

North Dakota Immunization Information System: Reminder/Recall Report

A **Reminder** is communication to an individual patient that he/she is ***due now or on a future date*** for immunization(s)

A **Recall** is communication to an individual that he/she is ***past due*** for immunization(s)

The primary benefit of reminder/recall is to **improve timeliness and completion of immunizations recommended by the Advisory Committee on Immunization Practices (ACIP) to prevent disease.** The reminder/recall report is generated from the North Dakota Immunization Information System (NDIIS) based on the immunization forecaster.

How to Run Reminder/Recall Report:

1.) To run the reminder/recall report, click the **Create Reminder-Recall** hyperlink from your home screen.

North Dakota Immunization Information System

Help

Provider:

Client	Provider	Reminder/Recall	VFC Vaccine
<ul style="list-style-type: none"> Search 	<ul style="list-style-type: none"> Lookup 	<ul style="list-style-type: none"> Create Reminder-Recall 	<ul style="list-style-type: none"> Vaccine Ordering, Returns and Wastages
Vaccine Management	Reports		
<ul style="list-style-type: none"> Lot Management Vaccine Login 	<ul style="list-style-type: none"> Reports 		

Responsibility for Reminder/Recall:

A health care provider is responsible for the immunization and reminder/recall process for his/her patients. The Local Public Health Unit is responsible for the immunization and reminder/recall process of the population as a whole within its jurisdiction (county, district, ect.) The NDDoH recommends that health care providers and Local Public Health Units coordinate their reminder/recall activities for their areas to ensure efforts are not duplicated and patients are not missed.

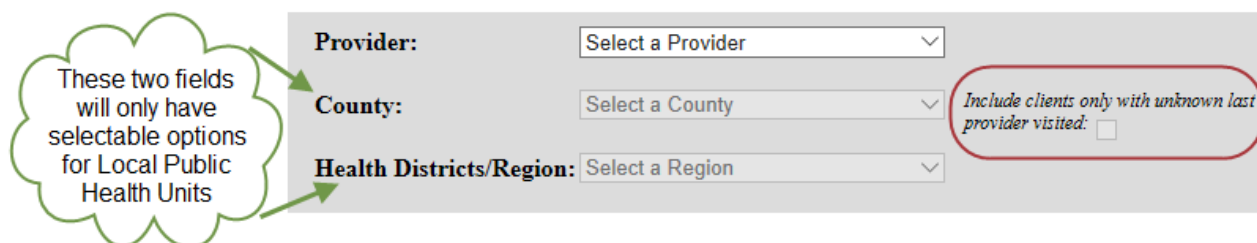
The NDDoH recommends that the last provider visited for each patient be responsible for conducting reminder/recall. In the NDIIS, the last provider visited is the last provider to enter a non-influenza vaccine in the patient's immunization record. When conducting reminder/recall in the NDIIS, patients will automatically be included with a specific provider, based on where their last immunization was received. Providers will have the option to include influenza vaccine from the last provider visited status.

The NDDoH recommends that providers always choose to “exclude influenza from last provider visited”.

This is the default setting in the NDIIS reminder/recall report.

3.) Select your provider from the **Provider** field drop-down box.

- Patients pulled onto report will be based off of the patient's last provider visited without influenza vaccine.



The screenshot shows a form with three dropdown menus: "Provider:", "County:", and "Health Districts/Region:". Each dropdown menu has a placeholder text "Select a [Provider/County/Region]". To the left of the form, a green cloud-shaped callout box contains the text "These two fields will only have selectable options for Local Public Health Units" with arrows pointing to the "Provider:" and "County:" dropdowns. To the right of the form, a red rounded rectangle highlights a checkbox labeled "Include clients only with unknown last provider visited:".

Local Public Health Units have access to conduct reminder/recall for their own patients, if they are the last provider visited as well for the county they serve. Local Public Health Units that are multi-county districts have access to run the report for their whole region. If no provider in a county considers an individual a patient, there would be no responsibility for the reminder/recall process for that individual at the provider level, but on the next level of hierarchy (county), making a Local Public Health Unit responsible for that patient. They also have access to conduct reminder/recall for patients with an unknown “last provider visited” by checking this box in the NDIIS report settings. These patients will not be included in the reminder/recall conducted by any other provider in the county or district.

