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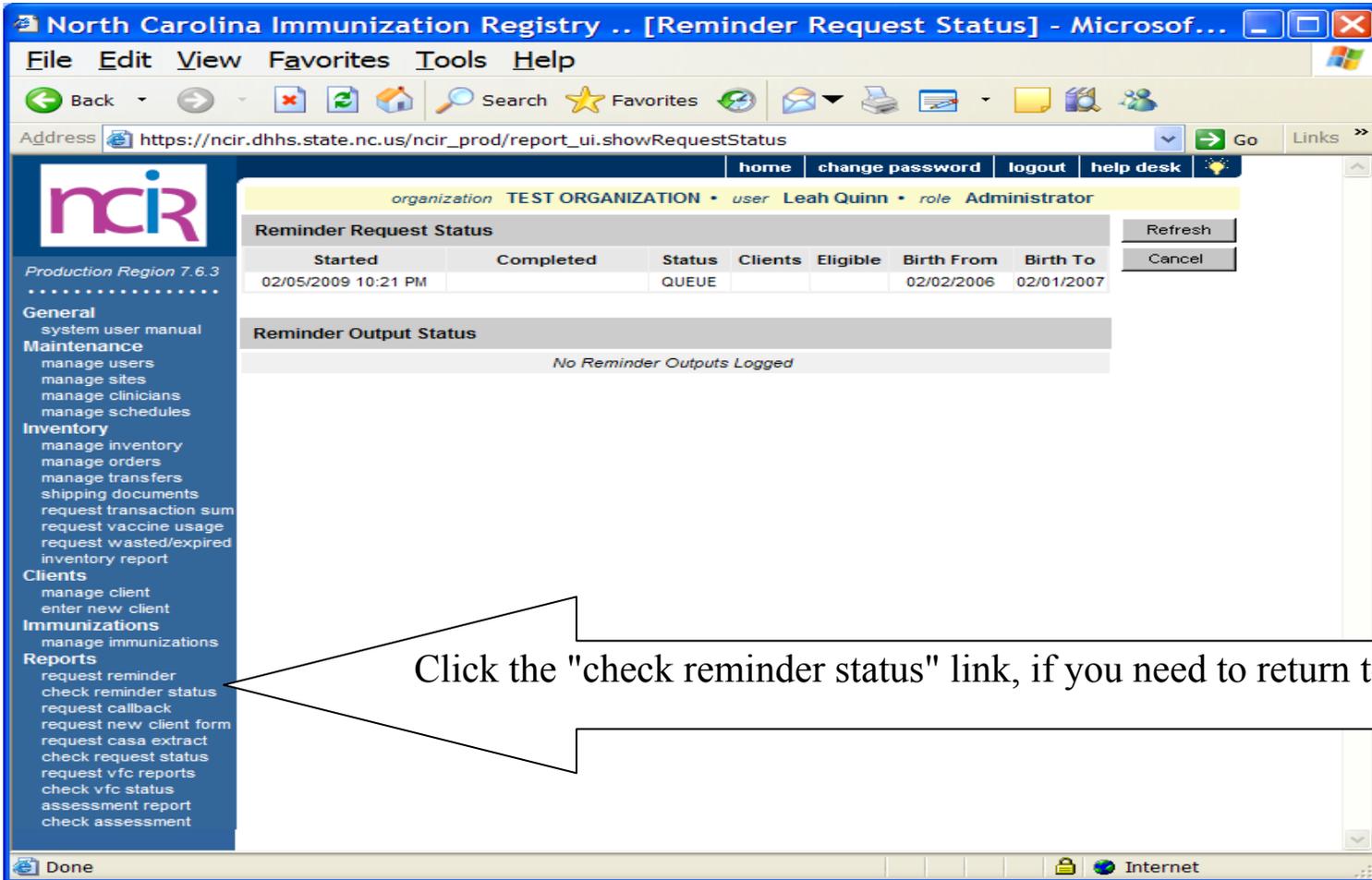
Click the "generate" button only one time- and then wait for the screen to switch over to the status screen.

Enter the birth date range

Click the "Generate" button –**one time only**!

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**

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

Click the link to open the
Reminder Request Process Summary

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

Verify the correct birth date range here

Verify the selected Vaccine Group(s) here

Notice any "omitted clients" here

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 (x 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).

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.

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 <u>the address information for each responsible person who is selected to receive notices</u>.

