

Reminder/Recall User Guide

Updated: 12/05/2022

For additional support, the following resources are available:

Local CAIR Representatives (LCRs): <https://go.cdph.ca.gov/cair-lcr>

CAIR Help Desk:

Phone: 800-578-7889

Email: CAIRHelpDesk@cdph.ca.gov

CAIR Website: <https://cdph.ca.gov/cair>

This guide describes how to use the Reminder/Recall feature in CAIR2. This feature allows users to create letters, cards, mailing labels, postcards and lists for patients who are due and/or overdue for immunizations. This feature is available to users with Regular, Inventory, School Clinic Regular, School Clinic Inventory, WIC, Health Plans and DXQA user roles.

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I. IMPORTANT INFORMATION ABOUT THE REMINDER/RECALL FEATURE

BEFORE USING THE REMINDER/RECALL FEATURE, THERE ARE SEVERAL IMPORTANT ISSUES TO NOTE:

1. **Inactivating Patients:** Before running Reminder/Recall reports, we highly recommend you use the CAIR2 Manage Patient Status feature to inactivate patients no longer receiving services at your site. This will ensure that only active patients are included in your reminder/recall reports. For more detailed information on how to inactivate patients no longer being seen at your site please review the [Guide to Using the Manage Patient Status Feature in CAIR2](#).
2. **Large Numbers of Patients in Your Report:** If the results of your Reminder/Recall request includes over 2,000 patients you may receive an error message and the report may not generate. You will need to narrow your criteria to decrease the amount of patients in your report (See Page 3, Section III below). You should also inactivate patients no longer receiving services at your site using the CAIR2 Manage Patient Status feature described above.

NOTE: If you expect that your report will include a large number of patients, it is also recommended that you run your report after hours due to less activity in CAIR2 during those times; this will increase the probability that your report will successfully generate.

3. **Patients Included in Your Report:** A Patient that is due/overdue for immunizations will be included in your report only if the following conditions are met:
 - The patient's Status is set to 'Active' for your site (this field is located on the 'Organization Information' tab in the patient's record).
 - The 'Allow Reminder and Recall Contact?' field is set to 'Yes' for your site (this field is also located on the 'Organization Information' tab in the patient's record).
 - The patient meets all of the criteria you set for your Reminder/Recall Request (See Section III below).

Number of Reports You Can Generate: Reminder/Recall is **user-specific** and only allows a user to have **one** Reminder/Recall report at a time stored in CAIR2 – for one site or multiple sites. When you run a new report, the previous report will no longer be available. Also only the user that generates the Reminder/Recall Report will be able to view the report.

- **Single sites:** If your clinic/agency only has one site (i.e., one CAIR2 Org Code), when you run a new Reminder/Recall report for that site, the previous report will no longer be available.
- **Multiple sites:** If your clinic/agency has multiple sites (i.e., more than one CAIR2 Org Code), only one report can be generated and saved at a time for all sites (e.g., if you run a Report for one site and then run a Report for another site, the report you ran for the first site will no longer be available once you run the report for the second site).

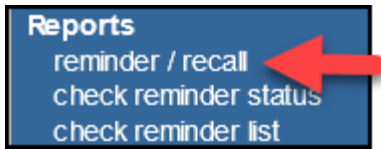
Therefore, It is highly recommended that you save/export your Reports before generating a new report for that site or another site.

NOTE: If you want to have several reports stored in CAIR2, you should have different users at your site run them, since each user can have one Reminder/Recall report stored in CAIR2.

II. ACCESSING THE REMINDER/RECALL FEATURE

To access the Reminder/Recall feature:

1. Log into CAIR2 at <https://cair.cdph.ca.gov>
2. Click **Reminder/Recall** underneath 'Reports' in the blue menu panel.



The Reminder/Recall Request screen will display (see next section).

III. GENERATING A REMINDER/RECALL REQUEST

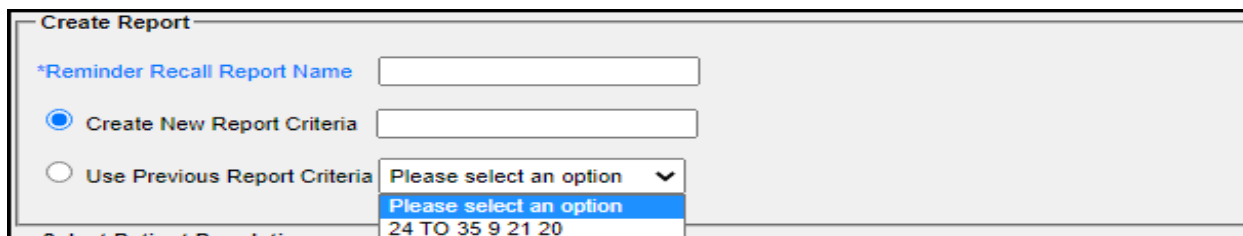
The Reminder/Recall Request screen (below) is used to select the criteria you want to use to determine which patients to include in your Reminder/Recall report. You are able to customize the report by using some or all of the criteria on this screen. All Reminder/Recall reports are evaluated based on today's date (i.e., the date you run the report). Each of the criteria is described on the following pages.

Reminder/Recall Request screen

Reminder/Recall Request
Create Report
*Reminder Recall Report Name
 Create New Report Criteria
 Use Previous Report Criteria
Select Patient Population
Population Options:
 Patients Associated with CAIR Clinic 5
Contact Options:
 Select patients with any contact information
 Select patients with a mailing address
 Select patients with a phone number
 Select patients with an email address
Indicate the Tracking Schedule
 Use Tracking Schedule Selected for All Patients
 Use Tracking Schedule Associated with Each Patient
Select the Vaccine Group To Report on
 Use All Vaccine Groups
 Use Vaccine Groups Selected
 Include Subpotent Vaccinations Exclude Flu Vaccine from Report
 Vaccines Due Now Vaccines Past Due Both
Enter Additional Demographic Criteria
City Zip Code County
Enter Date Criteria
 Birth Date Range
 Age Range
All reports filters are evaluated based on today's date.

