Washington State Immunization Information System
Reference Guide

Reminder/Recall in the IIS

Why Should I Use Reminder/Recall?

Reminder/Recall helps identify patients who are due or overdue for vaccines. Using Reminder/Recall helps keep your patients up-to-date with recommended vaccines and can help increase your clinic or organization's immunization rates.

What Do I Need to Get Started?

You need the **Run Reminder/Recall** permission on your Immunization Information System (IIS) user account. You may also want the **Manage Reminder/Recall** permission for more advanced options, like saving templates and managing patient cohorts. Reminder/Recall will not show up in your left navigation menu if you do not have one of these permissions.

Contact your IIS System Administrator to add reminder/recall permissions to your account. If you are unsure whether your organization or clinic has a system administrator, contact the Help Desk at 1-800-325-5599 or WAIISHelpDesk@doh.wa.gov to find out.

Reminder/Recall is a Three Step Process:

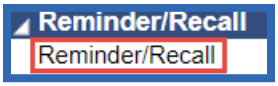
Step One: Set up Reminder/Recall Criteria

Step Two: Preview and Edit Patient List

Step Three: Choose Reminder/Recall Output(s)

Step One: Set up Reminder/Recall Criteria

1. Click the **Reminder/Recall** option under the **Reminder/Recall** heading in your left menu.



2. When the Reminder/Recall screen opens, choose the "**For all patients you own"** radio button. Pharmacies or other organizations that do not own patients should choose "**For all patients you have seen at your facility**" option.

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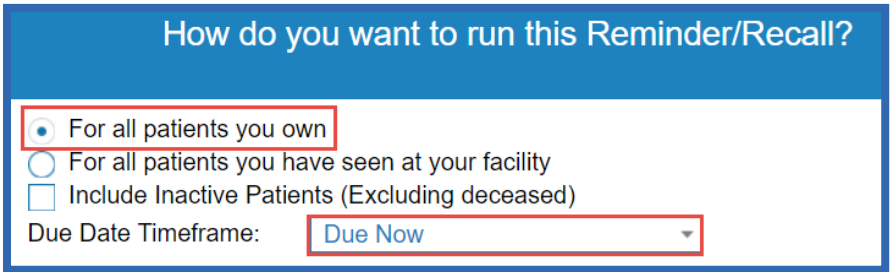
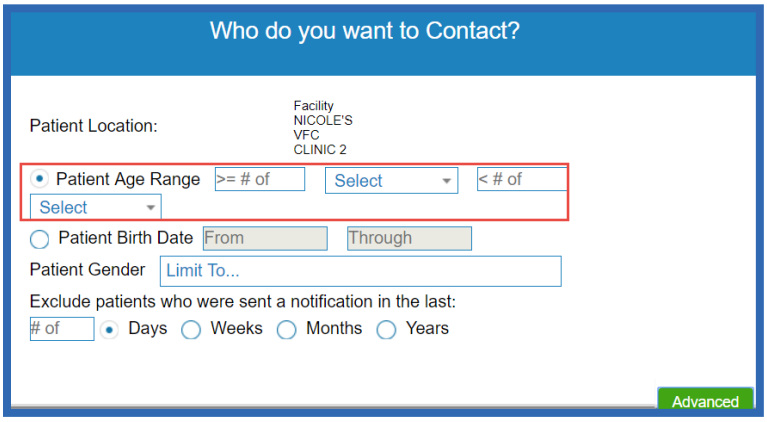
3. Choose a **Due Date Timeframe** from the drop-down menu.

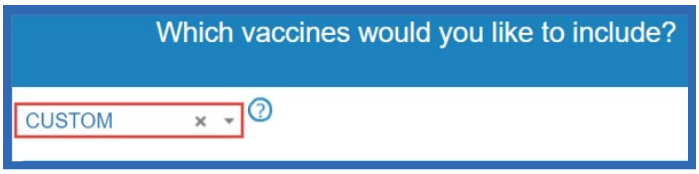
   - **Due Now:** Patients who are currently due or past due for vaccines.
   - **Past Due:** Patients who are overdue for vaccines. Can choose from 1, 2, or 3 months past due.
   - **Coming Due:** Patients who are not yet due for vaccines. You can choose due in 1, 2, or 3 months.
   - **Custom:** Lets you set a specific timeframe (e.g. patients due for vaccines between 1/1/25 – 1/31/25).



