



Generating Reminder Recall, Client List and Reminder Letters

Reminder Recall (This report **must** be generated to get the Client List and the Reminder Letter)

1. Click **Request Reminder** under the Reports section
2. Select your vaccine group 1 of 2 ways:
 - a. **Use All Vaccine Groups**- allows you to use all the vaccine groups to run the report
 - b. **Use Selected Vaccine Groups**- allows you to choose individual groups (as many as you like) by scrolling through the list and double clicking each vaccine group you want to use.
3. Enter the **Birth Date Range**
4. Click **Generate** (Reminder Request status page will display)
5. Click the **Refresh** button (this will update the status until you are at 100%- wait a few minutes in between clicking the refresh button)
6. Click on the report name in blue under the **Started** column (ex: [02/17/2009 07:16am](#))

Client Query Listing (provides a listing of all clients) (See Attached Example)

1. Once you are on the Reminder Request Status page, click on the report name. (ex: [02/17/2009 07:16am](#))

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
02/17/2009 07:16 AM	02/17/2009 07:17 AM	100 %	1	1	02/15/1996	02/15/1998

2. Click the blue link **Client Query Listing** on the bottom portion of the screen.
3. Click **Refresh** (list will show status as 100% complete when ready)
4. Click **Client List** (in blue) and you will receive the client query listing.

Note: To run a Reminder Letter from here click the Back button and you will be directed back to the status page

Reminder Letter (See Attached Example)

1. Once you are on the Reminder Recall Status page, click on the report name. (ex: [02/17/2009 07:16am](#))

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
02/17/2009 07:16 AM	02/17/2009 07:17 AM	100 %	1	1	02/15/1996	02/15/1998

2. Click **Reminder Letter** (blue link on the bottom portion of the screen under Client Query Listing). You can also add in any free text in the corresponding boxes [report name, phone and free text] to appear on the letter itself. [Ex: (free text) Please bring your insurance card with you].
3. Click **Refresh**
4. Click **Reminder Letter** and then print out. (this will print to the responsible persons if the Notices box was checked on the demographic page)

**** Note: One organization will be able to generate one of each of the following reports (vaccine usage, assessment, request reminder) only once every 10 minutes. This time limit is report specific.**

Client Query Listing Example

Report run on: 02/17/2009 07:21 AM

Client Query Listing

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Client Name (F M L)	Chart Number	Phone Number	Address	City/State/ZIP
LAST NOTICE TEST - 01/01/1997			128 Main	Madison, NC 53708-1234
		(336) 651-9876	128 Main	Madison, NC 53708-1234

Vaccine	Recmd Day	Immunization Dates
HepA	05/15/2008	1) 11/15/2007
HepB	02/01/2006	1) 01/01/2006
Influenza	07/01/1997	
MMR	01/01/1998	
Meningo	01/01/2008	
Polio	03/01/1997	
Td	01/01/2004	
Tdap	01/01/2008	
Varicella	01/01/1998	

***This is an example of what the Client Query List looks like. This list will have all those clients that were eligible for Reminder Recall*

Reminder Letter Example

Dear Last Notice Test,

Our records indicate that Last Notice Test, has received the following immunizations:

Immunizations History		
Immunization	Date Administered	Series
HepA	11/15/2007	1 of 2
HepB	01/01/2006	1 of 3

Our records also show that Last Notice may be due for the following immunizations. If Last Notice received these or other immunizations from another health care provider, please call our office so that we can update Last Notice's record. Otherwise please take Last Notice to a health care provider to receive them.

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
Polio	03/01/1997
Influenza	07/01/1997
MMR	01/01/1998
Varicella	01/01/1998
Td	01/01/2004
HepB	02/01/2006
Meningo	01/01/2008
Tdap	01/01/2008
HepA	05/15/2008

The number for our office is: 919-707-5550

Please make sure to bring any insurance information on your next visit

*This is the where anything you type in the **Free Text** or **Phone #** boxes will appear.*

***A Reminder Letter will print out for those listed as Responsible Persons who have the Notices box checked on the Personal Information page in the NCIR.*