

Reminder/Recall in ALERT IIS

This guide will help you set up and run a reminder/recall in ALERT IIS. The instructions are meant for use with adolescents but can be applied to any age groups by selecting the appropriate ages and vaccines.

First things first:

- Before starting reminder/recall, you should read the “Manage Your Active Patient List in ALERT IIS” guide and inactivate patients no longer served by your clinic. Accurate patient lists make reminder/recall much more effective.
- **Be sure you are using Internet Explorer.** There are known issues with Firefox and Chrome.

Reminder/Recall Setup

From the reports menu on the left-hand side, select “reminder / recall”:



When you set up reminder/recall, you can save your settings and go back to rerun and/or edit them later. If you are creating new criteria, enter a name in the box provided. Once you save those settings, it will appear in the “Use a previous Reminder Recall Request Criteria” dropdown menu under the name you entered. Here, I’m setting up new criteria which I’ve named “Training”:

A screenshot of the 'Reminder/Recall Request' web interface. At the top are navigation buttons: home, manage access/account, forms, related links, logout, help desk. Below is a user information bar: organization Scott's Clinic • user Scott Jeffries • role Super User (Provider and LHD). The main section is titled 'Reminder/Recall Request' and has a sub-section 'Create New List ...'. There are two radio button options: 'Enter new Reminder Recall Request Criteria' (selected) with a text box containing 'Training' and a 'List Name' label, and 'Use a previous Reminder Recall Request Criteria' with a dropdown menu showing 'Please select an option'.

Next it asks you to select a tracking schedule. It defaults to the tracking schedule associated with each patient, but we advise you to use the ACIP schedule for all patients:

A screenshot of the 'Indicate the Tracking Schedule ...' web interface. It features two radio button options: 'Use Tracking Schedule Associated with Each Patient' and 'Use Tracking Schedule Selected for All Patients' (selected). Next to the selected option is a dropdown menu showing 'ACIP'.

Select the vaccines you want to look for. Here, I've selected the three standard adolescent vaccines – HPV, meningococcal, and Tdap – and I also included varicella, for which all adolescents should have evidence of immunity, either from past vaccination or history of disease.

You can choose “Vaccines Due Now” and/or “Vaccines Past Due”. Adolescent vaccines are typically considered past due at age 13. We recommend selecting “Both” to cover as many kids as you can.

Select the Vaccine Group To Report on ...

Use All Vaccine Groups
 Use Vaccine Groups Selected

Vaccines Due Now
 Vaccines Past Due
 Both

Tetanus
Typhoid
Yellow Fever
Zoster

Add
Remove

HPV
Meningo
Td/Tdap
Varicella

You can ignore the next three sections unless you specifically want to use them. “Use Subpotent Vaccinations” does not apply to this kind of reminder/recall. If your clinic’s Super User has set up schools or providers in ALERT, you can limit your recall population to patients who have been assigned to those (if you haven’t created any, the menus will be blank). You can further limit your recall population to patients residing in a certain 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

Now on to dates. First you need to decide when you want to look for due/overdue vaccines, the “Target Date Range”. If you just want to use the current date, you can leave those fields blank.

You will want to enter a birth date range to narrow down your population. For this example, we’re going to do reminder/recall on all 11-to-18-year-olds as of the current date, which we’ll say is July 1, 2013. You’ll need to do some math to get the birth date range, but it’s easier with these little tricks:

Start date: Take the *oldest* age you’re after, add 1, subtract that from the current year, and add one day. Since we don’t want anyone older than 18 as of 7/1/2013, we subtract 19 from 2013 and add one day to 7/1 to get 7/2/1994.

End date: Take the *youngest* age you want and subtract that number from the current year. We don’t want anyone younger than 11, so we’ll subtract 11 years from 7/1/2013 to get 7/1/2002.

Enter the Date Criteria ...

Target Date Range From To

Birth Date Range From 07/02/1994 To 07/01/2002

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

“Select the Vaccine Groups to Display” determines what gets printed in the immunization history and forecast. Even though you’ll only be looking for certain vaccines, we strongly advise you to leave this on “Use All Vaccine Groups”. That way, they’ll know every vaccine for which they are due and there will be no surprises when they get to your office.

Select the Vaccine Groups to Display ...

