

# Reminder/ Recall

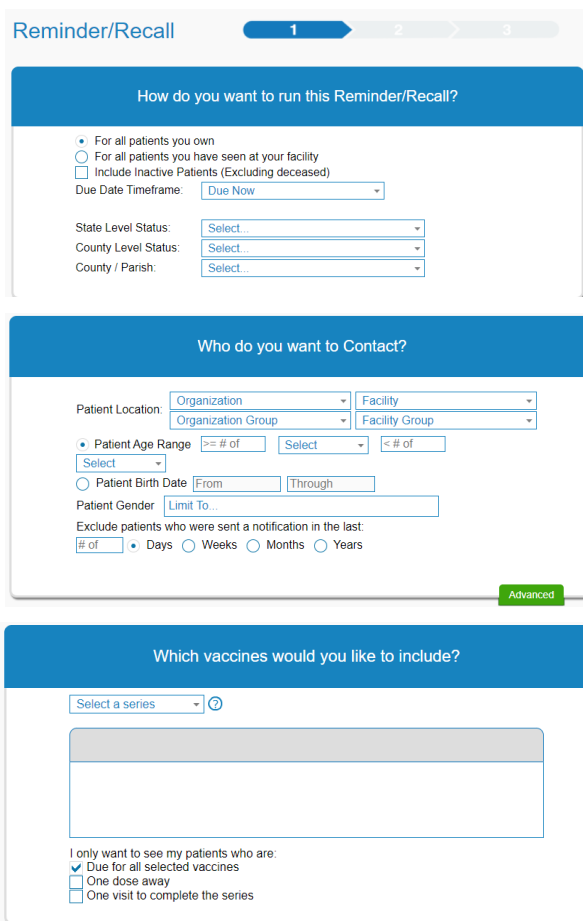
These instructions detail how to generate a reminder/ recall. Note only authorized users with the correct permissions may generate the report.

## Reminder/ Recall

1. Click the **Reminder/Recall > Reminder/Recall** menu link.



2. Select the options for the type of patient recall list you want: *How do you want to run this Reminder/ Recall, Who do you want to Contact, Which vaccines would you like to include?*



The screenshot shows the 'Reminder/Recall' configuration page with three main sections:

- How do you want to run this Reminder/Recall?**
  - Radio buttons for:
    - For all patients you own
    - For all patients you have seen at your facility
    - Include Inactive Patients (Excluding deceased)
  - Due Date Timeframe:
  - State Level Status:
  - County Level Status:
  - County / Parish:
- Who do you want to Contact?**
  - Patient Location: Organization, Facility, Organization Group, Facility Group
  - Patient Age Range:
  - Patient Birth Date:
  - Patient Gender:
  - Exclude patients who were sent a notification in the last:   Days  Weeks  Months  Years
- Which vaccines would you like to include?**
  - Select a series:
  - Limit To:
  - I only want to see my patients who are:
    - Due for all selected vaccines
    - One dose away
    - One visit to complete the series

3. Next, click **Generate Patient List**. This page displays the list of patients who meet the criteria selected on the parameter page. On this page you can:
  - Inactivate patients
  - Remove patients who do not have name, phone, address, or email
  - Remove patients who have received the selected number of reminder/recall notifications
  - Review the reminder/recall criteria you used for patient search.
  - Export the list of patients into a .csv file by clicking on **Export Patient List** and following the prompts.
4. When finished with the patient list, click **Submit** to save changes.
5. After you click **Submit**, the action page opens. The following action can be performed on this page:
  - **Generate a Patient List-** generates an HTML file that displays a detailed list of your patients, including their vaccination forecast, based on the vaccines that were selected.
  - **Print Letters-** generates a reminder/ recall letter for each patient on the patient list.
  - **Generate Auto-Dialer Content-** generates an HTML file that can be used with any external auto-dialer application.
  - **Generate Mail-Merge-** generates a text file that can be used with an external mail-merge application.
  - **Create Avery 8387 Postcards-** generates a reminder/recall postcard for each patient on the patient list.