



## North Dakota Immunization Information System: Reminder/Recall Report

A **Reminder** is communication to an individual patient that he/she is *due now or on a future date* for immunization(s)

A **Recall** is communication to an individual that he/she is *past due* for immunization(s)

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.** The reminder/recall report is generated from the North Dakota Immunization Information System (NDIIS) based on the immunization forecaster.

### How to Run Reminder/Recall Report:

1.) To run the reminder/recall report, click the **Create Reminder-Recall** hyperlink from your home screen.

The screenshot shows the user interface of the North Dakota Immunization Information System. At the top left is a green icon of a syringe. The main header is 'North Dakota Immunization Information System' in bold black text. Below the header is a blue bar with a 'Help' button. A dropdown menu shows 'Provider: RG Test Provider'. The main content area is a grid of menu items:

| Client   | Provider  | Reminder/Recall  | VFC Vaccine  |
|--|---|--|--|
| <ul style="list-style-type: none"><li>Search</li></ul>                               | <ul style="list-style-type: none"><li>Lookup</li></ul>  | <ul style="list-style-type: none"><li>Create Reminder-Recall</li></ul> | <ul style="list-style-type: none"><li>Vaccine Ordering, Returns and Wastages</li></ul> |
| Vaccine Management   | Reports   |  |  |
| <ul style="list-style-type: none"><li>Lot Management</li><li>Vaccine Login</li></ul> | <ul style="list-style-type: none"><li>Reports</li></ul> |  |  |

A red circle highlights the 'Create Reminder-Recall' link in the 'Reminder/Recall' column, with a red arrow pointing to it.

### 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, district, etc.) The NDHHS recommends that healthcare providers and Local Public Health Units coordinate the 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. In the NDIIS, the last provider visited excluding influenza is the last provider to enter a non-influenza/non-COVID vaccine in the patient's NDIIS record. Users have the option to change this default and include patients based on the last provider visited (i.e., the last provider to enter any vaccine in the patient's NDIIS record). The NDHHS recommend only changing the default if running reminder/recall for influenza or COVID-19.

3.) Select your provider from the **Provider** field drop-down box.

- Patients pulled onto report will be based off of the patient's last provider visited without influenza vaccine.

The image shows a screenshot of a web interface for selecting report parameters. It features three dropdown menus: 'Provider' (with 'Select a Provider' text), 'County' (with 'Select a County' text), and 'Health Districts/Region' (with 'Select a Region' text). To the left, a green cloud-shaped callout box with arrows pointing to the 'Provider' and 'County' dropdowns contains the text: 'These two fields will only have selectable options for Local Public Health Units'. To the right, a red rounded rectangle highlights a checkbox labeled 'Include clients only with unknown last provider visited:'. The checkbox is currently unchecked.

Local Public Health Units have the ability to run reminder/recall for their own patients or their county. Local Public Health Units that are multi-county districts have access to run the report for their whole region. They also have the option to conduct reminder/recall for patients within their county that have an unknown "last provider visited" by checking this box in the NDIIS report settings. These patients will not be included in the reminder/recall conducted by any other provider in the county or district.

**Communication directly from a patient's provider is more effective than reminder/recall communication from the NDHHS.**

4.) Use the radio buttons to indicate which gender you would like your report to look for.

- **The NDHHS recommends always including all genders when running this report. The default is set for “All”.**

**Gender:**  
 All  Male  Female  Unknown

5.) Select the race you want the report to pull by changing the drop-down box from the default of “All” or leave the box as is to look at all races.

- **The NDHHS recommends always including all races when running this re-  
port.**

**Race:** → ALL  
AMERICAN INDIAN OR ALASKA NATIVE  
ASIAN  
BLACK OR AFRICAN AMERICAN  
NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER  
WHITE  
OTHER RACE  
UNKNOWN

**Include Air Force base clients:**  
**Exclude Influenza from Visited:**  
**Age Range:**

Providers may also choose whether or not to include Air Force Base clients in the reminder/recall report. The Air Force Bases in North Dakota do not enter immunizations into the NDIIS, so individuals vaccinated at the Base facility will always show up as being behind on immunizations. If “No” is selected, these children will not show up on the reminder/recall list.

6.) Use the radio button to indicate if you would like Air Force Base Clients included in your report.

- The default setting is “Yes”.

