

Reminder/Recall Made Easy

With the MCIR



*Thank you to the Region 1 MCIR Oakland County Office for
putting this together!*

For assistance with Reminder Recall, please contact your
regional MCIR office. Regional contact information is
available at www.mcir.org/contact_regions.html

The MCIR Home Page

MCIR Reminder & Recall allows you to automatically generate reminder and recall letters to be mailed to people due or overdue for immunizations.

From the MCIR home page you can access the Reminder & Recall section, located on the lower left hand side of the screen.



The links you may see include:

- **Create Reminder** – Link used to create reminder notices based on criteria such as age, patient roster search, and / or zip code
- **Create Recall** – Linked used to create recall notices based on criteria such as a person's age range, vaccine series, and/or start date
- **Retrieve / Confirm Results** – Link to retrieve the results of a Reminder or Recall job run. Information in this area includes the report(s) name, user who ran the report, date, and any system notices
- **Create Reports** – Link to run various reports on people who have missed recalls or the number of vaccines resulting from a recall
- **Access Reports** – Link to access the various reports you can run based off of the Reminder & Recall reports already generated

Creating Reminder Notices

Clicking on the link *Create Reminder* displays the *Reminder Outreach Notices* screen. This screen allows you to generate reminder letters (currently only available for 1 year, 5 year, or 11 years olds). The main elements on this screen include the following:

- *Target Date*- provides the date that the reminder notices report will be ready (must be at least 24 hours in the future).
- *Description*- give your report a descriptive name
- *Type of Reminder Notification* - dictates the age of the child you would like to run the reminders for. Current choices are 1, 5, and 11 years old, as well as a high risk reminder.
- *Generate Notices based on options* - check this box to run a report based solely on patient roster.
- *Generate notices based on geography* - option to search by zip code.
- *Provider Message* - space where providers can enter a custom message that will be printed on all of the reminder letters.
- *Maximum children to be included in the result* - box places a limit on the number of children pulled for the reminders.

The screenshot shows a web application interface titled "Reminder Outreach Notices". At the top right, there are links for "Print new" and "Home Exit". Below the title is a navigation menu with tabs: "Person", "Reports", "YIM", "Rem/Rec", "My Site", "Admin", and "Other". Under the "Reports" tab, there are sub-links: "Create Reminder", "Create Recall", "Retrieve/Confirm Results", "Create Reports", and "Access Reports".

The main form area contains the following fields and options:

- Target Date:** A date input field with the value "02/03/2009" and a calendar icon.
- Description:** A text input field with the value "1 year reminder".
- Preview Report:** A button next to the description field.
- Type of Reminder Notice:** A section with four radio button options:
 - Happy Birthday Reminder Notice (1 year)
 - Kindergarten Reminder Notice (5 year)
 - Adolescent Reminder Notice (11 year)
 - High Risk Reminder Notice
- Generate Notice based on options:** A section with a checkbox labeled "Use only patient roster", which is currently unchecked.
- Generate notices based on geography:** A section with a label "ZIP Code" and an empty text input field.
- Provider Message:** A large text area containing the message: "If you think your child has received the above missing shots please give us a call or if you know that your child has not received the above shots, please call for an appointment. Together we can help children be as healthy as possible." There are scroll bars on the right side of this text area.
- Maximum people to be included in the result:** A text input field with the value "300".

At the bottom of the form are two buttons: "Submit" and "Cancel".

Reminder Notice Example:

Let's say that a provider would like to run a reminder report on 100 of their overdue 5-year old patients. They want this report tomorrow and would like to add the personal message "We look forward to seeing you soon!" We would approach this report in the following manner:

- 1.) Change the *Target Date* to 1/19/2004 (or a date 3 days in the future)
- 2.) Change the *Description* to 5 Year Notice or a similar description that will be easy to recognize
- 3.) Change the type of reminder to *Kindergarten Reminder Notice (5 year)* by clicking on its radio button
- 4.) Place a check in the box *Use only patient roster* so that you receive only children on your roster
- 5.) Type "We look forward to seeing you soon!" in the *Provider message* box
- 6.) Type 100 in the *Maximum children to be included in the result* box

Your screen should now look like the following:

The screenshot shows a web application window titled "Reminder Outreach Notices". In the top right corner, there are links for "Print Help", "Home", and "Exit". Below the title is a navigation menu with tabs for "Person", "Reports", "VIM", "Rem/Rec", "My Site", "Admin", and "Other". Under the "Rem/Rec" tab, there are links for "Create Reminder", "Create Recall", "Retrieve/Confirm Results", "Create Reports", and "Access Reports".

