CAIR2 Reminder/Recall User Guide

Revised: 01/30/2025

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 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 QA user roles.

For additional support, the following resources are available:

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

CAIR Help Desk:
Phone: 800-578-7889
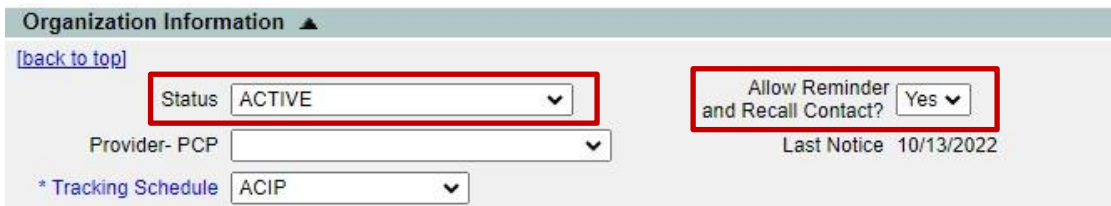Email: CAIRHelpDesk@cdph.ca.gov
CAIR2 Website: (cdph.ca.gov/cair)

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Section 1: Important Information about the Reminder/Recall Feature

Before using the Reminder/Recall feature, there are several important issues to note:

- **Inactivating patients:** Before running Reminder/Recall reports, we **highly recommend** you use the CAIR2 Manage Patient Status feature to inactivate patients who are no longer receiving services at your site. This ensures that **only active patients are included in your Reminder/Recall reports**. For more details on inactivating patients who are no longer being seen at your site, refer to the **CAIR2 Guide to Using the Manage Patient Status Feature** found on the CAIR2 User Guides Page.

- **Large numbers of patients in your report:** If the results of your Reminder/Recall request include over 2,000 patients, you will receive an error message, and the report may not generate. You must narrow your criteria to decrease the number of patients in your report (see the Generating a Reminder/Recall Request section). You should also inactivate patients who are no longer receiving services at your site by using the CAIR2 Manage Patient Status feature described above. **Note:** If you suspect that your report will include a large number of patients, it is recommended to run the report after regular business hours due to less activity in CAIR2 during those times. This will help increase the probability that your report will be successfully generated.

- **Patients included in your report:** A patient who is due/overdue for immunizations will be included in your report only if the following conditions are met in their CAIR2 record:

  - In the 'Organization Information' tab in the patient's record:
    - The patient's 'Status' field is set to 'Active'.
    - The 'Allow Reminder and Recall Contact?' field is set to 'Yes'.
  - Make sure the patient meets all the criteria you set for your Reminder/Recall request (see the Generating a Reminder/Recall Request section).

- **Number of reports you can generate:** Reminder/Recall is **user-specific** and only allows users to have **one** Reminder/Recall report 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 can 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 all sites.

Note: If you need several reports stored in CAIR2 for your site, you should have different users from your site run separate reports. Each user can store one Reminder/Recall report stored in CAIR2 at a time.

Section 2: Accessing the Reminder/Recall Feature

To access the Reminder/Recall feature:

1. Log into CAIR2 at https://cair.cdph.ca.gov

2. Click the **reminder/recall** link underneath the 'Reports' header in the blue menu panel.
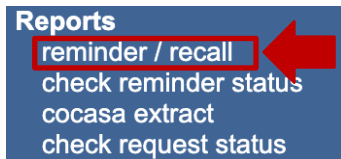
3. The 'Reminder/Recall Request' screen will display (see the Generating a Reminder/Recall Request section below).

Section 3: Generating a Reminder/Recall Request

The 'Reminder/Recall Request' screen (see screenshot below) is used to select the criteria needed based on the patients you want to include in your Reminder/Recall report. You can customize the report 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

Create Report

*Reminder Recall Report Name [   ]

⦿ Create New Report Criteria [   ]

◯ Use Previous Report Criteria [Please select an option ▾]

Select Patient Population

Population Options:

⦿ Patients Associated with LCR TRN Clinic

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 [ACIP ▾]

◯ Use Tracking Schedule Associated with Each Patient

Select the Vaccine Group To Report on

⦿ Use All Vaccine Groups

◯ Use Vaccine Groups Selected

| Adeno | | Add | | |
| Anthrax | | Remove | | |

☐ 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   Earliest Birth Date [   ] 📅   Latest Birth Date [   ] 📅

