



# How Do I Create Reminder/Recall Reports?

# Things You Should Know

In CT WiZ you can generate reminder / recall reports for:

- An individual patient on his/her immunization home page.
- Your entire clinic using a standard CT WiZ report.

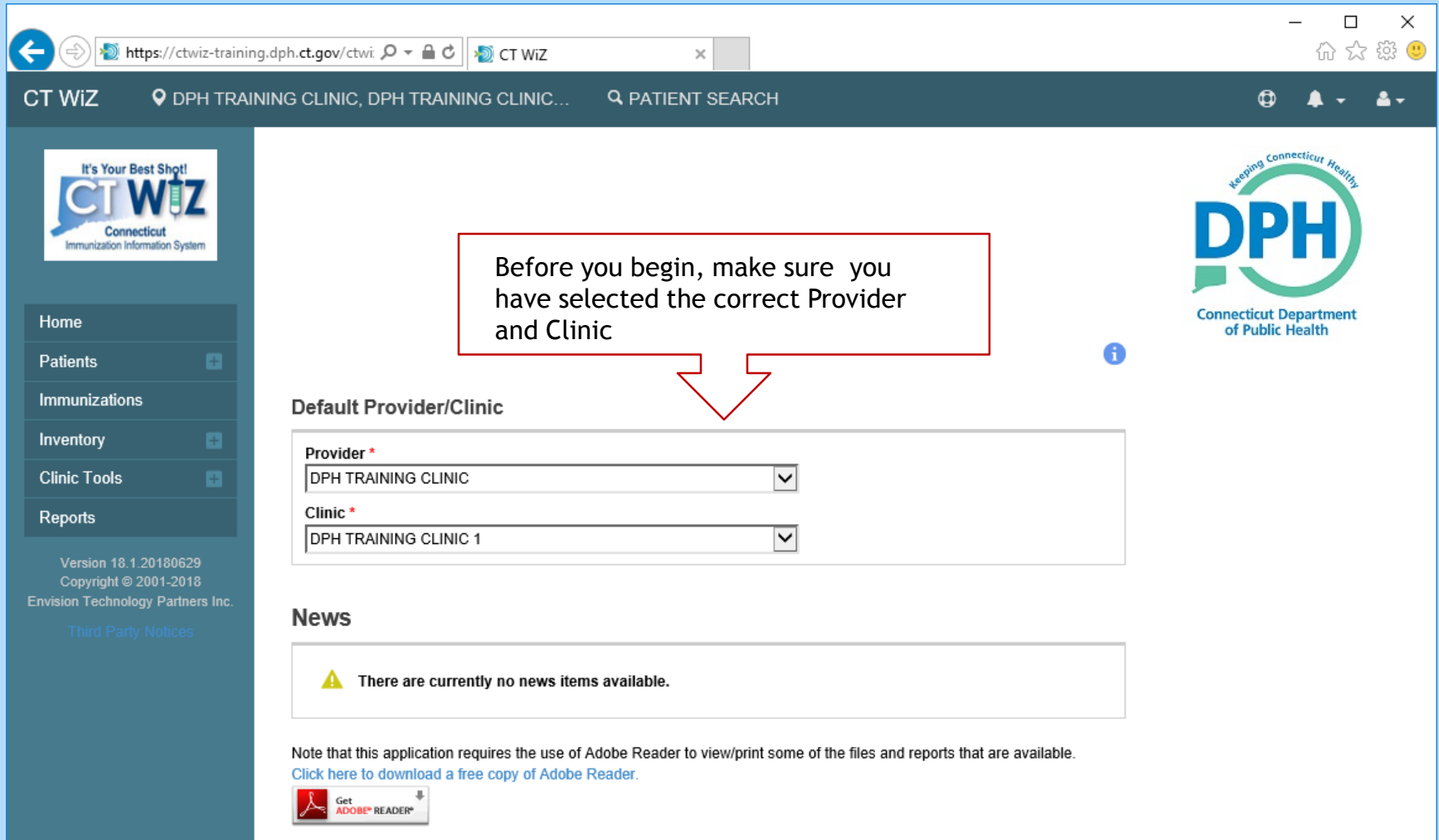
The reports are based on ACIP logic. They are provided to assist with clinical decision making.

