VacTrAK Basic Reminder/Recall Guide

Reminder/Recall allows you to notify patients due or past due for vaccinations. It is an effective, evidence based strategy to improve and sustain vaccination coverage rates in target populations when performed on a regular basis.

Organization (IRMS) Client or Facility Client user types have access to the Reminder/Recall menu/options. Contact VacTrAK support for assistance.

Step 1: Select **Reminder/Recall** from the menu. Select options for target population. Specify age group and age appropriate vaccine series.

> **Ownership –** A patient is considered to be under your ownership if you are their normal primary care provider or if you were the last place where they received an administered vaccine.
>
> **Service** – Select all patients you serve and for all patients to whom your practice has administered a vaccine to, regardless if they are currently owned by a different primary care provider.
>
> **Due Date Timeframe** – refine list to patients that are due now, overdue or due in the future.
>
> **Select a series –** Select the age appropriate vaccine series from the drop down list, once selected, the vaccines and number of doses is displayed, or create a custom series.
>
> **Schedule** – allows the user to schedule Reminder/Recall generation at a specified date/time. This option works best for large practices or age cohorts of larger than 1000 patients.
>
> **Generate Patient List** - output will provide patient name, age, vaccines due, available contact methods, R/R attempts and Reason for Inactivation.

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Step 2: Review list of patients and remove any that you do not want to contact by un-checking box before patient name.

Filter List – by contact type or prior notification

Check box - remove patients from recall group by un-checking

Hover – hover over patient record to display patient details

Icons – available contact methods (address, phone, cell, email)

Reason for Inactivation – patients that are no longer active with practice can be set to inactive so they no longer show on reports and reminder recall as owned by your organization

Export the Patient List – open patient list in a .csv file for review; each vaccine for which a patient is due will show on a separate line for easy filter and sort

Submit – Submit edited list of patients for next step

Step 3: What do you want to do with your selected recall group?

Choose method by clicking on the appropriate icon, follow the pop-up instructions/prompts.

- Generate a Patient List
- Print Letters
- Generate Auto-dialer Content
- Generate Mail Merge
- Create Custom Post Cards
- Print Mailing Labels
- Save as a Patient Group (Cohort) to track success rate
- Send email