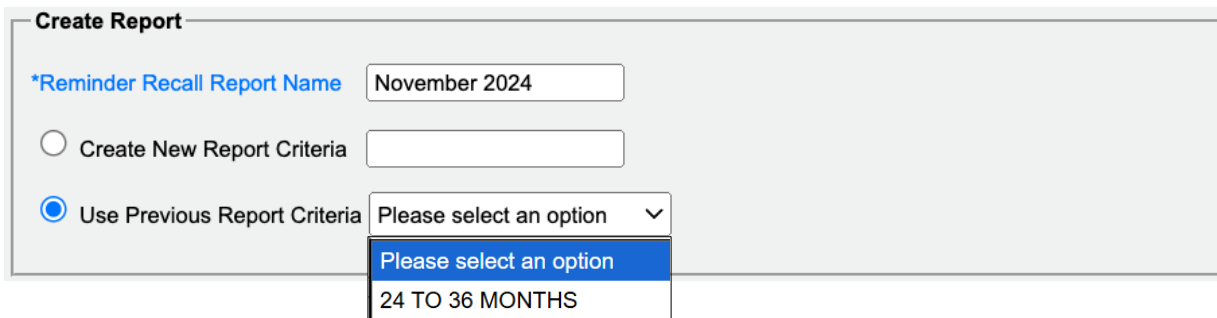◯ Age Range   Youngest Age [   ]   Oldest Age [   ]   [Years ▾]

All reports filters are evaluated based on today's date.

[Save & Generate]   [Generate]   [Cancel]

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

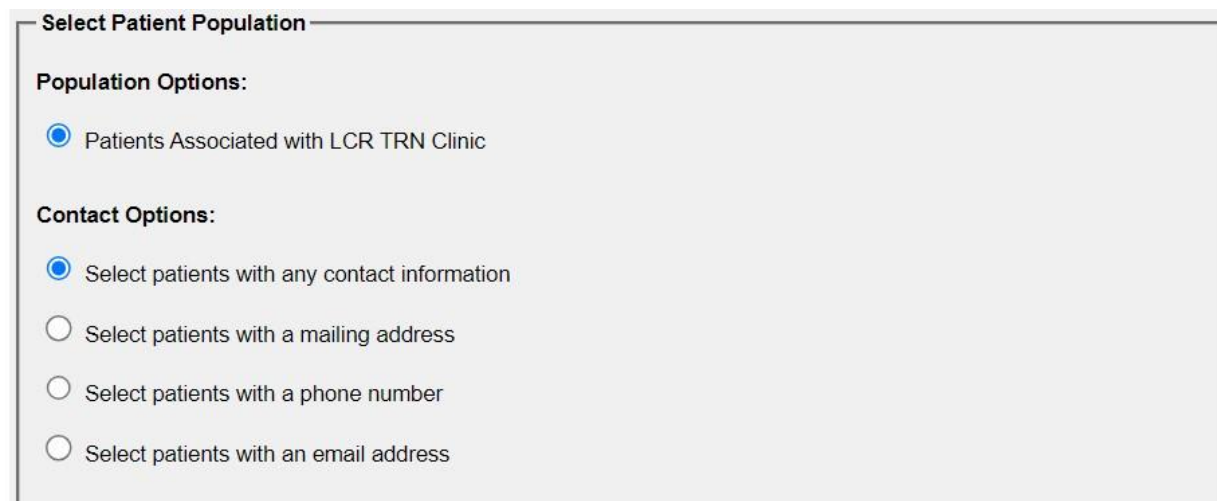**Reminder Recall Report Name (required):** This is a required field, and you must give your report a name. When creating a new report, we recommend entering a descriptive name to help identify the report (e.g., Enter the month and the year that you're running the report, November 2024).

The two 'Report Criteria' options are optional but are highly recommended:

- **Create New Report Criteria:** Select this option if you want to create a new report with new criteria – i.e., if you're going to have different criteria than the previous report you ran (e.g., different age group or if this is the first time you are running this report), enter a new descriptive name for this new report.

- **Use Previous Report Criteria:** Select this option if you want to use the same criteria you used in a previous report. Select the previous report you want to use from the dropdown. You can make changes to the criteria you previously used if you would like. In the example above, a previous report was created with criteria entered as '24 TO 36 MONTHS' to indicate the report was run for 24 to 36-month-old patients. **Note:** Selecting the 'Use Previous Report Criteria' option still requires a 'Reminder Recall Report Name' to be entered.

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, either by phone, mail, or email.

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

- **Contact Options:** You must select **one** patient contact option. The option defaults to 'Select patients with any contact information', which is recommended so that your report includes more patients who are due/overdue for immunizations. However, you can change this to limit the report to only include active patients with specific contact information in their CAIR2 record.

  For example, if you choose 'Select patients with a phone number', the report will only include active patients with a home and/or cell phone number in their CAIR2 record.

  Contact Options include:
  - 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:
This section gives you two options for choosing which vaccine recommendation tracking schedule you want to use for the report.

```
┌─ Indicate the Tracking Schedule ──────────────────────────────────┐
│                                                                    │
│  ⦿  Use Tracking Schedule Selected for All Patients  [ ACIP    ▾ ] │
│                                                                    │
│  ○  Use Tracking Schedule Associated with Each Patient             │
│                                                                    │
└────────────────────────────────────────────────────────────────────┘
```

You can choose:
- **Use Tracking Schedule Selected for All Patients:** This option applies to the tracking schedule you select in the dropdown to **All** patients in the report. **Note:** CAIR2 defaults to the 'ACIP' (Advisory Committee on Immunizations Practices) schedule and is the tracking schedule that should be used by most providers.
- **Use Tracking Schedule Associated with Each Patient:** This option will use the tracking schedule set within each patient's record (located in the 'Organization Information' tab on the 'Update Patient' screen – e.g., Kindergarten, Preschool/Day-Care, Seventh Grade). **Note:** This option is only intended for school clinics if needed to determine doses needed for school requirements.