Communication directly from a patient's provider is more effective than statewide communication. ***The NDDoH will only conduct reminder/ recall under special circumstances, such as vaccine shortages, emergency situations (i.e. pandemics, outbreaks) or for specific grant funded projects.***

- 4.) Use the radio buttons to indicate which gender you would like your report to look for.
- ***The NDDoH recommends always including all genders when running this report. The default is set for "All".***

Gender:
 All Male Female Unknown

- 5.) Select the race you want the report to pull by changing the drop-down box from the default of "All" or leave the box as is to look at all races.
- ***The NDDoH recommends always including all races when running this report.***

Race: → ALL
AMERICAN INDIAN OR ALASKA NATIVE
ASIAN
BLACK OR AFRICAN AMERICAN
NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER
WHITE
OTHER RACE
UNKNOWN

Include Air Force base c
Exclude Influenza from
Visited:
Age Range:

- 6.) The maximum number of recall tries is set to "No Maximum".
- Note– a recall try is counted when the report is downloaded or if postcards/ labels are printed from the report. The number of recall tries is reset to zero when a new dose is added to the client's record.

Maximum Recall Tries: No Maximum ▾

Providers may also choose whether or not to include Air Force Base clients in the reminder/recall process. The Air Force Bases in North Dakota do not enter immunizations into the NDIIS, so Air Force children will always show up as being behind on immunizations. If “No” is selected, these children will not show up on the reminder/recall list that is generated. This functionality is most important for providers and Local Public Health Units in Ward and Grand Forks counties.

7.) Use the radio button to indicate if you would like Air Force Base Clients included in your report.

- The default setting is “Yes”.

Include Air Force base clients: Yes No

In order for a patient to be consider an “Air Force Base” patient in the NDIIS, they must be marked as such in on their demographic page. They will not be excluded based on city or zip code entered.

* First Name:	TEST	<input type="checkbox"/> Air Force Base	
* Middle Name:	A		
Suffix:		* City:	BISMARCK
* Race:	UNKNOWN	* State:	NORTH DAKOTA
* Ethnicity:	UNKNOWN	* Zip:	58506
* Birth Date:	01/01/2000	County:	BURLEIGH
<input type="checkbox"/> Is Multiple Birth (twins, triplets, etc)		* Birth State/Country:	NORTH DAKOTA
* Gender:	FEMALE	* Primary Phone:	701-867-5309
Alias First Name:	ACCT	* Phone Number Type:	MOBILE PHONE
Alias Middle Name:		Email Address:	

8.) Use radio button to indicate if you would like to exclude influenza vaccines from Last Provider Visited

- **The NDDoH recommends using the default setting of “Yes” for this question as not all patients get their influenza vaccine from their primary care provider.** If the patient is still due for their seasonal influenza vaccine, it will show up as a due or past due vaccine on the reminder/recall report

Exclude Influenza from Last Provider Visited: Yes No

The NDIIIS allows providers to conduct the reminder/recall for different cohorts of patients. These cohorts can be determined using a minimum and maximum age range (in months or years), pre-set age ranges based on ACIP recommendations, and well-child visit schedules or birthdate ranges.

9.) Use the check boxes to indicate which cohort you would like the report to pull.

- Note– only one box can be checked at a time

Age Range:

Min Age: Max Age: Age In: Select Age Range:

BirthDate Range: From To (mm/dd/yyyy)

- **Min/Max Age** can be run in months or years

Min Age: Max Age: Age In:

BirthDate Range: From To (mm/dd/yyyy)

- The **Select Age Range** option has pre-defined age groups to chose from

Select Age Range:

- 8 Months
- 13 Months
- 19 Months
- 24 Months
- 19 - 35 Months
- 6 Years
- 13 Years

10.) Next, select the vaccine that you would like for your reminder/recall by clicking the checkbox next to the name

Vaccine Families: *(If no vaccine is selected then all forecast vaccines will be used.)*