Reminder/Recall Request Criteria:

1. **Create Report:** This section requires you to name your report and select new or previous criteria.



The screenshot shows a form titled "Create Report". It has three main sections: a text input field for "*Reminder Recall Report Name", a radio button labeled "Create New Report Criteria" which is selected, and another radio button labeled "Use Previous Report Criteria" which is unselected. Next to the "Use Previous Report Criteria" radio button is a dropdown menu with the text "Please select an option" and a list of options, with "24 TO 35 9 21 20" visible.


- Reminder Recall Report Name (required): You must give your report a name.

NOTE: When creating a new report we recommended giving it a descriptive name to help identify the report. In the example above, a previous report was created with criteria entered as '24 TO 35 9 21 20' to indicate the report was run for 24 to 35 month old patients and the report was created on 09/21/2020).

You also must select one of the two Report Criteria options:

- Create New Report Criteria: Select this option if you want to create a new report with new criteria – i.e., if you want to have different criteria than the previous report you ran (e.g., different age group). Enter a new name for this new report.
- Use Previous Report Criteria: Select this option if you want to use the exact same criteria you used in a past report. Select the past report you want to use from the dropdown. You can make changes to the criteria you previously used if you would like.

2. **Select Patient Population:** This section allows you to select the patients you want to include in the report based on how you plan to contact these patients (i.e., by phone, mail or email).



The screenshot shows a form titled "Select Patient Population". It is divided into two sections: "Population Options" and "Contact Options". Under "Population Options", there is a radio button labeled "Patients Associated with LCRTEST1" which is selected. Under "Contact Options", there are four radio buttons: "Select patients with any contact information" (selected), "Select patients with a mailing address", "Select patients with a phone number", and "Select patients with an email address".

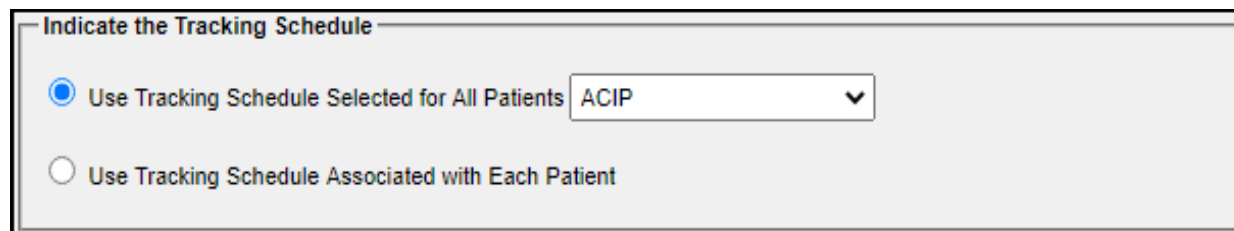
- Population Options: The report will automatically include active patients associated with your site (the site you are logged into).

NOTE: If you are a Local Health Department (LHD) site or LHD Immunization Coordinator with access in CAIR2 to view all patients in your County, you will see another option in this section to select all patient residing in your County.

- Contact Options: You must select **one** of the contact options. It defaults to the 'Select patients with any contact information' option, but you can change this if you want to limit it to include only patients with specific contact information in their CAIR2 record (e.g., mailing address only).

IMPORTANT: The report will only include patients that are active at your site **AND** who have the specific contact information you selected in their CAIR2 record. For example, if you select the option ‘select patients with a phone number’, the report will only include active patients that have a home and/or cell phone number in their CAIR2 record. It is recommended to use the default option ‘any contact information’ so that your report includes more patients that are due/overdue.

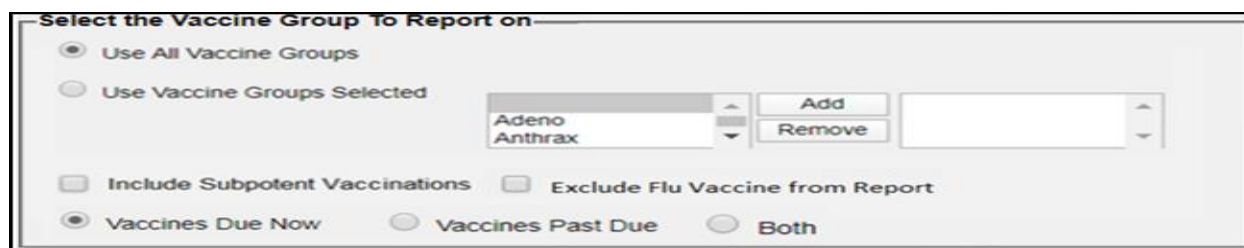
3. **Indicate the Tracking Schedule:** This section gives you two options for choosing which vaccine recommendation tracking schedule you want to use for the report.



You can choose:

- Use Tracking Schedule Selected for All Patients: This option will apply the tracking schedule you select in the dropdown to ALL patients in the report. CAIR2 defaults to the ACIP schedule.
- Use Tracking Schedule Associated with Each Patient: This option will use the tracking schedule that is set within each patient’s record (located in the ‘Organization Information’ tab on the Update Patient screen - e.g., Kindergarten, Preschool/daycare, 7th grade).

4. **Select the Vaccine Group to Report On:** This section allows you to indicate which vaccine groups will be included in your report. There are several options to choose from (described below).