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

```
┌─ Select the Vaccine Group To Report on ──────────────────────────────────┐
│                                                                           │
│  ⦿  Use All Vaccine Groups                                                │
│                                                                           │
│  ○  Use Vaccine Groups Selected   ┌──────────▲┐  [  Add   ]  ┌────────▲┐  │
│                                    │ Adeno     │  [ Remove ]  │        │  │
│                                    │ Anthrax  ▾│              │       ▾│  │
│                                    └───────────┘              └────────┘  │
│                                                                           │
│  ☐ Include Subpotent Vaccinations    ☐ Exclude Flu Vaccine from Report    │
│                                                                           │
│  ⦿ Vaccines Due Now    ○ Vaccines Past Due    ○ Both                       │
│                                                                           │
└───────────────────────────────────────────────────────────────────────────┘
```

Options include:

- **Use All Vaccine Groups:** CAIR2 defaults to this option. Based on the selected tracking schedule, this will include all vaccines a patient is due for.
- **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** radio button, select one-by-one the vaccine(s) you want to include, and click the **Add** button. The vaccines you selected will appear in the box to the right. **Note:** If you want to remove a vaccine you selected, select the vaccine name from the right-hand side box and then click the **Remove** button.
- **Include Subpotent Vaccinations:** Subpotent vaccinations are vaccine doses marked as 'Subpotent' in the patient's CAIR2 record (e.g., the patient received an expired vaccine).
  - Selecting the **Include Subpotent Vaccinations** checkbox will show these doses in the list of vaccinations the patient has received.
  - If you choose **not** to include Subpotent doses, those doses will not be included in the list of vaccines the patient has received. Therefore, selecting the 'Include Subpotent Vaccinations' checkbox is recommended if you want to view the patient's entire immunization record in CAIR2.
  - 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 a Reminder/Recall for Flu vaccines, you can exclude Flu vaccines from your report. By checking this box, the report will not include Flu doses that have been given to the patient and are due/past due.
- You can also choose if you want to include vaccines due now (Reminder), vaccines past due (Recall), or both (Reminder and Recall) based on the tracking schedule you selected:
  - **Vaccines Due Now:** This option will only include patients **due** for at least one of the selected recommended vaccine groups.
  - **Vaccines Past Due:** This option will only include patients **past due** for at least one of the selected recommended vaccine groups.
  - **Both:** This option will include all patients **due and/or past due** for at least one of the selected recommended vaccine groups.

Enter Additional Demographic Criteria: This section is optional. Entering a City, Zip Code, and/or County will narrow your results to include only active patients 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.

Enter Date Criteria: This section allows you to enter an option for either birthdate or age range (see screenshot below). The options are described below. **Note:** If a range is not entered, the report will pull patients of all ages.

Options include:

- **Birth Date Range:** If you choose to use a birth date range, the report will include only patients with a birth date within the range entered. You can enter the birthdate ranges or select them by clicking on the calendar. An 'Earliest Birth Date' and 'Latest Birth Date' range must be entered in MM/DD/YYYY format for this option.
- **Age Range:** If you choose to use an age range, the report will include only those patients who fall within the age range entered. A 'Youngest Age' and 'Oldest Age' must be entered for this option. **Note:** CAIR2 defaults to 'Years', but you can change your selection to 'Months'.

Create the Report: You have two options for generating your report, which are described below.

Important: Before generating the report, you should review the criteria selections/entries you made to ensure they are correct for the report you want to run.

The two options for generating the report include:

- **Save & Generate:** This option will allow you to save **and** generate the report in CAIR2.
- **Generate:** This option will allow you to only generate the report for viewing, but the report won't be saved.

Note: Clicking the **Cancel** button will remove your selected criteria on this screen.

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

The 'Reminder Request Status' screen will display after selecting the **Save & Generate** or **Generate** button. The results may take several minutes to generate depending on the number of Active patients associated with your site and the criteria you selected for your report. You can view the progress of the report in the 'Status' field. Periodically clicking the **Refresh** button will update the progress.

This screen will display the following:

- **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 set for the report.

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

Reminder Request Status							
Name	**Started**	**Report VG**	**Status**	**Patient Count**	**Range From**	**Range To**	Refresh
NOVEMBER 2024	11/07/2024 02:44:11 PM	All	100 %	12	24	36	Cancel

Note: You don't have to stay on this screen while waiting for the report to finish generating. You can continue to work in CAIR2 or log out and check on the status at a later time. To check the report's 'Status', click the **check reminder status** link under the 'Reports' header in the blue menu panel (see <u>Viewing Completed Reports and List of Patients section</u>).

