

How To Run Reminder/Recall Report



Covered in this Section

In this section we will be reviewing how to use VIIS to generate a reminder/recall report.

- What is the Reminder/Recall report?
 - This report is designed to generate a mailing and/or listings for clients who are coming due or are past due for immunizations.
 - The report can be filtered based on when the immunizations are needed, client's age, or specific vaccine group.



Reminder/Recall Report: Requirements

Personal Information

* Last Name LOU * Gender Female
* First Name CINDY VIIS ID 282519
Middle Name Birth Order (for multiple births)
Suffix Birth Country UNITED STATES
* Birth Date 11/01/2018 Birth State
Mother's Maiden Last Birth County
Mother's First Name Medical Record Number

Save
History/Recommend
Reports
Cancel

Last Updated by Patel Peds on 08/17/2020

Organization Information

[back to top] Allow Sharing of Immunization Data Yes
Status ACTIVE Allow Reminder and Recall Contact? Yes
Provider-PCP Last Notice
* Tracking Schedule ACIP

Medical Record Numbers

Remove MRN	Medical Record Number	Primary
No Medical Record Numbers have been added for this patient.		

Add Medical Record Number

Medical Record Number Add Medical Record Number

Expand All

Patient AKA (0)
Patient Information
Address Information
Responsible Persons (1)
Patient Comments (3)

For a patient to be included in the report they must:

- A. An “association” must be made with the patient. This can be done via one of the following:
 - 1) Updating a chart with an administered/historical vaccine via data exchange or manually
 - 2) Clicking “**Save**” on the patient’s record in VIIS
- B. “**Allow Reminder/Recall Contact**” must be “Yes”.



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Remove MRN	Medical Record Number	Primary
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Add Medical Record Number

Medical Record Number Add Medical Record Number

Expand All

Patient AKA (0)

Address Information

[back to top]
[view Patient Address History](#)
Last Updated 08/17/2020

No Viable Address

Start Date 02/05/2020

Street Address 123 SUESS DRIVE Home Phone 804 - 555 - 5555
Other Address Cell Phone
P.O. Box E-Mail
Zip 23220 zip add-on codes+4
City WHOVILLE State VA
County

Responsible Persons (1)

Patient Comments (3)

For a patient to be included in the report they must:

C. The patient must have a complete address listed in the “Address Information” section



Generating the Reminder/Recall Report

VIIS
Virginia Immunization Information System
Training Region 1.0.0

Maintenance
manage clinicians
manage physicians

Inventory
manage transfers
shipping documents
manage inventory
accountability report
request
doses administered
transaction summary
inventory count list
manage orders

Patients
patient search
enter new patient
merge patients

Immunizations
manage hearing report
patient search

Reports
reminder / recall
check reminder status
request callback
assessment report
check assessment
manage custom letters
ad hoc eligibility report
check eligibility status
vfc report
check vfc report status
group patients
check group status

home manage access/account user manual related links logout help desk

organization Pat Peds/PATP • user Lion King • role IR Administrator

Reminder/Recall Request

Create New List ...

Enter new Reminder Recall Request Criteria List Name

Use a previous Reminder Recall Request Criteria

Indicate the Tracking Schedule ...

Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients

Select the Vaccine Group To Report on ...

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno	Add	
Anthrax	Remove	

Vaccines Due Now

Vaccines Past Due

Both

Step 1: Click “Reminder/Recall” under the Reports section

Step 2: Set filters for the report

Note: If you do not want to set filters, click “Generate” at the bottom of the screen. The report will run for all vaccine groups using the current date as the target.



Reminder/Recall: Filters

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Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients

Select the Vaccine Group To Report on ...

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno	Add	
Anthrax	Remove	

Vaccines Due Now

Vaccines Past Due

Both

Enter a 'list name' to save your filters

The report can be generated to filter for all vaccine groups or specific group(s). To filter for a specific group, select it and then click **"Add"** to move it to the box on the right

You can also filter for **"Vaccines Due Now"**, **"Vaccines Past Due"**, or **"Both"**. ACIP is used to determine these recommendations



Reminder/Recall: Filters

Select Subpotent Recall ...

Use Subpotent Vaccinations

Select the School & Primary Care Provider ...

School Provider (PCP)

Enter Additional Demographic Criteria ...

City Zip Code County

Enter the Date Criteria ...

Target Date Range From To

Birth Date Range From To

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

Select the Vaccine Groups to Display ...

Use All Vaccine Groups

Use Vaccine Groups Selected

Adeno
Anthrax

Add Remove

Specify How to Sort the Report Data ...

