

To Generate an NCIR Request Reminder report, (for immunizations required for clients ≤ 5 years of age)
You must be an Administrator in the NCIR to see the reports menu!
Under the reports menu, click on "request reminder".

Enter a **birth date range** -use the birth date range that corresponds to the age group of clients that you want to remind/recall;
e.g. For current 2 year olds (as of Feb. 1, 2009) choose a one year birth date range such as 02/02/2006 to 02/01/2007.

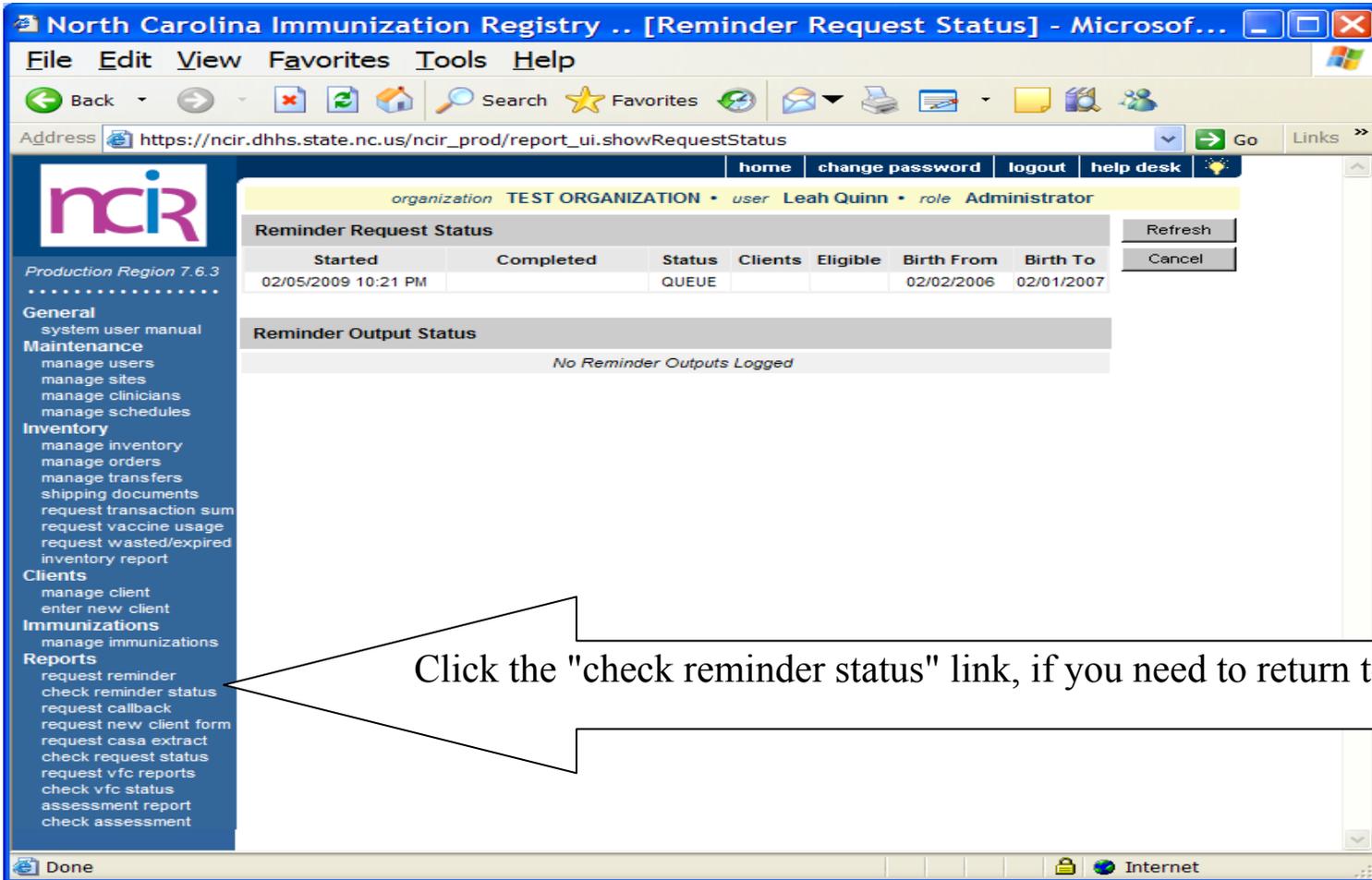
Click the "generate" button only one time- and then wait for the screen to switch over to the status screen.

