

Patient Reminder/Recall



New Mexico State Immunization Information System (NMSIIS) Reminder

February 06, 2020

Reminder Criteria			
Reminder Run Name: TRN TEST	Run Schedule Date: 02/20/2019	Run Completed Date: 02/20/2019	
	Reminder Date From: 01/01/2019	Reminder Date Through: 01/31/2019	
	# of Patients in Run: 0	# of Patients Assessed: 0	
Vaccine Series: H1N1-09 - All			
Other Criteria: Only Include Patients With Address (i.e., Street Address, City, State, Zip)? Y Include Patients Due For Vaccinations (Reminders)? Y Include Patients Overdue For Vaccinations (Recalls)? Y			
Provider: DR. POISON IVY			
Clinic: TEST CLINIC		Age Range From (years): 18	Age Range Through (years): 32
School Dist: ALL SCHOOL DISTRICTS	School: ALL SCHOOLS	VFC Eligibility:	
City:	County:	Zip:	Gender: Both

County: Home Phone:
Work Phone:
Cell Phone:

Gender: Email:
Reminder Date: Age At Date: Primary Contact: Relationship:
VFC Eligibility: Most Recent Refusal:
Default Clinic: () Primary Insurance:
Most Recent Immunization Date: Most Recent Immunization Clinic:
Immunization History:

Name	Contact Info	Immunization Recommendations
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Reminder/Recall Vaccine Summary

Vaccine	Number
Total Remaining Vaccinations Due:	
Total Patients Remaining Due for Vaccinations:	
Total Patients with New Vaccinations:	
Total Patients Combined or Marked as Deleted:	
Total Patients Originally Due for Vaccinations:	

NOTE: Patients Combined or Marked as Deleted are not displayed.



**New Mexico State Immunization Information System
(NMSIIS)**

February 08, 2020

Unvaccinated Report

Reminder Criteria			
Reminder Run Name: TRN TEST	Run Schedule Date: 02/20/2019	Run Completed Date: 02/20/2019	
	Reminder Date From: 01/01/2019	Reminder Date Through: 01/31/2019	
	# of Patients in Run: 0	# of Patients Assessed: 0	
Vaccine Series: H1N1-09 - AI			
Other Criteria: Only Include Patients With Address (i.e., Street Address, City, State, Zip)? Y Include Patients Due For Vaccinations (Reminders)? Y Include Patients Overdue For Vaccinations (Recalls)? Y			
Provider: DR. POISON IVY			
Clinic: TEST CLINIC	Age Range From (years): 18	Age Range Through (years): 32	
School Dist: ALL SCHOOL DISTRICTS	School: ALL SCHOOLS	VFC Eligibility:	Gender: Both
City:	County:	Zip:	

County: Home Phone:
Work Phone:
Cell Phone:

Gender: Email:
Reminder Date: Age At Date: Primary Contact: Relationship:
VFC Eligibility: Most Recent Refusal:
Default Clinic: () Primary Insurance:
Most Recent Immunization Date: Most Recent Immunization Clinic:
Immunization History:

Name	Contact Info	Immunization Recommendations
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Reminder/Recall Vaccine Summary

Vaccine	Number
Total Remaining Vaccinations Due:	
Total Patients Remaining Due for Vaccinations:	
Total Patients with New Vaccinations:	
Total Patients Combined or Marked as Deleted:	
Total Inactive Patients:	
Total Patients Originally Due for Vaccinations:	

NOTE: Only Patients Remaining Due for Vaccinations are displayed.

About the Report

The *Patient Reminder/Recall* report is used to identify patients that have missed or are coming due for scheduled vaccinations. It is a tool for providers to improve their vaccination coverage rate by identifying patients in need for immunization services. The *Patient Reminder/Recall* report provides a static snapshot of the data during a specified time. Immunizations administered after the *Patient Reminder/Recall* report has been generated will not be reflected on that particular run. Please keep this in mind when sending out information to patients based off this report.

This report can be run by all clinic users who have been granted permission to run the report. Clinics may need to undergo a data quality review in order to be allowed permission to run the report. To assist in the data quality review process, it is helpful to run the *Possible Duplicate Patient Vaccinations*, *Vaccines Added but Not Administered*, *Patient Roster*, and the *Possible Patients Duplicates* report prior to running the *Reminder/Recall* report. Once a reminder/recall has been scheduled, it will run as a nightly job to prevent the webIZ from slowdowns during regular business hours. Reminder/Recalls are most effective when carried out regularly and consistently.

