

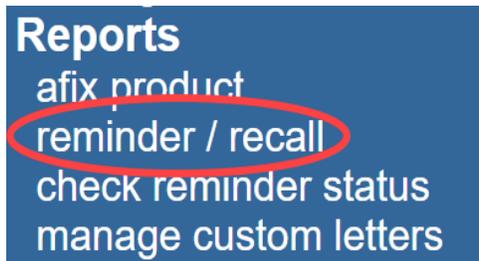
Reminder/Recall in IRIS

An important component in an immunization provider practice is ensuring that vaccines reach individuals who need them. While appropriate vaccine administration is essential, there is no guarantee that vaccinations are being given to every person at the recommended age.

One proven strategy to improve immunization rates is reminder and recall messages to patients. Reminders notify patients that immunizations are due, and recalls notify patients that immunizations are past due. Idaho's Immunization Reminder Information System (IRIS) can generate reports to determine which patients associated with your organization in IRIS are due, or overdue, for immunizations. The reports include a patient list, reminder letters, and mailing labels.

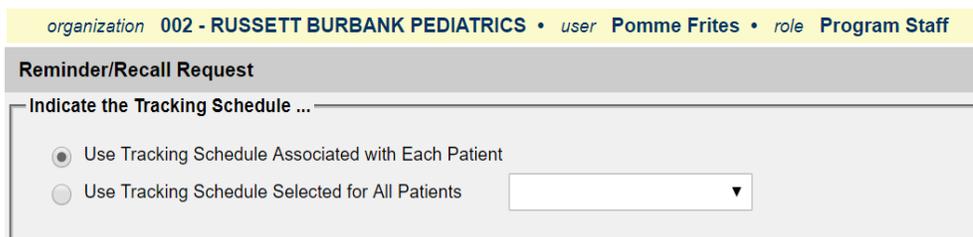
Creating a Reminder/Recall Request

1. Log in to IRIS.
2. In the left-side menu in the **Reports** section click *reminder / recall*.



3. The **Reminder/Recall Request** screen will open with various parameters to help narrow down the generated patient lists.

- **Indicate the Tracking Schedule:** Leave this as “Use Tracking Schedule Associated with Each Patient.” The other option, “Use Tracking Schedule Selected for All Patients” is “ACIP” which is the same schedule as the tracking schedule associated with most patients in IRIS.

A screenshot of the IRIS Reminder/Recall Request form. At the top, it shows the organization as '002 - RUSSETT BURBANK PEDIATRICS', the user as 'Pomme Frites', and the role as 'Program Staff'. Below this, the title 'Reminder/Recall Request' is displayed. The main section is titled 'Indicate the Tracking Schedule ...' and contains two radio button options: 'Use Tracking Schedule Associated with Each Patient' (which is selected) and 'Use Tracking Schedule Selected for All Patients'. To the right of the second option is a dropdown menu.

- **Select the Vaccine Group(s):** Leave as “Use All Vaccine Groups” or click “Use Vaccine Groups Selected”. To select vaccine groups, scroll through the vaccines listed, click to select each vaccine you would like to be included in a reminder/recall, and click the *Add>* button or double click the vaccine. All selected vaccine groups will appear in the right hand box in green font. To remove a vaccine group from the list, either double-click or click on the vaccine and then click *<Remove*. Focusing on all vaccines can help catch-up all patients. Focusing on certain vaccine groups can help with vaccination clinics, and even ordering quantities.

Reminder/Recall in IRIS

Select the Vaccine Group(s) ...

Use All Vaccine Groups
 Use Vaccine Groups Selected

Measles
Mumps
Pertussis (Tdap)

Add >
< Remove

HPV
MeningACWY
MeningB

- **Select the School & Primary Care Provider:** These dropdowns will only show physicians and schools if they have been added under your organization and included in the patient's demographic information. It is okay to leave these blank.

Select the School & Primary Care Provider ...

School

Provider (PCP)

- **Enter Additional Demographic Criteria** to narrow down results by location. It is okay to leave these blank.

Enter Additional Demographic Criteria ...

City Zip Code County

- **Enter the Age Criteria** by Age or by Birth Date. The *From* and *To* fields are required.

Enter the Age Criteria ...