The screenshot shows the 'North Carolina Immunization Registry' web application. The browser title is 'North Carolina Immunization Registry .. [Mailing Report Request] - Microsoft I...'. The address bar shows 'https://ncir.dhhs.state.nc.us/ncir_prod/report_ui.showRequestReminder'. The user is logged in as 'Leah Quinn' with the role of 'Administrator'. The main content area is titled 'Reminder/Recall Request' and contains the following sections:

- Select the Vaccine Group(s) ...**: Radio buttons for 'Use All Vaccine Groups' and 'Use Vaccine Groups Selected'. The 'Use Vaccine Groups Selected' option is chosen. A list of selected groups includes Typhoid, Yellow Fever, and Zoster. An 'Add >' button is visible, and a 'DTP/aP' group is also listed.
- Enter Additional Demographic Criteria ...**: Fields for City, Zip Code, and County.
- Enter the Date Criteria ...**:
 - Birth Date Range**: From 02/02/2006 to 02/01/2007.
 - Target Date Range**: From and To fields are empty.
 - Weeks Since Last Notice**: A text input field.
 - Exclude clients more than**: A dropdown menu set to 'Month(s) Overdue'.
 - Exclude from**: Radio buttons for 'Today's Date' (selected) and 'Target From Date'.
- Specify How to Sort the Report Data ...**:
 - Sort 1st By: Last Name, Ascending.
 - Sort 2nd By: First Name, Ascending.
 - Sort 3rd By: (empty), (empty).
 - Sort 4th By: (empty), (empty).

A 'Generate' button is located at the bottom of the form. A note below the button reads: 'NOTE: Fields marked with an asterisk are required.' Two callout boxes with arrows point to the 'Birth Date Range' field and the 'Generate' button, with text: 'Enter the birth date range' and 'Click the "Generate" button -one time only!' respectively.

The report will go to "Queue" status. You may move to other areas within the NCIR during the report processing.



If you move to other areas within the NCIR and wish to return to check the status of the request, Click "check reminder status" (located under the "reports" menu option).

Click refresh one or two times, and then wait until the link is ready - (depending on the number of clients within the organization, this may take several minutes).

Once the link is available (underlined in blue), click to review the **Reminder Request Process Summary**

organization TEST ORGANIZATION • user Leah Quinn • role Administrator

Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
02/10/2009 02:24 PM	02/10/2009 02:25 PM	100 %	28	18	02/02/2006	02/01/2007

Reminder Output Status

No Reminder Outputs Logged

Refresh

Cancel

General

- system user manual

Maintenance

- manage users
- manage sites
- manage clinicians
- manage schedules

Inventory

- manage inventory
- manage orders
- manage transfers
- shipping documents
- request transaction sum
- request vaccine usage
- request wasted/expired
- inventory report

Clients

- manage client
- enter new client

Immunizations

- manage immunizations

Reports

Click the link to open the **Reminder Request Process Summary**

“Clients” shows how many clients are recommended or overdue. “Eligible” shows how many of those are eligible for reminder/recall

You may Print and/or save this report for future reference and to verify that you selected the correct vaccine group(s) and the desired birth date range.

Click on "File" and then "Save as" to save to your computer

Criteria Evaluated at this Step	Clients
Clients that are active or inactive for TEST ORGANIZATION.	233
Clients that are active for TEST ORGANIZATION.	129
Clients from Step 2 that are born between 02/02/2006 and 02/01/2007 .	30
Clients from Step 3 that meet the following criteria: ● County is not specified; ● School is not specified; ● Provider is not specified; ● Weeks Since Last Notice is not specified.	30
5 Clients from Step 4 that meet the following criteria regarding vaccination status: ● Clients that are Recommended or Overdue for one or more vaccinations as of 02/10/2009 ; ● Use the following vaccine groups: DTP/aP, HepB, Hib, MMR, Polio and Varicella ; ● Use for all clients. ● Exclude Overdue Reminders is not specified	28
6 Clients from Step 5 that meet the following criteria. ● Have one or more responsible persons ; ● At least one responsible person receives notices ; ● City is not specified ● Zip Code is not specified	18
Total Number of Clients Eligible for Reminder	
7 Clients from Step 5 that are omitted from Step 6: Omitted Clients	18 (10)

Output	Description	Additional Input
Client Query Listing	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text: Please call Beth Quinn if you have any questions regarding this information. Thank you!

