

Clinic Tools

PhilaVax Recall Report

The **PhilaVax Recall Report** creates a list of patients that are overdue for vaccination. The report can be customized to a specific age group and specific vaccines. The list will be limited to patients assigned to your clinic in PhilaVax. If you do not have access to reports, please email vaccines@phila.gov.

How to Generate the Recall Report

1. Log onto Philavax.
2. Select **Reports** menu in the left hand corner.
3. Under **Patient Management**, select **Patient Reminder/Recall**.

The screenshot shows the PhilaVax web application interface. At the top, there is a header with 'PhilaVax', a location indicator 'PDPH - DDC - IMMUNIZATION PROGRAM, PROJ01 - PDPH - DDC, PRO...', and a search icon labeled 'PATIENT SEARCH'. On the left side, there is a navigation menu with the following items: Home, Patients, Immunizations, IZ Quick Add, Inventory, Clinic Tools, Reports (highlighted with a red circle '2'), Outreach, and Administration. Below the menu, there is a footer area with 'App Version 22.6.0.0', 'Recommender Version 22.6.1.0', 'Copyright © 2001-2022', 'Envision Technology Partners Inc.', and a link for 'Third Party Notices'. The main content area is titled 'Reports' and contains three sections: 'Patient' (listing options like Batch Patient Administrative Record, COVID-19 Vaccination Record, etc.), 'Forms / Informational Documents' (listing ACIP Child and Adolescent Immunization Schedule, etc.), and 'Patient Management' (listing Birth Vaccinations, Inactivate Patients, Patient Detail with Services, etc.). A red circle '3' highlights the 'Patient Management' section.

4. Select **Add Reminder/Recall Run**

The screenshot shows the 'Patient Reminder/Recall' form. At the top right, there are two buttons: 'Cancel' and 'Add Reminder/Recall Run' (highlighted with a red circle '4'). Below the buttons is a 'Search Criteria' section with a dropdown arrow. Underneath, there is a text input field for 'Provider/Clinic:' with the value 'PDPH - DDC - IMMUNIZATION PROGRAM, PROJ01 - PDPH - DDC (PROJ01)' and a placeholder 'SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE'. Below that is a text input field for 'Run Name'.

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5. Set the parameters for the **Recall Report**. Descriptions of each field are indicated below. Only complete the fields identified below. Information for other fields may not be available or relevant to the report.

- A. **Run Name** – Enter a name for the Report.
- B. **Provider/Clinic** – Will default to your practice.
- C. **Report Type** – Patient Default clinic should be selected.
- D. **Run Scheduled Date** – Enter the date you want to schedule the Report to run. Reports are run over night in PhilaVax.
- E. **Run Completed Date** – This is a read-only field and will list when the job has been processed.
- F. **Reminder/Recall Date Range** – Best to select one day! Patients who need a vaccination within this date range will be included in the Report. The range shouldn't be too wide or the report becomes unmanageable.
- G. **Age Range OR Date of Birth Range** – Used to select patients of a specific age. Only one of these fields needs to be selected, and it is easiest to select Age Range. To keep the report manageable, select a narrow age range.
- H. Check the box **Include Patients Overdue For Vaccinations** to include patients who are overdue for vaccinations. Enter 0 (zero) for minimum and maximum number of days.
- I. **Vaccine Series and Optional Dose** – Choose which vaccines you want to include in the report. Leave Dose Number blank so that any dose in the series that is missing will be included in the report.

6. Select **Create** to process the report. Reminder/Recalls are run overnight to prevent PhilaVax from slowing down during regular business hours. Guidance on using the report is outlined on the next page of this guide.

Patient Reminder/Recall

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Add

Create
Cancel

A Run Name

B Provider/Clinic: PDPH - DDC - IMMUNIZATION PROGRAM , PROJ01 - PDPH - DDC
SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

C Report Type
 Patient Default Clinic
 Vaccination Clinic

D Run Schedule Date **E** Run Completed Date

F Reminder/Recall Date Range *
 From: Through:

G Age Range *
 From: Through: UOM: MONTHS

Date of Birth Date Range *
 From: Through:

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

Include Recommender Reminders/Recalls?

