

Creating a Reminder in Allscripts Professional EHR

Ensure timely and appropriate immunization orders and administration

Keeping track of patient immunization requirements is an important aspect in the delivery of ongoing patient care. Alerts based on patient age, immunization history, time since previous immunization, and risk factors help streamline care and reduce the burden on providers to keep track of recommended immunization requirements. This is especially helpful to ensure patients complete all doses in an immunization series. In Allscripts Professional EHR, these alerts are called **Reminders**.

Benefits of Reminders

Automated **Reminders** reduce the need to manually check records to assess patient immunization needs, and help ensure that patients receive appropriate and timely immunizations according to Centers for Disease Control and Prevention (CDC) recommendations.

Considerations:

- **Reminders** for immunizations are not automatically created when an immunization is added to the electronic health record (EHR) immunization schedule. The **Reminder** will trigger based upon immunization history
- An immunization administered by another practice or in the pharmacy may **not** have been documented in the EHR; a **Reminder** could be triggered for an immunization the patient has already received. Maintaining updated immunization history for patients will minimize duplication
- User privileges to create **Reminders** may be limited to select users with specific security privileges or subject to practice business policies

If you have further technical questions, consult your internal or external EHR support resources.

This guide provides a high-level overview of how to create a Reminder in Allscripts Professional EHR. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.

Please note that this guide was created based upon Allscripts Professional EHR version 19.4. Screens and features may change as new software versions are released.

This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.

Creating a Reminder in Allscripts Professional EHR

Allscripts Professional EHR enables the setup of **Reminders**, based on certain criteria. Available criteria include immunization.

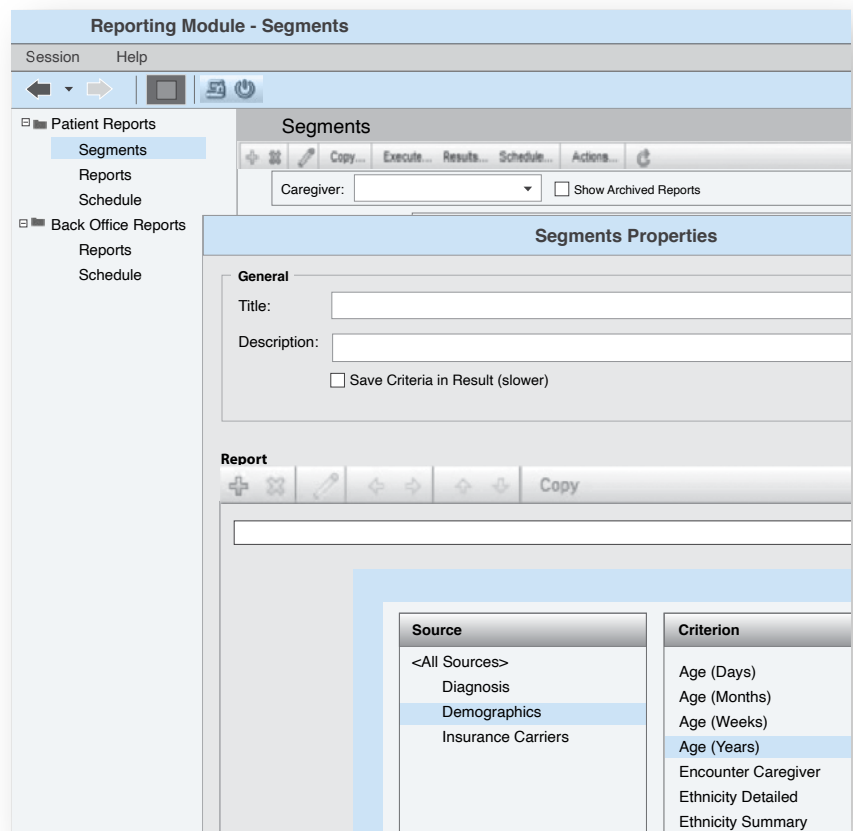
For example, a **Reminder** may be created to identify which patients are due or overdue for Product X. **Reminders** can be created in bulk based on a report that lists all patients who are overdue for Product X.

Using the reports section, **Patient Lists** can be created and **Reminders** set up to help remind providers of immunizations due. When a patient's immunization is due or overdue, the **Reminder** displays in the patient's chart. To create **Reminders** in bulk in Allscripts Professional EHR, you must first run a report to identify the appropriate patients for **Reminders**.