By Age: *From 11 Years *To 18 Years

By Birth Date: From To

- **Enter the Status Criteria:** Choose patients that are *Currently Due or Past Due* or patients that are *Due in the Next [up to 6] Month(s)*. This can help you either recall patients who have missed immunizations, or remind patients that are due soon, and help you schedule future immunization visits.

Enter the Status Criteria ...

Select one of the two criteria sets below...

Currently Due or Past Due

Due in the Next Month(s)

1
2
3
4
5
6

Reminder/Recall in IRIS

- **Enter Last Notice Criteria:** Enter weeks since last notice. This will exclude patients who have been included in a reminder/recall within the time period indicated.

Enter Last Notice Criteria...

Weeks Since Last Notice

- **Specify How to Sort the Report Data:** Select sorting by last name, first name, school, provider, and/or county.

Specify How to Sort the Report Data ...

Sort 1st By Sort 3rd By

Sort 2nd By Sort 4th By

- Ensure that all parameters are correct and click *Generate*.

Sort 2nd By Sort 4th By

Reminder Request Status

When the Reminder Request has been generated, the **Reminder Request Status** page will open. This page can also be opened from the left-side menu in the **Reports** section by clicking *check reminder status*.

Reports

afix product
reminder / recall
check reminder status
manage custom letters

Initially, the request status will be QUEUE. To see the updated status, click the *Refresh* button.

organization 002 - RUSSETT BURBANK PEDIATRICS • user Pomme Frites • role Program Staff

| Reminder Request Status | | | | | | <input type="button" value="Refresh"/> |
|-------------------------|-----------|--------|----------|-------------|------------|--|
| Started | Completed | Status | Patients | Target From | Target To | <input type="button" value="Cancel"/> |
| 11/07/2018 03:07 PM | | QUEUE | | 11/07/2018 | 11/07/2018 | |

Reminder Output Status

No Reminder Outputs Logged

Reminder/Recall in IRIS

When the Status is 100%, the date and time in the Started column will turn into a link. The columns will show what time the request was started, what time it was completed, how many patients fall under the input parameters, and the target to and from dates.

| organization 002 - RUSSETT BURBANK PEDIATRICS • user Pomme Frites • role Program Staff | | | | | | |
|--|---------------------|--------|----------|-------------|------------|---------|
| Reminder Request Status | | | | | | Refresh |
| Started | Completed | Status | Patients | Target From | Target To | Cancel |
| 11/07/2018 03:07 PM | 11/07/2018 03:08 PM | 100 % | 3 | 11/07/2018 | 11/07/2018 | |
| Reminder Output Status | | | | | | |
| No Reminder Outputs Logged | | | | | | |

Generating Outputs

1. Click on the link in the Started column.
2. The **Reminder Request Process Summary** will open. This will show how the data was evaluated, and how many patients fall into each of the steps during the evaluation.

| Reminder Request Process Summary | | |
|---|---|-----------|
| Step | Criteria Evaluated at this Step | Patients |
| 1 | Patients associated with 002 - IDA ROSE MEDICAL PRACTICE. | 227 |
| 2 | Patients immunized by 002 - IDA ROSE MEDICAL PRACTICE. | 197 |
| 3 | Patients that are active within 002 - IDA ROSE MEDICAL PRACTICE and allow Reminder & Recall Contact. Additional criteria includes: <ul style="list-style-type: none"> • Patients between age 11 Year(s) and 18 Year(s).; • County is not specified; • School is not specified; • Provider is not specified; • Weeks Since Last Notice is not specified. | 51 |
| 4 | Patients that meet Address Criteria. Additional criteria includes: <ul style="list-style-type: none"> • City is not specified • Zip Code is not specified. | 51 |
| 5 | Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> • Patients that are Recommended or Overdue for one or more vaccinations as of 07/03/2018; • Use the following vaccine groups: HPV, MeningACWY, MeningB and ; • Use tracking schedule associated with each patient.. | 51 |
| Total Number of Patients Eligible for Reminder | | 51 |

3. Below the **Reminder Request Process Summary** is the **Reminder Request Output Options** module. This module can create 3 different outputs: Reminder Letters, Mailing Labels, and Patient Query Listings.

| Reminder Request Output Options | | |
|---------------------------------------|--|--|
| Output | Description | Additional Input |
| Reminder Letter | Standard Reminder Letter. | Report Name: Adol Recall 072718 Free Text: Walk-ins for immunization only nurse visits are welcome any time! Phone #: 208-555-5555 |
| Mailing Labels | Avery Mailing Labels. | Report Name: <input type="text"/> |
| Patient Query Listing | A list of patients based on the report criteria. | Report Name: <input type="text"/> |

