

## Documented recall management process

A documented immunisation recall process must include the following.

Methods used to recall patients.

- Ensure all communication is clear, informative and reflects cultural competency. Use a minimum of three different methods of contact.
- Telephone – Best impact with ability to confirm appointment there and then.
- Text message – Use PMS function to bulk message pre-loaded text message template or individualised messaging.
- Patient portal – Use the portal to message, recall and attach patient suitable information on immunisation e.g. schedule, Health-Ed immunisation information.
- Letter – Consider associated costs with postage and postage delivery timeframes which could delay timely immunisation. Use pre-loaded letter template on PMS and include patient suitable information on immunisation.

The process / frequency of recalls / timelines.

- **6 weeks**
  - Pre-call at 4 weeks.
  - 1<sup>st</sup> recall at 6 weeks.
  - 2<sup>nd</sup> recall at 8 weeks
  - 3<sup>rd</sup> recall 10 weeks.
  - Refer onto Outreach Immunisation Services (OIS) by 10.5 weeks.
- **3 months**
  - Pre-call at 2.5 months.
  - 1<sup>st</sup> recall at 3 months.
  - 2<sup>nd</sup> recall at 3.5 months.
  - 3<sup>rd</sup> recall at 4 months.
  - Refer onto Outreach Immunisation Services (OIS) by 4.5 months.
- **5 months**
  - Pre-call at 4.5 months.
  - 1<sup>st</sup> recall at 5 months.
  - 2<sup>nd</sup> recall at 5.5 months.
  - 3<sup>rd</sup> recall at 6 months.
  - Refer to onto Outreach Immunisation Services (OIS) by 6.5 months.
- **12 months**
  - Pre-call at 11.5 months.
  - 1<sup>st</sup> recall at 12 months.
  - 2<sup>nd</sup> recall at 12.5 months.
  - 3<sup>rd</sup> recall at 13 months.
  - Refer to onto Outreach Immunisation Services (OIS) by 13.5 months.

	<ul style="list-style-type: none"> <li>• <b>15 months</b> <ul style="list-style-type: none"> <li>• Pre-call at 14.5 months.</li> <li>• 1<sup>st</sup> recall at 15 months.</li> <li>• 2<sup>nd</sup> recall at 15.5 months.</li> <li>• 3<sup>rd</sup> recall at 16 months.</li> <li>• Refer onto Outreach Immunisation Services (OIS) by 16.5 months.</li> </ul> </li> <li>• <b>4 years</b> <ul style="list-style-type: none"> <li>• Pre-call at 3yrs 11.5 months.</li> <li>• 1<sup>st</sup> recall at 4 years.</li> <li>• 2<sup>nd</sup> recall at 4 years &amp; 1 month.</li> <li>• 3<sup>rd</sup> recall at 4 years &amp; 1.5 month.</li> <li>• Use patient prompt / dashboard to scan for patient overdue immunisations.</li> </ul> </li> <li>• <b>45 years</b> <ul style="list-style-type: none"> <li>• Pre-call 2 weeks prior to birthday.</li> <li>• 1<sup>st</sup> recall at 45 years.</li> <li>• 2<sup>nd</sup> recall at 2 weeks later.</li> <li>• 3<sup>rd</sup> recall at 2 weeks later.</li> <li>• Use patient prompt / dashboard to scan for patient overdue immunisations.</li> </ul> </li> <li>• <b>65 years</b> <ul style="list-style-type: none"> <li>• Pre-call 2 weeks prior to birthday.</li> <li>• 1<sup>st</sup> recall at 65 years.</li> <li>• 2<sup>nd</sup> recall at 2 weeks later.</li> <li>• 3<sup>rd</sup> recall at 2 weeks later.</li> <li>• Use patient prompt / dashboard to scan for patient overdue immunisations.</li> </ul> </li> <li>• <b>Pregnancy</b> <ul style="list-style-type: none"> <li>• Pre-call at 14 weeks.</li> <li>• 1<sup>st</sup> recall from 16 weeks' gestation.</li> <li>• 2<sup>nd</sup> recall from 2 weeks later.</li> <li>• 3<sup>rd</sup> recall from 2 weeks later.</li> <li>• Set patient alert to highlight due immunisation.</li> </ul> </li> </ul>
<p>Opportunistic methods.</p>	<ul style="list-style-type: none"> <li>• Use patient prompt / dashboard to scan for overdue immunisations.</li> <li>• Check family tree function on PMS to scan for other whānau members who may be overdue immunisations.</li> <li>• Scan appointment templates and notify GP of overdue immunisations.</li> <li>• Provide immunisations whenever possible, if not schedule a time that suits whānau.</li> <li>• Use culturally appropriate methods to engage whānau in immunisation conversations.</li> <li>• Offer referral to Outreach Immunisation Services (OIS) where appropriate and available.</li> </ul>

	<ul style="list-style-type: none"> <li>• Update clinical team at each team huddle for those patients overdue for immunisations.</li> </ul>
Documentation and alert system.	<ul style="list-style-type: none"> <li>• Use PMS function to create keywords/quick keys that improve immunisation event recording.</li> <li>• Follow current national immunisation standards to record immunisations.</li> <li>• Use patient alert system to prompt overdue immunisations of whanau where appropriate.</li> </ul>
Roles and responsibilities of all team members involved (including non-clinical team members).	<ul style="list-style-type: none"> <li>• Nominate at least one immunisation portfolio champion and consider rotating role to gain wider understanding among team. This person has full clinical understanding of childhood and adult immunisation schedule, skilled in immunisation conversations and immunising.</li> <li>• Ensure there are an adequate number of fully authorised immunisers within the service to cover patient need and are rostered to provide immunisations across practice opening times.</li> <li>• Ensure all staff involved in precalling and recalling have available to them a written process to follow with dedicated time allocated to this work.</li> <li>• Action overdue immunisation reports if applicable in your region and refer onto OIS where appropriate and available.</li> <li>• Ensure nonclinical staff involved in precalling and recalling have clinical oversight to ensure process is meeting national immunisation standards.</li> <li>• Ensure front desk staff are fully trained to prioritise immunisation appointments where possible especially for Māori and Pasifika whanau.</li> <li>• Ensure practice environment and staff provide a culturally safe and comfortable experience for all whanau attending for immunisation.</li> <li>• A welcoming practice environment will encourage whanau to attend for vaccination without fear of costs or challenges regarding overdue bills.</li> </ul>