

## HOW TO USE NCIR'S REMINDER / RECALL REPORT

NCIR's Reminder/Recall Report allows you to generate letters for patients who are due or overdue for vaccines. It can also be used to find eligible patients when your office has short-dated vaccine. You must be an Administrator in the NCIR to see the Reports menu – and generate the report.

1. Under **Reports** menu, click **Request Reminder**.
2. Under **Indicate the Tracking Schedule** select **Use Tracking Schedule Associated with Each Client**.
3. Under **Select the Vaccine Group(s)** select the vaccine groups you wish to review by adding vaccines from the left column to the right or removing unneeded vaccines.
4. Selecting a **School & Primary Care Provider** or **Additional Demographic Criteria** are generally not needed.
5. Under **Enter the Date Criteria** enter your chosen **Birth Date Range**. Other options are available here to adjust report results.
6. Click **Generate**.
7. At the **Reminder Request Status** page, click **Refresh** to check the status of the report.
8. Once the report is complete, click the blue link in the **Started** column. A summary of the report results will be displayed.
9. Proceed to the **Reminder Report Output Options**.

Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Client Query Listing</a>	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
<a href="#">Client Extract</a>	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

10. Selecting **Reminder Letter** will generate a pdf file of letters addressed to parents encouraging them to return for needed vaccinations. Additional messages can be added in the Free Text box.
11. For more detailed client information, including a summarized immunization record and responsible person information, click the **Client Query Listing**.