

# Reminder/Recall User Guide

Revised: 06/06/2023

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 \(LCRs\): \(go.cdph.ca.gov/cair-lcr\)](https://go.cdph.ca.gov/cair-lcr)

**CAIR Help Desk:**

Phone: 800-578-7889

Email: [CAIRHelpDesk@cdph.ca.gov](mailto:CAIRHelpDesk@cdph.ca.gov)

[CAIR2 Website: \(cdph.ca.gov/cair\)](https://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 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 inactivating patients 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 may 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 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.
- **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' field 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 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).

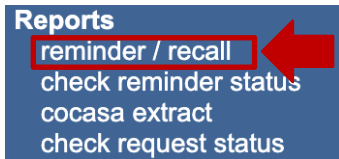
Therefore, it is **highly recommended** that you save/export your reports before generating a new report for that site or another site.

**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.

## 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 you want to use to determine which patients 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

### Select Patient Population

#### Population Options:

Patients Associated with CAIR Clinic 14

#### 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

Adeno	<input type="button" value="Add"/>	<input type="text"/>
Anthrax	<input type="button" value="Remove"/>	<input type="text"/>

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.

**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: 1. A text input field labeled "\*Reminder Recall Report Name". 2. A radio button labeled "Create New Report Criteria" with an empty text input field next to it. 3. A radio button labeled "Use Previous Report Criteria" with a dropdown menu next to it. The dropdown menu is open, showing a purple bar with a checkmark and the text "Please select an option", and a list of criteria: "24 TO 35 5 26 23".

- **Reminder Recall Report Name (required):** You must give your report a name. **Note:** When creating a new report, we recommend 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 5 26 23' to indicate the report was run for 24 to 35 month old patients, and the report was created on 05/26/2023).

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're going 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 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.

**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 has two main sections: 1. "Population Options:" with a radio button labeled "Patients Associated with CAIR Clinic 14". 2. "Contact Options:" with four radio buttons: "Select patients with any contact information", "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).
- **Contact Options:** You must select **one** of the contact options. It defaults to the 'Select patients with any contact information' option. Still, 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 active patients at your site **and** with the specific contact information you selected 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. Using the default option ‘Select patients with any contact information’ is recommended so that your report includes more patients that are due/overdue.

**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

Use Tracking Schedule Associated with Each Patient

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 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).

**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

Include Subpotent Vaccinations  Exclude Flu Vaccine from Report

Vaccines Due Now  Vaccines Past Due  Both

Options include:

- **Use All Vaccine Groups:** 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 the vaccine(s) you want to include, and click the **Add** button. **Note:** If you’re going to remove a vaccine you selected, select the vaccine 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. 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/overdue.
- 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 **due** for at least one of the selected recommended vaccine groups.
  - **Vaccines Past Due:** This option will only include patients **overdue** for at least one of the selected recommended vaccine groups.
  - **Both:** This option will include all patients **due and/or overdue** for at least one of the selected recommended vaccine groups.

**Enter Additional Demographic Criteria:** 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 Additional Demographic Criteria**

City  Zip Code  County

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

**Enter Date Criteria**

Birth Date Range    Earliest Birth Date      Latest Birth Date  



Age Range    Youngest Age     Oldest Age      

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 from 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:** There are two options for generating the report:

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

- **Save & Generate:** Will generate **and** save the report in CAIR2.

- **Generate:** Will 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.

**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.

**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 report's progress in the 'Status' field. Periodically clicking the **Refresh** button will update the progress.

Reminder Request Status							Refresh
Name	Started	Report VG	Status	Patient Count	Range From	Range To	Cancel
TEST05102023	05/10/2023 02:05:09 PM	All	QUEUE		2	20	

This screen will also 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							Refresh
Name	Started	Report VG	Status	Patient Count	Range From	Range To	Cancel
<a href="#">TEST 41523</a>	05/15/2023 10:44:23 AM	All	100 %	2	2	3	

**Note:** You can continue working in CAIR2 or log out while generating the report. To check the report's 'Status', click the **check reminder status** link under the 'Reports' header in the blue menu panel (see [Viewing Completed Reports and List of Patients section](#)).