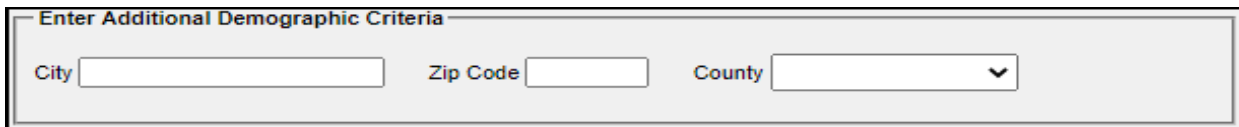
Options Include:

- Use All Vaccine Groups: CAIR2 defaults to the ‘Use All Vaccine Groups’ option. This will include all vaccines that a patient is due for based on the Tracking Schedule you selected.
- Use Vaccine Groups Selected: If you don’t want to include all vaccines that patients are due for, you can select specific vaccines for your report. To do this, click the ‘Use Vaccine Groups Selected’ button and then select each vaccine(s) you want to include and click the ‘Add’ button. **NOTE:** If you want to remove a vaccine you selected, click on the vaccine and then click the ‘Remove’ button.
- Include Subpotent Vaccinations: Subpotent vaccinations are vaccine doses that are marked as ‘Subpotent’ in the patient’s CAIR2 record (e.g., patient received expired vaccine). Selecting the ‘Include Subpotent Vaccinations’ check box will show these doses in the list of vaccinations the patient has received. If you chose **not** to include Subpotent doses, those doses will not be

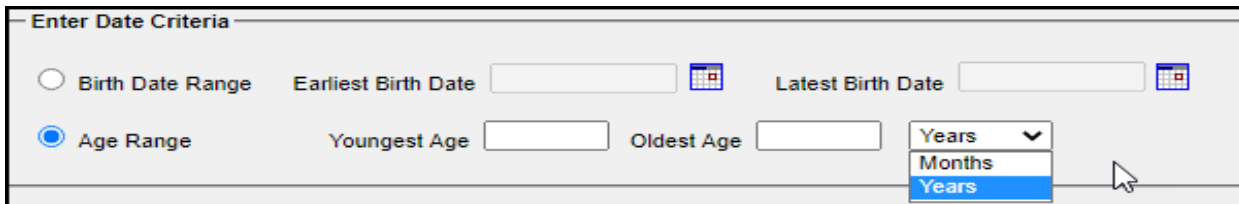
included in the list of vaccines the patient has received. In both cases, if the patient is due to receive those doses again, the report will list them as due/overdue for those doses.

- **Exclude Flu Vaccine from Report:** If you are not planning to do Reminder/Recall for Flu vaccines, you can exclude Flu vaccines from your report. By checking this box, Flu doses that have been given to the patient and that are due/overdue will not be included in the report.
- You can also choose if you want to include vaccines due now (Reminder), vaccines overdue (Recall) or both (Reminder and Recall) based on the tracking schedule you selected:
 - **Vaccines Due Now:** This option will only include patients that are due for at least one of the selected vaccine groups that are recommended.
 - **Vaccines Past Due:** This option will only include patients that are overdue for at least one of the selected vaccine groups that are recommended.
 - **Both:** This option will include all patients that are both due and/or overdue for at least one of the selected vaccine groups that are recommended.

5. **Enter Additional Demographic Criteria:** Entering a City, Zip Code and/or County will narrow your results to include only active patients that are within that geographical area. You can use one or all of these fields to narrow your results. The more information you include the more narrow the results.



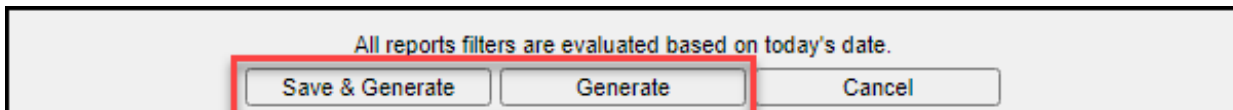
6. **Enter Date Criteria:** Options are described below.



Options include:

- a. **Birth date Range:** If you choose to use a birth date range, the report will include only those patients who have a birth date that falls within the range entered. For this option, both an Earliest Birth date and Latest Birth date range must be entered (in MM/DD/YYYY format). You can enter the birthdate ranges or select them from the calendar.
- b. **Age Range:** If you choose to use an age range, the report will include only those patients who fall within the age range entered. For this option, both a Youngest Age and Oldest Age must be completed. **NOTE:** CAIR2 defaults to 'Years' but you can change your selection to 'Months'.

7. **Create the Report:** There are two options for generating the report:



- **Save and Generate:** Will generate AND save the report in CAIR2.
- **Generate:** Will generate the report for viewing, but the report won't be saved.

Note: If you select the 'Cancel' button it will remove the criteria you selected on this screen.

IMPORTANT: Before generating the report you should review all of the criteria selections/entries you made to make sure they are correct for the report you want to run.

Reminder: All reports are evaluated based on today's date (i.e., the date you run the report).

8. After selecting the 'Save & Generate' or 'Generate' button, the **Reminder Request Status** screen will display.

| Reminder Request Status | | | | | | | Refresh | Cancel |
|-------------------------|------------------------|-----------|--------|---------------|------------|----------|---------|--------|
| Name | Started | Report VG | Status | Patient Count | Range From | Range To | | |
| TEST 83120 2 | 09/18/2020 11:23:47 AM | All | QUEUE | | 2 | 3 | | |

Depending on the number of Active patients associated with your site and the criteria you selected for your report, it may take several minutes for the results to generate. You can view the progress of the report in the **Status** field. Periodically clicking the 'Refresh' button will update the progress.

