How to Run a Reminder/Recall Report

Version 3.0_5.12.22

Connecticut Department of Public Health
Keeping Connecticut Healthy

- The Patient Reminder/Recall report generates a list of patients due or overdue for vaccinations.

- A patient is only included in your report if they have an active status at your clinic or your clinic gave a prior dose.

- 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.

Default Provider/Clinic

CT WiZ   📍 CVP TRAINING CLINIC REGION 2, CVP TRAINING CLINIC REGION 2, 1...   🔍 PATIENT SEARCH

It's Your Best Shot!
CT WiZ
Connecticut
Immunization Information System

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

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Third Party Notices

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.

Get 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.

Finding the report

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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Third Party Notices

Reports ℹ️ Learn More

Vaccine Information Statements (VIS)

CT Forms ar

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

Patient Reminder/Recall

Canc[...]

Search Criteria

Provider/Clinic: CVP TRAINING CLINIC REGION 4, CVP TRAINING CLINIC REGION 4 (4444)

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

Run Name

Run Schedule Date

From: 01/29/2022

Through: 04/29/2022

Run Completed Date

From: MM/DD/YYYY

Through: MM/DD/YYYY

Click on [...]
Reminder/[...]
Run to creat[...]
report with[...]
criteri[...]

When you click the Filter button, you will see R/R Reports that you have already created at the bottom of the page

▼ Filter

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		
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0	❓	View
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6	❓	View

Create a Reminder/Recall Run

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. Select a Report Type:
   - **Patient Default Clinic** – for medical homes and routine vaccinations or
   - **Vaccination Clinic** – for non-medical homes – better serves pandemic and flu vaccines where the patient default clinic is not updated when the vaccination is documented
4. Enter a **Run Schedule Date** (Double-click to enter today's date or you may choose a future date)
   - The report will process overnight
5. Enter a **Reminder/Recall Date Range**.
   - The report will show a list of patients due or overdue for the selected date range
6. 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

7. Enter a **Date of Birth Date Range** (This narrows the report to show a list of patients within that specified DOB range).
8. Select **Reminders (Due) or Recalls (Overdue)** – It is recommended that you do not check both boxes for a single report as the it does not differentiate which patients are due or overdue.

Con't Reminder/Recall Options

9 City [ ] Zip Code [99999-9999]

10 Gender [ ]

11
- [ ] 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)?

12
- [ ] 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)

13

	Vaccine Series	Dose Number
☑	COVID-19	
☑	DTaP / TD / Tdap	
☑	H1N1-09	
☑	Hep A	
☑	Hep B	
☑	Hib	
☑	HPV	
☑	Influenza	
☑	Meningococcal	
☑	MMR	
☑	Pneumococcal	
☑	Polio	
☑	Rotavirus	
☑	Varicella (CPOX)	
☑	Zoster	

14 (Dose Number column)

15 [Create] [Cancel]

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

9. Enter a **City** or **Zip Code**

10. Select a **Gender**

11. 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.

12. Specify the **number of days past due** for Recalls

13. Select the **Vaccine Series** that you want to assess

14. 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.

15. Click **Create** when done

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

Cancel   Add Reminder/Recall Run

Search Criteria

Provider/Clinic: CVP TRAINING CLINIC REGION 4, CVP TRAINING CLINIC REGION 4 (4444)

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

Run Name

Run Schedule Date

From
01/29/2022

Through
04/29/2022

Run Completed Date

From
MM/DD/YYYY

Through
MM/DD/YYYY

Click the **Filter** button to see R/R Reports that you have already created at the bottom of the page

▼ Filter

Provider	Clinic	Run Name	Run Schedule Date	Run Completed Date	
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		View
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15	View

Click the **View** button on the right to see the parameters for each report run.

Reports can be deleted after 120 days or if the report has not yet been run.

Patient Reminder/Recall

Cancel   Add Reminder/Recall Run

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		
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	JANUARY TO APRIL	04/29/2022		12/01/2021	04/29/2022	0	0	❓	View ▾
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	VACCINATION CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	6	6	❓	View ▾
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	PATIENT DEFAULT CLINIC	04/14/2022	04/15/2022	01/01/2022	04/14/2022	16			
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	TEST 2	04/14/2022	04/15/2022	11/01/2021	04/14/2022	9			
CVP TRAINING CLINIC REGION 4	CVP TRAINING CLINIC REGION 4	COVID-19 1/12/2022 - 4/12/2022	04/12/2022	04/13/2022	01/12/2022	04/12/2022	0			

VIEW
REPROCESS
UNVACCINATED REPORT
REPORT
EXTENDED REPORT
DYMO LABELS
AVERY LABELS
POSTCARD
FULL EXTRACT
AUTO-DIALER EMAIL EXTRACT
AUTO-DIALER PHONE NUMBER EXTRACT

Showing 1 to 5 of 5 entries

← Previous   1   Next →

Click the **Drop-Down Arrow** button next to the **View** button to see the outputs for each report.

Other Output Choices

VIEW

REPROCESS

UNVACCINATED REPORT

REPORT

EXTENDED REPORT

DYMO LABELS

AVERY LABELS

POSTCARD

FULL EXTRACT

AUTO-DIALER EMAIL EXTRACT

AUTO-DIALER PHONE NUMBER EXTRACT

- **View**: Displays the parameters entered for the run.
- The **Reprocess** option is not recommended to be used at this time.
- **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 then only the patient's name will appear on the label.
- **Full Extract, Auto-Dialer Email Extract and Auto Dialer Phone Number Extract**: Generates a CSV. file containing patient data for patients included in the Reminder/Recall.

Reviewing the Reminder/Recall Report

Reminder/Recall Report

- 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
410 CAPITOL AVE
HARTFORD, CT 06134   County: Hartford

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

Email:

2

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

Gender: Female
Reminder Date: 05/19/2019   Age At Date: 0Y 4M 0D
VFC Eligibility: VFC Eligible - Uninsured
Default Clinic: CVP TRAINING CLINIC REGION 2 (C1000P1000)

Primary Contact: BUGS BUNNY
Most Recent Refusal:
Primary Insurance:

Relationship: SIBLING

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 at another provider
   - 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

DPH
Connecticut Department
of Public Health

It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

Reminder/Recall Vaccine Summary

1

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.

Tips for Running CT WiZ Reports

- Visit: Patient Management for CT WiZ Training
- If a patient leaves your clinic, inactivate patients from your clinic in CT WiZ – *before* you run reports.
- **Run smaller Reports** – they are easier to manage.
- Larger reports will slow the CT WiZ system down and your report may timeout.
- Multiple reports can be generated to cover all patients (stagger over different days).
- Use the dose box by the vaccine/s to help target the data you are looking to generate.
- For help:
  - CT WiZ Reports Manual
  - Contact Us

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.