# Things You Should Know

Most reports appear in a pop up window in an Adobe .pdf format

- **Make sure your internet browser is not blocking pop-ups!**
- You probably have Adobe Reader on your computer. However, if you don't you can access it at <https://get.adobe.com/reader/>

# Home Screen - Begin Here



The screenshot shows the CT WIZ Home Screen in a web browser. The browser address bar shows the URL: <https://ctwiz-training.dph.ct.gov/ctwi>. The page header includes the CT WIZ logo, a location pin for 'DPH TRAINING CLINIC, DPH TRAINING CLINIC...', and a search bar for 'PATIENT SEARCH'. The main content area features a sidebar on the left with navigation links: Home, Patients (+), Immunizations, Inventory (+), Clinic Tools (+), and Reports. The main content area has a large red-bordered box with the text: 'Before you begin, make sure you have selected the correct Provider and Clinic'. Below this is a section titled 'Default Provider/Clinic' with two dropdown menus: 'Provider \*' set to 'DPH TRAINING CLINIC' and 'Clinic \*' set to 'DPH TRAINING CLINIC 1'. To the right of this section is a blue information icon (i). Below the dropdowns is a 'News' section with a yellow warning triangle icon and the text: 'There are currently no news items available.' At the bottom, there is a note: '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.](#)' followed by a 'Get ADOBE READER' button.