This screen will also display:

- **Name:** The name you gave the Report.
- **Started:** The date and time the report was generated.
- **Report VG:** The Vaccine Groups (VG) you selected to include in the report.
- **Status:** The progress of the report generated – 100% means the report is complete.
- **Patient Count:** The total number of patients included in the report.
- **Range From:** The Earliest/Youngest age criteria you selected for the report.
- **Range To:** The Latest/Oldest age criteria you selected for the report.

When the **Status** field displays 100%, the report is complete. The report Name will then become a hyperlink for you to click to view the report.

| Reminder Request Status | | | | | | | Refresh | Cancel |
|-------------------------------|------------------------|-----------|--------|---------------|------------|----------|---------|--------|
| Name | Started | Report VG | Status | Patient Count | Range From | Range To | | |
| VACCINE CHECK | 09/29/2020 01:15:30 PM | All | 100 % | 3 | 2 | 3 | | |
| TEST 83120 | 09/24/2020 01:42:18 PM | All | 100 % | 0 | 2 | 3 | | |

NOTE: You can continue to work in CAIR2 or log out while the report is generating. To check the Status of the report, click 'check reminder status' link under Reports on the menu panel (see Section V).

IV: CHOOSING YOUR REMINDER REQUEST OUTPUT OPTIONS

Once you have opened your completed report, the screen below will display. It contains 3 sections (described below):

A

| Step | Criteria Evaluated at this Step | Patients |
|---|--|----------|
| 1 | Patients associated with LCRTEST1. | 29 |
| 2 | Patients that are active within LCRTEST1 and allow Reminder & Recall Contact. Additional criteria includes: • Patients age 2 to 3 Years; | 6 |
| 3 | Patients that have a Mailing Address. Additional criteria includes: • City is not specified; • Zip Code is not specified; | 3 |
| 4 | Patients that meet the following criteria regarding vaccination status: • Patients that are Due Now for one or more vaccinations as of 09/18/2020; • Use all vaccine groups; • Use ACIP for all patients. | 2 |
| Total Number of Patients Eligible for Reminder | | 2 |

B

| Output | Description | Duplex Printing | Additional Input |
|------------------------------------|---|--------------------------|--|
| Reminder Letter | Standard Reminder Letter | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 Free Text: <input type="text"/> Phone #: <input type="text"/> |
| Reminder Card | Standard Reminder Card (4x5) | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 Free Text: <input type="text"/> Phone #: <input type="text"/> |
| Mailing Labels | Avery 5160 Mailing Labels. | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 |
| Mailing Labels | Avery 3256 Mailing Labels. | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 |
| 4 Up Card | CAIR 4 Up Cards | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 |
| Patient Query List | A list of patients based on the report criteria | <input type="checkbox"/> | Report Name: TEST 83120 2 09/15/2020 |

C

Review Patients that will display on the Reminder Recall Report.
Increment last notice date for all patients eligible for this reminder.
Return to the previous screen.

Review Patients
Increment Eligible
Cancel

A) REMINDER REQUEST PROCESS SUMMARY:

This section displays the total number of active patients for your site and the number that are included in the report based on the criteria you selected.

| Reminder Request Process Summary | | |
|---|--|----------|
| Reminder Request Criteria Name: TEST 83120 2 | | |
| Step | Criteria Evaluated at this Step | Patients |
| 1 | Patients associated with LCRTEST1. | 29 |
| 2 | Patients that are active within LCRTEST1 and allow Reminder & Recall Contact. Additional criteria includes: • Patients age 2 to 3 Years; | 6 |
| 3 | Patients that have a Mailing Address. Additional criteria includes: • City is not specified; • Zip Code is not specified; | 3 |
| 4 | Patients that meet the following criteria regarding vaccination status: • Patients that are Due Now for one or more vaccinations as of 09/18/2020; • Use all vaccine groups; • Use ACIP for all patients; | 2 |
| Total Number of Patients Eligible for Reminder | | 2 |

The information includes:

- **Step 1:** This section displays the total number of patients that are Active at your site.
- **Step 2:** This section displays the total number of patients that are Active at your site, have the 'Allow Reminder and Recall Contact' in their CAIR2 record set to 'Yes', and are within the age criteria that you selected for the report.
- **Step 3:** This section displays the total number of active patients that meet the criteria in Step 1 AND also meet the criteria you selected for 'Contact Option' (see page 4). For example, if you selected 'Patients with a mailing address', this will show the number of patients that meet the criteria in Step 1 AND also that have a complete mailing address in their CAIR2 record.
- **Step 4:** This section displays the total number of patients that meet the criteria you selected Step 1 and Step 2 and also meet the criteria you selected 'Indicate the Tracking Schedule' and 'Select Vaccine Group to Report on' sections on the Reminder/Recall Request screen for the report.
- **Total Number of Patients Eligible for Reminder:** This is the total number of patients included in the report based on ALL of the criteria you selected for the report.

B) REMINDER REQUEST OUTPUT OPTIONS:

This section allows you to choose which output option(s) you would like to generate for contacting your patients (e.g., letters, cards, a list, etc.). How to generate each option is described below.

You should pick the Output option that best matches the Contact Option you selected for the report (see Page 4). For example, if you selected to include patients with a mailing address in CAIR2, you may want to choose the Reminder Letter, Reminder Card, Mailing Labels and/or 4 Up Card.

