other monthly tasks.

How to Run the Reminder/Recall Report?

Step 1: Click **reminder/recall** located under Reports in the left-side menu panel.

Step 2: **Create New List or Use a Previous List**
Option 1 – Enter new Reminder Recall Request Criteria. This option will allow you to create a new set of report criteria. Name the recall criteria in the box provided. Choose a simple name that describes the report.
Option 2 – Use a previous Reminder Recall Request Criteria. This option will allow you to choose a previous used set of report criteria from the drop-down menu.

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.
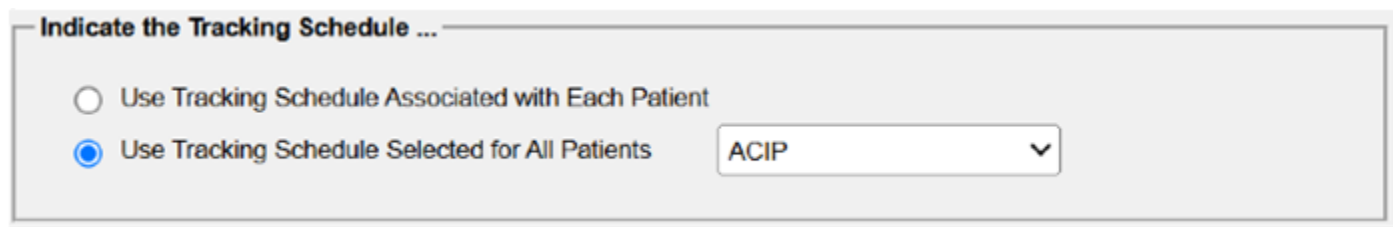

NOTE: There are several options of when you can run reminder recall to improve immunization rates at 24 months of age. Two recommended ages for reminder/recall are 13 and 19 months of age. 13-month reminder/recall ensures that kids have completed all of the shots they were supposed to have received during 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.

Step 3: **Select Patient Population -** We recommend leaving the default option but you can select a different patient population from the available options.
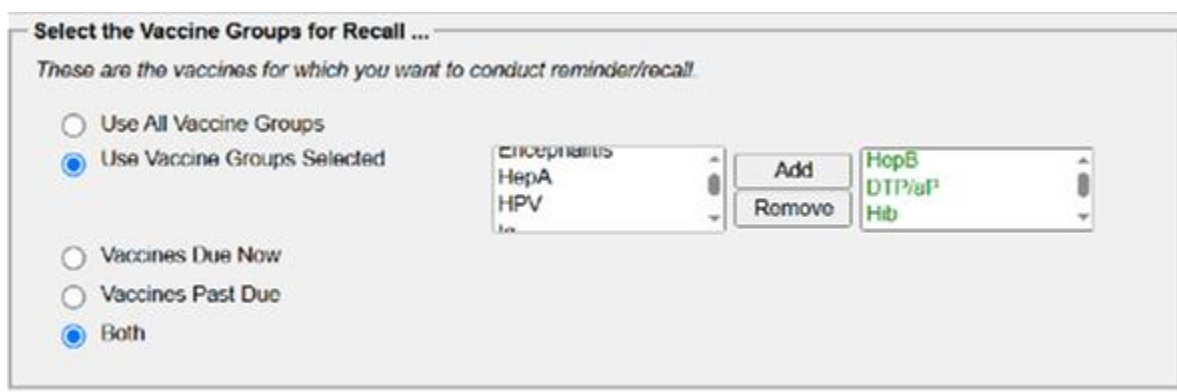
Step 4: **Indicate the Tracking Schedule** - Select the second option to "use tracking schedule selected for all patients." Choose ACIP from the drop-down menu. The ACIP schedule should always be used when running reminder/recall because all national assessment standards are based upon the ACIP schedule.

Step 5: **Select the Vaccine Group for Recall** - You can choose between including all vaccine groups or select the specific vaccines that you want to run the Reminder/Recall for by highlighting the vaccine name and clicking add. "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. We recommend selecting "Both" to ensure that your reminder/recall covers all patients you are due or past due for a vaccine.

Step 6: **Leave the next three fields blank** - They fields 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.

Step 7: **Select the Target Date, Birth Date, or Age Range -** 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.

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.

