

## Guide to Running your own compliancy report using the CT WiZ Reminder Recall Report Module

*Background:* When clinics begin to electronically report to CT WiZ, they no longer receive monthly mailed compliancy reports from the Department of Public Health Immunization Program. This guide details how your clinic can run your reminder recall report independently.

*Purpose:* **The patient reminder recall report (R/R) is a tool to generate a comprehensive overview of patients in your office that are due (reminder) or overdue (recall) for an immunization.** Use these reports to assist in recalling patients and getting them up to date with their immunizations. There are **two** important criteria to remember:

- Patients must have an active status in your clinic to be included in this report or have been given a prior dose at your clinic.
- These reports should be run consistently & regularly.
  - DPH recommends you run these reports **at least monthly**.
  - Though when time and staffing permit, it will be beneficial to run the R/R more frequently to maintain high data quality in CT WiZ.

**Instructions:** The tips and steps below can be helpful to clinic staff that enter patient and vaccination information, monitor the Electronic Health Record/HL7 interface, or conduct reminder recall patient outreach. Please see the video and manual below to find helpful information about report capabilities in CT WiZ:

- [R/R video tutorial](#)
- [CT WiZ Reports Manual](#)

**To run a new “compliancy report” using reminder recall report:** log into CT WiZ

- 1) Click on **reports** from the left-handed navigation menu in CT WiZ
- 2) In the patient management section, click on **Patient Reminder/Recall report**
- 3) Make sure “Provider/Clinic” name is correct for the clinic you are running the report
- 4) Click the **blue** “Add Reminder/Recall” button
- 5) Choose report parameters **\*see Appendix A**
  - a. Enter a run name: May 2023 Reminder Recall 8 months
  - b. Enter Provider/clinic: your clinic name
  - c. Enter Report type: patient default clinic
  - d. Enter run schedule date: current date
    - i. **\*Note: reminder recall report will run overnight**
  - e. Enter reminder recall date range: one full month
    - i. Ex.) May would be 05/01/2023 – 05/31/2023
  - f. Enter date of birth range: birth dates of patients turning 8 months **\*see Appendix B**
    - i. Ex) May’s report would be this birth range 8/1/2022 – 8/31/2022
    - ii. **\*Note: do not fill in “age range” field**
  - g. Enter options to target patients included for reminder/recall
    - i. Include patients overdue for vaccinations
    - ii. Include patients due for vaccinations

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- h. Check the below vaccines based on the birth cohort
    - i. 8 months: DTaP/ TD/ Tdap, Hep B, Hib, Pneumococcal, Polio
    - ii. 20 months: DTaP/ TD/ Tdap, Hep A, Hep B, Hib, MMR, Pneumococcal, Polio, Varicella
    - iii. **\*Note: leave dose blank to include all doses in series**
  - i. Click [blue](#) create button
    - i. *Reminder: report will be processed overnight after clicking create*
  - j. A [green](#) success box will appear upon completion of these steps
- 6) Run your second report: repeat steps 1-5 changing only the following two fields
- a. Run Name: May 2023 Reminder Recall 20 months
  - b. Date of birth range: 8/1/2021 - 8/31/2021

### **To view your reminder recall report: log into CT WiZ**

- 1) Click on reports from the left-handed navigation menu in CT WiZ
- 2) In the patient management section, click on Patient Reminder/Recall report
- 3) Make sure “Provider/Clinic” name is correct for the clinic you are running the report for
- 4) Click the filter button: your two reports should appear at the bottom of the screen.
- 5) Once the “run complete date” appears next to your report, click the down arrow, and choose “**report**”
  - a. Note: Your two reports will likely take 24 hours to run and appear with a “run completed date”.  
**If there is no “Run Complete Date” next to a report, the report has yet to be generated by the system.**
- 6) Report will open in PDF format which can be saved to your computer

### **What to do if your patient is generated on your reminder recall report:**

- Outreach may need to be conducted to schedule a vaccination visit.
- Patient data updates in CT WiZ may be needed, such as historical immunization information or updating patient status in your clinic. Please see trainings below:
  - [Uploading historical immunization information](#)
  - [Updating patient status](#)

### **Need Help?**

- Visit our [CT WiZ training webpage](#)
- Please submit a [help desk ticket](#) – select: Immunizations (CT WiZ), Category: Clinic Administration, Topic: CT WiZ Patient Management, sub-topic: CT WiZ Reports. *DPH staff will contact you for support.*