Section 4: Choosing Your Reminder Request Output Options

Once the Reminder/Recall report has finished generating and you have opened the completed report, the screen below will display. It contains 3 sections (described below):

Reminder Request Process Summary

Reminder Request Criteria Name: NOVEMBER 2024

A

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *CAIR Clinic 1*.	404
2	Patients that are **active** within *CAIR Clinic 1* and **allow Reminder & Recall Contact**. Additional criteria includes: • Patients **age 24 to 36 Months**;	17
3	Patients that have **Any Contact Info**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified;	15
4	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now** for one or more vaccinations **as of 11/07/2024**; • Use all **vaccine groups**; • Use **ACIP** for all patients;	12
	Total Number of Patients Eligible for Reminder	**12**

Reminder Request Output Options

B

Output	Description	Additional Input		
Reminder Letter	Standard Reminder Letter.	Duplex Printing ☐		
		Report Name	NOVEMBER 2024 11/07/2024	
		Free Text		
		Phone #		
Reminder Card	Standard Reminder Card (4x5).	Report Name	NOVEMBER 2024 11/07/2024	
		Free Text		
		Phone #		
Mailing Labels	Avery 5160 Mailing Labels.	Report Name	NOVEMBER 2024 11/07/2024	
Mailing Labels	Avery 3256 Mailing Labels.	Report Name	NOVEMBER 2024 11/07/2024	
4 Up Card	CAIR 4 Up Cards	Report Name	NOVEMBER 2024 11/07/2024	
Patient Query Listing	A list of patients based on the report criteria.	Report Name	NOVEMBER 2024 11/07/2024	

Last Notice Date Options

C

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

A. Reminder Request Process Summary

The 'Reminder Request Process Summary' section displays results for your site and includes information based on your selected criteria (see screenshot below).

Reminder Request Process Summary

Reminder Request Criteria Name: NOVEMBER 2024

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *CAIR Clinic 1*.	404
2	Patients that are **active** within *CAIR Clinic 1* and **allow Reminder & Recall Contact.** Additional criteria includes: • Patients **age 24 to 36 Months**;	17
3	Patients that have **Any Contact Info**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified;	15
4	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now** for one or more vaccinations **as of 11/07/2024**; • Use all **vaccine groups**; • Use **ACIP** for all patients;	12
	Total Number of Patients Eligible for Reminder	**12**

The information includes:

- **Step 1:** This displays the total number of **patients** associated with your site.
- **Step 2:** This displays the total number of **Active patients** at your site who have the 'Allow Reminder and Recall Contact?' field in their CAIR2 record set to 'Yes' (this field is located on the 'Organization Information' tab in the patient's record), and are **within the age criteria** you selected for the report.
- **Step 3:** This displays the total number of patients that meet the criteria in Step 2 **and** also meet the criteria you selected for the 'Contact Option' (see page 6). For example, if you selected 'Any Contact Info', it will show the number of patients that meet the criteria in Step 1 and have a complete mailing address in their CAIR2 record.
- **Step 4:** This displays the total number of patients who meet the criteria you selected in Step 2 and also met the criteria you selected in the 'Indicate the Tracking Schedule' and 'Select the Vaccine Group To Report on' sections on the 'Reminder/Recall Request' screen for the report (see the Generating a Reminder/Recall Request section).
- **Total Number of Patients Eligible for Reminder:** This is the overall total number of patients included in the Reminder/Recall report based on the specific criteria you selected for the report.

B. Reminder Request Output Options

The 'Reminder Request Output Options' section lets you choose which Output Option(s) you want to generate to contact your patients (e.g., letters, cards, a list of your patients, etc.) to inform them of the vaccine(s) they are due or past due (see screenshot below).

You should pick the Output Option that best matches the 'Contact Option' you selected for the report (see page 6). 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. The process of generating each option is described below.

Contacting patients by email and/or phone: If you plan to contact patients by email and/or phone, click on the **check reminder list** link under the 'Reports' section on the left blue menu panel (see 'Viewing List of Patients' in the [Viewing Completed Reports and List of Patients section](#)) or the **Review Patients** button on the 'Last Notice Date Options' section of the screen shown on page 10 (see the [Last Notice Date Options section](#)) to see each patient's email and phone number.

Reminder Request Output Options

Output	Description	Additional Input		
Reminder Letter	Standard Reminder Letter.	Duplex Printing ☐		
		Report Name	NOVEMBER 2024 11/07/2024	
		Free Text		
		Phone #		
Reminder Card	Standard Reminder Card (4x5).	Report Name	NOVEMBER 2024 11/07/2024	
		Free Text		
		Phone #		
Mailing Labels	Avery 5160 Mailing Labels.	Report Name	NOVEMBER 2024 11/07/2024	
Mailing Labels	Avery 3256 Mailing Labels.	Report Name	NOVEMBER 2024 11/07/2024	
4 Up Card	CAIR 4 Up Cards	Report Name	NOVEMBER 2024 11/07/2024	
Patient Query Listing	A list of patients based on the report criteria.	Report Name	NOVEMBER 2024 11/07/2024	

Note: You can only run one Output Option at a time. If you want to run multiple Options (e.g., Reminder Letter and Mailing Labels), you can run one option first and then go back into the report to run another option (see the [Viewing Completed Reports and List of Patients section](#)).

