

## Recall Reports for series completion

### Helping ensure patients receive all doses in an immunization series

When providers have patients who have been prescribed an immunization with multiple doses in a series, they may encounter situations where patients may be delayed in receiving or not receive the subsequent doses in the series, due to varying reasons and, therefore, not complete their recommended dosing regimen. To help ensure patients receive all the required doses, it is paramount for providers to act to have the patient return for the remaining dose(s).

### Benefits of Recall Reports for immunization series completion

Patient Lists, called **Recall Reports** in eClinicalWorks EHR are a useful tool to identify patients who have a gap-in-care according to clinical guidelines. They may help providers meet quality measures and improve quality health care, such as increasing immunization rates. **Recall Reports** can also be helpful in identifying patients who have not completed all required doses in an immunization series.

### Considerations:

- The number of patients appearing on a **Recall Report** may be impacted by the clinical data available in the EHR; for example, if an immunization was administered by another provider or in the pharmacy, it may not have been recorded in the EHR and patients will be included in the **Recall Report** showing they need additional doses
- The **Recall Report** criteria should consider active patients only (not deceased or inactive as determined by the practice)
- User privileges to configure and run **Recall Reports** 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 Recall Reports for an immunization series completion within eClinicalWorks 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 eClinicalWorks EHR version 11. 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.*

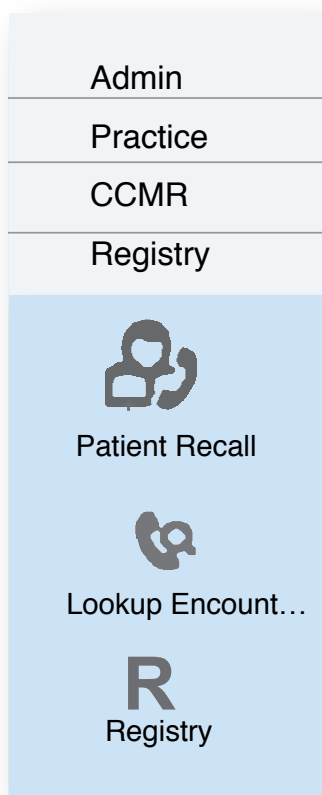
## Create a Recall Report for series completion of immunization

eClinicalWorks EHR provides multiple tools to track patient compliance, and one frequently used tracking method is to generate **Recall Reports**. Immunization series completion is a common use of these **Recall Reports**.

The following steps illustrate how to create a **Recall Report** to identify appropriate patients who may be candidates for a certain immunization.

### Create a Recall Report for an immunization:

- On the right side of the chart, under the **Registry** section, select **Patient Recall**



# Creating a Recall Report for GSK immunizations in eClinicalWorks EHR



- The **Patient Recall** window displays
- Select the **All Labs/DI/Imm Alerts** tab
- Select the **Protocol** ellipse button to search for the desired protocol
- The **Alert List** displays. Choose the desired immunization from the list

**Patient Recall**

Appointment Date Patient Protocol **All Labs/DI/Imm Alerts** DX RX

Protocol Product X Overdue ... Provider/Facility Filter

Report List Date (s) 07/01/2019 Due By

Filter Patients

Age To Sex Both Deceased Only Inactive Only Over Due Diagnosis (ICD-9)

Date of Service Filter 01/01/2019 To 07/01/2019 Search Criteria Based on test not ordered

Ignore Service Dates (Includes all the patients without encounters) Rendering Provider All Providers

Consolidated View Ignore Facility / Provider Status

Look Up

**Patient Recall**

Appointment Date Patient Protocol **All Labs/DI/Imm Alerts** DX RX

Protocol Product X Overdue ... Prov

Report List Date

**Alert List**

Lab/Immunization/DI Alerts

Facility Facility Group Providers **All Alerts**

- MRI ANKLE BILAT WITH
- NM OCTREOSCAN TUM
- NUSWAB VAGINITIS PU
- Pneumococcal Vaccine Polyvalent
- Product X
- PT/INR - DONE IN CLINI
- RAD DEXA BONE DENS
- RENIN (REN) - 84244
- Screening: Colorectal Car
- Screening: DM Eye Exam
- Screening: Fall Risk
- SURGICAL PATHOLOGY
- URINALYSIS COMPLETE
- Urine Dip Stick - done in
- URINE MICROALBUMIN
- US PELVIC NON-OB COM

OK Cancel

# Creating a Recall Report for GSK immunizations in eClinicalWorks EHR



- Once the **Protocol** is selected, other filters can be applied as appropriate

**Patient Recall**

Appointment Date | Patient | Protocol | All Labs/DI/Imm Alerts | DX | RX

Protocol: Product X Overdue ... Provider/Facility Filter: [Empty]

Report List: [Empty] Date (s): 07/01/2019 Due By: [Empty]

Filter Patients

Age: [ ] To: [ ] Sex: Both [ ] Deceased Only [ ] Inactive Only [ ] Over Due: [ ] Diagnosis (ICD-9): [ ]

Date of Service Filter: 01/01/2019 To: 07/01/2019 Search Criteria: Based on test not ordered

Ignore Service Dates (Includes all the patients without encounters) Rendering Provider: All Providers

Consolidated View  Ignore Facility / Provider Status: [ ]

**Look Up**

- Select the **Look Up** button in the bottom right to create the report to generate a list of patients who meet the report criteria
- Once a **Recall Report** is available, there are several actions that can be performed using the buttons at the bottom of the list including printing letters, sending the patient a message via the **Patient Hub**, or scheduling a new appointment

**Patient Recall**

Appointment Date | Patient | Protocol | All Labs/DI/Imm Alerts | DX | RX

Protocol: Product X Overdue ... Provider/Facility Filter: **ALL Facilities / All Patients**

Report List: [Empty] Date (s): 07/01/2019 Due By: [Empty]

Filter Patients

Age: [ ] To: [ ] Sex: Both [ ] Deceased Only [ ] Inactive Only [ ] Over Due: Yes [ ] Diagnosis (ICD-9): [ ]

Date of Service Filter: 01/01/2019 To: 07/01/2019 Search Criteria: Based on test not ordered

Ignore Service Dates (Includes all the patients without encounters) Rendering Provider: All Providers

Consolidated View  Ignore Facility / Provider Status: [ ]

**Look Up**

▲ HIDE ▼

<input type="checkbox"/>	Patient	Test	DOB	Sex	Age	Home Phone	Last Done	Due Date	Last Visit	Next Visit	Status	Providers
<input type="checkbox"/>	Wayne, John	Product X	02/14/1953	M	65Y		No Record	Now	11/28/2018			
<input type="checkbox"/>	Evans, Dale	Product X	09/28/1948	M	72Y		No Record	Now	01/10/2019			
<input type="checkbox"/>	Wills, Chill	Product X	08/26/1941	F	79Y		No Record	Now	04/04/2019			
<input type="checkbox"/>	Prince, Diana	Product X	12/07/1946	F	74Y		No Record	Now	12/22/2018			

Letter: [ ] ... Run Letter(s) [ ] Pt Hub [ ] New Appt [ ] Status [ ] Alerts [ ] Copy [ ] < Prev [ ] Next > [ ] eMsg [ ] Messenger [ ]

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