

## Reminder-Recall

### Getting Started

The primary benefit of reminder/recall is to **improve timeliness and completion of immunizations recommended by the Advisory Committee on Immunization Practices (ACIP) to prevent disease**. Reminder-recall is generated from the North Dakota Immunization Information System (NDIIS) based on the immunization forecast.

- ⇒ *A **Reminder** is communication to an individual patient that they are **due now or on a future date** for immunization(s)*
- ⇒ *A **Recall** is communication to an individual that they are **past due** for immunization(s)*

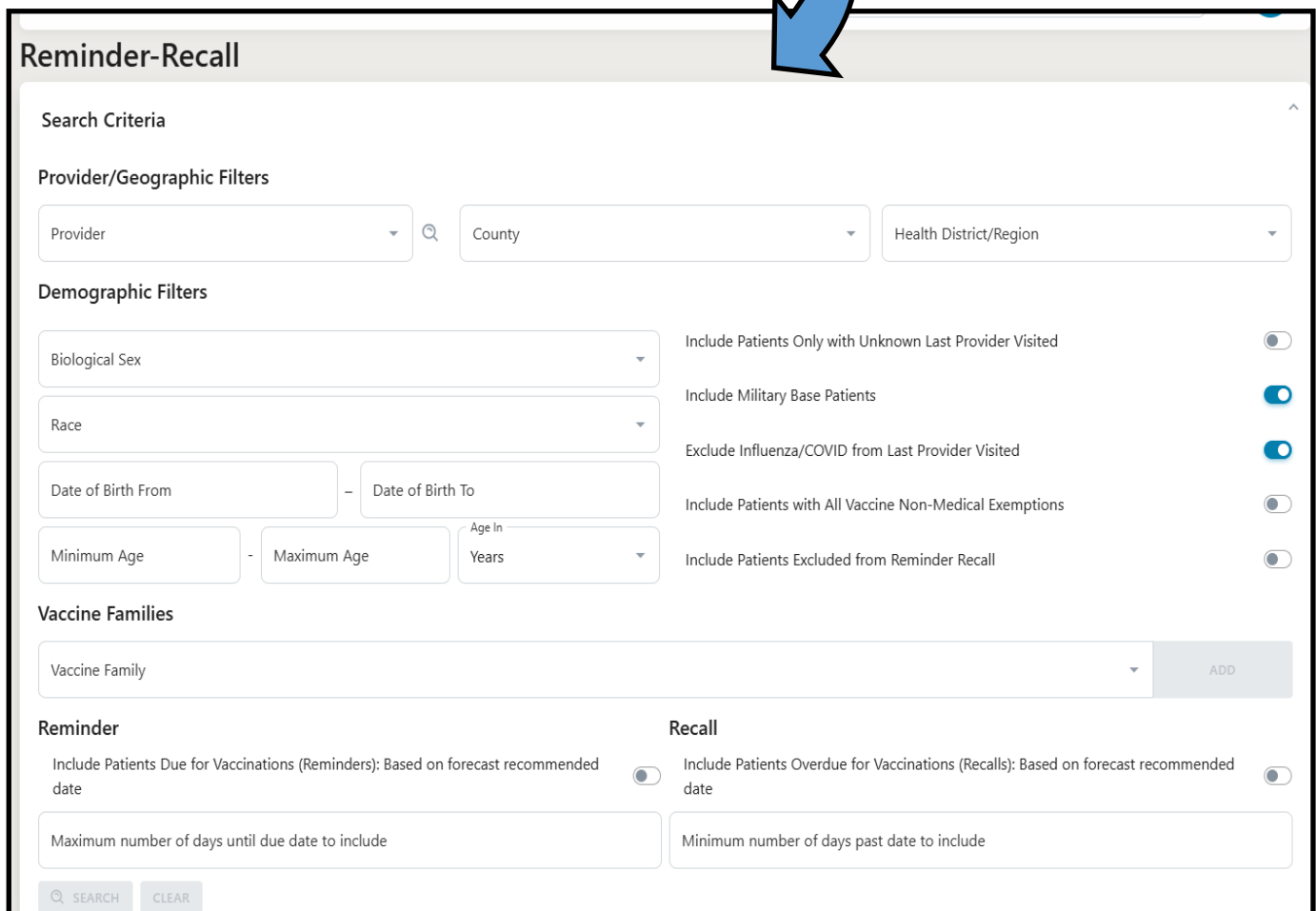
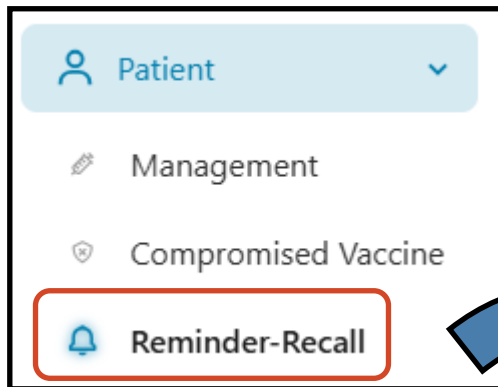
### **Responsibility for Reminder/Recall:**

