

VacTrAK Basic Reminder/Recall Guide

Reminder/Recall allows you to notify patients due or past due for vaccinations. It is an effective, evidence based strategy to improve and sustain vaccination coverage rates in target populations when performed on a regular basis.

Organization (IRMS) Client or Facility Client user types have access to the Reminder/Recall menu/options. Contact VacTrAK support for assistance.

Step 1: Select **Reminder/Recall** from the menu. Select options for target population. Specify age group and age appropriate vaccine series.

Ownership – A patient is considered to be under your ownership if you are their normal primary care provider or if you were the last place where they received an administered vaccine.

Service – Select all patients you serve and for all patients to whom your practice has administered a vaccine to, regardless if they are currently owned by a different primary care provider.

Due Date Timeframe – refine list to patients that are due now, overdue or due in the future.

Select a series – Select the age appropriate vaccine series from the drop down list, once selected, the vaccines and number of doses is displayed, or create a custom series.

Schedule – allows the user to schedule Reminder/Recall generation at a specified date/time. This option works best for large practices or age cohorts of larger than 1000 patients.

Generate Patient List - output will provide patient name, age, vaccines due, available contact methods, R/R attempts and Reason for Inactivation.

Logged in: PAUL GUZMAN Date: April 11, 2016

[Reports](#) >>
 [Use Templates](#) >>
 [See Patient Groups](#) >>

Reminder/Recall

1 | 2 | 3

How do you want to run this Reminder/Recall?

For all patients you own
 For all patients you have seen at your facility
 Include Inactive Patients (Excluding deceased)
 Due Date Timeframe: Due Now

Who do you want to Contact?

Patient Location: Organization (IRMS) Facility
Organization (IRMS) Group

Patient Age Range 19 Months x 35 Months x v
 Patient Birth Date From Through

Patient Gender Limit To...

Exclude patients who were sent a notification in the last:
 # of v Days Weeks Months Years

Advanced

Which vaccines would you like to include?

CHILD SERIES x v

Vaccine Family	CHILD SERIES Number of doses in this series
DTaP/DT/Td	4
HIB	3
POLIO	3
HEP-B 3 DOSE	3
MMR	1
VARICELLA	1
PNEUMO (PCV)	4

I only want to see my patients who are:
 Due for all selected vaccines
 One dose away
 One visit to complete the series

[Click here to go to previous results from run on April 11, 2016 11:52:16 AM.](#)

Clear
Schedule
Generate Patient List

VacTrAK Basic Reminder/Recall Guide

Step 2: Review list of patients and remove any that you do not want to contact by un-checking box before patient name.

Filter List – by contact type or prior notification

Check box - remove patients from recall group by un-checking

Hover – hover over patient record to display patient details

Icons – available contact methods (address, phone, cell, email)

Reason for Inactivation – patients that are no longer active with practice can be set to inactive so they no longer show on reports and reminder recall as owned by your organization

Export the Patient List – open patient list in a .csv file for review; each vaccine for which a patient is due will show on a separate line for easy filter and sort

Submit – Submit edited list of patients for next step

Step 3: What do you want to do with your selected recall group?

Choose method by clicking on the appropriate icon, follow the pop-up instructions/prompts.

- Generate a Patient List
- Print Letters
- Generate Auto-dialer Content
- Generate Mail Merge
- Create Custom Post Cards
- Print Mailing Labels
- Save as a Patient Group (Cohort) to track success rate
- Send email

Logged in: PAUL GUZMAN | Date: April 11, 2016

Reports >>> Use Templates >>> See Patient Groups >>>

Reminder/Recall

1 > 2 > 3

What patients do you want to add to your recall group?

Remove Patients who don't have an available
 Name Phone Address Email

Remove Patients who have received more than notifications.

	Last	First	Age	Vaccines Due	Available Contact Methods	R/R Attempts	Reason for Inactivation
<input checked="" type="checkbox"/>	ASTER	DANIEL	8	7		0	Select
<input checked="" type="checkbox"/>	GARNATION	MARIA	5	7		0	Select
<input checked="" type="checkbox"/>	FAVOR	FLAVOR	3	2		0	Select
<input checked="" type="checkbox"/>	JEFFERSON	JINKS	6	7		0	Select

Showing 1 to 4 of 4 entries

Export Patient List | Submit

Logged in: PAUL GUZMAN | Date: April 11, 2016

Reports >>> Use Templates >>> See Patient Groups >>>

Reminder/Recall

1 > 2 > 3

4 4 1 0 0

What do you want to do with your selected recall group?

- Generate A Patient List
- Print Letters
- Generate Auto-Dialer Content
- Generate Mail-Merge
- Create Custom Post Cards
- Create Avery 8387 Postcards
- Print Labels
- Save As a Patient Group (Cohort)
- Send Email