## Section 4: Choosing Your Reminder Request Output Options

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



### Reminder Request Process Summary

Reminder Request Criteria Name: TEST 41523

Step	Criteria Evaluated at this Step	Patients
1	Patients <b>associated</b> with <i>LCR TRN Clinic</i> .	20
2	Patients that are <b>active</b> within <i>LCR TRN Clinic</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: • Patients <b>age 2 to 3 Years</b> ;	2
3	Patients that have <b>Any Contact Info</b> . Additional criteria includes: • <b>City</b> is not specified; • <b>Zip Code</b> is not specified;	2
4	Patients that meet the following criteria regarding vaccination status: • Patients that are <b>Due Now or Past Due</b> for one or more vaccinations <b>on or before 05/15/2023</b> ; • Use all <b>vaccine groups</b> ; • Use <b>ACIP</b> for all patients;	2
<b>Total Number of Patients Eligible for Reminder</b>		<b>2</b>

A

### Reminder Request Output Options

Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text" value="TEST 41523 05/15/2023"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name <input type="text" value="TEST 41523 05/15/2023"/> Free Text <input type="text"/> Phone # <input type="text"/>
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name <input type="text" value="TEST 41523 05/15/2023"/>
<a href="#">Mailing Labels</a>	Avery 3256 Mailing Labels.	Report Name <input type="text" value="TEST 41523 05/15/2023"/>
<a href="#">4 Up Card</a>	CAIR 4 Up Cards	Report Name <input type="text" value="TEST 41523 05/15/2023"/>
<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name <input type="text" value="TEST 41523 05/15/2023"/>

B

### 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 <b>eligible for this reminder</b>.</i>	<input type="button" value="Increment Eligible"/>
<i>Return to the previous screen.</i>	<input type="button" value="Cancel"/>

C

## A. Reminder Request Process Summary

This section displays your site's total number of active patients and the number included in the report based on your selected criteria (see screenshot below).

Reminder Request Process Summary		
Reminder Request Criteria Name: TEST 41523		
Step	Criteria Evaluated at this Step	Patients
1	Patients <b>associated</b> with <i>LCR TRN Clinic</i> .	20
2	Patients that are <b>active</b> within <i>LCR TRN Clinic</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: • Patients <b>age 2 to 3 Years</b> ;	2
3	Patients that have <b>Any Contact Info</b> . Additional criteria includes: • <b>City</b> is not specified; • <b>Zip Code</b> is not specified;	2
4	Patients that meet the following criteria regarding vaccination status: • Patients that are <b>Due Now or Past Due</b> for one or more vaccinations <b>on or before 05/15/2023</b> ; • Use all <b>vaccine groups</b> ; • Use <b>ACIP</b> for all patients;	2
<b>Total Number of Patients Eligible for Reminder</b>		<b>2</b>

The information includes:

- **Step 1:** This section displays the total number of Active patients at your site.
- **Step 2:** This section displays the total number of Active patients at your site, 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 section displays the total number of active patients that meet the criteria in Step 1 **and** also meet the criteria you selected for the ‘Contact Option’ (see page 5). For example, if you selected ‘Select patients with a mailing address’, 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 section displays the total number of patients that meet the criteria you selected in Step 1 and Step 2 and also met the criteria you selected in ‘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 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 lets you choose which Output Option(s) you want to generate for contacting your patients (e.g., letters, cards, a list, etc.) (see screenshot below). 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 5). 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, click on the **check reminder list** link on the left blue menu panel or the **Review Patients** button on the ‘Last Notice Date Options’ section of the screen shown on page 9 (see [Last Notice Date Options section](#)) to see each patient’s email and phone number.