Below are the instructions on how to generate 'Reminder Request Output Options':

Reminder Letter: This option generates a letter for each patient in your Reminder/Recall patient list results that you can send to the parent/guardian. The letter includes the patient's name, CAIR ID#, the vaccines the patient has received, the vaccines that you selected to include that are due, overdue, or both, and some standard text. You can also add text and/or your site's phone number (see page 14 for an example of a Reminder Letter).

To generate Reminder Letters:
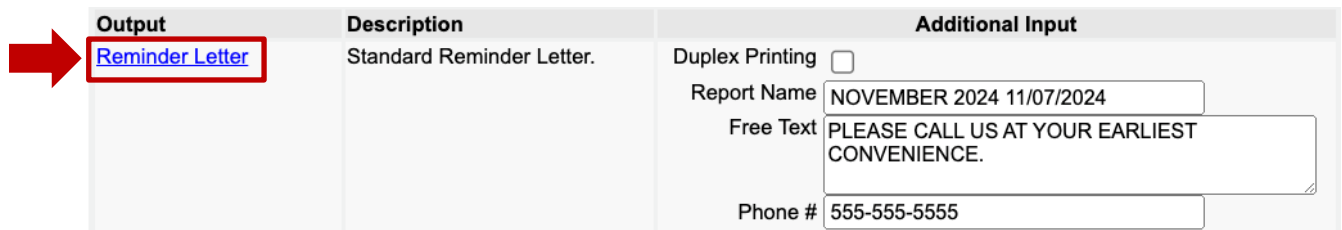1. In the 'Additional Input' column for the Reminder Letter, you have the option of entering the following:

Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Duplex Printing ☐	
		Report Name	NOVEMBER 2024 11/07/2024
		Free Text	PLEASE CALL US AT YOUR EARLIEST CONVENIENCE.
		Phone #	555-555-5555

- **Duplex Printing (optional):** If you check off this box, an additional blank piece of paper is added between each letter when you print it.
- **Report Name:** This will default to the original name you gave the report. You can edit this field if you would like, but the Report Name will **not** display on the Reminder Letter.
- **Free Text:** This field is optional, but it is recommended so any information that you enter in this text box will appear at the end of every letter.
- **Phone #:** This field is optional. If you enter a telephone number, it will appear at the end of every letter.

2. Once you fill in the information, click the **Reminder Letter** hyperlink under the 'Output' column.

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Duplex Printing ☐ Report Name: NOVEMBER 2024 11/07/2024 Free Text: PLEASE CALL US AT YOUR EARLIEST CONVENIENCE. Phone #: 555-555-5555

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

Reminder Request Status

Name	Started	Report VG	Status	Patient Count	Range From	Range To
NOVEMBER 2024	11/07/2024 02:44:11 PM	All	100 %	12	24	36

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Reminder Letter	11/07/2024 03:13 PM	11/07/2024 03:13 PM	11/07/2024 03:13 PM	Ready

4. Your letters can be viewed once the 'Status' displays as 'Ready' and the report name becomes a hyperlink. Click the hyperlink under the 'Name' column. **Note:** The Reminder Letter will be generated in Spanish for patients with the 'Language Spoken' field set to Spanish in the 'Patient Information' tab in their CAIR2 Record. The English language and Spanish language letters will display as separate hyperlinks.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Reminder Letter	11/07/2024 03:13 PM	11/07/2024 03:13 PM	11/07/2024 03:13 PM	Ready

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, which includes who the letter is addressed to, the patient's immunization record, and the vaccines the patient is due/overdue for. 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: 6423925

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

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	02/06/2022	1 of 5	DTaP-HepB-IPV
	04/06/2022	2 of 5	DTaP, NOS
HepA	02/08/2023	1 of 2	HepA, NOS
	09/08/2023	2 of 2	HepA, NOS
HepB	02/06/2022	1 of 3	DTaP-HepB-IPV
	06/08/2022	2 of 3	HepB, NOS
Influenza-seasnl	02/05/2023	1 of 2	Flu NOS
MMR	02/11/2023	1 of 2	MMRV
	11/05/2023	2 of 2	MMR
PneumoConjugate	03/12/2023	1 of 2	PCV13
Polio	02/06/2022	1 of 4	DTaP-HepB-IPV
Varicella	02/11/2023	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
COVID-Seasonal NOS
DTaP, NOS
Flu NOS
HepB, NOS
Hib, NOS
PCV NOS
Polio, NOS

C

The number for our office is: 555-555-5555

PLEASE CALL US AT YOUR EARLIEST CONVENIENCE.

