



How to Run a Reminder/Recall Report

Version 2_3.11.20

Things You Should Know

- The Patient Reminder/Recall report generates a list of patients due or overdue for vaccinations.
- A patient is only included in your report if he/she has an active status at your clinic.
- Reminder/Recall reports are processed overnight.
- Reminder/Recall reports are based on immunization data that has been entered into CT WiZ.

The reports are based on ACIP logic and should be used to assist with clinical decision making.



- Home
- Patients
- Immunizations
- Education
- Inventory
- Clinic Tools
- Reports
- HL7 Management

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Default Provider/Clinic

Provider *
CVP TRAINING CLINIC REGION 2

Clinic *
CVP TRAINING CLINIC REGION 2

News

[07/18/2019] - Welcome to CT WIZ

Welcome to CT WiZ Training!

Note that this application requires the use of Adobe Reader to view/print some of the files and reports that are available.
[Click here to download a free copy of Adobe Reader.](#)



On the HOME screen, you will see the Clinics you are assigned to in the Default Provider/Clinic section. If you are assigned to multiple clinic locations, make sure that you have selected the correct one in the banner at the top of the screen.

CT WIZ CVP TRAINING CLINIC REGION 2, CVP TRAINING CLINIC REGION 2, 1... PATIENT SEARCH

Immunizations
Education
Inventory
Clinic Tools
Reports
HL7 Management

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Reports [Learn More](#)

Vaccine Information Statements (VIS)
CT Forms and
Technical Application

1. Click on Reports to navigate to the reports screen

Patient Management

Birth Vaccinations
Inactivate Patients
Patient Detail with Services
Patient List By Insurance Source
Patient List/Counts By Clinic Report
Patient Reminder/Recall
Patient Roster
Patient VFC Eligibility History
Patients By Birth Facility Type
Patients First Seen
Patients with Active Exemptions
Patients with Adverse Reactions
Patients with Notes
Patients with Vaccine Refusals
Patients with Vaccine Refusals - Datamart
Vaccine Recall
Patients with Precautions / Contraindications

2. Scroll to the Patient Management Section

- Click the Patient Reminder/Recall

Coverage Statistics

Clinic Immunization Count
Coverage Assessment Snapshot Reports
Dosage Report
Doses Administered

Create a Reminder/Recall Report

Click on Add Reminder/Recall Run to create a new report with new criteria

Cancel **Add Reminder/Recall Run**

Patient Reminder/Recall [Learn More](#)

View

Provider *

Clinic *

| Provider | Clinic | Run Name | Run Schedule Date | Run Completed Date | Reminder/Recall From Date | Reminder/Recall Through Date | # of Patients in Run | # of Patients Assessed | |
|------------------------------|------------------------------|----------------------|----------------------|----------------------|---------------------------|------------------------------|----------------------|------------------------|--|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | <input type="button" value="Clear Filters"/> |
| CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 7 | 7 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |
| CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 18 | 18 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |

| | | |
|--|---------------------------------------|--|
| <input type="button" value="Unvaccinated Report"/> | <input type="button" value="Report"/> | <input type="button" value="Extended Report"/> |
| <input type="button" value="Dymo Labels"/> | | |
| <input type="button" value="Full Extract"/> | | |

Here you will see R/R Reports that you have already created

Create a Reminder/Recall Run

Add

Create Cancel

Run Name 1

TEST 2

Provider*

CVP TRAINING CLINIC REGION 2

Clinic* 2

CVP TRAINING CLINIC REGION 2

Run Schedule Date* **Run Completed Date** 3

01/02/2020 MM/DD/YYYY

Reminder/Recall Date Range* 4

From: 12/31/2019 Through: 06/30/2020

Age Range*

From: Through: UOM: MONTHS

Date of Birth Date Range* 5*

From: 12/31/2018 Through: 06/30/2019

Options To Target Patients Included For Reminder/Recall

City Zip Code

99999-9999

Gender

Ignore Setting For "Do Not Include Patient in Reminder/Recall"?

Only Include Patients With Address (i.e., Street Address, City, State, Zip)?

Increment Patient Reminders/Recall Count?

Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination

Generate Reminder/Recall Event?

Include Patients Due For Vaccinations (Reminders)? 6

Include Patients Overdue For Vaccinations (Recalls)?

Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include

Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations?

Exclude patients with one or more vaccine refusals?