Below is a summary of the process to create a patient **Reminder** for Product X.

To run a Report

- Open the **Reporting Module**
- Navigate to **Patient Reports, Segments**
- Create a new **Segment** with the following criteria:
 - Demographic Criterion – Age ≥50 years
 - Demographic Criterion – Status – Active
 - Demographic Criterion – Status >< Deceased
- Execute the **Segment**



Creating a Reminder for GSK immunizations in Allscripts Professional EHR



- From **Patient Reports**, select **Reports**
- Select the **green plus** to add a criterion
- From the **Source** list, select **Immunizations**
- Choose from the list of **Immunization Criterion**, such as **Lack of Series** or **Past Due**
- Set appropriate details, such as a date range
- Link the **Segment** and save the **Report**
- Add any additional criterion, as appropriate
- Save the **Report**

Reporting Module - Reports

Session Help

← → [Icons]

Patient Reports
 Segments
 Reports
 Schedule

Reports
 + [Icons] Copy... Execute... Results... Schedule... Actions... [Refresh]

Caregiver: [Dropdown] Show Archived Reports

Report Properties

General

Title: [Text Field]

Description: [Text Field]

High Priority
 Restricted Access
 Preventative Health Reminder

Segment: [Text Field]

Keep for: [0] days Save Criteria in Result (slower)

Report

[Icons] Copy

Select Criterion

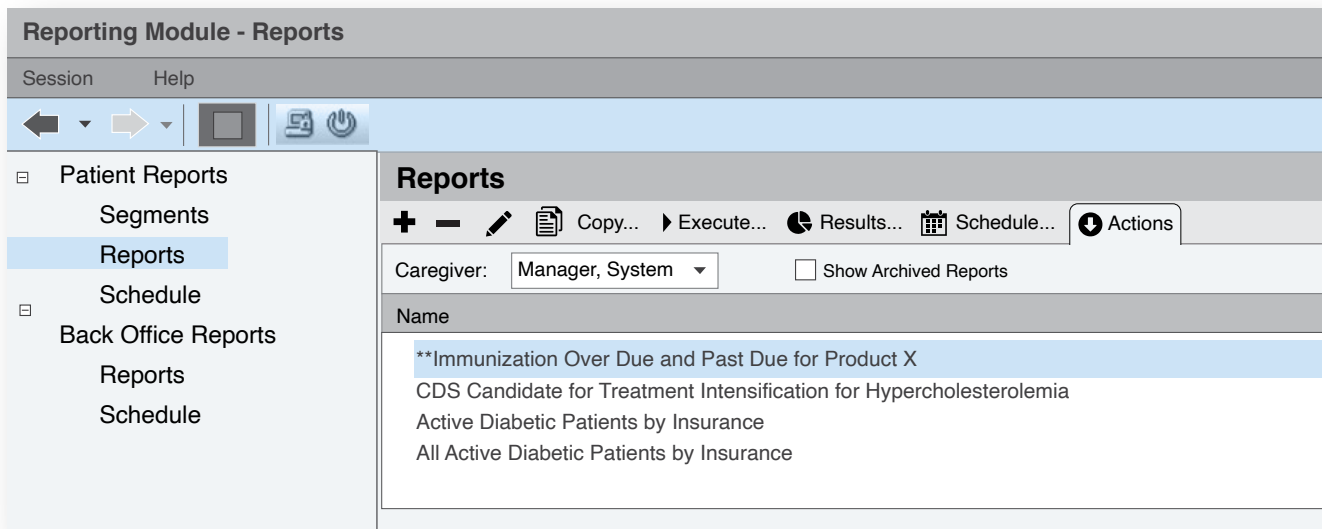
Source	Criterion	Description
<All Sources>	Immunizations (Days)	Patients who have a
CC/HPI	Immunizations by Administering Caregiver	Patients who have
History	Immunizations by Date Range	Patients who had a
Rx	Immunizations by Funding	Patients who were
Vitals	Immunizations by Lack of Series	Patients who have
Diagnosis	Immunizations by Lot Number	Patient who were
Labs	Immunizations by Reason not Given	Patients who did not
Procedures	Immunizations by Series	Patients who have a
Appointments	Immunizations Due	Patients who have
Referrals	Immunizations Given Early	Patients who have
Demographics	Immunizations Past Due	Patients who have
Encounter	Immunizations	Patients who have a
Immunizations		