Reminder Card: This option generates a card for each patient in your Reminder/Recall patient list 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 Reminder Letter – it only includes the patient's name and the vaccines you selected in the report that are due, past due, or both. You can also add text and/or your site's phone number (see page 15 for an example of a Reminder Card).

To generate Reminder Cards:
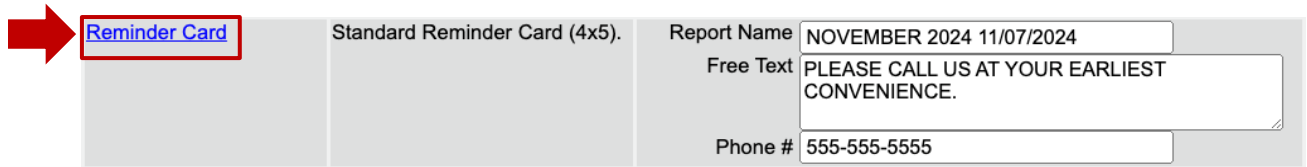
1. In the 'Additional Input' column for the Reminder Card, you have the option of entering the following:

Reminder Card	Standard Reminder Card (4x5).	Report Name	NOVEMBER 2024 11/07/2024
		Free Text	PLEASE CALL US AT YOUR EARLIEST CONVENIENCE.
		Phone #	555-555-5555

- **Report Name:** This will default to the original name you gave the report. You can edit this field if you would like, but the Report Name will **not** display on the Reminder Card.

- **Free Text:** This field is optional, but it is recommended, so any information that you enter in this text box will appear at the end of every card.
- **Phone #:** This field is optional. If you enter a telephone number, it will appear at the end of every card.

2. Once you fill in the information, click on the **Reminder Card** hyperlink under the 'Output' column.

3. In the 'Reminder Output Status' section, once the 'Status' displays as 'Ready' and the report name becomes a hyperlink, your cards are ready to be viewed. Click the hyperlink under the 'Name' column. **Note:** The Reminder Card will be generated in Spanish for patients with the 'Language Spoken' field set to Spanish in the 'Patient Information' tab in their CAIR2 Record. The English language and Spanish language cards will display as separate hyperlinks.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Reminder Card	11/07/2024 03:22 PM	11/07/2024 03:22 PM	11/07/2024 03:22 PM	Ready

4. 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, which includes who the card is addressed to, and below it, it will show the vaccines the patient is due/overdue for. 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.

A

Dear Parent of Chip Choco

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
Polio	04/16/2022
COVID-Seasonal	06/16/2022
DTP/aP	06/16/2022
HepB	08/03/2022
Hib	03/16/2023
PneumoConjugate	05/07/2023
Influenza-seasnl	08/01/2024

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 Reminder/Recall patient list results. You must use Avery Mailing Labels #5160 or #3256 or their equivalent. You can use the mailing labels to mail out the Reminder Letters and/or Reminder Cards.

To generate Mailing Labels:

1. In the 'Additional Input' column for the type of Mailing Labels, the 'Report Name' field will default to the original name you gave the report. You can edit this field if you would like, but the Report Name will **not** display on the Mailing Labels.

| Mailing Labels | Avery 5160 Mailing Labels. | Report Name NOVEMBER 2024 11/07/2024 |
| Mailing Labels | Avery 3256 Mailing Labels. | Report Name NOVEMBER 2024 11/07/2024 |

2. To view the Mailing Labels, click on the **Mailing Labels** hyperlink under the 'Output' column for the mailing labels you would like to use.

| Mailing Labels | Avery 5160 Mailing Labels. | Report Name NOVEMBER 2024 11/07/2024 |
| Mailing Labels | Avery 3256 Mailing Labels. | Report Name NOVEMBER 2024 11/07/2024 |

3. In the 'Reminder Output Status' section, once the 'Status' displays as 'Ready' and the report name becomes a hyperlink, your labels are ready to be viewed. Click the hyperlink under the 'Name' column.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Mailing Labels 5160	11/07/2024 03:32 PM	11/07/2024 03:32 PM	11/07/2024 03:32 PM	Ready

4. To print the labels, click the printer icon in Adobe Acrobat Reader®.

4 Up Card: This option generates 4 Up Cards; however, it is required to go through an ordering process. Local Health Department (LHD) Immunization Coordinators can order the 4 Up cards directly via the CDPH IZ Coordinator's website. Other providers can order them by contacting their local LHD Immunization Coordinator or LHD Immunization Program.

Below are examples of the two 4 Up cards available for ordering.

The 4 Up Card option generates 4 individual postcards per each 8.5"x11" postcard for each patient in your Reminder/Recall patient list results that you can send to the parent/guardian.

To generate 4 Up Cards:

1. In the 'Additional Input' column for the 4 Up Card, the 'Report Name' field will default to the original name you gave the report. You can edit this field if you would like, but the Report Name will **not** display on the 4 Up Cards.