1. Give the report a **Run Name**
 2. Make sure the selected **Provider** and **Clinic** are correct for the report you want to run
 3. Enter a **Run Schedule Date** (Double-click to enter today's date or you may choose a future date)
 - The report will process overnight
 4. Enter a **Reminder/Recall Date Range**.
 - The report will show a list of patients due or overdue for the selected date range
 5. Enter an **Age Range**.
 - This narrows the report to show a list of patients within that specified age range.
 - Make sure that you change the UOM to years for the older patients
- *OR
- Enter a **Date of Birth Date Range**.
- This narrows the report to show a list of patients within that specified DOB range.
6. Select **Reminders (Due)** and/or **Recalls (Overdue)** as desired

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

Con't Reminder/Recall Options

Options To Target Patients Included For Reminder/Recall

7 City Zip Code

8 Gender

Ignore Setting For "Do Not Include Patient in Reminder/Recall?"

Only Include Patients With Address (i.e., Street Address, City, State, Zip)?

Increment Patient Reminders/Recall Count?

Exclude Patients After Number of Reminders/Recalls Without Subsequent Vaccination

Generate Reminder/Recall Event?

Include Patients Due For Vaccinations (Reminders)?

Include Patients Overdue For Vaccinations (Recalls)?

Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include

Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations?

Exclude patients with one or more vaccine refusals?

Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

| 11 | Vaccine Series | Dose Number | 12 |
|-------------------------------------|------------------|----------------------|-----------|
| <input checked="" type="checkbox"/> | DTaP / TD / Tdap | <input type="text"/> | |
| <input type="checkbox"/> | H1N1-09 | <input type="text"/> | |
| <input type="checkbox"/> | Hep A | <input type="text"/> | |
| <input checked="" type="checkbox"/> | Hep B | <input type="text"/> | |
| <input checked="" type="checkbox"/> | Hib | <input type="text"/> | |
| <input type="checkbox"/> | HPV | <input type="text"/> | |
| <input type="checkbox"/> | Influenza | <input type="text"/> | |
| <input type="checkbox"/> | Meningococcal | <input type="text"/> | |
| <input checked="" type="checkbox"/> | MMR | <input type="text"/> | |
| <input checked="" type="checkbox"/> | Pneumococcal | <input type="text"/> | |
| <input checked="" type="checkbox"/> | Polio | <input type="text"/> | |
| <input type="checkbox"/> | Rotavirus | <input type="text"/> | |
| <input checked="" type="checkbox"/> | Varicella (CPOX) | <input type="text"/> | |
| <input type="checkbox"/> | Zoster | <input type="text"/> | |

13

Create

Cancel

There are many Options you can choose when creating your report:

7. Enter a City or Zip Code

8. Select a Gender

9. Increment Patient Reminder/Recall Count & Generate Reminder/Recall Event

- Checking these boxes are important if you want to mark patients as "Lost to Follow up" after 3 Reminder Recall Runs & no vaccinations in the last 120 days.

10. Specify the number of days past due for Recalls

11. Select the Vaccine Series that you want to assess

12. Number of Doses that you want to assess

- Only use this if you are looking for a specific dose. e.g. if you enter 4th DTaP, you will ONLY get a listing of patients missing the 4th DTaP, and not children that missed their 1st, 2nd, or 3rd DTaP.

13. Click Create when done

Creating a new Reminder/Recall Run

Patient Reminder/Recall

✓ Success The Record Has Been Saved ×

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page. ⓘ

Edit

Update

Cancel

Run Name

TEST 2

Provider *

CVP TRAINING CLINIC REGION 2 ▼

Click Cancel once the success message displays. You can update any of the fields and click Update if a change is needed.

Review and Delete existing reports

Patient Reminder/Recall [Learn More](#)

Cancel [Add Reminder/Recall Run](#)

View

Provider *

Clinic *

| Provider | Clinic | Run Name | Run Schedule Date | Run Completed Date | Reminder/Recall From Date | Reminder/Recall Through Date | # of Patients in Run | # of Patients Assessed | | |
|--|------------------------------|----------------------|----------------------|----------------------|---------------------------|------------------------------|----------------------|------------------------|--|-------------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | <input type="button" value="Clear Filters"/> | |
| <input type="radio"/> CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 01/02/2020 | | 12/31/2019 | 06/30/2020 | 0 | NA | <input type="button" value="Reprocess"/> | <input type="button" value="View"/> |
| <input type="radio"/> CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 01/02/2020 | | 12/31/2019 | 06/30/2020 | 0 | NA | <input type="button" value="Reprocess"/> | <input type="button" value="View"/> |
| <input type="radio"/> CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 7 | 7 | <input type="button" value="Reprocess"/> | <input type="button" value="View"/> |
| <input type="radio"/> CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 18 | 18 | <input type="button" value="Reprocess"/> | <input type="button" value="View"/> |