Sort 1st By Last Name Ascending Sort 3rd By

Sort 2nd By First Name Ascending Sort 4th By

Save & Generate Generate Cancel

“Target Date Range” allows you to filter the report using a past, current, and/or future date range

“Birth Date Range” allows you to filter by age

**You can choose to filter using either option or both.*

Choose which vaccine groups you would like to display on the report

Step 3: Click **“Save & Generate”** to save filters for future use or **“Generate”** to run the report

Generating the Reminder/Recall Report

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
08/28/2020 03:18 PM	08/28/2020 03:19 PM	100 %	0	08/28/2020	08/28/2020

Reminder Output Status

No Reminder Outputs Logged

Click “**Refresh**” until the report is complete. Once complete, you may click on the blue date hyperlink to go to the Summary Screen.



Reminder/Recall: Summary Screen

Reminder Request Process Summary

Reminder Request Criteria

Step	Criteria Evaluated at this Step	Patients
1	Patients associated with <i>Pat Peds</i> .	9
2	Patients that are active within <i>Pat Peds</i> and allow Reminder & Recall Contact . Additional criteria includes: <ul style="list-style-type: none">• Birthdate range is not specified;• School is not specified;• Provider is not specified.	4
3	Patients that have a Valid Address . Additional criteria includes: <ul style="list-style-type: none">• City is not specified;• Zip Code is not specified.	3
4	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">• Patients that are Due Now or Past Due for one or more vaccinations as of 09/28/2020;• Use all vaccine groups;• Use tracking schedule associated with each patient.	3
<i>Total Number of Patients Eligible for Reminder</i>		3

The Summary Screen lists the number of patients involved in the search and the criteria that were used to define the search.



Reminder/Recall: Output Options

Reminder Request Output Options		
Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery 5160 Mailing Labels.	Report Name <input type="text"/>
Mailing Labels	Avery 3256 Mailing Labels.	Report Name <input type="text"/>
Patient Query Listing	A list of patients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>

Last Notice Date Options	
<i>Return to the previous screen.</i>	
<i>Preview Patients that will display on the Reminder Recall Report.</i>	<input type="button" value="Preview Patients"/>
<i>Increment last notice date for all patients eligible for this reminder.</i>	<input type="button" value="Increment Eligible"/>
<input type="button" value="Cancel"/>	

At the bottom of the “Summary Screen”, you can create various output options:

- A. **Reminder Letter**- Print a custom letter that can be mailed out to patients
- B. **Reminder Card**- Print a custom 4x5 card for mailing. Note: To be mindful of PHI/HIPPA when using this option
- C. **Mailing Labels**- Print the primary address on file in two different size options
- D. **Patient Query Listing**- Print a list of the eligible patients, including their vaccine history
- E. **Extract Client Data**- Pull an extract of the client data in XML format

* You can also click “**Preview Patients**” to view the eligible patients by name, DOB, and address with direct links to open the patient’s chart.



Reminder/Recall: Output Options

Reminder Request Status					
Started	Completed	Status	Clients	Target From	Target To
09/28/2020 11:13 AM	09/28/2020 11:14 AM	100 %	3	09/28/2020	09/28/2020

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Reminder Letter	Reminder Letter	09/28/2020 11:32 AM	09/28/2020 11:32 AM	09/28/2020 11:32 AM	Ready
Patient List	Patient List	09/28/2020 11:15 AM	09/28/2020 11:15 AM	09/28/2020 11:15 AM	Ready
Client XML	Client XML	09/28/2020 11:14 AM			Queue

After selecting the desired output option, VIIS will take you to the “Output Status” page, where you may have to click the **“Refresh”** button until the results are complete.



Reminder/Recall: Letter

Dear Parent/Guardian of Doo B Scoo,

Our records indicate that Doo B Scoo has received the following immunizations:

Immunization Record		Tracking Schedule: ACIP	
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	04/11/2017	1 of 5	DTaP, NOS
	06/13/2017	2 of 5	DTaP, NOS
HepA	06/13/2017	Not Valid	HepA, NOS
HepB	12/07/2016	1 of 3	HepB, NOS
Hib	04/11/2017	1 of 3	Hib, NOS
	06/13/2017	2 of 3	Hib, NOS
PneumoConjugate	04/11/2017	1 of 3	PCV NOS
	06/13/2017	2 of 3	PCV NOS
Polio	04/11/2017	1 of 4	Polio, NOS
	06/13/2017	2 of 4	Polio, NOS
Rotavirus	04/11/2017	1 of 3	Rotavirus, NOS
	06/13/2017	2 of 3	Rotavirus, NOS

Our records also show that Doo B Scoo may be due for the following immunizations. If Doo received these or other immunizations from another health care provider, please call our office so that we can update Doo's record. Otherwise please take Doo to a health care provider to receive them.

