



# VAC TRAK

## 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 of 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.

The screenshot shows the VAC TRAK Reminder/Recall configuration screen. At the top, it indicates the user is logged in as PAUL GUZMAN on April 11, 2016. The main heading is "Reminder/Recall" with a progress indicator showing step 1 of 3. The first section, "How do you want to run this Reminder/Recall?", offers options for patient ownership and inclusion of inactive patients, with a "Due Date Timeframe" set to "Due Now". The second section, "Who do you want to Contact?", allows filtering by Patient Location (Organization (IRMS) or Facility), Patient Age Range (19 to 35 months), Patient Birth Date, Patient Gender, and an exclusion option for patients notified in the last 1, 7, 30, or 90 days. The third section, "Which vaccines would you like to include?", shows a table of vaccine series for "CHILD SERIES":

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

Below the table, there are options to filter by "Due for all selected vaccines", "One dose away", or "One visit to complete the series". At the bottom, there are buttons for "Clear", "Schedule", and "Generate Patient List".

**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

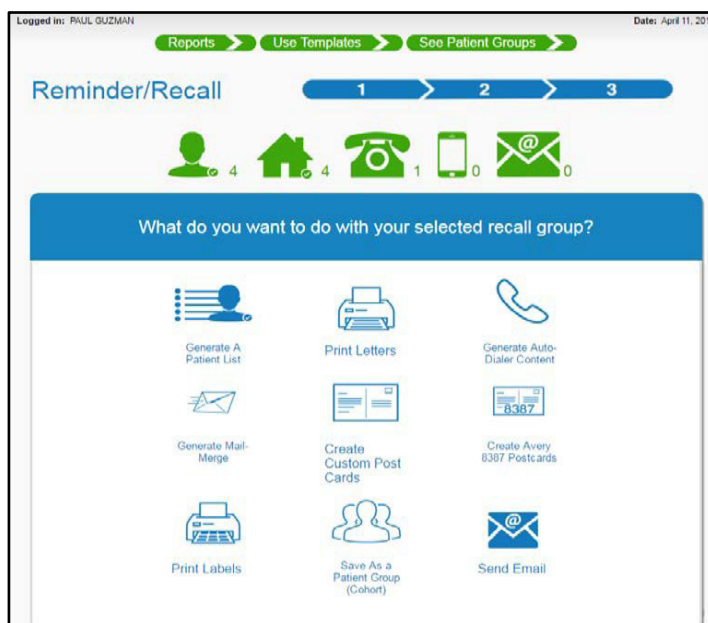
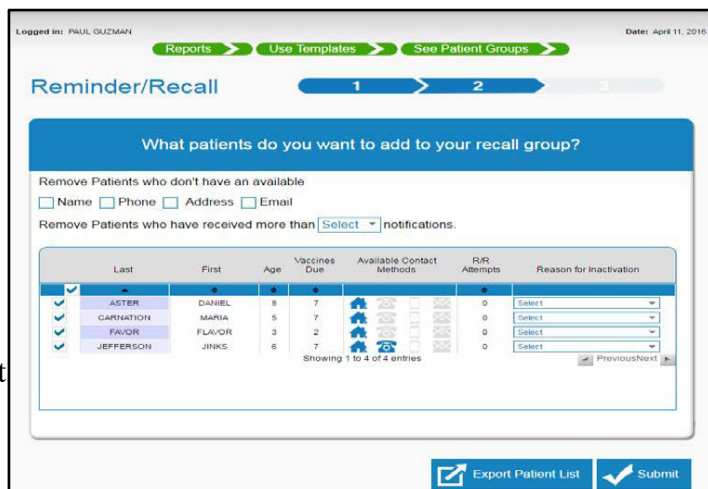
**Export the Patient List** – open patient list in a .csv file for review; each vaccine for which a patient is due will show on a separate line for easy filter and sort

**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



For questions, contact VacTrAK Support.

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