Reminder/Recall Manual

With the MCIR

July 22, 2015

For assistance with Reminder Recall, please contact your regional MCIR office. Regional contact information is available at www.mcir.org/contact_regions.html
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MCIR Reminder & Recall allows the generation of reminder and recall letters to be mailed to people due or overdue for immunizations.

The Reminder & Recall section is located on the upper section of the MCIR Home Page.

Available options are:

- **Create Reminder** – Link to generate reminder notices based on criteria such as age, patient roster search, and/or zip code.

- **Create Recall** – Link to generate 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. Information in this area includes the report(s) name, user who ran the report, date, and system notices.
Creating Reminder Notices

Clicking on the link Create Reminder displays the Reminder Outreach Notices screen.

The main elements on this screen include the following:

- **Target Date:** The date that the reminder notices report will be ready (Defaults to next calendar date).
- **Description:** Enter a descriptive name for this report to replace the system generated name.
- **Type of Reminder Notice:**
  - Current choices:
    - Happy Birthday Reminder Notice (1 year)
      Age range for this reminder will be children who turn 11.5 months of age within the last 15 days or will turn 11.5 months of age in the next 30 days.
    - Kindergarten Reminder Notice (5 year)
      Age range for this reminder will be children who are between 4 and 5 yrs of age.
    - Adolescent Reminder Notice (11 year)
      Age range for this reminder will be children who are between 11 and 12 yrs of age.
    - High Risk Reminder Notice
      Includes only persons flagged to receive influenza screening notification.
- **Generate Notices based on options:**
  - Provider ID (default)
  - Use only patient roster (optional)
- **Generate Labels (Only)** – Check this box to generate mailing labels instead of letters for the requested report (Avery 5960 labels).
- **Generate notices based on geography** – Entering a zip code limits the search to persons living in that zip code.
- **Provider Message** – The provider can enter a message that will be printed on all of the reminder letters (Limited to 500 characters).
Maximum People to be included in the result – This box places a limit on the number of persons selected for the reminders.
Reminder Notice Example

An office would like to run reminders for 100 of patients entering kindergarten. The office wants this report in 3 (three) days and would like to add the personal message “We look forward to seeing you soon! Please call our office at 517-555-1212 for an appointment.”

We would approach this report in the following manner:

1.) Change the **Target Date** to 7/17/2011 (or a date 3 (three) 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.) In the **Provider message** section type: “We look forward to seeing you soon! Please call our office at 517-555-1212 for an appointment.”

5.) In the box for **Maximum children to be included in the result** type “100”.

The screen should now look like the following image:
Preview Reminder Letter

Click on the Preview Report link (top right corner) for a letter sample as shown below.

July 1, 2011

MCR ID 1234567890
Date of Birth 02/28/1995
Age of Child 16 Years 4 Months

TEST TESTER
300 CHANDLER PLAZA
LANSONG, 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 shots. Please make an appointment to fully protect Test from life threatening childhood diseases.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>Next Dose Due</th>
<th>Recommended Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/Hib</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hepatitis B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**History of Shots Given by Series**

<table>
<thead>
<tr>
<th>Vaccine Series</th>
<th>Dose1</th>
<th>Dose2</th>
<th>Dose3</th>
<th>Dose4</th>
<th>Dose5</th>
<th>Dose6</th>
<th>Dose7</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTaP/Hib</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
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</tr>
<tr>
<td>Polio</td>
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<td></td>
</tr>
<tr>
<td>MMR</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Hepatitis B</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Non-Administrative/Phys Immunity**

<table>
<thead>
<tr>
<th>Series/antigen</th>
<th>Date</th>
<th>Reason</th>
</tr>
</thead>
</table>

If your child has received the above missing vaccines please call your primary care provider to update their record in the registry. If your child has not received the above vaccines, please call your primary care provider or local health department for an appointment.

Together we can help children be as healthy as possible.

Sponsored by Michigan Department of Community Health
If you have any questions about this letter call your health care provider or Lansing #611-317-3010

To close out of the preview window click the red X in the top right corner of the page, see below.
To complete the reminder run, click on the **Submit** button. You will then be prompted with a message box verifying your criteria (see graphic below). To print this message for future reference use Ctrl/P. Click OK to submit the report. You will be redirected to the MCIR home page.

