

Immunization Reminder and Recall Systems: Tips for Your Practice



Immunization Reminder and Recall Systems:

7 Tips for Your Practice

The COVID-19 pandemic has resulted in declining immunization rates. Pediatricians can use immunization reminder and recall systems to identify and notify families whose children are behind on immunizations (recall) or due soon (reminder). Using these systems may be one of the most powerful ways to catch up those who are behind and ensure optimal vaccination rates and adherence to well visits. The [Kansas Immunization Registry](#) (KSWebIZ) and electronic health records (EHR) can easily run reports that can be used by your practice to contact patients who are overdue. Building those practices into patient flow is key.

Steps to identify overdue patients may include:

- Decide on an age range to focus on, if it is not reasonable to check all patients.
- Run a KSWebIZ query for all patients in your selected age range who are 30+ days behind on vaccination.
- Run the same query in the EHR. If you are unsure about whether your EHR system has this capability, it is best to talk to your EHR vendor.
- Pull the records for everyone who came up on the lists.
- Reconcile the lists and update the EHR or KSWebIZ with missing information. Remove any patients who have moved or gone elsewhere from the list. Note that reconciliation between KSWebIZ and EHR should be done periodically.

Tip 1:

Why Should My Practice Increase Patient Recall Efforts Now?

It is essential to perform recalls, get in touch with families, and get children caught up on their vaccines. Here's why:

- **Preventative Care's Normal Benefits Are Amplified Right Now:** Every missed [Bright Futures](#) guideline is an evidence-based lost opportunity to address important developmental issues with children. Pediatric practices are on the front lines for issues around vaccines, vision, hearing, height, weight, dental health, depression, ADHD, lead and more.
- **Pediatricians Identify Abuse and Neglect:** Pediatricians, teachers, and other mandated reporters who provide direct care are on the front line of identifying abuse and neglect. During the pandemic, there are fewer sets of eyes on kids.
- **AAP Guidance Promotes Preventive Care:** The [AAP strongly encourages](#) pediatricians to continue with their preventive care services. "Pediatricians should identify children who have missed well-child visits and/or recommended vaccinations and contact them to schedule in person appointments inclusive of newborns, infants, children, and adolescents."
- **Your Performance-Based Measures Are Still In Play:** Practices receiving performance-based payments nearly always depend on the services performed during preventive care visits.
- **Stay in Business So You Can Continue to Provide Care:** Has your pediatric practice faced low volume in the past? Low volume can mean record low revenue. Use patient recall to increase visit volume in order to stay in business.

Tip 2:

Choosing a Reminder or Recall Strategy

Once you have a list of patients overdue or due soon for vaccines, you can start reaching out to them. Consider one or more of the strategies below. When selecting a strategy, consider the communication preferences of patients and families in your practice. What percent of patients actively utilize the patient portal? Do patients respond to mailed reminders, or are patients/families more responsive to individual phone calls? Do families find text messages more convenient?

- **Phone calls** placed by office staff tend to be more effective than auto-dialer calls, but often cost more in staff time.
- **Auto-dialers** automatically dial phone numbers and either play a recorded message or connect the call to a live person. Such systems also can be used for appointment reminders.

- **Mail reminder cards** or letters (“snail mail”) may be printed. Another approach is to have the family fill out the reminder card for the next visit (eg, dose 2 or 3 of HPV vaccine) when in your office.
- **Text messages** can be sent to remind parents or adolescents about vaccinations; however, they will need to “opt in”. Obtaining this permission might be easiest during a visit. [Text messages have proven effective in increasing influenza vaccination rates.](#)
- **Patient portals** are a common feature in most EHR systems. Practices can use this feature to send e-mails to patients or parents prompting them to check their patient portal, which will remind them of vaccinations that are due.

Tip 3:

Sample Vaccine Alert Messaging

Needing catch-up vaccine:

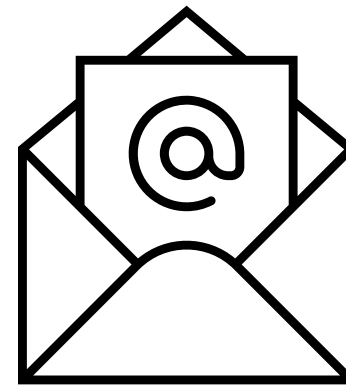
"[PRACTICE NAME] is contacting you as our records indicate that your child is overdue for a vaccine. Please call [PRACTICE PHONE NUMBER] today to schedule your child's vaccination. We've missed you!"