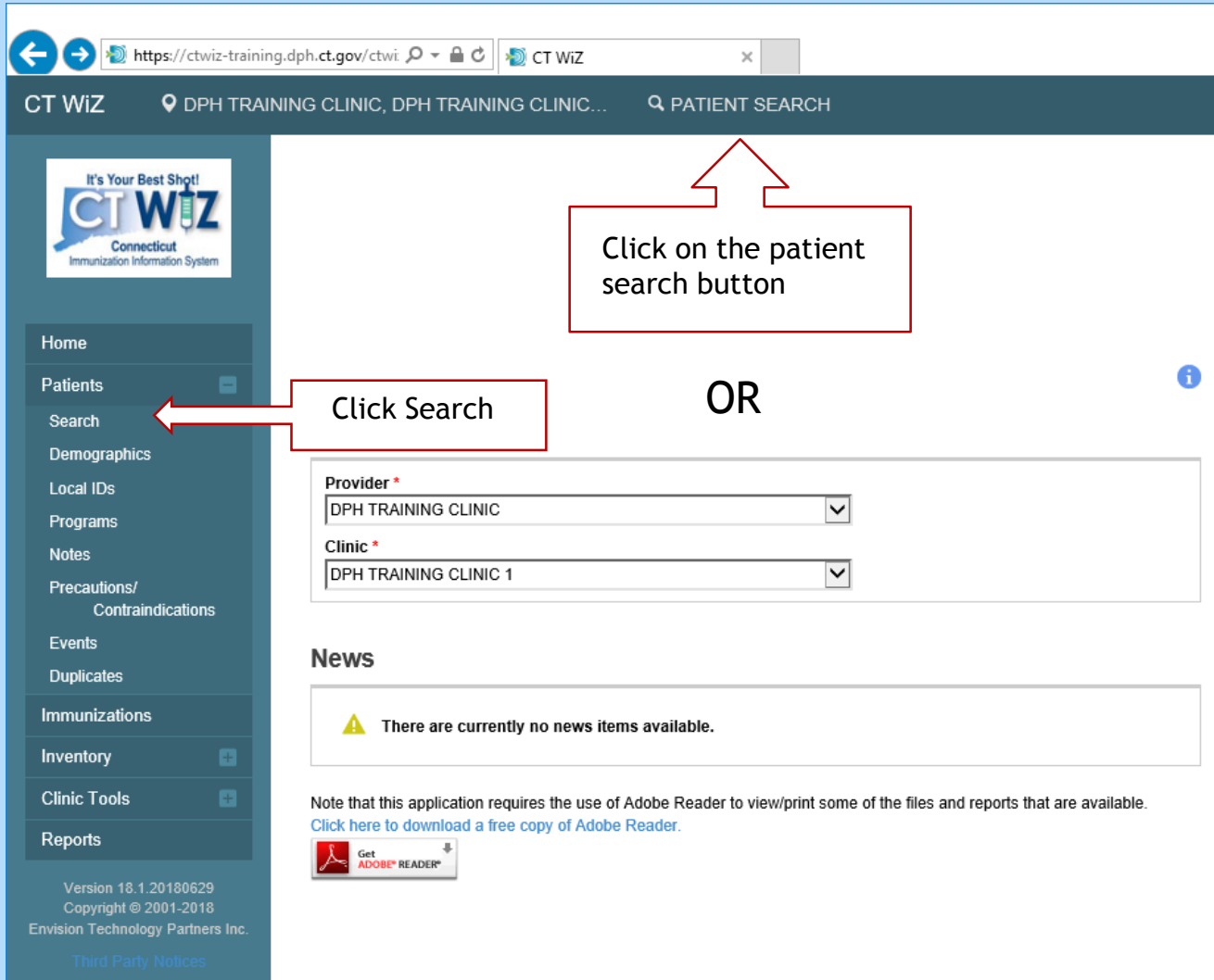
# For Individual Patient



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# Start by searching for the patient



The screenshot shows the CT WIZ Patient Search interface. The browser address bar displays <https://ctwiz-training.dph.ct.gov/ctwi>. The page header includes the CT WIZ logo, the text "DPH TRAINING CLINIC, DPH TRAINING CLINIC...", and a "PATIENT SEARCH" button. A red box with an arrow points to the "PATIENT SEARCH" button, with the text "Click on the patient search button".

On the left sidebar, the "Search" menu item is highlighted with a red box and an arrow pointing to it, with the text "Click Search".

In the center of the page, the word "OR" is displayed.

Below "OR", there are two dropdown menus. The first is labeled "Provider \*" and has "DPH TRAINING CLINIC" selected. The second is labeled "Clinic \*" and has "DPH TRAINING CLINIC 1" selected.

Below the dropdowns, there is a "News" section with a warning icon and the text "There are currently no news items available."


At the bottom, there is a note: "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.](#)" followed by the Adobe Reader logo.

The footer of the page includes: "Version 18.1.20180629", "Copyright © 2001-2018", "Envision Technology Partners Inc.", and a link for "Third Party Notices".

To get to the search screen click in one of the places shown here

# Conducting a Search for the patient

CT WIZ DPH TRAINING CLINIC, DPH TRAINING CLINIC 1, 7777 PATIENT SEARCH



Patient Search i

Links v

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text" value=""/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value=""/>

Previous Criteria
Clear
Search

**Info:** To minimize the creation of duplicates and aid in the identification of existing duplicates, please initially search for your patient using the first two letters of the first and last name and the date of birth. If a duplicate is found, please notify the helpdesk.

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Once you are at the patient search screen:

- Enter your search criteria
- Click on the Search button to find any matching patients

Possible search criteria:

- First 2 letters of first and names (John Smith = Jo & Sm)
- Patient ID
- Patient date of birth
- Other identifier (see Identifier Type drop down)

*Up to 50 records will be displayed for a search. The more information, the better the search.*

# Getting to the patient's Immunization Home



## Patient Search ?

Links ▾

### Search Criteria

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text" value="v"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text" value="BUNNY"/>	<input type="text" value="BEN"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="v"/>
<input type="button" value="Previous Criteria"/>		<input type="button" value="Clear"/> <input type="button" value="Search"/>		

### Search Results - 1 record(s)

ID	Name	Gender	DOB	Action
850430	BUNNY, BENJAMIN 182 ELM STREET ST HARTFORD, CT 06108	M	01/15/2018	<span>?</span> Demographics ▾

You may add a new patient by clicking the 'New Patient' button.