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### Appendix A: Example 8-month report parameters

Add

Create
Cancel

**Run Name**

**Provider/Clinic** : ABC PEDIATRICS, ABC PEDIATRICS/TORRINGTON

**Report Type**

Patient Default Clinic  
 Vaccination Clinic

**Run Schedule Date \***   **Run Completed Date**

**Reminder/Recall Date Range \***  
**From:**   **Through:**

**Age Range \***  
**From:**  **Through:**  **UOM:**

**Date of Birth Date Range \***  
**From:**   **Through:**

**Options To Target Patients Included For Reminder/Recall**

**City**  **Zip Code**

**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

Only include patients with 2 or more non- Influenza/H1N1-09/COVID-19 vaccinations?

Exclude patients with one or more vaccine refusals?

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

<input type="checkbox"/>	Vaccine Series	Dose Number
<input type="checkbox"/>	COVID-19	<input style="width: 50px;" type="text"/>
<input checked="" type="checkbox"/>	DTaP / TD / Tdap	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	H1N1-09	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Hep A	<input style="width: 50px;" type="text"/>
<input checked="" type="checkbox"/>	Hep B	<input style="width: 50px;" type="text"/>
<input checked="" type="checkbox"/>	Hib	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	HPV	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Influenza	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Meningococcal	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	MMR	<input style="width: 50px;" type="text"/>
<input checked="" type="checkbox"/>	Pneumococcal	<input style="width: 50px;" type="text"/>
<input checked="" type="checkbox"/>	Polio	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Rotavirus	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Varicella (CPOX)	<input style="width: 50px;" type="text"/>
<input type="checkbox"/>	Zoster	<input style="width: 50px;" type="text"/>

Create
Cancel

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Appendix B

**\*These birth cohort date of birth ranges will be filled in the Date of Birth Range.**

Ex.) Running the June 2023 reminder recall report, you will fill in 9/1/22-9/30/22 as the DOB range in CT WiZ to see patients turning 8 months of age in the month of June 2023.

YEAR	MONTH	8 Months – Birth Cohort	20 Months – Birth Cohort
2023	JANUARY	4/1/22 - 4/30/22	4/1/21 - 4/30/21
	FEBRUARY	5/1/22 - 5/31/22	5/1/21 - 5/31/21
	MARCH	6/1/22 - 6/30/22	6/1/21 - 6/30/21
	APRIL	7/1/22 - 7/31/22	7/1/21 - 7/31/21
	MAY	8/1/22 - 8/31/22	8/1/21 - 8/31/21
	JUNE	9/1/22 - 9/30/22	9/1/21 - 9/30/21
	JULY	10/1/22 - 10/31/22	10/1/21 - 10/31/21
	AUGUST	11/1/22 - 11/30/22	11/1/21 - 11/30/21
	SEPTEMBER	12/1/22 - 12/31/22	12/1/21 - 12/31/21
	OCTOBER	1/1/23 - 1/31/23	1/1/22 - 1/31/22
	NOVEMBER	2/1/23 - 2/28/23	2/1/22 - 2/28/22
	DECEMBER	3/1/23 - 3/31/23	3/1/22 - 3/31/22
2024	JANUARY	4/1/23 - 4/30/23	4/1/22 - 4/30/22
	FEBRUARY	5/1/23 - 5/31/23	5/1/22 - 5/31/22
	MARCH	6/1/23 - 6/30/23	6/1/22 - 6/30/22
	APRIL	7/1/23 - 7/31/23	7/1/22 - 7/31/22
	MAY	8/1/23 - 8/31/23	8/1/22 - 8/31/22
	JUNE	9/1/23 - 9/30/23	9/1/22 - 9/31/22
	JULY	10/1/23 - 10/31/23	10/1/22 - 10/31/22
	AUGUST	11/1/23 - 11/30/23	11/1/22 - 11/31/22
	SEPTEMBER	12/1/23 - 12/31/23	12/1/22 - 12/31/22
	OCTOBER	1/1/24 - 1/31/24	1/1/23 - 1/31/23
	NOVEMBER	2/1/24 - 2/28/24	2/1/23 - 2/28/23
	DECEMBER	3/1/24 - 3/31/24	3/1/23 - 3/31/23