Healthcare providers are responsible for immunization reminder/recall for their patients. Local public health units are responsible for immunization reminder/recall for the population within their service area (county or district). The NDDHHS recommends that healthcare providers and local public health units coordinate reminder/recall activities for their areas to ensure efforts are not duplicated and patients are not missed.

Provider based reminder/recall is defaulted to include patients based on their last provider visited excluding influenza and COVID19. In the NDIIS, the last provider visited excluding influenza and COVID19 is the last provider to enter a non-influenza/non-COVID19 vaccine in the patient's NDIIS record. Users have the option to change this default and include patients based the last provider visited (i.e., the last provider to enter any vaccine in the patient's NDIIS record). The NDDHHS recommends only changing the default if running reminder/recall for influenza or COVID19.

## How to Run Reminder-Recall:

1.) To access reminder-recall, select '**Reminder-Recall**' from the **Patient** drop-down on the Main Menu. Reminder-recall will open to the **Search Criteria**.

A screenshot of the 'Reminder-Recall' search criteria interface. The title 'Reminder-Recall' is at the top left. Below it is a 'Search Criteria' section. Under 'Provider/Geographic Filters', there are three input fields: 'Provider', 'County', and 'Health District/Region'. Under 'Demographic Filters', there are several options: 'Biological Sex', 'Race', 'Date of Birth From' and 'Date of Birth To', 'Minimum Age' and 'Maximum Age' (with 'Age In Years' dropdown), 'Include Patients Only with Unknown Last Provider Visited', 'Include Military Base Patients', 'Exclude Influenza/COVID from Last Provider Visited', 'Include Patients with All Vaccine Non-Medical Exemptions', and 'Include Patients Excluded from Reminder Recall'. Each of these options has a toggle switch. Under 'Vaccine Families', there is a 'Vaccine Family' input field and an 'ADD' button. At the bottom, there are two sections: 'Reminder' and 'Recall'. 'Reminder' has a toggle for 'Include Patients Due for Vaccinations (Reminders): Based on forecast recommended date' and an input field for 'Maximum number of days until due date to include'. 'Recall' has a toggle for 'Include Patients Overdue for Vaccinations (Recalls): Based on forecast recommended date' and an input field for 'Minimum number of days past date to include'. At the very bottom, there are 'SEARCH' and 'CLEAR' buttons.

2.) Select the **Provider/Geographic Filter** you want to use for the reminder-recall.

⇒ Only Local Public Health Units users and NDDHHS can run Reminder-Recall at the county or health district/region level.

3.) Select the **Demographic Filters** for your reminder-recall. The only demographics filter users are required to enter is age.

⇒ **Demographic Filters** and defaults:

**Biological Sex:** Defaults to include all (male, female, and unknown). This can be changed by selecting a different option from the drop-down menu.

**Race:** defaults to include all races. This can be changed by selecting a different option from the drop-down menu.

**Age:** Can be defined by entering a birthdate range or a minimum and maximum age in years or months.

**Include Patients Only with Unknown Last Provider Visited:** defaults to not include patients with unknown last provider visited. This can be changed by clicking the toggle. This filter can only be used by local public health units when running reminder/recall by county or health district/region.