**Include Air Force base clients:**  Yes  No

In order for a patient to be consider an “Air Force Base” patient in the NDIIS and be excluded from reminder/recall, they must be marked as such in on their demographic page. They will not be excluded based on city or zip code entered.

|   |            |   |              |
|---|------------|---|--------------|
| * First Name:   | TEST       | <input type="checkbox"/> Air Force Base |              |
| * Middle Name:  | A          |   |              |
| Suffix:   |            | * City:                                 | BISMARCK     |
| * Race:   | UNKNOWN    | * State:                                | NORTH DAKOTA |
| * Ethnicity:  | UNKNOWN    | * Zip:                                  | 58506        |
| * Birth Date:   | 01/01/2000 | County:                                 | BURLEIGH     |
| <input type="checkbox"/> Is Multiple Birth (twins, triplets, etc) |            | * Birth State/Country:                  | NORTH DAKOTA |
| * Gender:   | FEMALE     | * Primary Phone:                        | 701-867-5309 |
| Alias First Name:   | ACCT       | * Phone Number Type:                    | MOBILE PHONE |
| Alias Middle Name:  |            | Email Address:                          |              |

7.) Use radio button to indicate if you would like to exclude influenza/COVID vaccines from Last Provider Visited

- **The NDHHS recommends using the default setting of “Yes” for this question as not all patients get their influenza or COVID-19 vaccine from their primary care provider.**

**Exclude Influenza from Last Provider Visited:**  Yes  No

The NDIIS allows providers to conduct the reminder/recall for different cohorts of patients. These cohorts can be determined using a minimum and maximum age range (in months or years), pre-defined age groups, or birthdate ranges.

8.) Use the check boxes to indicate which cohort you would like the report to pull.

- Note– only one box can be checked at a time
- **Min/Max Age** can be run in months or years

Age Range:

Min Age:  Max Age:  Age In: Years   Select Age Range: Select One

BirthDate Range: From  To  (mm/dd/yyyy)

Min Age:  Max Age:  Age In:

BirthDate Range: From  To  (mm/dd/yyyy)

- The **Select Age Range** option has pre-defined age groups to chose from

Select Age Range:

- 8 Months
- 13 Months
- 19 Months
- 24 Months
- 19 - 35 Months
- 6 Years
- 13 Years

9.) Next, select the vaccine(s) that you would like for your reminder/recall by clicking the checkbox next to the name

- Users can also enter a dose number if they want the reminder/recall to include individuals due/past due for a specific dose number in a vaccination series

**Vaccine Families:** (If no vaccine is selected then all forecast vaccines will be used.)

|  |                                     |  |                          |                                  |
|--|-------------------------------------|--|--------------------------|----------------------------------|
| <input checked="" type="checkbox"/> DTAP | <input checked="" type="checkbox"/> | <input type="checkbox"/> PCV             | <input type="checkbox"/> | <input type="checkbox"/> COVID19 |
| <input type="checkbox"/> HIB             | <input type="checkbox"/>            | <input type="checkbox"/> PPSV            | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> POLIO           | <input type="checkbox"/>            | <input type="checkbox"/> TD/TDAP         | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> HEP B           | <input type="checkbox"/>            | <input type="checkbox"/> HPV             | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> MMR             | <input type="checkbox"/>            | <input type="checkbox"/> ROTAVIRUS       | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> VARICELLA       | <input type="checkbox"/>            | <input type="checkbox"/> MCV4            | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> HEP A           | <input type="checkbox"/>            | <input type="checkbox"/> ZOSTER          | <input type="checkbox"/> |                                  |
| <input type="checkbox"/> INFLUENZA       | <input type="checkbox"/>            | <input type="checkbox"/> MENINGOCOCCAL-B | <input type="checkbox"/> |                                  |

- **If no vaccines are selected, then all forecasted vaccines will be included for which a patient is due or past due.** If more than one vaccine is due or past due at the time the reminder/recall is run, all vaccinations will be accommodated in a single notification. There is no need to run multiple reports for multiple vaccines.
- The reminder/recall report should be run on a regular basis (i.e. weekly, monthly, and quarterly). Current ACIP guidance and wellness visits should be used to determine timing.
- **A single reminder notification should be considered 2 to 4 weeks before the recommended due date/date range for each recommended vaccine/ vaccination visit.** To avoid invalid doses being administered, providers should not schedule immunization appointments prior to the minimum valid date. This can be avoided by looking up a patient's immunization forecast when scheduling appointments and prior to administering any immunizations.
- The timeliness of reporting and recording data into the NDHHS is something that the provider running the reminder/recall report needs to keep in mind. Depending on when other providers enter their immunization information into the registry, there could be a delay of up to one month.
- In the NDHHS, providers are able to enter the number of days prior to the recommended due date to include patients for reminders and the number of days past due to include patients for recall. Both reminders and recalls can be run in the same report, or providers can select one or the other.

10.) Use the radio buttons to indicate if you want to use reminder (let patients know that they are **coming due** for a particular vaccination), recall (let patients know they are **past due** for vaccination), or both.