Contacting patients by email and/or phone: If you plan to contact patients by email and/or phone, you will need to select 'check reminder list' or Review Patients (see page 15) in order to see each patient's email and phone number.

| Reminder Request Output Options | | |
|---------------------------------------|--|--|
| Output | Description | Additional Input |
| Reminder Letter | Standard Reminder Letter. | Duplex Printing <input type="checkbox"/> Report Name <input type="text" value="TEST 83120 08/31/2020"/> Free Text <input type="text"/> Phone # <input type="text"/> |
| Reminder Card | Standard Reminder Card (4x5). | Report Name <input type="text" value="TEST 83120 08/31/2020"/> Free Text <input type="text"/> Phone # <input type="text"/> |
| Mailing Labels | Avery 5160 Mailing Labels. | Report Name <input type="text" value="TEST 83120 08/31/2020"/> |
| Mailing Labels | Avery 3256 Mailing Labels. | Report Name <input type="text" value="TEST 83120 08/31/2020"/> |
| 4 Up Card | CAIR 4 Up Cards | Report Name <input type="text" value="TEST 83120 08/31/2020"/> |
| Patient Query Listing | A list of patients based on the report criteria. | Report Name <input type="text" value="TEST 83120 08/31/2020"/> |

NOTE: You can only run one Output Option at a time. If you want to run more than one Option (e.g., Reminder Letter and Mailing Labels), you can run one option now and then go back into the report to run another option (See Section V below).

REMINDER LETTER

This option generates a letter for each patient included in your results that you can send to the parent/guardian. The letter includes the patient’s name, CAIR ID#, the vaccines the patient has received and the vaccines that you selected to include that are due, overdue or both, and some standard text. You can also add additional text and/or your site’s phone number if you would like. (See Page 11 for an example of a Reminder Letter).

To generate Reminder Letters:

1. In the **Additional Input** column for the Reminder Letter you have the option of entering:
 - a. **Duplex Printing (optional):** Adds additional blank piece of paper between each letter.
 - b. **Report Name:** This will default to the original name you gave the report. You can edit this field if you would like. **NOTE:** It does not display on the Reminder Letter.
 - c. **Free Text:** Any information you enter in this text box will appear at the end of every letter.
 - d. **Phone:** If you enter a telephone number, it will be appear at the end of the every letter.
2. Once you fill-in the information, click the **Reminder Letter** hyperlink under Output.

3. The ‘Reminder Request Status’ screen will display. The Reminder Output Status section will show the Name of the letter, the Type, Requested/Started/Completed dates and times, and Status.

Reminder Request Status screen

| Reminder Output Status | | | | | |
|---------------------------------------|-----------------|---------------------|---------------------|---------------------|--------|
| Name | Type | Requested | Started | Completed | Status |
| TEST 83120 08/31/2020 | Reminder Letter | 09/03/2020 09:22 AM | 09/03/2020 09:22 AM | 09/03/2020 09:22 AM | Ready |



4. Once the **Status** displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the hyperlink under **Name**.

NOTE: The Reminder Letter will be generated in Spanish for the patients that have the ‘Language Spoken’ field set to Spanish in the ‘Patient Information’ section in their CAIR2 Record. The English language and Spanish language letters will display as separate hyperlinks.
5. To print the letters, click the printer icon in Adobe Acrobat Reader®.

Below is an example of a Reminder Letter. The standard text that will show on each letter is shown in boxes A and B. If you entered additional information in the ‘Free Text’ or ‘Phone #’ section, it will display at the end of the letter shown in box C.

A

Dear Parent/Guardian of Chip Choco, CAIR2 ID: 145406

Our records indicate that Chip Choco has received the following immunizations:

| Immunization Record | | Tracking Schedule: ACIP | |
|---------------------|-------------------|-------------------------|------------------|
| Vaccine Group | Date Administered | Series | Vaccine |
| DTP/aP | 02/06/2019 | 1 of 5 | DTaP-HepB-IPV |
| | 04/06/2019 | 2 of 5 | DTaP, NOS |
| HepA | 06/08/2019 | 1 of 2 | HepA-HepB |
| HepB | 02/06/2019 | 1 of 3 | DTaP-HepB-IPV |
| | 06/08/2019 | 2 of 3 | HepA-HepB |
| Influenza-seasnl | 02/05/2019 | 1 of 2 | Flu quadrivalent |
| MMR | 11/05/2018 | 1 of 2 | MMR |
| | 02/11/2019 | 2 of 2 | MMRV |
| PneumoConjugate | 03/12/2019 | 1 of 1 | PCV13 |
| Polio | 02/06/2019 | 1 of 4 | DTaP-HepB-IPV |
| Varicella | 02/11/2019 | 1 of 2 | MMRV |

B

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

| Immunizations Due |
|-------------------|
| DTaP, NOS |
| Flu NOS |
| HepA, NOS |
| HepB, NOS |
| Hib, NOS |
| Polio, NOS |

C

The number for our office is: 555-555-5555
Please call our office at you earliest convenience.

REMINDER CARD

This option generates a 'card' for each patient included in your results that you can put in an envelope to mail to the parent/guardian. The Card is the same size as the Letter (8.5"x11") but it contains less information than the Letter – it only includes the patient's name and the vaccines you selected to include that are due, overdue or both. You can also add additional text and/or your site's phone number if you would like. (See Page 12 for an example of a Reminder Card).

To generate Reminder Cards:

- In the **Additional Input** column for the **Reminder Card** you have the option of entering:
 - Report Name:** This will default to the original name you gave the report. You can edit this field if you would like. **NOTE:** It does not display on the Reminder Letter.
 - Free Text:** Any information you enter in this text box will appear at the end of every card.
 - Phone:** If you enter a telephone number, it will be appear at the end of the every card.
- To view the cards, click the **Reminder Card** hyperlink under 'Output'.

| | | | |
|----------------------|-------------------------------|-------------|--|
| Reminder Card | Standard Reminder Card (4x5). | Report Name | 24 TO 35 9 21 20 09/21/2020 |
| | | Free Text | Please call us at your earliest convenience. |
| | | Phone # | 555-555-5555 |

- The 'Reminder Request Status' screen will display. The Reminder Output Status section will show the Name of the letter, the Type, Requested/Started/Completed dates and times, and Status.