You may also calculate the percentage of clients who are currently **NOT up-to-date** -simply divide the number in Step 5 by the number in Step 3 and multiply by 100; in the above example, $28/30 \times 100 = 93\%$ are **NOT up-to-date**.

Please NOTE: any client who does not have a "responsible person" documented in the client information screen will be considered "omitted" from reminder/recall (the number of omitted clients will be shown in Step 7). If you generate the report and see ["omitted clients"](#) as a link, those clients need additional responsible person address information (or a responsible person who will receive "notices") in order for a reminder letter and label to be created. Click the link to view a listing of the 'omitted clients'.

Under the Reminder Request Output Options, click the "**Client Query Listing**" link to generate a list of clients who are currently recommended or overdue for one or more immunizations, (based on the selected vaccine groups).

The screenshot shows the North Carolina Immunization Registry web application. The browser title is "North Carolina Immunization Registry .. [Reminder Request Output Options]". The address bar shows the URL: https://ncir.dhhs.state.nc.us/ncir_prod/report_ui.showReminderOutputOptions?pJobId=205648. The page displays a summary of client counts: "Total Number of Clients Eligible for Reminder" is 16, and "Clients from Step 5 that are omitted from Step 6:" is 7, with a link to "Omitted Clients". The main section is titled "Reminder Request Output Options" and contains a table with columns for "Output", "Description", and "Additional Input".

Output	Description	Additional Input
Client Query Listing	A list of clients eligible for reminder based on the report criteria (in .pdf format). Excludes omitted clients.	Report Name <input type="text"/>
Reminder Letter	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text" value="Please call Beth Quinn if you have any questions regarding this information. Thank you!"/> Phone # <input type="text" value="919-707-5580"/>
Reminder Card	Standard Reminder Card (4x5).	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>
Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
Client Extract	A .txt file of clients eligible for reminder based on the report criteria. Includes omitted clients.	Report Name <input type="text"/>

NOTE: Fields marked with an asterisk - are required.

Below the table is the "Last Notice Date Options" section, which includes a checked checkbox for "Set last notice date to today for all eligible clients when you select a report output." and buttons for "Revert Eligible", "Revert All", and "Cancel".

A callout box with the text "Click the 'Client Query Listing' link" points to the "Client Query Listing" link in the table.

Once you click the "Client Query Listing" link, the screen should switch over to the Reminder Output Status page and from there you can click the "Client List" link to open the Client Query Listing.

North Carolina Immunization Registry ... [Reminder Request Status] - Microsoft Internet Explorer

Address: https://ncir.dhhs.state.nc.us/ncir_prod/report_ui.showRequestStatus?pSchool=0

organization TEST ORGANIZATION • user Leah Quinn • role Administrator

Reminder Request Status

Started	Completed	Status	Clients	Eligible	Birth From	Birth To
02/16/2009 12:28 PM	02/16/2009 12:29 PM	100 %	27	17	02/02/2006	02/01/2007

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Mailing Labels	Mailing Labels	02/16/2009 12:30 PM	02/16/2009 12:30 PM	02/16/2009 12:30 PM	Ready
Reminder Letter	Reminder Letter	02/16/2009 12:30 PM	02/16/2009 12:30 PM	02/16/2009 12:30 PM	Ready
(Hmong)	Reminder Letter	02/16/2009 12:30 PM	02/16/2009 12:30 PM	02/16/2009 12:30 PM	Ready
(Somali)	Reminder Letter	02/16/2009 12:30 PM	02/16/2009 12:30 PM	02/16/2009 12:30 PM	Ready
Client List	Client List	02/16/2009 12:29 PM	02/16/2009 12:29 PM	02/16/2009 12:29 PM	Ready

To return to the **Reminder Request Process Summary**, you need to click the link for the main report, i.e., the link with the date and time.

This will take you back to the summary so you can generate the various output options. Each time you generate an output, e.g., client list, letters, labels, etc, you must click back on the main report link to return to the summary.

Click the "Client List" link to view the "Client Query Listing."

You can review this listing to see each client's immunization history and the address information for each responsible person who is selected to receive notices.