Retrieving your Reminder Report (Refer to pages 14 -15 of this manual)
Click on the Retrieve/Confirm Results from the Reminder/Recall menu to review the results of your report. Your report will contain the letters to each of the persons included in the reminder and a list at the end of the report of those persons that were matched (reported) and those persons non-matched and why a letter was not created for that person. Please contact your MCIR Regional Coordinator for additional information.
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 (Elements marked with an asterisk (*) are required fields):

- **Target Date** – This provides the date that the recall notices report will be ready (Must be at least 24 hours in the future).*

- **Description** – Enter a descriptive name to replace system generated name.*

- **Letter Type** – Choose from a Comprehensive or a Simple Letter (Click on Preview Report to review samples (see pages 10-11)).*

- **Generate notices based on age of person** – 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. (The default is months).*

- **Generate notices based on options** – Choose one or any of several options. These options include:
  - **Provider ID** – Default system setting.
  - **Use only patient roster** – If selected the recall will only include persons from the patient roster.
  - **Migrants** – This option provides a choice to include or exclude people with migrant status.
  - **Generate Labels (Only)** – Check this box to generate mailing labels instead of letters for the requested report (Avery 5960 labels).

- **Generate notices based on Vaccine Series and Doses Number** – This offers options to generate notices based on a series and a dose number. *Please note that when you ask for dose 4 (four) of a vaccine series, the report will only provide those persons missing that exact dose, if they are missing dose 3 (three) another recall must be run for those missing dose 3 (three).*

- **Generate notices based on geography** – This option is used to generate notices for persons in identified 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** – This option provides starting and ending dates for the recall. This limits the notices generated to those patients who were given immunizations in the date range specified.
**Provider Message** – In this section type: “We look forward to seeing you soon! Please call our office at 517-555-1212 for an appointment.”

**Maximum people to be included in the result** – Type “100” in this box. *

**See below for the MCIR Recall Outreach Notices screen:**

![Recall Outreach Notices screenshot]

- **The following vaccines series trigger a Recall:**
  - DTP/DTaP/DT/Td/Tdap
  - Polio
  - MMR
  - HIB
  - Hepatitis A
  - Hepatitis B
  - HPV
  - Varicella
  - Rotavirus
  - Seasonal Influenza
  - Pneumococcal Conjugate
  - Meningococcal Conjugate (overdue at 12)

- **Generally Recall Notices:**
  - ✓ Exclude records marked: “person does not receive medical care in MI”
  - ✓ Are not generated for anyone under the age of 6 months
  - ✓ Triggered 30 days after the overdue date
Preview Recall Letter

Click on the Preview Report link (top right corner) for letter samples. There are two letter format options: Comprehensive and Simple (see samples below).

July 1, 2011

MCIR ID 1234567890
Date of Birth 02/28/1995
Age of Child 16 Years 4 Months

TEST TESTER
300 CHANDLER PLAZA
LANSONG, MI 48900

Dear Parent or Guardian:

One of the most important ways to prevent disease is through routine immunizations. A new pneumococcal conjugate vaccine (PCV13) became available in 2010 and is currently recommended for all children up to 5 years of age and some older children with underlying medical conditions. Even if your child completed the series with PCV7, he/she may need a supplemental dose of PCV13 to assure protection. The Michigan Care Improvement Registry (MCIR) indicates that Test may be due for one or more immunizations.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>Next Due Date</th>
<th>Recommended Date</th>
<th>Overdue Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTP/DTaP/DT/Td</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hib</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polio</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MMR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hepatitis B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>History of Shots Given by Series</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine Series</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>DTP/DTaP/DT/Td</td>
</tr>
<tr>
<td>Hib</td>
</tr>
<tr>
<td>Polio</td>
</tr>
<tr>
<td>MMR</td>
</tr>
<tr>
<td>Hepatitis B</td>
</tr>
<tr>
<td>Varicella</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Administration/Title/Immunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Series/Analog</td>
</tr>
<tr>
<td>----------------</td>
</tr>
</tbody>
</table>

"Love them. Protect them. Immunize them." Please call your child’s doctor or call the Allegan County Health Department at 269-673-5411 for an appointment for immunizations. If you have any questions or if you think our records may not be up-to-date, please let us know. Thank you.

Sponsored by Michigan Department of Community Health
If you have any questions about this letter call your healthcare provider at Region #838-217-180.

Dear Parent or Guardian,

One of the most important ways to prevent disease is through routine immunizations. A new pneumococcal conjugate vaccine (PCV15) became available in 2010 and is currently recommended for all children up to 5 years of age and some older children with underlying medical conditions. Even if your child completed the series with PCV7, he/she may need a supplemental dose of PCV13 to assure protection. The Michigan Care Improvement Registry (MCIR) indicates that Test may be due for the following immunizations:

What you need to do:
- Please call your doctor or Health Department to make an appointment.
- Make sure to bring this notice with you to the appointment.
- Have your 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 your doctor or the Health Department, so that they can update the MCIR records.