Generate Reminder/Recall Event?

Include Manual Reminders/Recalls?

Include Patients Due For Vaccinations (Reminders)?

H Include Patients Overdue For Vaccinations (Recalls)?
 Minimum Number Of Days Past Due To Include Maximum Number Of Days Past Due To Include

Only include patients with 2 or more non- Influenza/H1N1-09/COVID-19/Monkey Pox vaccinations?

Exclude patients with one or more vaccine refusals?

I Vaccine Series and Optional Dose (Note: Leave Dose blank to include all doses in series)

| | Vaccine Series | Dose Number |
|-------------------------------------|------------------|----------------------|
| <input checked="" type="checkbox"/> | COVID-19 | <input type="text"/> |
| <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"/> |

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Create
Cancel

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Using the Report

1. Select **Filter**. You may change the **From** and **Through** date if necessary.

Patient Reminder/Recall Cancel **Add Reminder/Recall Run**

Search Criteria

Provider/Clinic: PDPH - DDC - IMMUNIZATION PROGRAM, PROJ01 - PDPH - DDC (PROJ01)

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

Run Name

Run Schedule Date

From: 06/01/2020 Through: 05/06/2022

Run Completed Date

From: MM/DD/YYYY Through: MM/DD/YYYY

1 Filter

2. Select the **Report Type** you'd like from the drop down menu. Helpful reports most commonly used:

- A. **View** - This will display the parameters of the report (ages, vaccines selected, etc.).
- B. **Unvaccinated Report** - Includes patients who have not returned to receive their immunizations since the last reminder/recall (Excel Report).
- C. **Report** - A detailed listing of all patients included in the Reminder/Recall (PDF Report).
- D. **Dymo Labels** - Generates a list of patient addresses designed to be printed on Dymo address labels.
- E. **Avery Labels** - Generates a list of patient addresses designed to be printed on Avery 5160 address labels (dimensions 1" x 2 5/8").
- F. **Post Cards** - Generates a list of patients to be printed on pre-formatted mailer postcards.
- G. **Full Extract** - Generates a patient list in a CSV file format that can be opened in Excel.

| 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 | |
|-----------------------------------|---------------------|-------------------------|-------------------|--------------------|---------------------------|------------------------------|----------------------|------------------------|---|
| PDPH - DDC - IMMUNIZATION PROGRAM | PROJ01 - PDPH - DDC | JULY 2020 RECALL REPORT | 07/16/2020 | 07/17/2020 | 07/06/2020 | 07/10/2020 | 86 | 88 | ? View |
| PDPH - DDC - IMMUNIZATION PROGRAM | PROJ01 - PDPH - DDC | JUNE 2020 RECALL | 06/17/2020 | 06/18/2020 | 05/01/2020 | 06/10/2020 | 9 | 10 | 2 View |

Showing 1 to 2 of 2 entries

- A** VIEW
- REPROCESS
- B** UNVACCINATED REPORT
- C** REPORT
- EXTENDED REPORT
- D** DYMO LABELS
- E** AVERY LABELS
- F** POSTCARD
- G** FULL EXTRACT
- AUTO-DIALER EMAIL EXTRACT
- AUTO-DIALER PHONE NUMBER EXTRACT

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Key Points to Remember

- Patient phone numbers and addresses listed in the report may not be up to date.
- There may be patients who have moved or gone elsewhere on the list. Please let your VFC nurse know about these patients, and PhilaVax will be updated.
- To prevent notifying patients multiple times during the same period, attention should be given to how often the reports are generated.
- Reports are time sensitive and should be reviewed as soon as possible.
- If vaccines have been given after a report is created, you will see a message next to the patient's name: "Immunizations have been added to this record."
- Always compare the **Reminder** list to immunizations in the patient's chart. There could be a vaccine in the patient chart that is not in PhilaVax. If this is the case, please notify your VFC Nurse.
- If you need assistance, contact your VFC Nurse.

VFC Nurse Contact Information

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