Reminder Request Status screen

| Reminder Output Status | | | | | |
|------------------------|---------------|---------------------|---------------------|---------------------|--------|
| Name | Type | Requested | Started | Completed | Status |
| TEST 83120 08/31/2020 | Reminder Card | 09/03/2020 09:54 AM | 09/03/2020 09:54 AM | 09/03/2020 09:54 AM | Ready |

- Once the **Status** displays as Ready and the report name becomes a hyperlink, your cards are ready to be viewed. Click the hyperlink under **Name**.
NOTE: The Reminder Card will be generated in Spanish for the patients that have the 'Language Spoken' field set to Spanish in the 'Patient Information' section in their CAIR2 Record. The English language and Spanish language cards will display as separate hyperlinks.
- To print the cards, click the printer icon in Adobe Acrobat Reader® .

Below is an example of the Reminder Card. The standard text that will show on each card is shown in box A. If you entered additional information in the 'Free Text' or 'Phone #' section, it will display at the end of the card shown in box B.

Dear Parent of Chip Choco

A Our records show that Chip Choco may be due for the following immunizations. If Chip received these or other immunizations from another health care provider, please call our office so that we can update Chip's record. Otherwise please schedule an appointment for Chip to receive them.

| Vaccine Group | Date Needed |
|------------------|-------------|
| Hib | 03/16/2018 |
| Polio | 04/03/2019 |
| DTP/aP | 06/01/2019 |
| HepB | 08/03/2019 |
| HepA | 12/08/2019 |
| Influenza-seasnl | 08/01/2020 |

B The number for our office is: 555-555-5555
Please call us at your earliest convenience.

MAILING LABELS

This option generates mailing labels with the name and address of each patient included in your results. You must use Avery Mailing Labels #5160 or #3256 or their equivalent. You can use the mailing labels in combination with the Reminder Letters and/or Reminder Cards if you would like.

To generate Mailing Labels:

- In the **Additional Input** column for the type of Mailing Labels, the Report Name will default to the original name you gave the report. You can edit this field if you would like.
NOTE: It does not display on the mailing labels.
- To view the type of Mailing Labels, click on the hyperlink under 'Output' for the mailing labels you have.

| | | | |
|--------------------------------|----------------------------|-------------|--|
| Mailing Labels | Avery 5160 Mailing Labels. | Report Name | <input type="text" value="TEST 83120 08/31/2020"/> |
| Mailing Labels | Avery 3256 Mailing Labels. | Report Name | <input type="text" value="TEST 83120 08/31/2020"/> |

- The 'Reminder Request Status' screen will display. The Reminder Output Status section will show the Name of the letter, the Type, Requested/Started/Completed dates and times, and Status.

Reminder Request Status screen

| Reminder Output Status | | | | | |
|---------------------------------------|---------------------|---------------------|---------------------|---------------------|--------|
| Name | Type | Requested | Started | Completed | Status |
| TEST 83120 08/31/2020 | Mailing Labels 5160 | 09/03/2020 11:49 AM | 09/03/2020 11:49 AM | 09/03/2020 11:49 AM | Ready |

- Once the **Status** displays as Ready and the report name becomes a hyperlink, your labels are ready to be viewed. Click on the hyperlink under **Name**.
- To print the labels, click the printer icon in Adobe Acrobat Reader® .

4 UP CARD

This option generates postcards for each patient included in your results. These postcards are available by contacting your Local Public Health Immunization Coordinator or Local CAIR Representative (LCR).

There are 4 individual postcards per each 8.5”x11” postcard sheet. They contain only the name and address of the patient and standard text indicating the patient is due for shots in both English and Spanish. The Organization Name appears at the top of each Card. You cannot edit/add additional text. Once printed, just tear along the perforation, stamp and mail. (See below for an example of a 4 Up Card).

To generate 4-Up Post Cards:

- In the **Additional Input** column for the 4 Up Card, the Report Name will default to the original name you gave the report. You can edit this field if you would like. **NOTE:** It does not display on the 4 Up Cards.
- To view the 4 Up Cards, click on the hyperlink under ‘Output’.



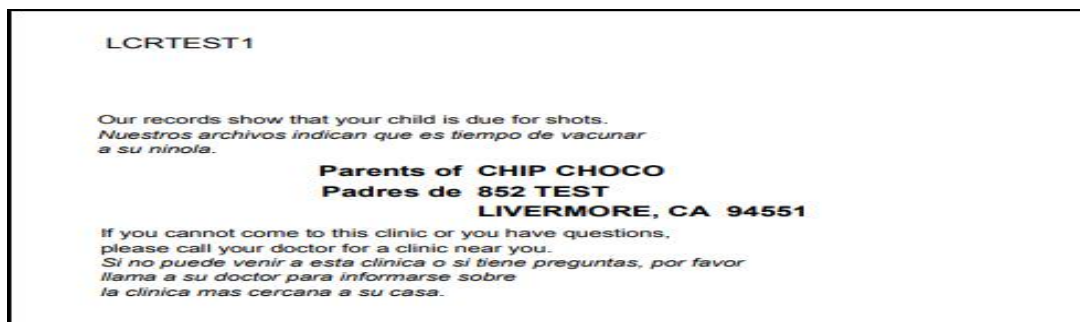
- The ‘Reminder Request Status’ screen will display. The Reminder Output Status section will show the Name of the letter, the Type, Requested/Started/Completed dates and times, and Status.