Creating a Reminder for GSK immunizations in Allscripts Professional EHR

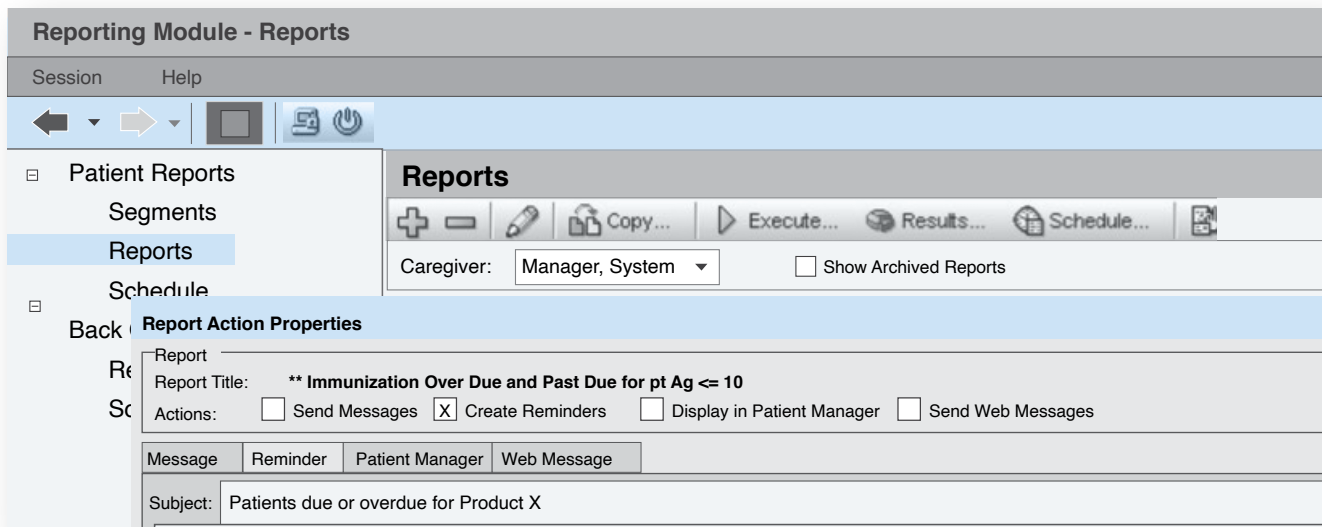


To create a Reminder

- Highlight the name of the appropriate **Report**, such as: **Immunization Over Due and Past Due for Product X**
- Select the **Actions** button from the toolbar to display **Report Action Properties**



- On the **Report Action Properties** template, select the **Reminder** tab, and enter a subject such as “Patients due or overdue for Product X.” Add appropriate **Reminder text**
- Select **OK**



Creating a Reminder for GSK immunizations in Allscripts Professional EHR



- To auto populate **Reminders** to display on the patient chart of those patients who meet the report criteria, execute actions on the **Execute Report** screen, and return to the **Reporting Module**
- From the **Reports** toolbar, select **Execute**
- The **Execute Report** template displays; select **Execute Actions (Create Reminders, Message, and Web Messages)**
- Select the **Execute** button to create **Reminders**
- The **Reminder** for due or overdue Patient X is placed on the patient's chart

Reminders						
Mark Complete	Mark Erroneous	Send Message...	Show Complete	Show Future	Show Erroneous	Preview Close
Subject	Date/Time v	Entered By	Completed By	Completed D...	Erroneous By	
Vaccine	6/6/2020 201...	Manager, Sys...				
Patient:		Priority:		Date Completed:		
Remind:		Always		Completed By:		
Entered By:		Manger, System				
Subject: Product X						
Note: Patient is overdue; give at next appointment						

Execute Report X

Segment

Name: Active patients \geq 50

Last Run: 6/6/2020 11:43:15 AM

Patient Count: 32

Options

Use Training Patients Only

Display Result

Execute Actions (Create Reminders, Messages, and Web Messages)

Execute
Cancel

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