- Demographics
- Immunizations
- Duplicates
- Events
- Local IDs
- Notes
- Outreach
- Precautions / Contraindications
- Programs

Choose Immunizations from the drop down menu for the patient

- Home
- Patients
- Search
- Demographics
- Local IDs
- Programs
- Notes
- Precautions/Contraindications
- Events
- Duplicates
- Immunizations
- Inventory
- Clinic Tools
- Reports



# Immunization Home

The immunization home screen shows:

- Vaccine history (including an ! to indicate invalid doses)
- Vaccines recommended for that day
- Varicella history

Make sure your browser is not blocking pop-ups

Click Recommend to get a pdf of vaccine recommendations

**BUNNY, BENJAMIN** ID: 850430 DOB: 01/15/2017 AGE: 1Y 6M 17D GENDER: M

## Immunizations Home

Learn More Links Select Action

View

DOB: 01/15/2017 Age: 1Y 6M 17D History of Varicella?: NO Date of Varicella: MM/DD/YYYY

Recommended Immunizations for today, 8/1/2018 (1Y 6M 17D)

**Vaccine**

- PCV13
- MMR
- Hep B, ped/adol
- Polio-IPV
- DTaP
- Varicella
- Hib (PRP-T)
- Hep A, ped/adol, 2D
- Influenza Quad Inj P

Please do not rely solely on the Recommender to forecast immunizations. Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <http://www.cdc.gov/vaccines/pubs/pinkbook/index.html#chapters>

Vaccine	Dose	Date	Age	Clinic				
<b>DTaP / TD / Tdap</b>								
DTaP-HepB-IPV	1	03/11/2017	0Y 1M 24D	PR	H	?	Update	
DTaP-Hib (TriHIBit)	2	05/11/2017	0Y 3M 28D	PR	H	?	Update	
DTaP-HepB-IPV	3	07/14/2017	0Y 5M 29D	PR	H	?	Update	
<b>Polio</b>								
DTaP-HepB-IPV	1	03/11/2017	0Y 1M 24D	PR	H	?	Update	
DTaP-HepB-IPV	2	07/14/2017	0Y 5M 29D	PR	H	?	Update	
<b>Hib</b>								
Hib (PRP-d)	1	03/11/2017	0Y 1M 24D	PR	H	?	Update	
DTaP-Hib (TriHIBit)		!	05/11/2017	0Y 3M 28D	PR	H	?	Update
<b>Pneumococcal</b>								
PCV13	1	03/10/2017	0Y 1M 23D	PR	H	?	Update	
PCV13	2	05/10/2017	0Y 3M 25D	PR	H	?	Update	
PCV13	3	07/14/2017	0Y 5M 29D	PR	H	?	Update	
<b>Rotavirus</b>								
Rotavirus (Rotarix)	1	03/12/2017	0Y 1M 25D	PR	H	?	Update	
Rotavirus (Rotarix)	2	05/11/2017	0Y 3M 28D	PR	H	?	Update	
<b>Hep B</b>								
DTaP-HepB-IPV	1	03/11/2017	0Y 1M 24D	PR	H	?	Update	
DTaP-HepB-IPV	2	07/14/2017	0Y 5M 29D	PR	H	?	Update	
<b>Influenza</b>								
Influenza Ped Quad P-Free	1	10/10/2017	0Y 8M 25D	PR	H	?	Update	

Auto-Populate Add Vaccines Screen

# Sample Report - Recommender Section

— Recommended immunizations for today, 09/05/2018 (1Y 7M 21D)

Vaccine	On-Hand
DTaP	✖
Hep A, ped/adol, 2D	✔
Hep B, ped/adol	✔
Hib (PRP-T)	✖
Influenza Quad Inj P	✖
MMR	✔
PCV13	✔
Polio-IPV	✔
Varicella	✔

Please do not rely solely on the Recommender to forecast immunizations. Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <http://www.cdc.gov/vaccines/pubs/pinkbook/index.html#chapters>

The first recommended return date is 10/03/2018 (1Y 8M 18D)