4 Up Card	CAIR 4 Up Cards	Report Name	NOVEMBER 2024 11/07/2024

2. To view the 4 Up Cards, click on the **4 Up Card** hyperlink under the 'Output' column.

4 Up Card	CAIR 4 Up Cards	Report Name	NOVEMBER 2024 11/07/2024

3. In the 'Reminder Output Status' section, once the 'Status' displays as 'Ready' and the report name becomes a hyperlink, your cards are ready to be viewed. Click the hyperlink under the 'Name' column.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	4 Up Card	11/07/2024 03:41 PM	11/07/2024 03:41 PM	11/07/2024 03:41 PM	Ready

4. To print the 4 Up Cards, click the printer icon in Adobe Acrobat Reader®.

Below is an example of a 4 Up Card. The standard text will include the Organization Name at the top of each card. It will indicate that the patient is due/overdue for vaccines in both English and Spanish, and it will only include the patient's name and address. You cannot edit/add additional text. Once printed, just tear along the perforation, stamp, and mail.

LCR TRN Clinic

Our records show that your child is due for shots.
*Nuestros archivos indican que es tiempo de vacunar
a su niñola.*

Parents of CHIP CHOCO
Padres de 825 TEST
                LIVERMORE, CA 94551

If you cannot come to this clinic or you have questions,
please call your doctor for a clinic near you.
*Si no puede venir a esta clínica o si tiene preguntas, por favor
llama a su doctor para informarse sobre
la clínica mas cercana a su casa.*

Patient Query Listing: This option displays the patient list and includes each patient's demographic information, immunization history, and immunizations that are due/overdue. **Note:** Depending on the number of patients displayed on the results, it may generate a lengthy patient list.

To generate a Patient Query Listing:

1. In the 'Additional Input' column for the Patient Query Listing, the 'Report Name' field will default to the original name you gave the report. You can edit this field if you would like, and the new name will display on the patient list.

Patient Query Listing	A list of patients based on the report criteria.	Report Name	NOVEMBER 2024 11/07/2024

2. To view the Patient Query Listing, click the **Patient Query Listing** hyperlink under the 'Output' column.

Patient Query Listing	A list of patients based on the report criteria.	Report Name	NOVEMBER 2024 11/07/2024

3. In the 'Reminder Output Status' section, once the 'Status' displays as 'Ready' and the report name becomes a hyperlink, your Patient Query Listing is ready to be viewed. Click the hyperlink under the 'Name' column.

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Patient List	11/07/2024 03:48 PM	11/07/2024 03:48 PM	11/07/2024 03:48 PM	Ready

4. To print the Patient Query Listing, click the printer icon in Adobe Acrobat Reader®.

Below is an example of a Patient Query Listing for two patients. The listing will include the patient's demographic information, immunizations due (located in the 'Immunizations' column), and immunizations administered (located in the 'Immunization Dates' column). **Note:** If any date fields show as blank, the vaccine has not been administered to the patient.

```
TEST 8 13 24 08/13/2024                    Patient Query              08/13/2024   Page   1   of   1
CHIP CHOCO                                                      DOB:        12/16/2021
HM: (555) 555-5555          CP:                                CAIR2 ID:6423925
825 TEST LIVERMORE CA 94551                     MRN:           Schedule:ACIP

   Vaccine          Immunizations    Immunization Dates
   COVID-Seasonal   06/16/2022
   DTP/aP           06/16/2022       1) 02/06/2022   2) 04/06/2022
   HepA             Complete         1) 02/08/2023   2) 09/08/2023
   HepB             08/03/2022       1) 02/06/2022   2) 06/08/2022
   Hib              03/16/2023
   Influenza-seasnl 08/01/2024       1) 02/05/2023
   MMR              Complete         1) 02/11/2023   2) 11/05/2023
   PneumoConjugate  05/07/2023       1) 03/12/2023
   Polio            04/16/2022       1) 02/06/2022
   Varicella        12/16/2025       1) 02/11/2023

HEIDY LAMAR                                                     DOB:        02/05/2021
HM:                         CP:                                CAIR2 ID:6423928
345 HOLLYWOOD BLVD. BEVERLY HILLS CA 90210      MRN:           Schedule:ACIP

   Vaccine          Immunizations    Immunization Dates
   COVID-Seasonal   08/05/2021
   DTP/aP           04/05/2021
   HepA             02/05/2022
   HepB             05/05/2021
   Hib              05/05/2022
   Influenza-seasnl 08/01/2024
   MMR              02/05/2022
   PneumoConjugate  02/05/2023       1) 08/15/2021
   Polio            04/05/2021
   Varicella        02/05/2022
```

C. Last Notice Date Options

The 'Last Notice Date Options' section includes an option to view a list of all the patients in your Reminder/Recall report and an option to add a Reminder/Recall last notice date for your patients.