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

https://ncir.dhhs.state.nc.us/repository/21916200982209.pdf - Microsoft Internet Explorer

File   Edit   Go To   Favorites   Help

Search   Favorites

https://ncir.dhhs.state.nc.us/repository/21916200982209.pdf

Links »

1 / 1   100%   Find

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.

on: 02/05/2009 10:50 PM   **Client Query Listing**   Page 1 of 1

Name (F M L)   Chart Number   Phone Number   Address   City/State/ZIP

Y WOODPECKER - 05/01/2006   (919) 707-5588   5601 Six Forks Rd   RALEIGH, NC 27609
                                             (919) 707-5588   5601 Six Forks Rd   RALEIGH, NC 27609

cine   Recmd Day   Immunization Dates

aP   Contraindicated   1) 07/14/2008   2) 07/29/2008 (NV)
A   05/01/2007
B   09/29/2008   1) 07/14...   2) 07/29/2008 (NV)
            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 (NV)
            Contraindicated   1) 07/14/2008

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

in

Do   Unknown Zone

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.

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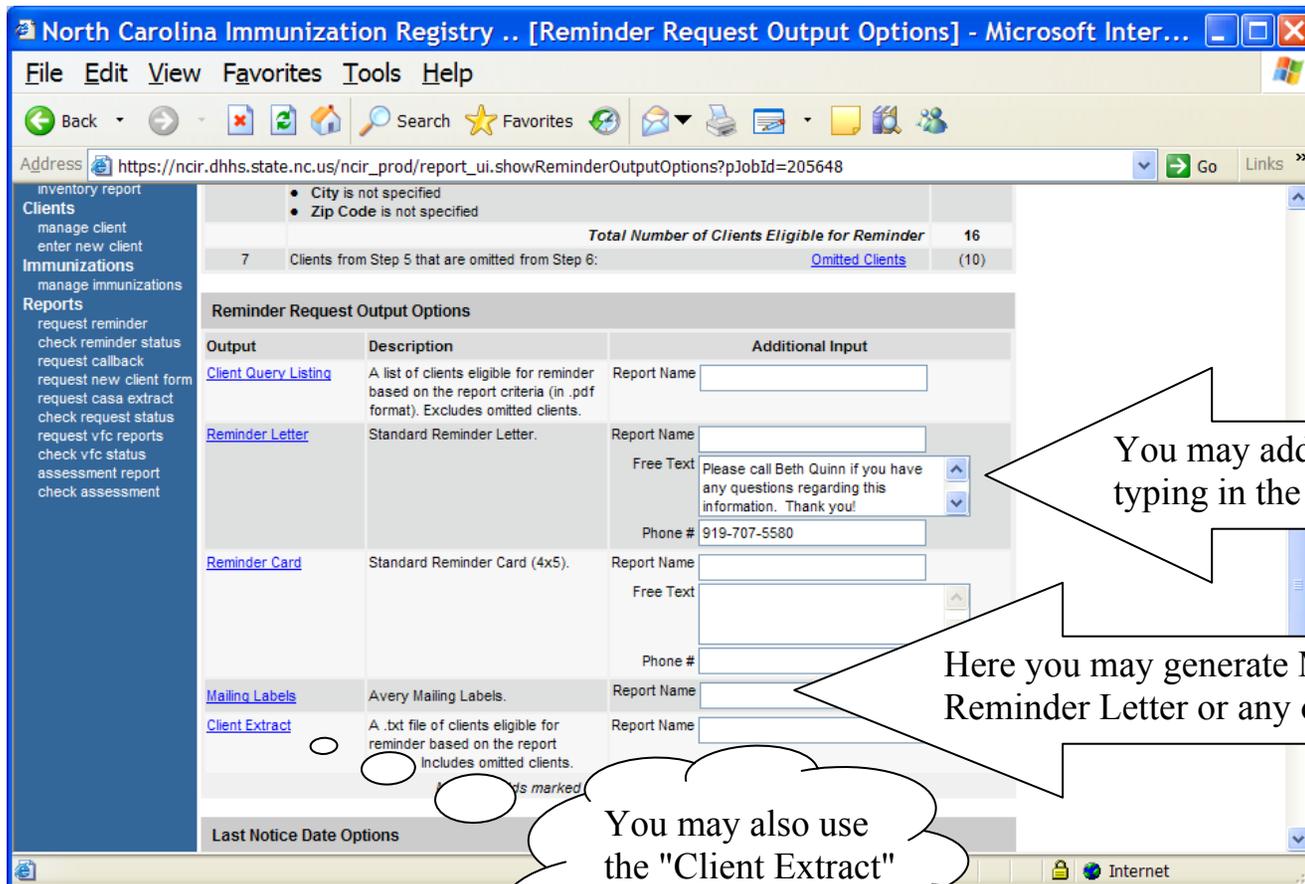
You may add "Free text" to the Reminder letter by typing in the "Free text" area.

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   Go   Links »

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
PneumoConjugate 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
PneumoConjugate 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   Unknown Zone

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