Future recommendations based upon provider preferences for vaccines

Vaccine	Date	Age
Influenza Quad Inj P	10/03/2018	1Y 8M 18D
Hep A, ped/adol, 2D	03/05/2019	2Y 1M 18D
DTaP	01/15/2021	4Y 0M 0D
MMR	01/15/2021	4Y 0M 0D
Polio-IPV	01/15/2021	4Y 0M 0D
Varicella	01/15/2021	4Y 0M 0D
HPV9	01/15/2028	11Y 0M 0D
MCV4 (Menactra)	01/15/2028	11Y 0M 0D
Recombinant Zoster	01/15/2067	50Y 0M 0D
PCV13	01/15/2082	65Y 0M 0D

Print

Recommendations for BUNNY, BEN (850430) DOB: 01/15/2017 AGE: 1Y 7M 21D

Click here at the  
 bottom of the  
 report for a  
 printable version



# For your clinic



Connecticut Department of Public Health  
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# Getting to the Patient Reminder / Recall Report




Home

Patients 

Immunizations

Inventory 

Clinic Tools 

Reports **1**


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## Reports

Click on one of the links below to view the document or run the report. 

### Patient

[IZ History/Risk/Recommendations](#)  
[Official Immunization Record](#)  
[Patient Administrative Record](#)  
[Vaccine Documentation/Consent Form](#)

### Forms / Informational Documents

[ACIP Child and Adolescent Immunization Schedule](#)  
[ACIP Child and Adolescent Catch-up Immunization Schedule](#)  
[ACIP Adult Immunization Schedule](#)  
[Clinic Contact Listing](#)  
[Product Listing](#)  
[Vaccine Information Statements \(VIS\)](#)

### CT Forms and Resources

Report not available - No reports available

### Patient Management

**2** [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 Adverse Reactions](#)  
[Patients with Notes](#)  
[Patients with Vaccine Refusals](#)  
[Patients with Vaccine Refusals - Datamart](#)  
[Vaccine Recall](#)  
[Patients with Precautions / Contraindications](#)

1. Click on Reports
2. Click on Patient Reminder / Recall



# Things You Should Know

- The patient reminder / recall report generates a list of patients due or overdue for vaccinations
- A patient will only be included in your report if he/she has an active status at your clinic
- Reminder/recall runs are processed overnight

# Creating a Report

## Patient Reminder/Recall

Choose filters for existing Reminder/Recall Runs. Click "View" to see the details of the Reminder/Recall run or select a specific Reminder/Recall Run and click the applicable button to view extracts, reports, etc.

Add Reminder/Recall Run



Click here to get to the screen where you can create a report

## View

Provider \*

WE LOVE KIDS PEDIATRICS CT

Clinic \*

WE LOVE KIDS PEDIATRICS SOUTH

Cancel

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	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>			<input type="button" value="Clear Filters"/>
<input checked="" type="radio"/> WE LOVE KIDS PEDIATRICS CT	WE LOVE KIDS PEDIATRICS SOUTH	LORETTA	08/03/2018	08/06/2018	01/01/2018	08/03/2018	9	9	<input type="button" value="Reprocess"/> <input type="button" value="View"/>

<input type="button" value="Unvaccinated Report"/>	<input type="button" value="Report"/>	<input type="button" value="Extended Report"/>
<input type="button" value="Dymo Labels"/>	<input type="button" value="Avery Labels"/>	<input type="button" value="Postcard"/>
<input type="button" value="Full Extract"/>		

# Creating a Report

## Add

**Run Name**  1

**Provider\***  
 2

**Clinic\***  
 2

**Run Schedule Date\***  3 **Run Completed Date**  6

**Reminder/Recall Date Range\***  
 From:  4 Through:  4

**Age Range\***  
 From:  Through:  UOM:  5

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

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)? 6

Include Patients Overdue For Vaccinations (Recalls)? 6

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?