Reminder Request Output Options		
Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name TEST 41523 05/15/2023 Free Text Phone #
<a href="#">Reminder Card</a>	Standard Reminder Card (4x5).	Report Name TEST 41523 05/15/2023 Free Text Phone #
<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name TEST 41523 05/15/2023
<a href="#">Mailing Labels</a>	Avery 3256 Mailing Labels.	Report Name TEST 41523 05/15/2023
<a href="#">4 Up Card</a>	CAIR 4 Up Cards	Report Name TEST 41523 05/15/2023
<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name TEST 41523 05/15/2023

**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 now and then go back into the report to run another option (see [Viewing Completed Reports and List of Patients section](#)).

**Reminder Letter:** This option generates a letter for each patient 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 text and/or your site’s phone number. See page 13 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
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name 24 TO 35 5 10 23 05/21/2023 Free Text PLEASE CALL US AT YOUR EARLIEST CONVENIENCE. Phone # 555-555-5555

- **Duplex Printing (optional):** Adds an additional blank piece of paper between each letter.
  - **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 letter.
  - **Phone #:** 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 (see screenshot below).

Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Duplex Printing <input type="checkbox"/> Report Name <input type="text" value="24 TO 35 5 10 23 05/21/2023"/> Free Text <input type="text" value="PLEASE CALL US AT YOUR EARLIEST CONVENIENCE."/> Phone # <input type="text" value="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
<a href="#">24 TO 35 5 26 23</a>	05/26/2023 02:43:32 PM	All	100 %	60		

Reminder Output Status						
Name	Type	Requested	Started	Completed	Status	
<a href="#">24 TO 35 5 26 23 05/26/2023</a>	Reminder Letter	06/06/2023 11:08 AM	06/06/2023 11:08 AM	06/06/2023 11:08 AM	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	
<a href="#">24 TO 35 5 26 23 05/26/2023</a>	Reminder Letter	06/06/2023 11:08 AM	06/06/2023 11:08 AM	06/06/2023 11:08 AM	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. If you enter 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	02/06/2020	1 of 5	DTaP-HepB-IPV
	04/06/2020	2 of 5	DTaP, NOS
HepA	02/08/2021	1 of 2	HepA, NOS
	09/08/2021	2 of 2	HepA, NOS
HepB	02/06/2020	1 of 3	DTaP-HepB-IPV
	06/08/2020	2 of 3	HepB, NOS
Influenza-seasn1	02/05/2021	1 of 2	Flu NOS
MMR	02/11/2021	1 of 2	MMRV
	11/05/2021	2 of 2	MMR
PneumoConjugate	03/12/2020	1 of 2	PCV13
Polio	02/06/2020	1 of 4	DTaP-HepB-IPV
Varicella	02/11/2021	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
HepB, NOS
Hib, NOS
PCV13
Polio, NOS
SARS-COV-2 (COVID-19)

C

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

PLEASE CALL US AT THE EARLIEST CONVENIENCE

**Reminder Card:** This option generates a 'card' for each patient 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 Reminder Letter – it only includes the patient's name and the vaccines you selected to have that are due, overdue, or both. You can also add text and/or your site's phone number. See page 14 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	TEST 41523 05/15/2023
		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. **Note:** It does not display on the Reminder Card.

- **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 appear at the end of every card.

2. Click the **Reminder Card** hyperlink under the 'Output' column to view the cards.

A screenshot of a form for a reminder card. A red arrow points to a blue hyperlink labeled "Reminder Card". The form contains the following information:

Standard Reminder Card (4x5).	Report Name	TEST 41523 05/15/2023
	Free Text	PLEASE CALL US AT YOUR EARLIEST CONVENIENCE
	Phone #	555-555-5555

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.