Reminder/Recall in IRIS

a. Reminder Letter

- i. Input a report name 20 characters or less (i.e. Adol Recall 072718)
- ii. Insert any free text desired. This can include things like instructions on making immunization appointments, office hours, any special immunization clinics being held, etc.
- iii. Insert the best phone number patients can use to contact the clinic regarding immunizations.
- iv. Click *Reminder Letter*
- v. The **Check Reminder Status** screen will open again. The letters can be found beneath the **Reminder Output Status** section. Click *Refresh* until the Status to the right says Ready and the items in the Name column turn blue.
- vi. Click the name of the letter for review. If any patient included in the cohort is indicated to speak Spanish, a Spanish letter will be generated for them. The letter includes vaccination history, any vaccines that may be due, the phone number entered, and any free text entered (see Appendix I).
- vii. Please print and/or save the file to the desktop, as the reports will only be saved in IRIS for 7 days.

| Reminder Request Status | | | | | | Refresh |
|-------------------------------------|---------------------|--------|----------|-------------|------------|---------|
| Started | Completed | Status | Patients | Target From | Target To | Cancel |
| 07/27/2018 10:32 AM | 07/27/2018 10:33 AM | 100 % | 51 | 07/28/2018 | 09/27/2018 | |

| Reminder Output Status | | | | | |
|--|-----------------|---------------------|---------------------|---------------------|--------|
| Name | Type | Requested | Started | Completed | Status |
| Adol Recall 072718 (Spanish) | Reminder Letter | 07/27/2018 10:38 AM | 07/27/2018 10:38 AM | 07/27/2018 10:38 AM | Ready |
| Adol Recall 072718 | Reminder Letter | 07/27/2018 10:38 AM | 07/27/2018 10:38 AM | 07/27/2018 10:38 AM | Ready |

b. Mailing Labels

- i. Input a report name 20 characters or less (i.e. Adol Recall 072718)
- ii. Click *Mailing Labels*
- iii. The **Check Reminder Status** screen will open again. The labels can be found beneath the **Reminder Output Status** section. Click *Refresh* until the Status to the right says Ready and the items in the Name column turn blue.
- iv. These automatically generated labels will match the Reminder Letters (see Appendix II). Use Avery template 5160.
- v. Please print and/or save the file to the desktop, as the labels will only be saved in IRIS for 7 days.

c. Patient Query Listing

- i. Input a report name 20 characters or less (i.e. Adol Recall 072718)
- ii. Click *Patient Query Listing*
- iii. The **Check Reminder Status** screen will open again. The list can be found beneath the **Reminder Output Status** section. Click *Refresh* until the Status to the right says Ready and the items in the Name column turn blue.
- iv. The list generated is for internal use. The immunization history of three (3) patients per sheet will be generated (see Appendix III). This is a useful tool for reviewing completeness of records, or determining those that may no longer be patients at the clinic.
- v. Please print and/or save the file to the desktop, as the list will only be saved in IRIS for 7 days.

Reminder/Recall in IRIS

Name and save the custom letter

Name the custom letter

Saving this letter will allow it to be run in the same way as the letters above. Simply click on the name of the custom letter in the **Reminder Request Output Options** module

4. After a custom letter has been created and saved, the letter will display under the **Reminder Request Output Options** on the **Reminder Request Process Summary** page. Only three custom letters may be saved and available for use.

| Reminder Request Output Options | | |
|--|--|--|
| Output | Description | Additional Input |
| Reminder Letter | Standard Reminder Letter. | Report Name <input type="text"/> Free Text <input type="text" value="Please join us as we participate in HPV Free ID! Immunization only walk-ins are welcome every day during the"/> Phone # <input type="text" value="208-555-5555"/> |
| Mailing Labels | Avery Mailing Labels. | Report Name <input type="text"/> |
| Patient Query Listing | A list of patients based on the report criteria. | Report Name <input type="text"/> |
| Adolescent Reminder/Recall | Custom Letter. | Report Name <input type="text"/> |
| HPV Free ID Reminder | Custom Letter. | Report Name <input type="text"/> |
| Pediatric Reminder/Recall | Custom Letter. | Report Name <input type="text"/> |