| | | |
|--|---------------------------------------|--|
| <input type="checkbox"/> Unvaccinated Report | <input type="checkbox"/> Report | <input type="checkbox"/> Extended Report |
| <input type="checkbox"/> Dymo Labels | <input type="checkbox"/> Avery Labels | |
| <input type="checkbox"/> Full Extract | | |

Click View to

- Review existing report criteria & edited runs without a completed date.
- Reports can be deleted after 120 days.

Viewing a Report

View

Provider *

CVP TRAINING CLINIC REGION 2

Clinic *

CVP TRAINING CLINIC REGION 2

| Provider | Clinic | Run Name | Run Schedule Date | Run Completed Date | Reminder/Recall From Date | Reminder/Recall Through Date | # of Patients in Run | # of Patients Assessed | | |
|----------------------------------|------------------------------|------------------------------|----------------------|----------------------|---------------------------|------------------------------|----------------------|------------------------|--|--|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | | | <input type="button" value="Clear Filters"/> | |
| <input type="radio"/> | CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 01/02/2020 | 01/03/2020 | 12/31/2019 | 06/30/2020 | 19 | 19 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |
| <input checked="" type="radio"/> | CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 01/02/2020 | 01/03/2020 | 12/31/2019 | 06/30/2020 | 19 | 19 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |
| <input type="radio"/> | CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 7 | 7 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |
| <input type="radio"/> | CVP TRAINING CLINIC REGION 2 | CVP TRAINING CLINIC REGION 2 | TEST 2 | 12/26/2019 | 12/27/2019 | 12/26/2019 | 06/30/2020 | 18 | 18 | <input type="button" value="Reprocess"/> <input type="button" value="View"/> |

Unvaccinated Report

Report

2

Extended Report

Dymo Labels

Avery Labels

Postcard

Full Extract

1. Choose the report that you want to view
2. Click on Report button

Other Output Choices

| | | |
|---------------------|--------------|-----------------|
| Unvaccinated Report | Report | Extended Report |
| Dymo Labels | Avery Labels | Postcard |
| Full Extract | | |

- **Unvaccinated Report:** Lists patients meeting Reminder/Recall criteria that have not returned for immunizations since the reminder/recall was run.
- **Report:** Lists all patients meeting Reminder/Recall criteria.
- **Extended Report:** Provides additional patient details.
- **Dymo Labels, Avery Labels, and Postcard:** If the mailing address is empty in Demographics than only the patient's name will appear on the label.
- **Full Extract:** Generates a CSV file containing patient data for patients included in the Reminder/Recall.



Reviewing the Reminder/Recall Report



Reminder/Recall Report



CT WIZ Reminder

March 11, 2020

Reminder Criteria

| | | |
|--|--|---|
| Reminder Run Name: TEST 2 | Run Schedule Date: 01/02/2020 | Run Completed Date: 01/03/2020 |
| | Reminder Date From: 12/31/2019 | Reminder Date Through: 06/30/2020 |
| | # of Patients in Run: 19 | # of Patients Assessed: 19 |
| Vaccine Series: DTaP / TD / Tdap - All, Polio - All, Hib - All, Pneumococcal - All, Hep B - All, MMR - All, Varicella (CPOX) - All | | |
| Other Criteria: Generate Reminder/Recall Event? Y Include Patients Due For Vaccinations (Reminders)? Y Include Patients Overdue For Vaccinations (Recalls)? Y | | |
| Provider: CVP TRAINING CLINIC REGION 2 | | |
| Clinic: CVP TRAINING CLINIC REGION 2 | Date of Birth Date Range From: 12/31/2018 | Date of Birth Date Range Through: 06/30/2019 |

| | | | |
|--|----------------------------|-------------------------|---------------------|
| School Dist: ALL SCHOOL DISTRICTS | School: ALL SCHOOLS | VFC Eligibility: | Gender: Both |
| City: | County: | Zip: | |

BUNNY, BETTY (896214) - DOB: 01/19/2019
 410 CAPITOL AVE
 HARTFORD, CT 06134 County: Hartford