Reminder Request Status screen

| Reminder Output Status | | | | | | |
|---------------------------------------|-----------|---------------------|---------------------|---------------------|--------|---|
| Name | Type | Requested | Started | Completed | Status | |
| TEST 83120 08/31/2020 | 4 Up Card | 09/08/2020 12:37 PM | 09/08/2020 12:37 PM | 09/08/2020 12:37 PM | Ready |  |

- Once the **Status** displays as Ready and the report name becomes a hyperlink, your 4 Up Card is ready to be viewed. Click on the hyperlink under **Name**.
- To print the 4 Up Cards, click the printer icon in Adobe Acrobat Reader® .

Below is an example of a 4 Up Card:



PATIENT QUERY LISTING

This option displays demographic and immunization history for each patient included in your results. It includes the patient’s Name, DOB, CAIR2 ID#, MRN, address, assigned Tracking Schedule, immunizations due (located in the Immunizations Section) and immunizations received (located in the Immunization Dates section) as documented in CAIR2. (See below for an example of Patient Query Listing).

To generate a Patient Query Listing:

1. In the **Additional Input** column for the Patient Query Listing, the Report Name will default to the original name you gave the report. You can edit this field if you would like.
2. To view the Patient Query Listing, click on the hyperlink under ‘Output’.



6. The ‘Reminder Request Status’ screen will display. The Reminder Output Status section will show the Name of the letter, the Type, Requested/Started/Completed dates and times, and Status.

Reminder Request Status screen

| Reminder Output Status | | | | | |
|---------------------------------------|--------------|---------------------|---------------------|---------------------|--------|
| Name | Type | Requested | Started | Completed | Status |
| TEST 83120 08/31/2020 | Patient List | 09/08/2020 12:42 PM | 09/08/2020 12:42 PM | 09/08/2020 12:42 PM | Ready |

3. Once the **Status** displays as Ready and the report name becomes a hyperlink, your Patient Query Listing is ready to be viewed. Click on the hyperlink under **Name**.
4. To print the Patient Query Listing, click the printer icon in Adobe Acrobat Reader®.

Below is an example of a Patient Query Listing (2 patients).

| TEST 83120 08/31/2020 | | Patient Query Listing | | 09/08/2020 Page 1 of 1 | |
|--|-----------------|-----------------------------|--|------------------------|------------|
| CHOP CHOCO | | MRN: | | DOB: | 12/16/2016 |
| 852 TEST LIVERMORE, CA 94551 | | MRN: | | CAIR2 ID: | 145406 |
| | | | | Schedule: | ACIP |
| Vaccine | Immunizations | Immunization Dates | | | |
| DTP/aP | 06/01/2019 | 1) 02/06/2019 2) 04/06/2019 | | | |
| HepA | 12/08/2019 | 1) 06/08/2019 | | | |
| HepB | 08/03/2019 | 1) 02/06/2019 2) 06/06/2019 | | | |
| Hib | 03/16/2018 | | | | |
| Influenza-seasonl | 08/01/2020 | 1) 02/05/2019 | | | |
| MMR | Complete | 1) 11/05/2018 2) 02/11/2019 | | | |
| PneumoConjugate | Complete | 1) 03/12/2019 | | | |
| Polio | 04/03/2019 | 1) 02/06/2019 | | | |
| Varicella | Contraindicated | 1) 02/11/2019 | | | |
| REDY LAMARR | | MRN: | | DOB: | 02/05/2017 |
| 345 HOLLYWOOD BLVD BEVERLY HILLS, CA 90210 | | MRN: | | CAIR2 ID: | 146046 |
| | | | | Schedule: | ACIP |
| Vaccine | Immunizations | Immunization Dates | | | |
| DTP/aP | 04/05/2017 | | | | |
| HepA | 02/05/2018 | | | | |
| HepB | 02/05/2017 | | | | |
| Hib | 05/05/2018 | | | | |
| Influenza-seasonl | 08/01/2020 | | | | |
| MMR | 02/05/2018 | | | | |
| PneumoConjugate | 10/10/2018 | 1) 08/15/2018 | | | |
| Polio | 04/05/2017 | | | | |
| Varicella | 02/05/2018 | | | | |

C) LAST NOTICE DATE OPTIONS:

This section allows you to view the list of patients that were included in your results with their email address and phone number if it is included in CAIR2. This option is helpful if you are planning to call and/or email patients for Reminder/Recall. This section also allows you to update the ‘Last Notice’ field in each patient’s record.

| Last Notice Date Options | |
|--|---|
| <i>Review Patients that will display on the Reminder Recall Report.</i> | <input type="button" value="Review Patients"/> |
| <i>Increment last notice date for all patients eligible for this reminder.</i> | <input type="button" value="Increment Eligible"/> |
| <i>Return to the previous screen.</i> | <input type="button" value="Cancel"/> |

The options (buttons) on the **Last Notice Date Options** table include:

1. **Review Patients** button: This option will display a list of all of the patients that were included in your results, including their Name, Birth Date, CAIR ID#, MRN, Home phone, Cell phone, Email, Address, City and Zip Code if the information is in the patient’s record. You can also click on the hyperlink of the patient’s name to open their CAIR2 record.

You can also export this list in Excel format to save by clicking the ‘Export List’ button at the top of the screen.