Immunizations Due
DTaP, NOS
Flu NOS
HepA, NOS
HepB, NOS
Hib, NOS
Measles
Meningococcal, NOS
MMR
Mumps
PCV NOS
Polio, NOS
Rubella
Varicella

The number for our office is: 8045555555

Here is an example of the “Reminder Letter”. The text can be customized to fit your needs. The top portion contains the vaccine history on file and the bottom table displays vaccines that are currently due.

Reminder/Recall: Mailing Labels

Mailing labels can be selected in two sizing options:

1. Avery 5160
2. Avery 3256

Here is an example of the labels.

BIGGER JACK DADDY WARBUCKS
133 MAJOR CHORD
SPRINGFIELD VA 22232

To the Parent/Guardian of:
CINDY LOU
123 SUESS DRIVE
WHOVILLE VA 23220

To the Parent/Guardian of:
DOO B SCOO
555 RAINBOW LANE
GLEN ALLEN VA 23233



Reminder/Recall: Patient Query Listing

Report run on : 09/28/2020		Patient Query Listing		Page 1 of 0	
Patient Name (FML)	Phone Number	Address	City/State/ZIP		
BIGGER JACK DADDY WARBUCKS -	(904) 090-0909	133 MAJOR CHORD	SPRINGFIELD, VA 22232		
			Tracking Schedule:	ACIP	
Vaccine	Immunizations Due	Immunization Dates			
DTP/aP	Max Age Exceeded	1) 03/01/2000			
HepB	01/01/2019				
Hib	Max Age Exceeded	1) 03/01/2000			
HPV	03/16/2020	1) 01/20/2020			
Influenza-seasnl	08/01/2020	1) 01/20/2020			
Measles	Complete	1) 10/04/2017 2) 10/04/2018 3) 01/01/2019 4) 02/01/2019 5)			
Meningo	01/01/2002				
MMR	Complete	1) 10/04/2017 2) 10/04/2018 3) 01/01/2019 4) 02/01/2019 5)			
Mumps	Complete	1) 10/04/2017 2) 10/04/2018 3) 01/01/2019 4) 02/01/2019 5)			
Polio	03/17/2021	1) 03/01/2000 2) 09/17/2020			
Rubella	Complete	1) 10/04/2017 2) 10/04/2018 3) 01/01/2019 4) 02/01/2019 5)			
Td/Tdap	01/01/2007				
Varicella	01/29/2019				
CINDY LOU - 11/01/2018	(804) 555-5555	123 SUESS DRIVE	WHOVILLE, VA 23220		
			Tracking Schedule:	ACIP	
Vaccine	Immunizations Due	Immunization Dates			
DTP/aP	11/01/2022	1) 01/08/2019 2) 03/05/2019 3) 04/30/2019 4) 02/11/2020			
HepA	05/05/2020	1) 11/05/2019			
HepB	04/01/2020	1) 01/08/2019 2) 02/05/2020			
Hib	Complete	1) 03/05/2019 2) 04/30/2019 3) 02/11/2020			
HPV	11/01/2027				
Influenza-seasnl	08/01/2020				
Measles	Complete	1) 11/05/2019 2) 02/05/2020			
MMR	Complete	1) 11/05/2019 2) 02/05/2020			
Mumps	Complete	1) 11/05/2019 2) 02/05/2020			
PneumoConjugate	11/01/2019	1) 01/08/2019 2) 03/05/2019			
Polio	11/01/2022	1) 01/08/2019 2) 03/05/2019 3) 04/30/2019 4) 02/11/2020 (NV)			
Rotavirus	Max Age Exceeded	1) 03/05/2019			
Rubella	Complete	1) 11/05/2019 2) 02/05/2020			
Varicella	03/04/2020				

Patient Query Listing allows you to view/print the eligible patient results. Patient's name, phone number, and primary address on file will display at the top of each box. Each box includes the "Immunizations Due" column and "Immunization Dates" to display their current vaccine history.

Questions?

For technical assistance please contact:

VIIS Helpdesk

Monday-Friday 8:30am – 5:00pm

Email: viis_helpdesk@vdh.virginia.gov

Phone Number: (866) 375-9795

For all training requests please contact:

VIISInfo@vdh.virginia.gov

Additional training guides and resources can be found at:

<https://www.vdh.virginia.gov/immunization/viis/viisregorgs/>