Routine, on-time vaccinations:

"Hi! [Practice Name] is offering a friendly reminder that your child's wellness visit and/or vaccinations are due. It is very important to stay on track with these appointments. Please call our office at [PRACTICE PHONE NUMBER] to schedule your child's appointment. See you soon!"

Newborn appointments:

"Congratulations from [PRACTICE NAME] on your new baby! Newborn checkups and on-time vaccines are very important. Please keep your scheduled appointments or schedule one today by calling us at [PRACTICE PHONE NUMBER] if you haven't already. We can't wait to see you!"



Tip 4:

Auto-dialer or Text Vendors

The following is a list of some auto-dialer or text vendors compiled by AAP. (Please note that the AAP cannot endorse or recommend specific products or brands. This is only meant to aid you in your selection.)

- **Text-Em-All**: Improve Patient Care with SMS for Healthcare. Text-Em-All helps hospitals, senior living facilities, and other healthcare facilities effectively communicate important information to patients, caregivers, and staff. Two plans are available.
- **Intrado**: A patient engagement platform. HouseCalls Pro helps improve patient experiences and outcomes with EHR-driven workflow automation and personalized messaging.
- **Voicent**: The auto-dialer solution delivers pre-recorded audio messages to a list of contacts. It can also leave answering machine messages in your own voice.

Tip 5:

Reminder/Recall Considerations

Here's some things to consider when running a reminder/recall for your clinic:

- Your reminder/recall report will be more accurate if you inactivate those patients who are no longer coming to your clinic and run the recommended data quality reports to help you correct inaccurate data (e.g. patient duplicate records).
- Be sure the vaccines and dose numbers that you include in your reminder/recall are appropriate for the patient age range that you want to remind or recall.
- Patients can be included in many reminder/recalls. To prevent notifying patients multiple times during the same period, some

care should be given to how reminder/recalls are generated. We recommend that patients be included in no more than 3 – 5 reminders within the same age range and criteria over a period of one year.

- Reminder/recalls are most effective when carried out regularly and consistently.

Tip 6:

Reminder/Recall Notification Templates and Mail Merge Resources

Use these modifiable templates to create your letter or postcard reminder/recall notifications. There is one for school-aged patient reminder/recall notifications. Once you download the templates, you can adjust/edit the content as needed, including adding contact information or your provider logo.

Notification Template

- School-age – see next slide

Using mail merge is a simple way to auto-populate reminder/recall letters or postcards with patient information, including name and address. You can use your office output spreadsheet to create individualized letters/postcards for each patient. Below are some resources compiled for doing a mail merge:

Mail Merge Instructions

- [Mail Merge Using Excel](#) (includes guidance for Windows and macOS)
- [How to Use Mail Merge in Microsoft Word](#)
- [How to Use Word & Excel for Mail Merge \(Step-by-Step Guide\)](#)

Mail Merge Videos

- [How to Do a Mail Merge in Microsoft Word](#)
- [Making Address Labels with Mail Merge](#)

School-Age Notification Template

Your Letterhead Here

«First_Name» «Last_name»
«Address_Line_1» «Address_Line_2»
«City», «State» «Zip»

Date

Dear <<First_Name>>,

According to our records, your child is missing the following vaccine(s) required for school entry: <<Immunization_Recommendations>>. These vaccines keep your child from catching and spreading diseases that can make them and others sick.

If there is a disease outbreak or case in your child's school and they have not received the vaccine for that disease, they may be excluded from school until it is safe for them to return. This could be 21 days or more, which could mean lost learning time for them and lost work and wages for you.

Please contact us at [email](#) and/or [phone number](#) or visit our website at [your website here](#) for more information about getting vaccinated. Once vaccinated, we will provide you with copies of your child's updated immunization record to give to your child's school and keep for your own records.

If your child already received their vaccinations, please contact us to update their immunization record.