A version of this report is available to local public health agencies (LPAs) and schools. LPAs can run this report for patients in specific counties or zip codes. Please contact the NMSIIS Helpdesk for more information at [1-833-882-6454](tel:1-833-882-6454) or [505-827-6454](tel:505-827-6454)

Running the Report

The main screen of this report lists all previous reminder/recall lists. This is displayed chronologically with the most recent report appearing first. Once again, please note, all *Reminder/Recall* reports are run overnight and are available to users the following day.

To create a new reminder/recall follow the steps below:

Step 1: Click on the "Add Reminder/Recall Run" button to guide you to a new screen.

Step 2: Enter a "Run Name." This is used to identify a specific reminder/recall run on the main reminder/recall listing screen.

Step 3: Verify the correct "Provider" and "Clinic" are selected from the drop-down menu. Users may have access to more than one provider or clinic depending on their settings in CIIS.

Step 4: Enter a date in the "Run Scheduled Date." Please note, the "Run Complete Date" is a read-only, system populated date when the report is completed. This field cannot be changed.

Step 5: Enter a date into the “From” and “Through” fields of the “Reminder/Recall Date Range.” These fields restrict the list of patients to only those who need a vaccination within these parameters.

Step 6: Specify an “Age Range” by entering a value in the “From” and “Through” fields in this section. Use the drop-down menu to select a Unit of Measurement (UOM). The UOM can be in months or years.

Step 7: Use the “Options to Target Patients Included for Reminder/Recall” section to restrict the reminder/recall to specific user defined parameters.

This section includes the following options:

- *Gender*: Male or Female
- *Ignore Settings for the "Do not Include Patients in Reminder/Recall"* - This references patient with the "Do not Include Patients in the Reminder/Recall" option checked in the patient's demographic screen in CIIS. Selecting this option overrides this setting and includes these patients in the *Reminder/Recall* report.
- *Only Include Patients with Address*: Limits the patient list to those who have complete addresses on file.
- *Increment Patient Reminders/Recall Count*: Select this option to indicate that this reminder/recall should be included when counting the number of Reminder/Recalls for a patient. The number of "countable" reminder/recalls are utilized in other areas of the application that provide functionality to inactivate patients or exclude patients with "X" number of reminder/recalls without a response.
- *Exclude Patients after a Number of Reminder/Recalls without Subsequent Vaccination*: Enter a number into this field to indicate that patients with "X" number of reminder/recalls without a vaccination will be excluded from the reminder/recall. This ties into the option to *Increment Patient Reminder/Recall Count*. Only those reminder/recalls that are counted towards the patient reminder/recall total will be examined here.
- *Generate Reminder/Recall Event?* : If selected, the reminder/recall processing will create a system-generated event on the *Patient Events* screen for each patient included in the results.
- *Include Patients Due for Vaccinations (Reminders)?* Check this to include patients coming due for one or more vaccinations within the minimum and maximum date range selected. To run the *Reminder/Recall* report, you must select Reminder, Recalls, or both.
- *Include Patients Overdue for Vaccinations (Recalls)?* Check this option to include patients who are overdue for one or more vaccinations within the minimum and maximum date ranges specified by the user. This feature has an optional field to narrow the report to patients that fall into the "Minimum Number of Days Past Due Include" to the "Maximum Number of Days Past Due Include" range. To run the *Reminder/Recall* report, you must select Reminder, Recalls, or both.
- *Exclude Patients with less than 2 Non-Influenza/H1N1 Vaccinations?* This selection is automatically check-marked and

will exclude patients that do not have at least two non-influenza or H1N1 vaccinations from the report. Users can choose to remove this check mark to include these patients in the results.

- *Exclude Patients With One or More Vaccine Refusals?* By selecting this checkbox, patients that have one or more vaccine refusals in WebIZ will be excluded from the results.
- *Vaccine Series and Optional Dose* selects the vaccine series that should be assessed in the *Reminder/Recall* report. Only patients needing an immunization from the selected series will be included. Optionally, you can specify the specific dose within the series. In this case, only patients who needed dose "X" of the vaccine will be included in the report (e.g. selecting Varicella series and entering "2" in the dose field, will restrict the results to patients needing a second dose of the Varicella vaccine). Leave the dose field blank to include patients who need a vaccine from the indicated series without restricting the results to a specific dose.