The main form area contains the following fields and options:

- Target Date:** A text box containing "02/03/2009" with a calendar icon to its right.
- Description:** A text box containing "Kindergarten reminder".
- Preview Report:** A link to the right of the description box.
- Type of Reminder Notice:** A section with four radio button options:
 - Happy Birthday Reminder Notice (1 year)
 - Kindergarten Reminder Notice (5 year)
 - Adolescent Reminder Notice (11 year)
 - High Risk Reminder Notice
- Generate Notice based on options:** A section with one checked checkbox:
 - Use only patient roster
- Generate notices based on geography:** A section with one text box:
 - ZIP Code: []
- Provider Message:** A large text area containing the text "We look forward to seeing you soon!".
- Maximum people to be included in the result:** A text box containing "100".

At the bottom of the form are two buttons: "Submit" and "Cancel".

Preview Reminder Letter

You can click on the *Preview Report* link to see what your reports will look like before any child information is added.

February 2, 2009

MCIR ID 1234567890
Date of Birth 02/28/1995
Age of Child 13 Years 11 Months

TEST TESTER
300 CHANDLER PLAZA
LANSING, MI 48900

The time to start school will be here before you know it.

Michigan law requires that all students must be immunized against vaccine-preventable diseases to attend school. The table below lists the recommended due dates for Test's next shots. Please make an appointment to fully protect Test from life threatening childhood diseases.

Immunization Status and Shots Needed		
Vaccine Series	Next Dose Due	Recommended Date
DTP/DTaPDT/Td		
Hib		
Polio		
MMR		
Hepatitis B		
Varicella		

History of Shots Given by Series							
Vaccine Series	Dose#1	Dose#2	Dose#3	Dose#4	Dose#5	Dose#6	Dose#7
DTP/DTaPDT/Td							
Hib							
Polio							
MMR							
Hepatitis B							
Varicella							

Non-Administrations/Titers/Immunity		
Series/Antigen	Date	Reason

We look forward to seeing you soon!

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If you have any questions about this letter call your healthcare provider or Region #888-217-390#

Close out of the preview window. To complete the reminder run, click on the *Submit* button. You will then be prompted with a message box verifying your criteria.

Click *Ok* to submit the report. You will then be redirected to the MCIR home page. Here, you can click on *Retrieve/Confirm Results* in the Reports box or *Access Reports* in the Reminder/Recall box to review the results of your report.

Creating Recall Notices

Clicking on the link *Create Recall* from the MCIR main page displays the *Recall Outreach Notices* screen. This screen allows you to automatically generate recall letters. The main elements on this screen include the following:

- *Target Date*- provides the date that the reminder notices report will be ready (must be at least 24 hours in the future).
- *Description*- give your report a descriptive name
- *Letter Type* – allows you to choose a Comprehensive letter showing the total history and assessment for doses due, or Simple letter explaining those doses that are due, as well as a provider section showing a history of shots.
- *Generate notices based on age of person* section, you would enter a minimum age in the *Person of age at least* box and a maximum age in the *but not yet of age* box. You would then choose months or years from the radio button to the right.
- In the *Generate notices based on options* section, you choose one or any of several options. These options include:
 - *Use only patient roster* – generates notices using only your patient roster
 - *Use only provider ID* – generates notices of people under your provider ID
 - *Exclude Migrant people* – excludes people with migrant status
- *Generate notices based on vaccine series and doses within series* – offers options to generate notices based off of a series and a dose number
- *Generate notices based on geography* - option to search by zip code. LHD Administrators also have the option to run a recall by county.
- *Generate notices based on last administered shot date during the following period* - provide a space for a starting and ending date. This limits the notices generated to those patients who were given immunizations during the date range specified in your clinic.
- *Generate notices based on last administered shot date during the following period* - provides a space for a starting and ending date. This limits the notices generated to those patients who were given immunizations during the date range specified in your clinic.
- *Provider Message* - space where provider can enter a message that will be printed on all of the reminder letters.
- *Maximum people to be included in the result* - box places a limit on the number of people pulled for the reminders.

A screen print of the default *Recall Outreach Notices* screen follows:

The screenshot shows the 'Recall Outreach Notices' web application interface. At the top, there are navigation tabs: 'Person', 'Reports', 'VIM', 'Rem/Rec', 'My Site', 'Admin', and 'Other'. Below these are links: 'Create Reminder', 'Create Recall', 'Retrieve/Confirm Results', 'Create Reports', and 'Access Reports'. The main form area includes the following fields and sections:

- Target Date:** 02/03/2009
- Description:** Jan 2008 recall 19 to 36 mos
- Letter Type:** Comprehensive, Simple
- Generate notices based on age of person:** People of age at least 19 but not yet of age 36, with radio buttons for months (selected) and years.
- Generate notices based on options:** Use only patient roster, Migrants dropdown menu set to 'Exclude'.
- Generate notices based on vaccine series and dose within series:** Vaccine Series dropdown menu, Dose Number input field.
- Generate notices based on geography:** ZIP Code input field.
- Generate notices based on last administered shot date during the following period:** Starting Date and Ending Date input fields.
- Provider Message:** A text area containing the message: "If you think your child has received the above missing shots please give us a call or if you know that your child has not received the above shots, please call for an appointment. Together we can help children be as healthy as possible."
- Maximum people to be included in the result:** 300

Recall Notice Example:

Let's say that a LHD provider would like to run a recall report on 300 of their 19 – 36 month old children who received their fourth DTaP with them. They want this report as soon as possible and would like to add the personal message "Please contact our office as soon as possible!" We would approach this report in the following manner:

- 1.) Leave the *Target Date* at its default since we would like to receive it as soon as possible
- 2.) Change the *Description* to Recall 19-36 DTaP (or similar description)
- 3.) Click the circle next to the Comprehensive or Simple letter type
- 4.) In the *Generate notices based on age of person* boxes, enter 19 in the *People of age at least* and 36 in the *but not yet* box
- 5.) Change the *Vaccine Series* box to read DTP/DTaP/DT/Td and enter the number 4 in the *Dose* box
- 6.) Enter the provider message "Please contact our office as soon as possible!" in the *Provider Message* box, be sure to include your office phone number here.
- 7.) Type 300 in the *Maximum people to be included in the result* box

Your screen should now look like the one following:

The screenshot shows a web application titled "Recall Outreach Notices". At the top right, there are links for "Print Help", "Home", and "Exit". Below the title is a navigation menu with tabs for "Person", "Reports", "VIM", "Rem/Rec", "My Site", "Admin", and "Other". Under the "Reports" tab, there are links for "Create Reminder", "Create Recall", "Retrieve/Confirm Results", "Create Reports", and "Access Reports".

The main form area contains the following fields and options:

- Target Date:** 02/03/2009
- Description:** 4th DTaP recall 19 to 36 mos
- Letter Type:** Comprehensive, Simple
- Generate notices based on age of person:** People of age at least 19 but not yet of age 36, with radio buttons for months (selected) and years.
- Generate notices based on options:** Use only patient roster, Migrants dropdown menu set to "Exclude".
- Generate notices based on vaccine series and dose within series:** Vaccine Series dropdown menu set to "DTP/DTaP/DT/Td/Tdap", Dose Number input field set to 4.
- Generate notices based on geography:** ZIP Code input field.
- Generate notices based on last administered shot date during the following period:** Starting Date and Ending Date input fields.
- Provider Message:** A text area containing the message: "Please contact our office at 248-555-1212 as possible!".
- Maximum people to be included in the result:** 300

Preview Recall Letter

You can click on the *Preview Report* link to see what your report will look like before any information is added. Notice the difference shown below between the Comprehensive and Simple recall letters:

- The Comprehensive letter shows a complete history of doses the child has already received, as well as the assessment table for what doses are due next and when.
- The Simple letter explains the doses that are currently due for the parent's benefit, but also have a separate section at the bottom of the page directed to the provider which also shows the table of historical doses already received.

An example of the Comprehensive and Simple letters follows:

The Comprehensive Letter

February 2, 2009

MCIR ID 1234567890
 Date of Birth 02/28/1995
 Age of Child 13 Years 11 Months

TEST TESTER
 300 CHANDLER PLAZA
 LANSING, MI 48900

Dear Parent or Guardian:

One of the most important ways to prevent disease is through routine immunizations. As of December 2007, booster doses of the Hib vaccine are in short supply. Healthy children may need to wait to get a booster dose. Talk to your doctor on when your child should receive the Hib booster dose. The Michigan Care Improvement Registry (MCIR) indicates that Test may be due for one or more shots.

Immunization Status and Shots Needed			
Vaccine Series	Next Dose Due	Recommended Date	Override Date
DTaP/DTaP/DTaP/DTaP			
Hib			
Polio			
MMR			
Hepatitis B			
Varicella			

History of Shots Given by Series							
Vaccine Series	Dose#1	Dose#2	Dose#3	Dose#4	Dose#5	Dose#6	Dose#7
DTaP/DTaP/DTaP/DTaP							
Hib							
Polio							
MMR							
Hepatitis B							
Varicella							

Non-Administration/ Titers/ Immunity		
Series/Antigen	Date	Reason

Please contact our office at 248-555-1212 as possible!

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 If you have any questions about this letter call your healthcare provider or Region 888-217-3908

The Simple Letter

February 2, 2009

MCIR ID 1234567890
 Date of Birth 02/28/1995
 Age of Child 13 Years 11 Months

TEST TESTER
 300 CHANDLER PLAZA
 LANSING, MI 48900

Dear Parent or Guardian,
 One of the most important ways to prevent disease is through routine immunizations. The Michigan Care Improvement Registry (MCIR) indicates that Test may be due for the following immunizations: . . .