Tip 7:

Four Free Patient Reminder Software

If you're not ready to commit to purchasing patient reminder software services, here's a few tools that are free with limited functionality that can give you an idea of how it can simplify day-to-day activities at your practice:

SimplyBook.me

Cost: Free to \$49.90/month

Best for: Options to book on multiple platforms to reach a wider audience

SimplyBook.me allows businesses to display their availability for new and existing customers to make bookings. Businesses can add a SimplyBook.me widget to their website or App, or add a Book Now CTA to their Facebook,

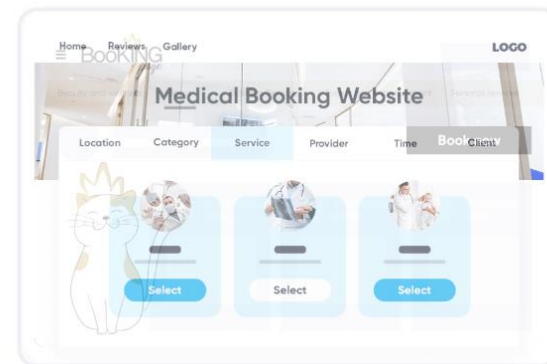
Instagram, or Google Maps page or through Booking.page.

Top features:

Online scheduling and notifications via SMS or email

Coupons and gift cards

20 customizable website templates and booking widgets that can be added to your website



Appointy

Cost: Free to \$79.99/month

Best for: Getting bookings directly from Facebook, Instagram, Google and your business website

Appointy is scheduling software that is available in multiple countries and languages and is designed to help you grow and manage your business. Appointy allows you to accept appointments online, send automated email or SMS reminders, and integrate with social media and your Google Calendar.

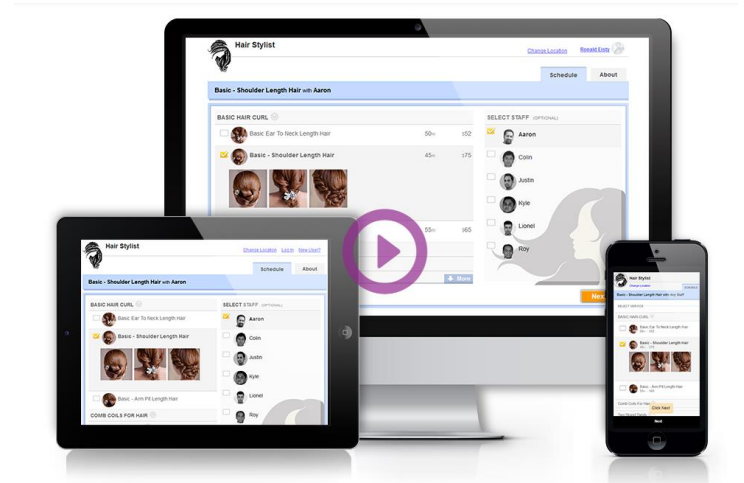
Top features:

Calendar Sync and automatic reminders

Dedicated relationship manager

Gift certificates

Accept online pre-payments



Reservio

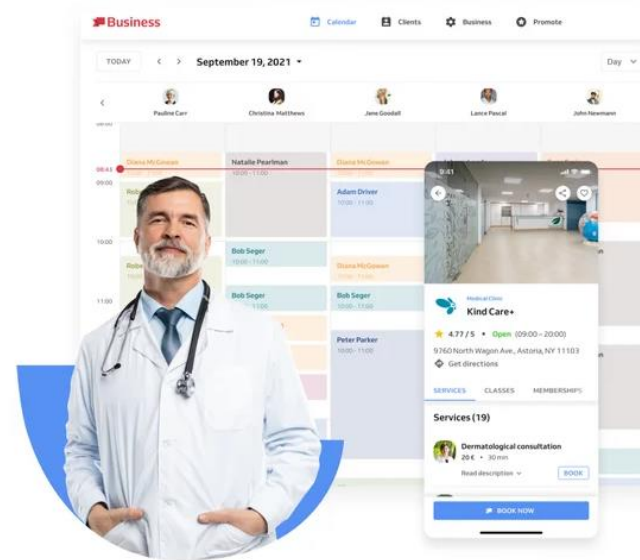
Cost: Free to \$40/month

Best for: Integration with your Google Calendar, iCal, or your website gives patients access to your practice hours

Reservio is an online booking and appointment scheduling platform for client-serving businesses of all types and sizes that is available in over 35 countries. With an intuitive CRM that can provide valuable business insights to help managers make better scheduling decisions, Reservio works as a smart business assistant.

Top features:

- Online booking and scheduling
- Staff and shift management
- Business reporting and statistics



Mend

Cost: Free+

Best for: Showing provider capacity and utilization

Mend is a HIPAA-compliant telemedicine tool that makes patient scheduling and reminders look easy. Their Predictive IQ technology uses artificial intelligence algorithms to predict no-shows and cancellations before they happen.

Top features:

Digital intake forms

Group video and scheduling

Patient appointment reminders, patient scheduling