4. Enter a **Patient Age Range** or **Birth Date Range**.
   - You can also limit patients by gender and exclude patients that were included on previous reminder/recall reports.
   - Click on the green advanced button to view more options for limiting the patients included in your report.



5. Select a **Vaccine Series** or **Custom** from the drop-down box. The **Custom** option allows you to check the boxes next to each vaccine you want to include. You can also limit by a specific dose number (e.g. 4th dose of DTaP).



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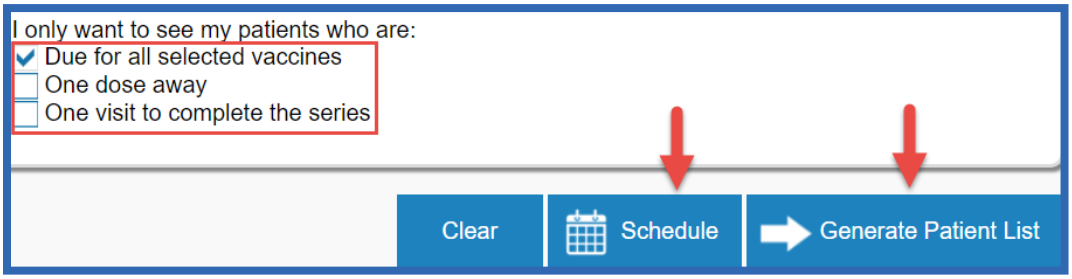
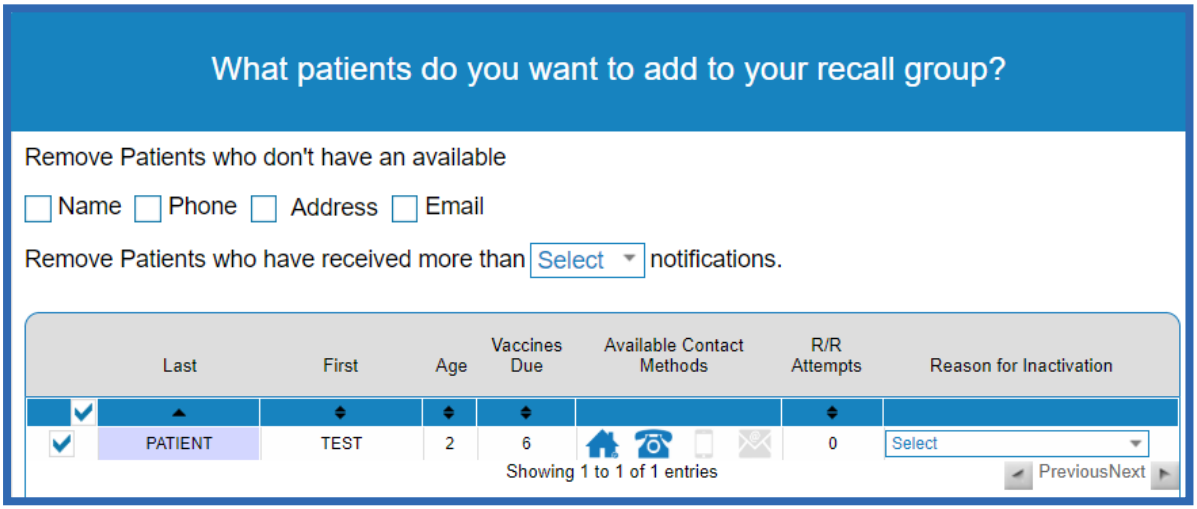
6. You can also choose to limit your report to patients who are:
   - **Due for all selected vaccines**: Patients due for any vaccines in the selected series.
   - **One dose away**: Patients who are one dose away from completing the selected series.
   - **One visit to complete the series**: Patients who are one visit away from completing the series.
7. Click the **Generate Patient List** or the **Schedule** button.
   - **Generate Patient List** takes you to the screen where you can preview your reminder/recall list.
   - **Schedule** lets you set a specific time to run the reminder/recall report. You receive an email with a link that takes you to the reminder/recall report when it's done running.