Patient Reminder/Recall Cancel Add Reminder/Recall Run

View

Provider/Clinic : DR. POISON IVY, ALL CLINICS
SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	Reminder/Recall From Date	Reminder/Recall Through Date	# of Patients in Run	# of Patients Assessed	
DR. POISON IVY	TEST CLINIC	TRN TEST	02/20/2019	02/20/2019	01/01/2019	01/31/2019	0	0	? Reprocess View

Unvaccinated Report Report

Dymo Labels Avery Labels Postcard

Full Extract Auto-Dialer Email Extract Auto-Dialer Phone Number Extract

Add a Reminder Recall

?
Cancel

Run Name

Number of Patients in Run: 0
Number of Patients Assessed: 0

Provider/Clinic : DR. POISON IVY , TEST CLINIC

Run Schedule Date * **Run Completed Date**

Reminder/Recall Date Range *
From: **Through:**

Age Range *
From: **Through:** **UOM:** YEARS

Date of Birth Date Range *
From: **Through:**

Options To Target Patients Included For Reminder/Recall

Patient Eligibility

County **City** **Zip Code**
School District
School
Gender

Ignore Setting For "Do Not Include Patient in Reminder/Recall"?
 Only Include Patients With Address (i.e., Street Address, City, State, Zip)?
 Increment Patient Reminders/Recall Count?
 Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination
 Generate Reminder/Recall Event?
 Include Patients Due For Vaccinations (Reminders)?
 Include Patients Overdue For Vaccinations (Recalls)?
 Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include
 Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations?
 Exclude patients with one or more vaccine refusals?

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

<input type="checkbox"/>	Vaccine Series	Dose Number
<input type="checkbox"/>	DTaP / TD / Tdap	<input type="text"/>
<input checked="" type="checkbox"/>	H1N1-09	<input type="text"/>
<input type="checkbox"/>	Hep A	<input type="text"/>
<input type="checkbox"/>	Hep B	<input type="text"/>
<input type="checkbox"/>	Hib	<input type="text"/>
<input type="checkbox"/>	HPV	<input type="text"/>
<input type="checkbox"/>	Influenza	<input type="text"/>
<input type="checkbox"/>	Meningococcal	<input type="text"/>
<input type="checkbox"/>	MMR	<input type="text"/>
<input type="checkbox"/>	Pneumococcal	<input type="text"/>
<input type="checkbox"/>	Polio	<input type="text"/>
<input type="checkbox"/>	Rotavirus	<input type="text"/>
<input type="checkbox"/>	Varicella (CPOX)	<input type="text"/>
<input type="checkbox"/>	Zoster	<input type="text"/>

Optionally Exclude Patients With Insurance Sources (By Default All Are Included)

Available Health Insurance

(UNINSURED) UNINSURED
 (AETNA) AETNA HEALTH AND LIFE INSURANCE
 (BCBS) BLUE CROSS BLUE SHIELD (HEALTH)
 (GWL) GREAT-WEST LIFE ASSURANCE COMPANY
 (HUM) HUMANA INSURANCE COMPANY
 (LOVE) LOVELACE HEALTH SYSTEM, INC.
 (CAID) MEDICAID
 (CARE) MEDICARE
 (PRES) PRESBYTERIAN HEALTH PLAN, INC.
 (TRI) TRICARE WEST INSURANCE

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Exclude Health Insurance

?
Delete
Cancel

Report Output

This report has a number of options available to the user. See below for a description of each option.

- *Unvaccinated Report*: Includes patients who have not returned or received their immunizations since the last reminder/recall.
- *Report (Reminder/Recall)*: A detailed listing of all patients included in the reminder/recall.
- *Dymo Labels*: Generates a list of patient addresses designed to be printed on Dymo address labels.
- *Avery Labels*: Generates a list of patient addresses designed to be printed on Avery 5160 style labels.
- *Postcard*: Generates a list of patients to be printed on pre-formatted mailer postcards.
- *Full Extract*: Generates a patient list in a CSV file format.
- *Auto-Dialer Email Extract*: Generates a patient list, including the patient email address, in a comma delimited format that can be opened in Excel for mail merge or other uses.
- *Auto-Dialer Phone Number Extract*: Generates a patient list, including patient phone numbers, in a comma delimited format that can be opened in Excel for mail merge or other uses.