Use All Vaccine Groups
 Use Vaccine Groups Selected

Adeno	Add	
Anthrax		
BCG		

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:

Last, click “Save & Generate” to run the reminder/recall and save your criteria under the name you specified at the start, or just click “Generate” to run it without saving. Click “Cancel” to exit without running or saving your reminder/recall.

Once you generate your reminder/recall, ALERT takes you to the status screen, which shows the request is in the queue:

Reminder Request Status						Refresh
Started	Completed	Status	Patients	Target From	Target To	Cancel
07/08/2013 09:07 AM		QUEUE		07/08/2013	07/08/2013	

You do not need to stay on this screen while it generates – this is happening on ALERT’s computers. You can set up your custom letter, do other work, or exit out of your browser entirely while the report generates. The amount of time it takes to generate depends on the size of your recall population and the current load on ALERT’s servers.

You can return to the screen by clicking “check reminder status” from the Reports menu:



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
07/08/2013 09:16 AM	07/08/2013 09:16 AM	100 %	3	07/08/2013	07/08/2013	

Congratulations – you’ve just generated a reminder/recall! We’re almost done, but not quite. Clicking that link will take you to the summary and output page that will control how your letters are printed.

Summary and Output Options

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:

Reminder Request Process Summary		
Reminder Request Criteria Name:		
Step	Criteria Evaluated at this Step	Patients
1	Patients associated with <i>Scott's Clinic</i> .	10
2	Patients immunized by <i>Scott's Clinic</i> .	10
3	Patients that are active within <i>Scott's Clinic</i> and allow Reminder & Recall Contact . Additional criteria includes: <ul style="list-style-type: none"> ● Patients born between 07/09/1994 and 07/08/2002; ● County is not specified; ● School is not specified; ● Provider is not specified; 	3
4	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
5	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 07/08/2013; ● Use the following vaccine groups: HPV, Meningo, Td/Tdap and Varicella; ● Use ACIP for all patients.. 	3
Total Number of Patients Eligible for Reminder		3

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. (*Note: the patient preview will only be available for 24 hours after you generate the reminder/recall.*)

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 Scott's Clinic .	Increment Immunized
Return to the previous screen.	Cancel

This brings up a list of every patient in the reminder/recall. Click on a name to edit/inactivate a patient. If you're satisfied with your patient list, click the "Return to Reminder Recall" button.

Preview Patients					Return to Reminder Recall
Patient Name(LN, FN M)	Birth Date	Address	City	Zip	
Starkey, Richard	07/07/2000	800 NE OREGON ST	PORTLAND	97232	
Zimmerman, Robert	05/24/1998	800 NE OREGON ST	PORTLAND	97232	
Elliott, Cass	09/19/1996	800 NE OREGON ST	PORTLAND	97232	

➤ **NOTE:** If you inactivate patients from this screen, you must rerun reminder/recall so it can rebuild the patient list.

We've reached the final step! Now that we've generated the reminder/recall, set up our letter, and reviewed the patient list, we just need to tell it to create the letters. You have many options but we recommend a custom letter (see the "Custom Letters for Reminder/Recall in ALERT IIS" guide). When you set up a custom letter, you give it a name; that name appears as a link at the bottom of the list. I named mine "Training letter". Name this report anything you want and check "Duplex Printing" if you'll be doing 2-sided printing. When you're ready to go, just click on the name of the letter.

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"/>
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"/>
Training letter	Custom Letter.	Duplex Printing <input checked="" type="checkbox"/> Report Name <input type="text" value="R/R Training"/>

Now it takes you back to the request status screen and we just need to wait for it to finish. The letters are in the second box under "Reminder Output Status" with the name you just gave them ("R/R training").

Reminder Request Status					
Started	Completed	Status	Patients	Target From	Target To
07/08/2013 09:16 AM	07/08/2013 09:16 AM	100 %	3	07/08/2013	07/08/2013

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
R/R training	Custom Letter	07/08/2013 01:38 PM	07/08/2013 01:38 PM		Processing

Hit refresh to update the status. When it's ready, the name will turn into a blue link:

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
R/R training	Custom Letter	07/08/2013 01:38 PM	07/08/2013 01:38 PM	07/08/2013 01:38 PM	Ready

Clicking that link will open a PDF containing every letter ready for printing. It functions just like a regular PDF – you can print it directly from your browser or save it to your computer to print later.

You're now a reminder/recall expert! For questions, contact the ALERT IIS Help Desk at (800) 980-9431.