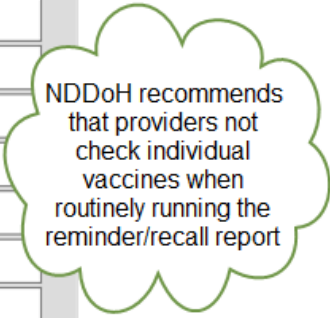
<input type="checkbox"/> DTAP	<input type="checkbox"/>	<input type="checkbox"/> PCV	<input type="checkbox"/>
<input type="checkbox"/> HIB	<input type="checkbox"/>	<input type="checkbox"/> PPSV	<input type="checkbox"/>
<input type="checkbox"/> POLIO	<input type="checkbox"/>	<input type="checkbox"/> TD/TDAP	<input type="checkbox"/>
<input type="checkbox"/> HEP B	<input type="checkbox"/>	<input type="checkbox"/> HPV	<input type="checkbox"/>
<input type="checkbox"/> MMR	<input type="checkbox"/>	<input type="checkbox"/> ROTAVIRUS	<input type="checkbox"/>
<input type="checkbox"/> VARICELLA	<input type="checkbox"/>	<input type="checkbox"/> MCV4	<input type="checkbox"/>
<input type="checkbox"/> HEP A	<input type="checkbox"/>	<input type="checkbox"/> ZOSTER	<input type="checkbox"/>
<input type="checkbox"/> INFLUENZA	<input type="checkbox"/>	<input type="checkbox"/> MENINGOCOCCAL-B	<input type="checkbox"/>

NDDoH recommends that providers not check individual vaccines when routinely running the reminder/recall report

10.) Next, select the vaccine that you would like for your reminder/recall by clicking the checkbox next to the name

Vaccine Families: *(If no vaccine is selected then all forecast vaccines will be used.)*

<input type="checkbox"/> DTAP	<input type="checkbox"/>	<input type="checkbox"/> PCV	<input type="checkbox"/>
<input type="checkbox"/> HIB	<input type="checkbox"/>	<input type="checkbox"/> PPSV	<input type="checkbox"/>
<input type="checkbox"/> POLIO	<input type="checkbox"/>	<input type="checkbox"/> TD/TDAP	<input type="checkbox"/>
<input type="checkbox"/> HEP B	<input type="checkbox"/>	<input type="checkbox"/> HPV	<input type="checkbox"/>
<input type="checkbox"/> MMR	<input type="checkbox"/>	<input type="checkbox"/> ROTAVIRUS	<input type="checkbox"/>
<input type="checkbox"/> VARICELLA	<input type="checkbox"/>	<input type="checkbox"/> MCV4	<input type="checkbox"/>
<input type="checkbox"/> HEP A	<input type="checkbox"/>	<input type="checkbox"/> ZOSTER	<input type="checkbox"/>
<input type="checkbox"/> INFLUENZA	<input type="checkbox"/>	<input type="checkbox"/> MENINGOCOCCAL-B	<input type="checkbox"/>



NDDoH recommends that providers not check individual vaccines when routinely running the reminder/recall report

- ***If no vaccines are selected, then all forecasted vaccines will be included for which a patient is due or past due. If more than one vaccine is due or past due at the time the reminder/recall is run, all vaccinations will be accommodated in a single notification. There is no need to run multiple reports for multiple vaccines.***
- *The reminder/recall report should be run on a regular basis (i.e. weekly, monthly, and quarterly). Current ACIP guidance and well-child visits should be used to determine timing.*
- ***A single reminder notification should be considered 2 to 4 weeks before the recommended due date/date range for each recommended vaccine/ vaccination visit. To avoid invalid doses being administered, providers are encouraged not to schedule immunization appointments prior to the minimum valid date. This can be avoided by looking up a child’s immunization forecast when scheduling appointments and prior to administering any immunizations.***
- ***One reminder and up to 3 follow-up recall notifications for each recommended vaccine/vaccination visits should be considered for children 0-6 years of age. Adolescent and adult reminder recall should also be considered. The timeliness of reporting and recording data into the NDIIS is something that the provider running the reminder/recall report needs to keep in mind. Depending on when other providers enter their immunization information into the registry, there could be a delay of up to one month or more.***
- *In the NDIIS, providers are able to enter the number of days prior to the recommended due date to include patients for reminders and the number of days past due to include patients for recall. Both reminders and recalls can be run in the same report, or providers can select one or the other.*

11.) Use the radio buttons to indicate if you want to use reminder (let patients know that they are **coming due** for a particular vaccination), recall (let patients know they are **past due** for vaccination), or both.