NOTE: This list is also available after the Reminder/Report is completed. See Section V for accessing completed reports. **This is the only list that contains patient email and phone numbers so if you plan to contact patients/parents by email or phone, this is best choice.**

Below is an example of a Review Patients List.

| Review Patients | | | | | | | | | | |
|-------------------------------------|------------|---------|-----|----------------|------|-------|--|--|--|--|
| | | | | | | | <input type="button" value="Export List"/> | <input type="button" value="Patient Query Listing"/> | <input type="button" value="Return to Check Reminder List"/> | |
| Patients Name (LN, FN, MI) | Birth Date | CAIR ID | MRN | Home | Cell | Email | Address | City | Zip | |
| Choco, Chiq | 12/16/2016 | 145406 | | | | | 852 TEST | LIVERMORE | 94551 | |
| Choco, Timmy | 09/01/2018 | 147355 | | (530) 555-5555 | | | 1355 MAIN STREET | REDDING | 96001 | |
| Michelson, Michelle | 09/01/2018 | 145644 | | (555) 555-5555 | | | 1564 LOWE AVE | REDDING | 96003 | |

2. **Increment Eligible** button: This option adds/updates the date in the ‘Last Notice’ field in each patient’s CAIR2 record for all patients included in your results. This field is located on the ‘Organization Information’ tab of the Update Patient screen in each patient record.

This field indicates the last time a patient was included in a Reminder/Recall report for your site. This is helpful if you want to document the last time you reached out to the patient for Reminder/Recall. If you don’t select this button the date will not be added/updated.

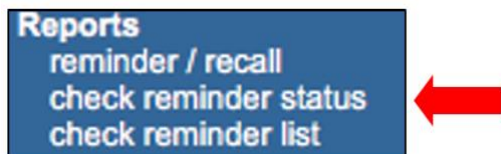
3. **Cancel** button: This will return you to the Reminder Request Status screen.

V. VIEWING COMPLETED REPORTS AND LIST OF PATIENTS

IMPORTANT REMINDER: Reminder/Recall is **user-specific** and only allows a user to have **one** Reminder/Recall report at a time stored in CAIR2 – for one site or multiple sites. When you run a new report, the previous report will no longer be available. Also only the user that generates the Reminder/Recall Report will be able to view the report. Please see the **Number of Reports You Can Generate** section on Page 2 for more information.

VIEWING COMPLETED REPORTS:

- 1) Click on '**check reminder status**' link on the blue menu panel under Reports.



- 2) The screen will display two sections – 'Reminder Request Status' and 'Reminder Output Status'.

| Reminder Request Status | | | | | | | Refresh |
|-----------------------------|------------------------|-----------|--------|---------------|------------|----------|---------|
| Name | Started | Report VG | Status | Patient Count | Range From | Range To | Cancel |
| TEST 082120 | 09/30/2020 11:07:21 AM | All | 100 % | 23 | | | |

| Reminder Output Status | | | | | | |
|--|--------------|---------------------|---------------------|---------------------|--------|--|
| Name | Type | Requested | Started | Completed | Status | |
| TEST 082120 09/30/2020 | Patient List | 09/30/2020 11:12 AM | 09/30/2020 11:12 AM | 09/30/2020 11:12 AM | Ready | |
| TEST 082120 09/30/2020 | 4 Up Card | 09/30/2020 11:12 AM | 09/30/2020 11:12 AM | 09/30/2020 11:12 AM | Ready | |

- **Reminder Request Status:** This section shows your in-process/last completed Report. Click on the hyperlink to view the report.
- **Reminder Output Status:** This section shows your in-process/last completed Output option (e.g., letters, mailing labels, postcards, etc.). Click on the hyperlink to view the report.

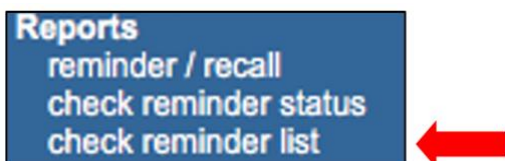
In the example above, we have one Reminder/Recall report (TEST082120), and we ran two Output Options on that report (e.g., Patient List and 4 Up Cards).

VIEWING LIST OF PATIENTS:

You can also view the list of patients that were included in your last report. This is the same list as shown in 'Review Patients' on Page 15. **The list includes the email and phone number of each patient.**

To view the **list of patients** included in your last report:

1. Click on '**check reminder list**' on the blue menu panel.



2. The **Check Reminder List** screen will display and you can click on the hyperlink to view the report.

| Check Reminder List | | |
|----------------------------------|---------------------|------------------------|
| | | Cancel |
| Reminder Request Name | Started | Patients |
| 24 TO 35 9 21 20 | 09/21/2020 01:39 PM | 3 |

3) The next screen will display the ‘Review Patients’ screen. It contains each patient’s Name, Birth Date, CAIR ID #, MRN, Home phone, Cell phone, Email, Address, City and Zip. You can also click on the hyperlink on the patient’s name under ‘Patients Name’ to open their record.

| Review Patients | | | | | | | | | |
|-------------------------------------|------------|---------|-----|----------------|------|-------|-----------------------------|---------------------------------------|---|
| | | | | | | | Export List | Patient Query Listing | Return to Check Reminder List |
| Patients Name (LN, FN, MI) | Birth Date | CAIR ID | MRN | Home | Cell | Email | Address | City | Zip |
| Choco, Chig | 12/16/2016 | 145406 | | | | | 852 TEST | LIVERMORE | 94551 |
| Choco, Timmy | 09/01/2018 | 147355 | | (530) 555-5555 | | | 1355 MAIN STREET | REDDING | 96001 |
| Michelson, Michelle | 09/01/2018 | 145644 | | (555) 555-5555 | | | 1564 LOWE AVE | REDDING | 96003 |

4) You can also export the list in Excel format to save it by clicking the ‘Export List’ button at the top of the screen.

From this screen you can also view ‘Patient Query Listing’ or ‘Return to Check Reminder List’ by clicking those buttons at the top of the screen.

VI. MANAGING CUSTOM LETTERS

NOTE: THIS FEATURE CURRENTLY DOES NOT WORK. ADDITIONAL INSTRUCTIONS WILL BE ADDED TO THIS GUIDE ONCE THIS FEATURE IS WORKING.