Step Two: Preview & Edit Patient List

1. Review and edit your patient list.
   - Remove patients who do not have an available name, phone number, mailing address or email.
   - Remove patients who have received more than a certain number of notifications. You can only use this option if you track reminder/recall attempts.
   - Uncheck the box in the first column to remove a patient from your final reminder/recall report.
   - Choose a **Reason for Inactivation** from the drop-down box. This automatically removes the patient from your final report and inactivates the patient so they do not appear on future reports.



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Tip: The **Vaccines Due** column includes **any** vaccines the patient needs, it is **not** limited to the number of vaccines due for the vaccine series you selected.

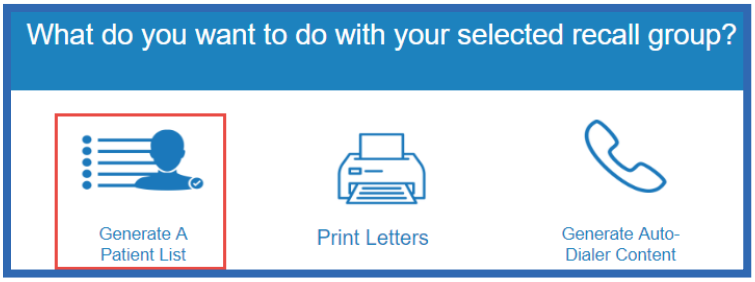
2. Click the **Submit** or **Export Patient List** button.
    - **Submit** takes you to the third reminder/recall screen where you select an output.
    - **Export Patient List** produces an excel file including the names, contact information, and list of vaccines due for each patient.

Step Three: Choose Reminder/Recall Output(s)

This is the third and final reminder/recall screen. Choose from the following output options based on how you want to contact patients:

- **Generate a Patient List:** Pulls a list of patients, contact information and their due or overdue vaccines.
- **Print Letters:** Produces a letter with each patient's name at the top. You can customize the letter.
- **Generate Auto-Dialer Content:** Produces a text file you can copy into Excel and upload into an auto-dialer system.
- **Generate Mail-Merge:** Produces a file you can use with any mail merge program.
- **Create Custom Post Cards:** Lets you set the postcard size and edit the message.
- **Create Avery 8387 Post Cards:** Produces a file sized to print on Avery 8387 postcards.
- **Print Labels:** Produces a file sized to print on Avery 5160 mailing labels.
- **Save as a Patient Group (Cohort):** Lets you save your patient group to recall later.
- **Send Email:** Lets you send a standard or custom email message to any patients with email addresses in the IIS.