To create a report you must:

1. Give the report a name (it will be saved and you can run it again later)
2. Check that you are in the right clinic/provider
3. Enter a date to run the report
4. Enter a date range
5. Enter an age range
6. Choose reminder and /or recall as desired
7. Click on **Create** when done

# Creating a Report

## Options To Target Patients Included For Reminder/Recall

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? **1**
- Include Patients Due For Vaccinations (Reminders)?
- Include Patients Overdue For Vaccinations (Recalls)?
  - Minimum Number Of Days Past Due To Include **2**  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) **3**

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

There are many options you can choose when creating your report including:

1. Generating a reminder / recall event.
2. Specifying the number of days past due
3. Choosing specific vaccines and or number of doses



# Working with existing reports

## Patient Reminder/Recall

Choose filters for existing Reminder/Recall Runs. Click "View" to see the details of the Reminder/Recall run or select a specific Reminder/Recall Run and click the applicable button to view extracts, reports, etc.

Add Reminder/Recall Run






## View

Provider/Clinic : ALL PROVIDERS, ALL CLINICS

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



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		
<input type="radio"/> ALL PROVIDERS	ALL CLINICS	TESTTT	07/31/2014	07/31/2014	07/31/2013	07/31/2014	128	129		Reprocess View
<input type="radio"/> ALL PROVIDERS	ALL CLINICS	TEST ALL	05/21/2013	05/21/2013	05/21/2013	05/21/2013	31	571		Reprocess View
<input type="radio"/> ALL PROVIDERS	ALL CLINICS	HPV 1	05/03/2013	05/03/2013	05/03/2013	05/03/2013	16	43		Reprocess View

Click here to re-process an existing report

Click here to view and edit an existing report



# Viewing a Report



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# Getting to the Patient Reminder / Recall Reports



Home

Patients

Immunizations

Inventory

Clinic Tools

Reports

1

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Report not available - No reports available

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[Patients By Birth Facility Type](#)  
[Patients First Seen](#)  
[Patients with Adverse Reactions](#)  
[Patients with Notes](#)  
[Patients with Vaccine Refusals](#)  
[Patients with Vaccine Refusals - Datamart](#)  
[Vaccine Recall](#)  
[Patients with Precautions / Contraindications](#)

2

1. Click on Reports
2. Click on Patient Reminder / Recall

View

Provider \*

WE LOVE KIDS PEDIATRICS CT

Clinic \*

WE LOVE KIDS PEDIATRICS SOUTH

Cancel

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	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="button" value="Clear Filters"/>
<input type="radio"/> WE LOVE KIDS PEDIATRICS CT	WE LOVE KIDS PEDIATRICS SOUTH	NEW	09/05/2018		07/01/2018	09/05/2018	0	NA	<input type="button" value="Reprocess"/> <input type="button" value="View"/>
<input type="radio"/> WE LOVE KIDS PEDIATRICS CT	WE LOVE KIDS PEDIATRICS SOUTH	TEST	09/05/2018		08/27/2018	09/05/2018	0	NA	<input type="button" value="Reprocess"/> <input type="button" value="View"/>
<input checked="" type="radio"/> WE LOVE KIDS PEDIATRICS CT	WE LOVE KIDS PEDIATRICS SOUTH	LORETTA	08/03/2018	08/06/2018	01/01/2018	08/03/2018	9	9	<input type="button" value="Reprocess"/> <input type="button" value="View"/>

1

<input type="button" value="Unvaccinated Report"/>	<input type="button" value="Report"/>	<input type="button" value="Extended Report"/>
<input type="button" value="Dymo Labels"/>	<input type="button" value="Avery Labels"/>	<input type="button" value="Postcard"/>
<input type="button" value="Full Extract"/>		

2

To view a report that has run:

1. Choose the report
2. Click on report

See the next slide for a description of the other output choices

# Other Output Choices

- **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.
- **Dymo Labels:** Generates a set of address labels designed to be printed on a Dymo Label printer.
- **Avery Labels:** Generates a set of address labels designed to be printed on Avery 5160 style labels.
- **Postcard:** Generates a report suitable to print pre-formatted reminder postcards.
- **Full Extract:** Generates a CSV file containing patient data for patients included in the Reminder/Recall.
- **Auto-Dialer Email Extract:** Generates a CSV file containing Patient Email Address, Patient ID, and Patient Name for patients included in the Reminder/Recall.
- **Auto-Dialer Phone Number Extract:** Generates a CSV file containing Patient Phone Number, Patient ID, and Patient Name for patients included in the Reminder/Recall.