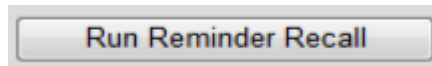
Include Patients Due for Vaccinations (Reminders) Yes No
Maximum number of days until due date to include: (If Yes is Selected)

Include Patients OverDue for Vaccinations (Recalls) Yes No
Minimum number of days past date to include: (If Yes is Selected)

NDDoH recommends running reminders for between 14 and 28 days

NDDoH recommends running recalls for vaccines 30 days past due

12.) Click **Run Reminder Recall** button to obtain the list of desired patients.



After the report has been run, a list of patients matching the selected criteria will be displayed on the screen. Patients with an incomplete address will be highlighted in orange. Patients whose addresses have been marked as “Air Force Base” on their demographics pages will be highlighted in yellow.

Remove from Printing	ClientID	Last Name	First Name	Middle Name	BirthDate	Address1	Address2	Apartment No.	PO BOX	City	state	Zip	Home Phone	Vaccines Due/Overdue
<input type="checkbox"/>	0001079834	ZZTEST	FRANKIE	NA	08/15/2014	456 KITTY DRIVE				MINOT	ND	58703	0000000000	DTaP, Hep A, Hep B, Hib, Influenza, MMR, PCV, Polio, Varicella
<input type="checkbox"/>	0001204659	TEST	SUZANNE	M	12/02/2014	00000				MINOT	ND	58701	0000000000	DTaP, Hep A, Hep B, Hib, Influenza, MMR, PCV, Polio, Varicella

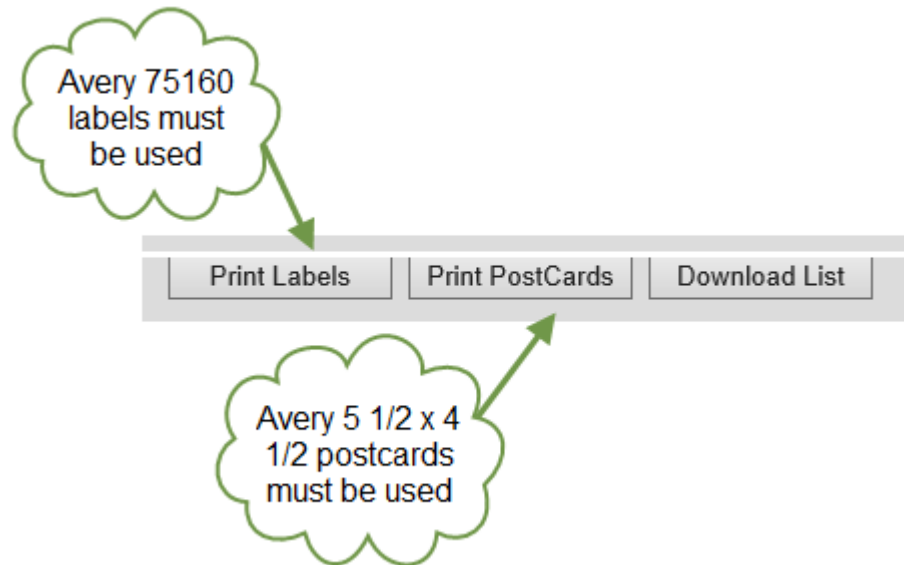
Record Count: 2

Address not complete

Air Force Base Client

13.) One report results are displayed, you can choose to download the list of patients, converting the report into an Excel document, print labels to place on postcards, or print mailing and return addresses directly onto postcards.

- Remember that clicking one of these three buttons will count as a recall try for each client on the list.



- If printing postcards, providers must type in a return address that will print on the postcard.