Click "File" and then "print" or "Save As" to save to your computer

Note the "Recmd Day" to determine the vaccine(s) for which the client is **past due**.

Note that this client has 2 responsible people with the same address. You can remove "notices" by unchecking the "notices" box for a responsible person.

Name (F M L)	Chart Number	Phone Number	Address	City/State/ZIP
WOODPECKER - 05/01/2006		(919) 707-5588	5601 Six Forks Rd	RALEIGH, NC 27609
		(919) 707-5588	5601 Six Forks Rd	RALEIGH, NC 27609

Vaccine	Recmd Day	Immunization Dates
naP	Contraindicated	1) 07/14/2008 2) 07/29/2008 (N/V)
A	05/01/2007	
B	09/29/2008	1) 07/14/2008 2) 07/29/2008 (N/V)
	Complete	1) 07/14/2008
za	Contraindicated	
	Contraindicated	1) 07/14/2008
o	05/01/2017	
ugate	Complete	1) 07/14/2008
	09/29/2008	1) 07/14/2008 2) 07/29/2008 (N/V)
	Contraindicated	1) 07/14/2008

You may Save and/or Print the client query listing for further review.
 You must click the "back" button to return to the NCIR.

To remove notices you can go to the "manage client" link and look up the client and then click on the "Responsible Person(s)" tab and remove the ✓ from the "Notices?" box to prevent a Responsible Person(s) from being printed in the letters and/or labels.

NOTE: You should only remove notices if you are certain that the Responsible Person does not wish to receive notices.

North Carolina Immunization Registry .. [Update Existing Client] - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://ncir.dhhs.state.nc.us/ncir_prod/client_ui.showClient?pClientId=11114186&pEditMode=1&

Mother's First Name: MOMMA Last Notice: 01/30/2009

NOTE: Fields marked with an asterisk - are required.

Last Updated by: NORTH CAROLINA IMMUNIZATION REGISTRY on 02/05/2009

Client Information Responsible Person(s) Client Comm

Responsible Person Listing

Select	Last Name	First Name	Relationship	City	Notices?	Primary?
<input checked="" type="radio"/>	WOODPECKER	MOMMA	Mother	RALEIGH	Yes	Yes
<input type="radio"/>	WOODPECKER	MOMMA	Mother	RALEIGH	Yes	

Details for Responsible Person: MOMMA WOODPECKER (Last Updated: 07/14/2008 10:07:31 AM)

- Last Name: WOODPECKER - Street Address: 5601 Six Forks Rd

First Name: MOMMA Other Address:

Middle Name: P.O. Box:

- Relation: Mother - City: RALEIGH

- Telephone: 919 - 707 - 5588 - State: NC - Zip: 27609

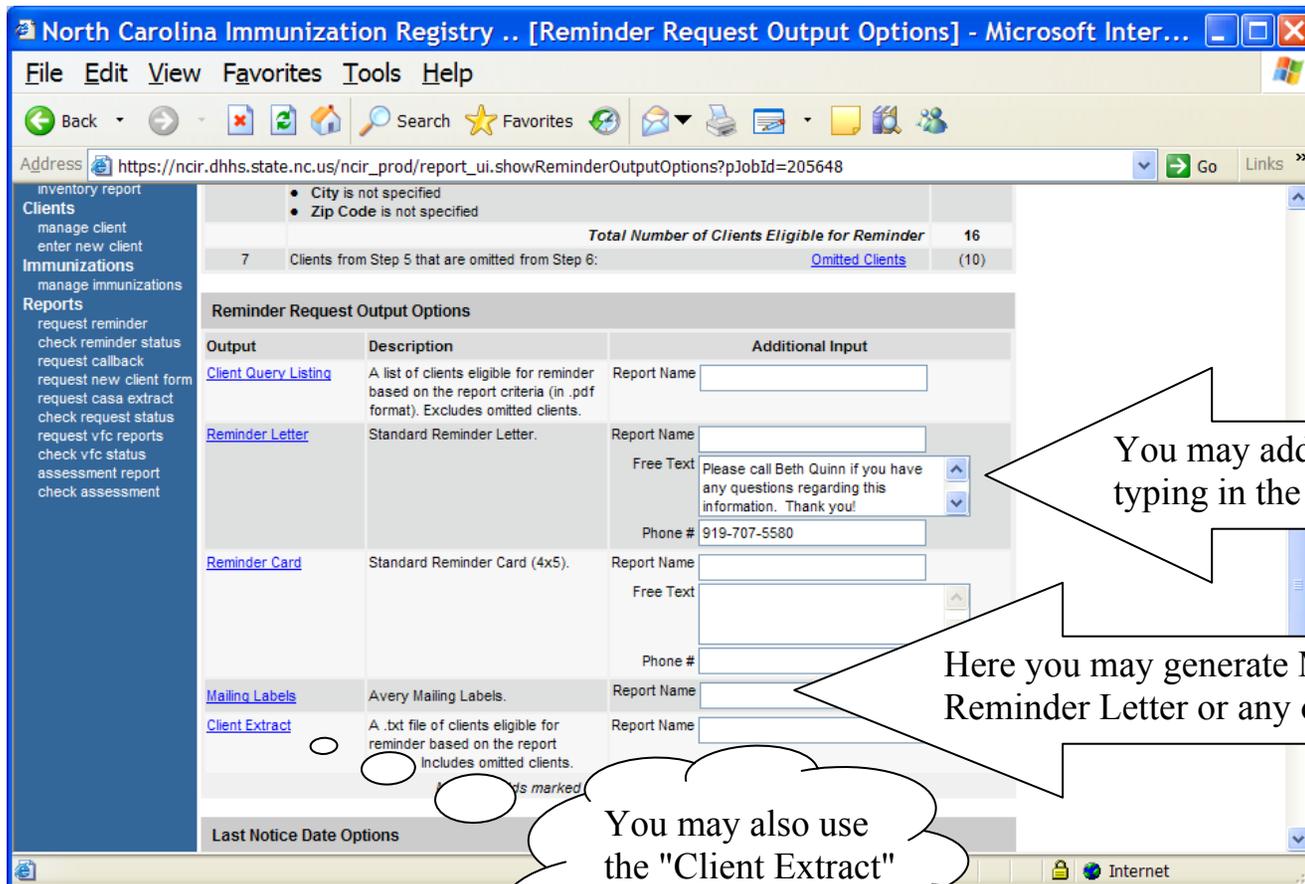
Extension: Language: ENGLISH

E-Mail: Notices? Primary?

NOTE: Fields marked with an asterisk - are required.

Under the Reminder Request Output Options, you can click the “Reminder Letter” link to generate a letter for each responsible person who receives notices. Also you can click the “Mailing Labels” link to generate a label for each responsible person who receives notices.

Please NOTE: If more than one responsible person has been selected to receive notices, a letter and/or label will be generated for each individual address, even if the address is the same for each responsible person. If you do not want to send multiple notices to a client you must uncheck the notices box for anyone who should not receive notices.



You may add "Free text" to the Reminder letter by typing in the "Free text" area.

Here you may generate Mailing Labels for use with the Reminder Letter or any other reminder/recall letter or card

You may also use the "Client Extract" to obtain a listing of client names

https://ncir.dhhs.state.nc.us/repository/21916200982789.pdf - Microsoft Internet Explorer

File Edit Go To Favorites Help

Address https://ncir.dhhs.state.nc.us/repository/21916200982789.pdf

1 / 2 96.5% Find

Dear Momma Woodpecker,

Our records indicate that Woody Woodpecker, has received the following immunizations:

Immunizations History		
Immunization	Date Administered	Series
DTP/aP	07/14/2008	1 of 5
DTP/aP	07/29/2008	Not Valid
HepB	07/14/2008	1 of 3
HepB	07/29/2008	Not Valid
Hib	07/14/2008	1 of 1
MMR	07/14/2008	1 of 2
PneumoConiugate 7	07/14/2008	1 of 1
Polio	07/14/2008	1 of 4
Polio	07/29/2008	Not Valid
Varicella	07/14/2008	1 of 2

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

Vaccines Recommended by Selected Tracking Schedule	
Vaccine	Date Needed
DTP/aP	Contraindicated
Influenza	Contraindicated
MMR	Contraindicated
Varicella	Contraindicated
Hib	Complete
PneumoConiugate 7	Complete
HepA	05/01/2007
HepB	09/29/2008
Polio	09/29/2008
Meningo	05/01/2017

The number for our office is: 919-707-5580

Please call Beth Quinn if you have any questions about this information. Thank you!

Done

Here's where the "Free text" will appear on your letters.