1. Select an output option by clicking on the appropriate icon.



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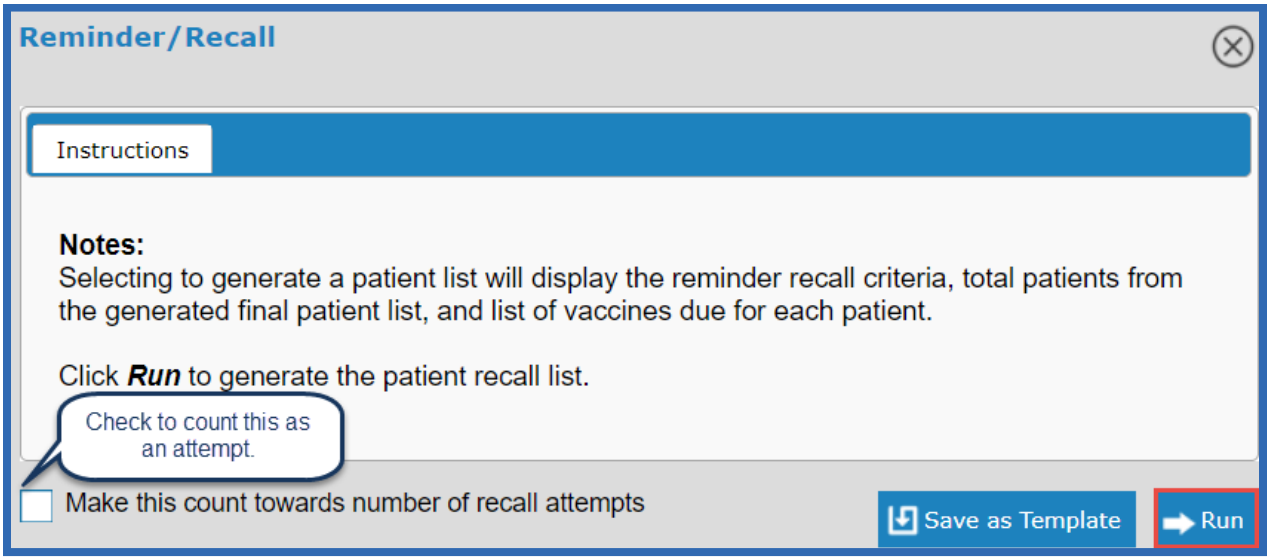
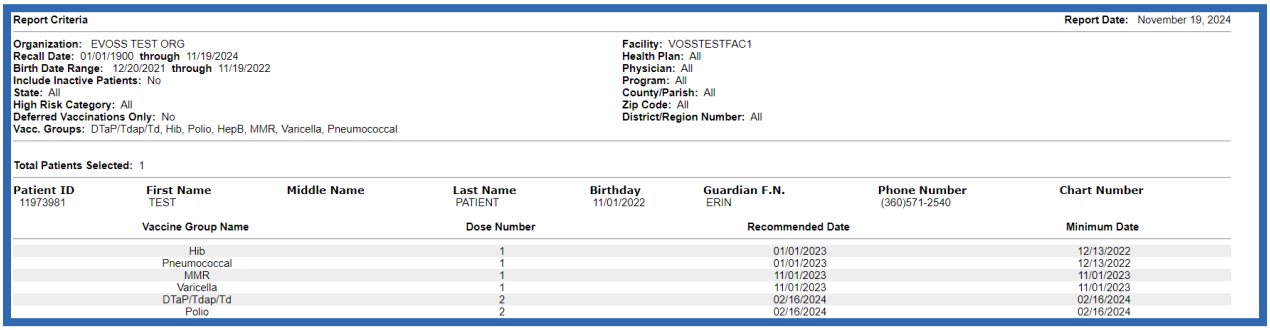
2. A pop-up screen will appear with instructions on how to run the selected output.
3. Check the **Make this count towards number of recall attempts** box if you want to track attempts.
4. Click the **Save as Template** button if you enter a custom message in one of the outputs and want to access this message later.
5. Click the **Run** button to view, print, or save your selected reminder/recall output.



Sample Patient List Output



Report Criteria — **Report Date:** November 19, 2024

Organization: EVOSS TEST ORG
Recall Date: 01/01/1900 **through** 11/19/2024
Birth Date Range: 12/20/2021 **through** 11/19/2022
Include Inactive Patients: No
State: All
High Risk Category: All
Deferred Vaccinations Only: No
Vacc. Groups: DTaP/Tdap/Td, Hib, Polio, HepB, MMR, Varicella, Pneumococcal

Facility: VOSSTESTFAC1
Health Plan: All
Physician: All
Program: All
County/Parish: All
Zip Code: All
District/Region Number: All

Total Patients Selected: 1

Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	Chart Number
11973981	TEST		PATIENT	11/01/2022	ERIN	(360)571-2540	

Vaccine Group Name	Dose Number	Recommended Date	Minimum Date
Hib	1	01/01/2023	12/13/2022
Pneumococcal	1	01/01/2023	12/13/2022
MMR	1	11/01/2023	11/01/2023
Varicella	1	11/01/2023	11/01/2023
DTaP/Tdap/Td	2	02/16/2024	02/16/2024
Polio	2	02/16/2024	02/16/2024

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