What you need to do:

- Please call the doctor or Health Department and make an immunization appointment.
- Make sure to bring this notice with you to the immunization appointment.
- Have the doctor or health department update MCIR records so all immunizations are recorded.
- Ask for a copy of the updated immunization record for you to keep at home.
- If you think Test has already received these immunizations, please call the doctor or the Health Department, so that they can update the MCIR records.

Please contact our office at 248-555-1212 as possible!

Dear Doctor:

The Michigan Care Improvement Registry records indicated that this child is overdue for the doses listed above. MCIR records as of 02/02/2009 show the following doses have been received:

History of Shots Given by Series							
Vaccine Series	Dose#1	Dose#2	Dose#3	Dose#4	Dose#5	Dose#6	Dose#7
DTaP/DTaP/DTaP/DTaP							
Hib							
Polio							
MMR							
Hepatitis B							
Varicella							

- If your records do not agree with this summary, or new doses are administered, please ensure that the correct information is entered into MCIR.
- Please call the MCIR office at 888-217-3908 if you have any questions about MCIR information.

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 If you have any questions about this letter call your healthcare provider or Region 888-217-3908

Close out of the preview window. To complete the recall run, click on the *Submit* button. You will then be prompted with a message box verifying your criteria.

Click *Ok* to submit the report. You will then be redirected back to the MCIR home page. Here, you can click on *Retrieve/Confirm Results* in the Reports box or *Access Reports* in the Reminder/Recall box to view the results of your report.

Retrieving and Confirming Your Results (Reminder and Recall)

Clicking on *Retrieve/Confirm Results* from the MCIR home page takes you into the *Reminder/Recall Runs* screen. Your screen will look similar to this:

Description	User	Date	
Recall 19 to 36 month DTaP	nyew	06/26/2006	Retrieve report
<i>Status: Waiting to be mailed.</i>			
june 2006 recall	kepsels2000	06/07/2006	Mailed Not Mailed Edit Retrieve report
<i>Status: Waiting to be mailed.</i>			

When looking at the *Reminder/Recall Runs* screen, you will notice the listing of reminder/recall reports that have been run under your provider's ID. Beside each of the report names, you will also see one of several status notices depending on the overall status of your report. These notices include:

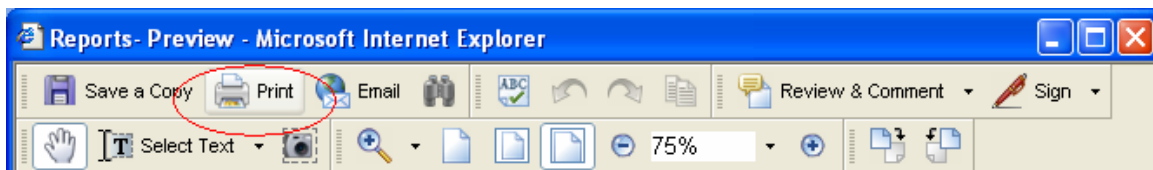
- **Note: You should retrieve the report prior to choosing Mailed or Not Mailed**
- **Refresh:** This will update your screen with the most recent information on your report status if still processing
- **Mailed:** Clicking this link will confirm that the last run of notices were generated and printed successfully. This will ensure that the current batch of notices will not be generated again for 60 days.
- **Not Mailed:** If the last run of notices were not generated as desired (e.g. the options or criteria were not set correctly), click on this link to clear out the database. This gives you a clean environment for generating a new set of notices so that these people can be recalled again in the near future.
- **Edit:** Individual people can be deleted from a run by clicking on this link.
- **Retrieve report:** Link used to retrieve, print and preview the report prior to choosing mailed or not mailed.

Printing Reminder/Recall Notices

From the *Reminder / Recall Runs* screen, locate your report. Click on the *Retrieve* link to access your report. The report will launch in Adobe PDF format.

Status: Report ready.			Report Details
Recall 19-36 DTaP	vestm1	01/15/2004	<u>Retrieve</u>
Status: Pending confirmation. Report is ready.			Notice Details
			Report Details

Once the report has launched, you will see a print button at the top of the screen. To print, simply click on this button.



After clicking on the print button, you will see a *print dialog box*. Here, you can choose a specific printer to print your notices to.

Once you are ready to print, click ok.

Abbreviations and Acronyms

DOB: Date of Birth

EBC: Electronic Birth Certificate

ID: Identification

LHD: Local Health Department

MCIR: Michigan Care Improvement Registry

MDCH: Michigan Department of Community Health

POC: Point of Contact