Calculating Birth Date Range:

To calculate for a 19-month rolling cohort:
Start date: Subtract 2 years from today's date. Add 5 months. Use the first day of that month.
11/15/2024 - 2 years = 11/15/2022 + 5 months = 04/15/2023   *04/01/2023*
End date: Use the last day of the same month and year as above.   *04/30/2023*

To calculate for 11–12-year-olds:
Start date: Take the *oldest* age you're after, add 1, subtract that from the current year, and add one day.
12+1=13   2024-13= 2011   *11/15/2011*
End date: Take the *youngest* age you want and subtract that number from the current year.
2024 – 11 = 2013   *11/14/2013*

Step 8: **Select Additional Vaccines to Forecast** - Select "Use All Vaccine Groups". This will include all doses a patient is missing, in additional to those selected previously.

Step 9: **Specify How to Sort Report Data and Save & Generate** - The default selection is to sort alphabetically by last name. You can also sort by first name, school, provider, or county.

There are two save options:
- Save & Generate - This will generate the reminder/recall list and save the criteria for future use.
- Generate - Generate will create a one-time report but will not save the criteria.

Reminder Request Status

After generating the report, you'll be redirected to the Reminder Request status page.

Depending on the search criteria and patient population it may take a while to generate the report. Click refresh to update report status. Once it's ready, the status will show "100%."

Click the blue hyperlink date and time to access report.

As the reports are generating you can move to other areas of ALERT IIS.

To return to the report status click "Check Reminder Status" in the reports menu on the left-hand side of the screen. Reports are kept for seven days.

reminder / recall
check reminder status
check reminder list
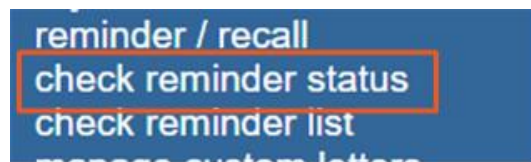
Understanding the Reminder/Recall Report

Process Summary

At the top of the report is the Reminder Request Process Summary. This section shows how ALERT IIS narrowed down your clinic population, based on the report criteria, 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: 2 4 YEAR OLD		
Step	**Criteria Evaluated at this Step**	**Patients**
1	Patients **associated** with *ALERT CLINIC 3*.	49
2	Patients **immunized** by *ALERT CLINIC 3*.	46
3	Patients that are **active** within *ALERT CLINIC 3* and **allow Reminder & Recall Contact**. Additional criteria includes: • Patients **with age range from: 2 Years to: 4 Years**; • **School** is not specified; • **Provider** is not specified.	33
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified.	29
5	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now or Past Due** for one or more vaccinations as of 04/30/2025; • Use the following **vaccine groups: DTP/aP, Hib, HepB and** ; • Use **ACIP** for all patients.	27
	Total Number of Patients Eligible for Reminder	27

Preview Patients

Before you finalize reminder/recall, you might find it helpful to preview the patients who will receive notices. Scroll to the Last Notice Date Option section at the bottom of the screen. A good option if your list of patients is small.

If you find inactive or no-longer patients, use the [Ad Hoc report](#) to update your patient population. *You can click on the patient's 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.*

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.

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 ALERT CLINIC 3.	Increment Immunized
Return to the previous screen.	Cancel

Reminder Request Output Options

ALERT IIS generates several patient contact options. You can send recall letters and postcards or call patients using ALERT IIS information or looking them up in your EHR.

Reminder Request Output Options

Output	Description	Additional input	
Reminder Letter	Standard Reminder Letter.	Duplex Printing	☐
		Report Name	
		Free Text	
		Phone #	
Reminder Card	Standard Reminder Card (4x5).	Report Name	
		Free Text	
		Phone #	
Mailing Labels	Avery 5160 Mailing Labels.	Report Name	
Patient Query Listing	A list of patients based on the report criteria.	Report Name	
Extract Client Data	Extract client data in XLSX format.	Report Name	
R/R letter	Custom Letter.	Duplex Printing	☐
		Report Name	

- 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.
- Use the "Extract Client Data" to import the reminder recall information into Excel in an XML format. Click the Forecasting tab on the bottom to see the recommended vaccines.
- Use the "Custom Letter" option to write a tailored letter template for your organization. It can include clinic contact information, immunization history and immunizations due, and space to write a general message to your patients. We recommend this over the "Reminder Letter" feature. To learn how to make a custom letter see the Creating a Custom Letter for Reminder/Recall tipsheet.

Resources –

If you need help or have a question visit the OIP website or contact our OIP Help at alertiis@odhsoha.oregon.gov or 1-800-980-9431.

Tipsheets:

- Ad Hoc List report
- Ad Hoc report
- Creating a Custom Letter for Reminder/Recall