"Love them. Protect them. Immunize them." Please call your child’s doctor or call the Allegan County Health Department at 269-673-5411 for an appointment for immunizations. If you have any questions or if you think our records may not be up-to-date, please let us know. Thank you.

Dear Doctor:
The Michigan Care Improvement Registry records indicated that this child is overdue for the doses listed above. MCIR records as of 07/01/2011 show the following doses have been received:

<table>
<thead>
<tr>
<th>Vaccine Series</th>
<th>Dose#</th>
<th>Dose#</th>
<th>Dose#</th>
<th>Dose#</th>
<th>Dose#</th>
<th>Dose#</th>
<th>Dose#</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTP/DTP/DT/ Tet</td>
<td></td>
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<td></td>
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<tr>
<td>Polio</td>
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<tr>
<td>MMR</td>
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<tr>
<td>Hepatitis B</td>
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<td></td>
</tr>
<tr>
<td>VACCINES</td>
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</tr>
</tbody>
</table>

- 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 888-217-390# if you have any questions about MCIR information.

Sponsored by Michigan Department of Community Health
If you have any questions about this letter call your healthcare provider or Region 488-217-390#.

To close out of the preview window click the red X in the top right corner of the page, see below.
Recall Letter Example:

An office would like to recall a maximum of 300 of 19 – 36 month old children who have not received their third DTaP. The office wants this report as soon as possible and would like to add the personal message “Please contact our office as soon as possible at 517-555-1212 for an appointment!” We would approach this report in the following manner:

1.) Leaving the **Target Date** at its default generates the report the next day, the earliest date the report will be available.

2.) Select letter type format

3.) Change the **Description** to Recall Comprehensive 19-36 mo DTaP #3 (or similar description).

4.) In the **Generate notices based on age of person**, enter 19 in the “**People of age at least**” box and 36 in the “**but not yet of age**” box. Leave the “**months**” default radio button marked (see screen print below).

5.) Choose the **Vaccine Series** DTP/DTaP/DT/Td/Tdap from the drop down menu and enter the number “3” in the **Dose Number** box.

6.) Enter in the **Provider Message** section “Please contact Dr. J. Doe’s office as soon as possible at 517-555-1212 for an appointment!” (or a similar message). Be sure to include your office name and phone number in this space.

7.) In the **Maximum people to be included in the result** box enter “300”.

Your screen should now look like the image below:

8.) To complete the recall run, click on the **Submit** button.
To complete the recall run, click on the **Submit** button. You will then be prompted with a message box verifying your criteria (see graphic below). To print this message for future reference use Ctrl/P. Click OK to submit the report. You will be redirected to the MCIR home page.

Retrieving your Recall Report (Refer to pages 14-15 of this manual)
Click on the Retrieve/Confirm Results from the Reminder/Recall menu to review the results of your report. Your report will contain the letters to each of the persons included in the recall and a list at the end of the report of those persons that were matched (reported) and those persons not-matched and why a letter was not created for that person. Please contact your MCIR Regional Coordinator for additional information.
Retrieving and Confirming Your Results (Reminder and Recall)

From the MCIR Home page click the Retrieve/Confirm Results link under the Reminder/Recall menu. When looking at the Reminder/Recall screen, you will notice the listing of reminder/recall reports that have been run under the provider ID. You will see that the Status below the report indicates whether the report is ready to be viewed or it is still processing.

Please note: all Reminders & Recalls process after 5 p.m.

Your screen will look similar to this:

Note: Retrieve and save the report. Once mailed a report can no longer be viewed.

- **Refresh** – This will update your screen with the most recent information on your report and inform you if your report is still processing or has been completed.

Once Retrieve Report has been clicked, the following options are available:

- **Mailed** – Clicking this link will confirm that the last run of notices were generated, printed successfully, and mailed. This will ensure that the current batch of notices/recalls will not be generated again for 60 days on these persons.

- **Not Mailed** – If the last run of notices were not generated as desired (e.g. the options or criteria were not set correctly) or otherwise used, 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. Each person will have the option of “Not Mailed” on the right. Clicking this will remove them from the recall.

<table>
<thead>
<tr>
<th>Birth Date</th>
<th>MCIR Id</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/02/2006</td>
<td>Not Mailed</td>
</tr>
<tr>
<td>01/23/2007</td>
<td>Not Mailed</td>
</tr>
</tbody>
</table>

Retrieve report – Link used to retrieve, print, preview and save the report prior to choosing Mailed or Not Mailed.

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

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. 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
- **MDHHS**: Michigan Department of Health and Human Services
- **POC**: Point of contact