Home Phone: 999-999-9999
 Work Phone:
 Cell Phone:

DTAP (2), HEP B, PED/ADOL (3), HIB (PRP-T) (2), MMR (1),
 PCV13 (2), POLIO-IPV (2), VARICELLA (1)

Gender: Female
 Email:
 Primary Contact: BUGS BUNNY Relationship: SIBLING

Reminder Date: 05/19/2019 Age At Date: 0Y 4M 0D
 VFC Eligibility: VFC Eligible - Uninsured
 Most Recent Refusal:
 Primary Insurance:

Default Clinic: CVP TRAINING CLINIC REGION 2 (C1000P1000)

Most Recent Immunization Date: 03/26/2019 Most Recent Immunization Clinic: C0000PR

Immunization History: DTAP / TD / TDAP(03/26/2019) POLIO(03/26/2019) HIB(03/26/2019) PNEUMOCOCCAL(03/26/2019) HEP B(01/19/2019 03/26/2019)

This report is similar to the monthly CT WIZ Compliancy Report that you may have previously received from DPH.

- At the top you will see the **Reminder Criteria** you entered for this report
- Below you will see all the patients that meet the criteria

Reminder/Recall Report

| | | | | | |
|---|--|-----------------------|--|---|--|
| 1 | BUNNY, BETTY (896214) - DOB: 01/19/2019 | | Home Phone: 999-999-9999 | 2 | DTAP (2), HEP B, PED/ADOL (3), HIB (PRP-T) (2), MMR (1), PCV13 (2), POLIO-IPV (2), VARICELLA (1) |
| | 410 CAPITOL AVE | | Work Phone: | | |
| | HARTFORD, CT 06134 | County: Hartford | Cell Phone: | | |
| | Gender: Female | | Email: | | Relationship: SIBLING |
| | Reminder Date: 05/19/2019 | Age At Date: 0Y 4M 0D | Primary Contact: BUGS BUNNY | | |
| | VFC Eligibility: VFC Eligible - Uninsured | | Most Recent Refusal: | | |
| | Default Clinic: CVP TRAINING CLINIC REGION 2 (C1000P1000) | | Primary Insurance: | | |
| 3 | Most Recent Immunization Date: 03/26/2019 | | Most Recent Immunization Clinic: C0000PR | | |
| | Immunization History: DTAP / TD / TDAP(03/26/2019) POLIO(03/26/2019) HIB(03/26/2019) PNEUMOCOCCAL(03/26/2019) HEP B(01/19/2019 03/26/2019) | | | | |

1. Patient Demographic Information

- Can be used to send letters or make reminder phone calls

2. Missing/Recommended Immunizations for the patient

- Before sending reminders, check the patient's medical record to see if these immunizations have been received
- If these missing immunizations have been received enter them as historical immunizations
 - See [Add historical immunizations](#) on the [CT WiZ Patient Management](#) page
- If the patient is no longer a patient at your clinic
 - See [Remove a patient from your clinic](#) on [CT WiZ Patient Management](#) page

3. Patients Immunization History

Reminder/Recall Report

1

Reminder/Recall Vaccine Summary

| Vaccine | Number |
|--|------------|
| DTaP | 19 |
| Hep B, ped/adol | 19 |
| Hib (PRP-T) | 19 |
| MMR | 19 |
| PCV13 | 19 |
| Polio-IPV | 19 |
| Varicella | 19 |
| Total Remaining Vaccinations Due: | 133 |

2

| | |
|--|----|
| Total Patients Remaining Due for Vaccinations: | 19 |
| Total Patients with New Vaccinations: | 0 |
| Total Patients Combined or Marked as Deleted: | 0 |
| Total Patients Originally Due for Vaccinations: | 19 |

NOTE: Patients Combined or Marked as Deleted are not displayed.

Scroll to the end of the report to see the Vaccine Summary

1. The summary lists of the type and number of vaccines due.
2. It also shows the number of patients due for vaccinations.
 - If you add historical doses the **total patients remaining due for vaccination** will change.

How To Get Help

- Click on the  located at the top of the page to get a description of whichever screen you are on.
- Some pages have a [Learn More](#) link. Click on this to see short "How to" videos. These appear on a separate page so you can play videos while navigating through CT WiZ.
- Visit the CT WiZ training page [here](#). The training page has numerous documents and step by step videos to help you.
- Still can't find an answer to your question? After you exhausted all the above options, submit a help desk ticket to get the quickest answer. You may do so [here](#).