Last Notice Date Options	
Review Patients that will display on the Reminder Recall Report.	Review Patients
*Increment last notice date for all patients **eligible for this reminder**.*	Increment Eligible
Return to the previous screen.	Cancel

The options (buttons) in the Last Notice Date Options section include the following:

- **Review Patients:** This option will display a list of all the patients that were included in your results, including their Name, Birth Date, CAIR ID#, MRN, Home and Cell Phone Number(s), Email, Address, City, and Zip code if the information is in the patient's CAIR2 immunization 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, Chip	12/16/2021	6423925		(555) 555-5555			825 TEST	LIVERMORE	94551
Lamar, Heidy	02/05/2021	6423928					345 HOLLYWOOD BLVD.	BEVERLY HILLS	90210

- o **Patient's Name hyperlink:** Click on the hyperlink of the patient's name to open and view their CAIR2 record.
- o **Export List:** Click on this button to export and save this list in Excel.
- o **Patient Query Listing:** You can also run a 'Patient Query Listing' from this screen by clicking on this button.
- o **Return to Check Reminder List:** Click on this button to view reminder lists of your reports.

Note: This list is also available after the Reminder/Report is completed. See the Viewing Completed Reports and List of Patients section about 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 the best choice.**

- **Increment Eligible:** This option adds/updates the date in the 'Last Notice' field in each patient's CAIR2 record for **all** patients included in your results. When you click on the button, it will automatically add/update the date that is located on each patient record's 'Organization Information' tab in the 'Update Patient' screen. This field indicates the last time a patient was included in your site's Reminder/Recall report. This is helpful if you want to document the last time you contacted the patient for Reminder/Recall. The date will not be added/updated if you don't select this button.


- **Cancel:** This will return you to the 'Reminder Request Status' screen.

Section 5: 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 can view the report. For more information, see the 'Number of reports you can generate' bullet point in the Important Information about the Reminder/Recall Feature section.

Viewing Completed Reports:

1. Click the **check reminder status** link on the blue menu panel under the 'Reports' header.
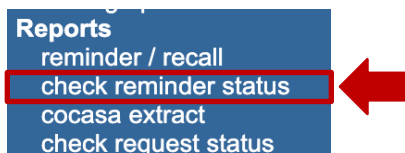
2. The screen will display two sections – 'Reminder Request Status' and 'Reminder Output Status' (see screenshot below).

Reminder Request Status

Name	Started	Report VG	Status	Patient Count	Range From	Range To
NOVEMBER 2024	11/07/2024 02:44:11 PM	All	100 %	12	24	36

Reminder Output Status

| Name	Type	Requested	Started	Completed	Status
NOVEMBER 2024 11/07/2024	Patient List	11/07/2024 03:48 PM	11/07/2024 03:48 PM	11/07/2024 03:48 PM	Ready
NOVEMBER 2024 11/07/2024	4 Up Card	11/07/2024 03:41 PM	11/07/2024 03:41 PM	11/07/2024 03:41 PM	Ready
NOVEMBER 2024 11/07/2024	Mailing Labels 5160	11/07/2024 03:32 PM	11/07/2024 03:32 PM	11/07/2024 03:32 PM	Ready
NOVEMBER 2024 11/07/2024	Reminder Card	11/07/2024 03:22 PM	11/07/2024 03:22 PM	11/07/2024 03:22 PM	Ready
NOVEMBER 2024 11/07/2024	Reminder Letter	11/07/2024 03:13 PM	11/07/2024 03:13 PM	11/07/2024 03:13 PM	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 (November 2024) and ran five Output Options on that report (e.g., Patient List, 4 Up Card, Mailing Labels 5160, Reminder Card, and Reminder Letter).

Viewing List of Patients: You can also view the list of patients included in your last report. This is the same list shown in 'Review Patients' in the Last Notice Date Options section above. **The list consists of the email and phone numbers of each patient.**

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

1. Click the **check reminder list** link on the blue menu panel under the 'Reports' header.

check group status
check reminder list
check vaccine elig status
accountability report
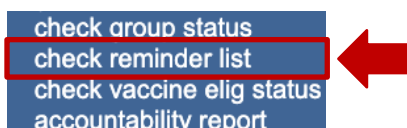
2. The 'Check Reminder List' screen will display, and you can click on the hyperlink to view the report.

Check Reminder List

		Cancel
Reminder Request Name	**Started**	**Patients**
NOVEMBER 2024	11/07/2024 02:44 PM	12

3. The 'Review Patients' screen will display. It contains each patient's Name, Birth Date, CAIR ID #, MRN, Home/Cell Phone Number(s), Email, Address, City, and Zip. To open their record, click on the patient's hyperlinked name under the 'Patients Name' column.

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, Chip	12/16/2021	6423925		(555) 555-5555			825 TEST	LIVERMORE	94551
Lamar, Heidy	02/05/2021	6423928					345 HOLLYWOOD BLVD.	BEVERLY HILLS	90210

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. **Note:** 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.

Section 6: Manage Custom Letters

Note: This feature currently does not work. Additional instructions will be added to this guide once this feature is working.