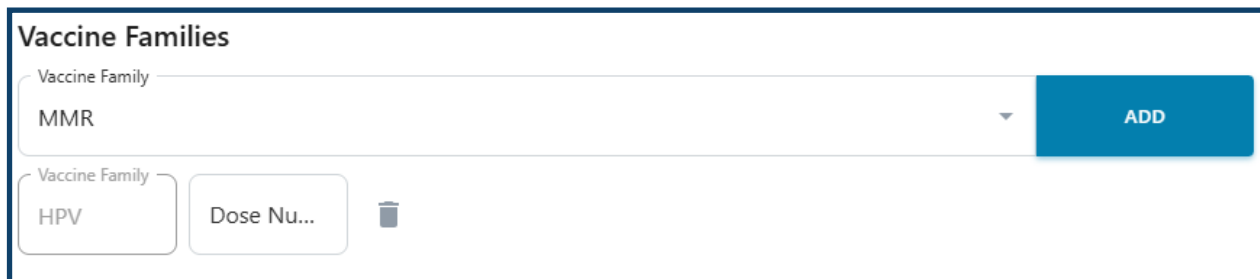
**Include Military Base Patients:** Defaults to include military base patients. This can be changed by clicking the toggle. This filter can only include or exclude patients based on the Military Base flag on the patient core demographics.

**Exclude Influenza/COVID from Last Provider Visited:** Defaults to exclude influenza/COVID from last provider visited. NDDHHS recommends only changing this if running reminder-recall for influenza or COVID19.

**Include Patients with All Vaccine Non-Medical Exemptions:** Defaults to exclude these patients. To include patients with a non-medical exemptions to all vaccines, click the toggle.

**Include Patients Excluded from Reminder-Recall:** Defaults to exclude patients who have been marked as opting out of reminder-recall. To include patients excluded from reminder-recall, click the toggle.

4.) Choose which vaccines to include in the reminder-recall by selecting the vaccine from the **Vaccine Families** drop-down and hitting the blue '**ADD**' button. The selected vaccine will drop down below the Vaccine Family box with a dose number box. You may enter a dose number if you wish to recall patients needing a specific dose number in a series. If dose number is left blank, reminder-recall will include patients due for any dose of that vaccine.



The screenshot shows a web interface for selecting vaccines. At the top, there is a section titled "Vaccine Families". Below this title is a dropdown menu labeled "Vaccine Family" with "MMR" selected. To the right of the dropdown is a blue button labeled "ADD". Below the dropdown, there is a list of added vaccines. The first entry is "HPV", which has a "Dose Nu..." input field and a trash icon to its right.

5.) Indicate if you wish to run a reminder (let patients know they are **coming due**), recall (let patients know they are **past due**) or both by using the toggles next to each option. You must also indicate either the maximum number of days until due date for reminders or the minimum number of days past due for recalls.

⇒ **The NDDHHS recommends running reminders for between 14 and 28 days and running recall for vaccines 30 days past due.**

Reminder	Recall
Include Patients Due for Vaccinations (Reminders): Based on forecast recommended date <input type="checkbox"/>	Include Patients Overdue for Vaccinations (Recalls): Based on forecast recommended date <input type="checkbox"/>
Maximum number of days until due date to include	Minimum number of days past date to include

6.) Click **Search** to obtain the list of patients.

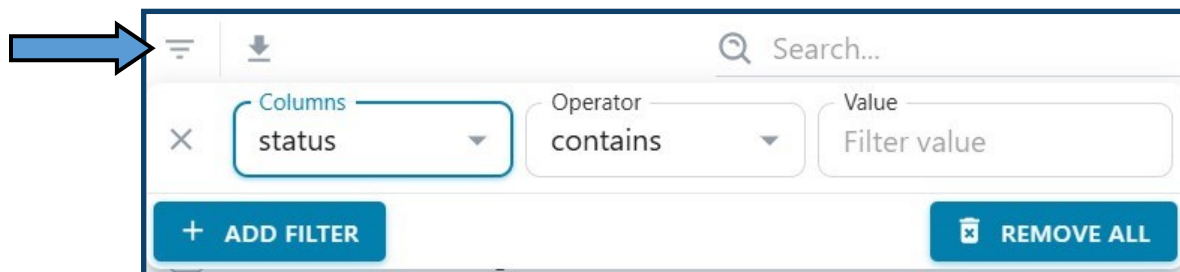
⇒ A table will be generated with patient information and the vaccines they are due for. Patients with incomplete address information will be indicated with a red icon and military addresses will be indicated with a yellow star.