A screenshot of a table titled "Reminder Output Status". A red arrow points to a blue hyperlink in the "Name" column. The table has the following structure:

Name	Type	Requested	Started	Completed	Status
<a href="#">TEST 41523 05/15/2023</a>	Reminder Card	05/15/2023 10:25 AM	05/15/2023 10:25 AM	05/15/2023 10:25 AM	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. If you enter 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	04/16/2020
COVID-19	06/16/2020
DTP/aP	06/16/2020
HepB	08/03/2020
Hib	03/16/2021
PneumoConjugate	12/16/2021
Influenza-seasnl	08/01/2022

**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 with the Reminder Letters and/or Reminder Cards if you would like.


**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. **Note:** It does not

display on the Mailing Labels.


<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name	TEST 41523 05/15/2023
<a href="#">Mailing Labels</a>	Avery 3256 Mailing Labels.	Report Name	TEST 41523 05/15/2023

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



<a href="#">Mailing Labels</a>	Avery 5160 Mailing Labels.	Report Name	TEST 41523 05/15/2023
<a href="#">Mailing Labels</a>	Avery 3256 Mailing Labels.	Report Name	TEST 41523 05/15/2023

- 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
<a href="#">TEST 41523 05/15/2023</a>	Mailing Labels 5160	05/15/2023 10:26 AM	05/15/2023 10:26 AM	05/15/2023 10:26 AM	Ready

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

**4 Up Card:** This option generates postcards for each patient 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 page 16 for an example of a 4 Up Card.

**To generate 4 Up Cards:**

- 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. **Note:** It does not display on the 4 Up Cards.


<a href="#">4 Up Card</a>	CAIR 4 Up Cards	Report Name	TEST 41523 05/15/2023
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- To view the 4 Up Cards, click the **4 Up Card** hyperlink under the 'Output' column.



<a href="#">4 Up Card</a>	CAIR 4 Up Cards	Report Name	TEST 41523 05/15/2023
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- 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
<a href="#">TEST 41523 05/15/2023</a>	4 Up Card	05/15/2023 10:27 AM	05/15/2023 10:27 AM	05/15/2023 10:27 AM	Ready

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



Below is an example of a 4 Up Card:

CAIR Clinic 1  
1 TEST ST  
LOS ANGELES, CA 90210

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

**Parents of ADRIANA ANDERSON**  
**Padres de 11212 ANYWHERE RD.**  
**RIVERSIDE, CA 92503**

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 clinica o si tiene preguntas, por favor  
llama a su doctor para informarse sobre  
la clinica mas cercana a su casa.*

**Patient Query Listing:** This option displays each patient’s demographic and immunization history in your results. It consists of the patient’s Name, DOB, phone number, CAIR2 ID#, address, MRN, assigned Tracking Schedule, immunizations due (located in the ‘Immunizations’ section), and immunizations received (located in the ‘Immunization Dates’ section) as documented in CAIR2. See page 17 for an example of a Patient Query Listing.

**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.

<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name	TEST 41523 05/15/2023
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2. To view the Patient Query Listing, click the **Patient Query Listing** hyperlink under the ‘Output’ column.

	<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name	TEST 41523 05/15/2023
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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	
	<a href="#">TEST 41523 05/15/2023</a>	Patient List	05/15/2023 11:03 AM	05/15/2023 11:03 AM	05/15/2023 11:03 AM	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:

CHIP CHOCO		DOB:	12/16/2019
HM: (555) 555-5555	CP:	CAIR2 ID:6423925	
825 TEST LIVERMORE CA 94551		MRN:	Schedule:ACIP
Vaccine	Immunizations	Immunization Dates	
COVID-19	06/16/2020		
DTP/aP	06/16/2020	1) 02/06/2020	2) 04/06/2020
HepA	Complete	1) 02/08/2021	2) 09/08/2021
HepB	08/03/2020	1) 02/06/2020	2) 06/08/2020
Hib	03/16/2021		
Influenza-seasn1	08/01/2022	1) 02/05/2021	
MMR	Complete	1) 02/11/2021	2) 11/05/2021
PneumoConjugate	12/16/2021	1) 03/12/2020	
Polio	04/16/2020	1) 02/06/2020	
Varicella	12/16/2023	1) 02/11/2021	