Return Address for Post Cards:*

Provider Name: 0000 - RG TEST

Address 1: 100 MAIN

Address 2:

City, State, Zip: BISMARCK, ND 58501

The information will be automatically populated only when a specific provider is selected

**only required when postcard printing is selected.*

The most cost-effective reminder/recall notification methods to improve timeliness and completion of immunizations, ranked from the most to least cost-effective are: telephone call (person to person, not using an auto-dialer system), letter, postcard and home visit. Effectiveness of reminder/recall can be increased by combining various notification methods. **The NDDoH recommends that providers send postcards to patients and follow-up with telephone calls.** The reminder/recall notification method should be based on available demographic information in the NDIIS. If the patient's phone number is not available, then a postcard should be sent.

If resources are limited, providers should prioritize Recalls over Reminders. Infants 0-24 months should be prioritized for reminder/recall over other age groups. The NDDoH recommends that providers recall infants 8 and 24 months of age.

Content of the Reminder/Recall Notification:

The reminder/recall notification used must be compliant with the provider's interpretation of HIPAA requirements. ***The HIPAA Privacy Rule permits healthcare providers to communicate with patients regarding their health care. This includes communicating with patients at their homes, whether through the mail, by phone, or in some other manner.*** In addition, the Rule does not prohibit [covered entities](#) from leaving messages for patients on their answering machines. However, to reasonably safeguard the individual's privacy, covered entities should take care to limit the amount of information disclosed on the answering machine. For example, a covered entity might want to consider leaving only its name, number, and other information necessary to confirm an appointment, or ask the patient to call back.

A covered entity may also leave a message with a family member, or other person who answers the phone when the patient is not home. The Privacy Rule permits covered entities to disclose limited information to family members, friends, or other persons regarding a patient's care, even when the patient is not present. However, covered entities should use professional judgement to ensure that such disclosures are in the best interest of the patient and limit the information disclosed. Federal Regulation [45 CFR164.510\(b\)\(3\)](#) may be referenced for additional information.

In situations where a patient has requested that the covered entity communicate with him/her in a confidential manner, such as by alternative means or at an alternate location, the covered entity must accommodate that request, if reasonable. For example, the NDDoH considers a request to receive mailings from the covered entity in a closed envelope rather than by postcard to be a reasonable request that should be accommodated. Similarly, a request to receive mail from the covered entity at a post office box rather than at home, or to receive calls at the office rather than at home are also considered to be reasonable requests, absent of extenuating circumstances. Again, Federal Regulation [45 CFR164.510\(b\)\(3\)](#) may be referenced for additional information. For more information about HIPAA, visit www.hhs.gov/ocr/privacy/hipaa/faq/index.html.

A reminder/recall notification must contain at least the patient's name, the fact that the patient is due or past due for immunizations, and contact information for where to get said immunizations. The notification does not have to be specific as to which immunization(s) the patient is due for.

Response to Reminder/Recall:

Immunization providers are responsible for updating their patients' contact information in the NDIIS as needed. Patient addresses and phone numbers are required fields in the NDIIS. In order to have a successful reminder/recall effort, valid contact information for each patient is necessary.

The NDDoH Immunization Program is notified of deceased North Dakota residents and these residents are then marked as such in the NDIIS and removed from reminder/recall. There is an occasional delay in the death notifications, so it is important for providers to review reminder/recall lists to ensure that deceased patients are not included in reminder/recall. The NDDoH is not notified of out-of-state patient deaths, so providers must notify the NDDoH Immunization Program of out-of-state deaths of patients in the NDIIS to ensure they are not included in reminder/recall.

After an unsuccessful reminder/recall attempt, providers should consider a different reminder/recall notification method. For example, if a provider mails a postcard to a patient and the postcard is returned, the provider should then try calling the patient.

If the provider is notified of an address or phone number change for a patient after attempting reminder/recall, the provider should updated the NDIIS with the patient's new contact information to facilitate future reminder/recall.

If a patient moves out-of-state or reports moving out of the provider or Local Public Health Unit's jurisdiction, or if the provider receives no response to a reminder/recall notification after three attempts, the provider should use the NDIIS' MOGE functionality to remove that patient from the last provider visited list. Online training and step by step instructions on how to use the MOGE function are available at www.health.nd.gov/immunize/ndiis/trainings.

For more information about NDIIS Reminder/Recall, please contact the NDDoH at 701.328.3386 or toll-free at 800.472.2180