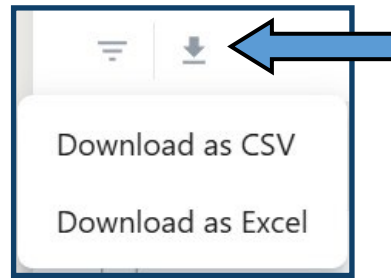
7.) Once the report has loaded, you have the option to sort the results by any column in the table or filter the results using the Filters option on the results page. You can filter the results by any column in the table by selecting the column and entering the value you want to filter.

⇒ If you need to change your search criteria, you can reopen the search criteria by clicking the **Refine Search** button.

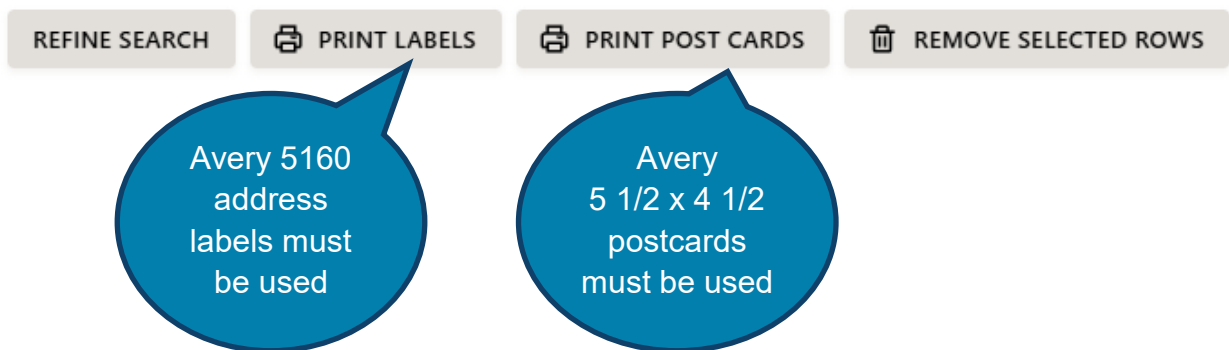
⇒ If you need to delete individual rows from the results, select the box next to the patient's name and then click **Remove Selected Rows**.



8.) You can export the list of patients as a CSV or Excel file by clicking on the export button then selecting the format of choice.



9.) You can also print labels or postcards by selecting the desired **Print Labels** or **Print Post Cards** button.



- ⇒ The return address section of the postcards will autofill with the provider's address from the NDIIS.
- ⇒ A prefix stating 'TO THE PARENT/GUARDIAN OF' will be autogenerated for all labels and postcards for patients younger than 18 years of age.
- ⇒ You may also need to change your browser print settings prior to printing the labels. If your print settings default to "Fit to printable area", change that setting to "Actual Size".

## Special Notes on Reminder-Recall

***The most cost effective reminder-recall notification methods are:***

- ⇒ ***telephone calls***
- ⇒ ***postcards***
- ⇒ ***letters***

Effectiveness of reminder-recall can be increased by using a combination of notification methods instead of relying on just one method.

Immunization providers are responsible for updating their patients' contact information in the NDIIS. Address and phone number are required fields and should be reviewed at every visit. In order to have a successful reminder-recall, valid contact information for each patient is necessary.

***The NDIIS is notified of deceased North Dakota residents and those residents are marked as permanently inactive in the NDIIS, removing them from reminder-recall. There is an occasional delay in the death notification, so it is important for providers to review reminder-recall lists to ensure that deceased patients are not included in any notices.***

***After an unsuccessful reminder-recall attempt, providers should consider a different notification method. For example, if a provider mails a postcard to a patient and the postcard is returned, the provider should try calling the patient.***

*If the provider is notified of an address or phone number change for a patient after attempting reminder-recall, the provider should update the NDIIS with the new contact information to facilitate successful future reminder-recall.*

*If a patient moves out-of-state or switches to a different provider, it is important that the patient's MOGE status be updated to reflect this change.*

*Patients who wish to opt out of receiving future reminder-recall notices can complete the [Reminder-Recall Opt Out form](#) on the NDIIS website or can be marked as opting out of reminder-recall by their immunization provider or local public health unit.*