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-19	08/05/2021		
DTP/aP	04/05/2021		
HepA	02/05/2022		
HepB	02/05/2021		
Hib	05/05/2022		
Influenza-seasn1	08/01/2022		
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

This section lets you view the patients in your results with their email addresses and phone number if it is included in CAIR2. This option is helpful if you plan to call and/or email patients for Reminder/Recall. This section also lets you update each patient’s record’s ‘Last Notice’ field. This field is located on each patient record’s ‘Organization Information’ tab in the ‘Update Patient’ screen.

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 <b>eligible for this reminder</b>.</i>	<input type="button" value="Increment Eligible"/>
<i>Return to the previous screen.</i>	<input type="button" value="Cancel"/>

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

- **Review Patients:** 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, phone number, Email, Address, City, and Zip if the

information is in the patient’s record. You can export this list in Excel format to save by clicking the **Export List** button at the top of the screen. You can also click on the hyperlink of the patient’s name to open their CAIR2 record.

Review Patients										
Patients Name (LN, FN, MI)	Birth Date	CAIR ID	MRN	Home	Cell	Email	Address	City	Zip	
<a href="#">Choco, Chip</a>	12/16/2019	6423925		(555) 555-5555			825 TEST	LIVERMORE	94551	
<a href="#">Lamar, Heidi</a>	02/05/2021	6423928					345 HOLLYWOOD BLVD.	BEVERLY HILLS	90210	

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

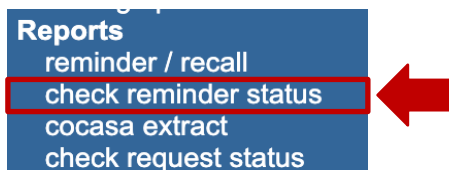
- **Increment Eligible:** This option adds/updates the date in the ‘Last Notice’ field in each patient’s CAIR2 record for all patients included in your results. This field is located on each patient record’s ‘Organization Information’ tab in the ‘Update Patient’ screen. This field indicates the last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

Reminder Request Status						
Name	Started	Report VG	Status	Patient Count	Range From	Range To
<a href="#">24 TO 35 5 26 23</a>	05/26/2023 02:43:32 PM	All	100 %	60		

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">24 TO 35 5 26 23 05/26/2023</a>	4 Up Card	06/06/2023 11:39 AM	06/06/2023 11:39 AM	06/06/2023 11:39 AM	Ready
<a href="#">24 TO 35 5 26 23 05/26/2023</a>	Reminder Card	06/06/2023 11:22 AM	06/06/2023 11:22 AM	06/06/2023 11:22 AM	Ready
<a href="#">24 TO 35 5 26 23 05/26/2023</a>	Reminder Letter	06/06/2023 11:08 AM	06/06/2023 11:08 AM	06/06/2023 11:08 AM	Ready

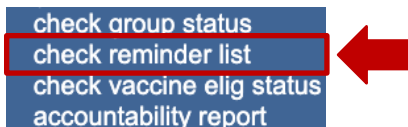
- **Reminder Request Status:** This section shows your in-process/last completed Report. Click on the hyperlink to view the report.
- **Reminder Output Status:** This section shows your in-process/last completed Output option (e.g., letters, mailing labels, postcards, etc.). Click on the hyperlink to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

In the example above, we have one Reminder/Recall report (24 TO 35 5 26 23) and ran three Output Options on that report (e.g., 4 Up Card, 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.



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
<a href="#">TEST 41523</a>	05/15/2023 10:44 AM	2

3. The ‘Review Patients’ screen will display. It contains each patient’s Name, Birth Date, CAIR ID #, MRN, phone number, 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
<a href="#">Choco, Chjp</a>	12/16/2019	6423925		(555) 555-5555			825 TEST	LIVERMORE	94551
<a href="#">Lamar, Heidy</a>	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.