- **The NDHHS recommends running reminders for between 14 and 28 days and running recall for vaccines 30 days past due**

|  |
|--|
| <p><b>Include Patients Due for Vaccinations (Reminders)</b> <input type="radio"/> <input checked="" type="radio"/></p> <p><i>Maximum number of days until due date to include: (If Yes is Selected)</i> <input type="text"/></p> |
| <p><b>Include Patients OverDue for Vaccinations (Recalls)</b> <input type="radio"/> <input checked="" type="radio"/></p> <p><i>Minimum number of days past date to include: (If Yes is Selected)</i> <input type="text"/></p>    |

11.) Click **Run Reminder Recall** button to obtain the list of desired patients.

**Run Reminder Recall**

After the report has been run, a list of patients matching the selected criteria will be displayed on the screen. Patients with an incomplete address will be highlighted in orange. Patients whose addresses have been marked as "Air Force Base" on their demographics pages will be highlighted in yellow, if the user selected to include them in the report.

| Remove from Printing     | ClientID   | Last Name | First Name | Middle Name | BirthDate  | Address1         | Address2 | Apartment No. | PO BOX | City  | state | Zip   | Home Phone | Vaccines Due/Overdue   |
|--------------------------|------------|-----------|------------|-------------|------------|------------------|----------|---------------|--------|-------|-------|-------|------------|--|
| <input type="checkbox"/> | 0001079834 | ZZTEST    | FRANKIE    | NA          | 08/15/2014 | 456 KITTIE DRIVE |          |               |        | MINOT | ND    | 58703 | 0000000000 | DTaP, Hep A, Hep B, Hib, Influenza, MMR, PCV, Polio, Varicella |
| <input type="checkbox"/> | 0001204659 | TEST      | SUZANNE    | M           | 12/02/2014 | 00000            |          |               |        | MINOT | ND    | 58701 | 0000000000 | DTaP, Hep A, Hep B, Hib, Influenza, MMR, PCV, Polio, Varicella |

Record Count: 2

Address not complete

Air Force Base Client

13.) Once report results are displayed, you can choose to download the list of patients, converting the report into an Excel document, print labels, or print postcards.

Avery 75160 labels must be used

Print Labels    Print PostCards    Download List

Avery 5 1/2 x 4 1/2 postcards must be used

- If printing postcards, providers must type in the return address they wanted printed.

**Return Address for Post Cards:\***

Provider Name: 0000 - RG TEST

Address 1: 100 MAIN

Address 2:

City, State, Zip: BISMARCK, ND 58501

The information will be automatically populated only when a specific provider is selected

*\*only required when postcard printing is selected.*

**The most cost-effective reminder/recall notification methods to improve timeliness and completion of immunizations, ranked from the most to least cost-effective are: telephone call (person to person, not using an auto-dialer system), postcard, and letter.** Effectiveness of reminder/recall can be increased by combining various notification methods. The reminder/recall notification method used should be based on available demographic information in the NDIIS (i.e., if the patient's phone number is not available, then a postcard or letter should be sent).

***If resources are limited, providers should prioritize Recalls over Reminders to get patients currently behind on immunizations caught up.***

### **Response to Reminder/Recall:**

Immunization providers are responsible for updating their patients' contact information in the NDIIS as needed. Patient addresses and phone numbers are required fields in the NDIIS. In order to have a successful reminder/recall effort, valid contact information for each patient is necessary.

***The NDHHS Immunization Unit is notified of deceased North Dakota residents and make every effort to ensure these records are marked as inactive in the NDIIS so they are removed from reminder/recall. There is an occasional delay in the death notifications, so it is important for providers to review reminder/recall lists to ensure that deceased patients are not included in reminder/recall. The NDHHS is not notified of out-of-state patient deaths, so providers must flag records for deceased individuals that they see as still active in the NDIIS following the policy as outlined on the NDIIS website (linked [here](#)).***

***After an unsuccessful reminder/recall attempt, providers should consider a different reminder/recall notification method.*** For example, if a provider mails a postcard to a patient and the postcard is returned, the provider should then 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 updated the NDIIS with the patient's new contact information to facilitate future reminder/recall.

If a patient moves out-of-state or reports moving out of the provider or Local Public Health Unit's jurisdiction, or if the provider receives no response to a reminder/recall notification after three attempts, the provider should use the NDIIS' MOGE functionality to remove that patient from the last provider visited list. Online training and step by step instructions on how to use the MOGE function are available on the NDIIS Trainings website (linked [here](#)).

***Any immunization provider conducting reminder/recall activities should work with their own HIPAA compliance officer and/or legal counsel to ensure communications to patients follow all applicable laws and policies.***