



# Organizational Reports User Guide

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Accountability Report

Ad Hoc Reports

Assessment Reports

Benchmark Reports

Group Patients Report

Reminder Recall

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**For additional support, the following resources are available:**

## **CAIR Help Desk**

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**Local CAIR Representatives (LCRs):** <http://cairweb.org/lcrs/>

**CAIR Website:** [www.cairweb.org](http://www.cairweb.org)

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## I. Accountability Report

The Vaccine Accountability Report provides information about inventory transactions entered into CAIR for selected quarterly time periods. The report is available to designated user roles only. The Vaccine Accountability Report can be generated for a single organization or multiple organizations depending on your role. When the Vaccine Accountability Report is generated for a single organization, both a Summary report and a Detail report will be created. When the Vaccine Accountability Report is generated for multiple organizations, only a Summary report will be created. The accountability report can be generated by Type of Vaccine Funding to show both summary accountability by vaccine group or detailed report showing accountability at the individual lot number sorted by vaccine group. To generate a Vaccine Accountability Report:

1. Click **Accountability Report Request** under the Reports section of the menu panel.

The screenshot shows the 'Vaccine Accountability Report Request' form. It includes the following sections:

- Begin Date** and **End Date** dropdown menus.
- Select Accountability for Organization** section with a radio button for **Select Individual Organization**.
- Organization Name** and **Selected Organizations** list boxes with buttons: **Add >**, **Add All >>**, **< Remove**, and **<< Remove All**.
- Select Type of Vaccine:** section with radio buttons for **VFC**, **317**, **State General Funding**, **Private**, and **All**.
- A text box containing the instruction: "If Individual Organization option is chosen and only one Org is selected, in addition to the Summary Report that shows Accountability by Vaccine Group, a Detail Report will be available that shows accountability by individual lot numbers, sorted by Vaccine Group."
- Report Name:** text input field.
- Generate** and **Cancel** buttons.

2. Select the Begin Date and End Date from the drop-down list.
3. Select Organizations from the Select screen if available. Otherwise will default to primary organization.
4. Select Type of Vaccine.
5. Enter a report name in the **Report Name** field.
6. Click the **Generate Report** button.
7. Your report will be listed on the Accountability Report Status screen. Click the **Refresh** button if the report is not shown.
8. Select the Summary or Detail Report blue hyperlink to view the report.

9. Once the status displays as Ready and the report name becomes a hyperlink, your reports are ready to be viewed. These reports are generated as .xls. Click the report name to open in Excel®
10. To print the letters, click the printer icon on the Excel® toolbar. Click the **OK** button in the Print dialog box.

## II. Ad Hoc Reports

The Ad Hoc reports function in CAIR2 allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations.



**Notes:** Patients whose information is added or changed on the day the report is run will appear in the results at most 30 minutes after the addition/change..

Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status in the organization information section of the patient's record.



### Ad Hoc List Reports

To produce a list of information about selected patients:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.

### Create a Customized List Report

What items would you like to display on the report?

**Patient**

- American Indian or Alaska Native
- Asian
- Birth County
- Birth date
- Black or African-American
- Consent Indicator
- County of Residence
- First name

Add >

< Remove

< Remove All

---

How would you like the report to be sorted?

Item to sort on: (not sorted) Order:  First-to-Last  Last-to-First

A report takes longer to run if you want it to be sorted.

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How would you like to filter the data?

Item to filter on: (no filters)

Comparison:

Value to compare to:

and:

Add/Save Edit

---

**Selected Filters**

Edit

Remove

And/Or

Group

UnGroup

---

Generate    Cancel

3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.

**How would you like to filter the data?**

Item to filter on (no filters) ▼

Comparison ▼

Value to compare to ▼ [input field] [calendar icon]

and ▼ [input field] [calendar icon]

**Selected Filters**

4. Under Item to filter on, select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Filters in CAIR2 are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make; for example, Between. =
6. Under Value to compare to, either choose a value from the drop down list in the left field and/or enter a date in the right field.
7. Under And, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.

How would you like to filter the data?

Item to filter on Birth date

Comparison BETWEEN

Value to compare to 07/21/2006

and 07/21/2011

Add/Save Edit

**Selected Filters**

Birth date BETWEEN 07/21/2006 AND 07/21/2011

Edit

Remove

And/Or

Group

UnGroup

Generate Cancel

9. When finished adding filter items:
  - a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button. Alternatively, can also be switched to AND by following the same process.
  - b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
  - c. Highlight a grouped statement and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
  - d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
  - e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

## Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.

**Create a Customized Count Report**

Would you like to count Patients or Immunizations?

Patients  Immunizations

What factors would you like to use to group the counts on the report?

**Patient Factors**

- American Indian or Alaska Native
- Asian
- Birth County
- Birth date
- Black or African-American
- Consent Indicator
- County of Residence
- Ethnicity

Buttons: Add >, < Remove, < Remove All

You may select a maximum of three factors to group the counts

3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.
4. Under Item to filter on select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.
6. Under Value to compare to, either choose a value from the drop down list in the left field or enter a beginning date in the right field.

How would you like to filter the data?

Item to filter on: (no filters)

Comparison: [dropdown]

Value to compare to: [dropdown] [input field]

and: [dropdown] [input field]

Buttons: Add/Save Edit

7. Under and, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click on **Add/Save**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
  - a. Group them together by highlighting two filter statements and click Group.
  - b. Change AND to OR by highlighting 'AND' and clicking the **And/Or** button. OR can also be switched to AND by following the same process.
  - c. Highlight a grouped statement and click on **Ungroup** to ungroup it.
  - d. Highlight a statement and click on **Remove** to remove it from the selected filters.
  - e. Highlight a statement and click on **Edit** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on **Add/Save**
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this section for more information.

## Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.



Ad Hoc Report Status				
Report Type	Started	Completed	Status	Row Count
COUNT	07/21/2011 10:32 AM		PROCESSING	0

Ad Hoc Report Status				
Report Type	Started	Completed	Status	Row Count
<u>COUNT</u>	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10

Ad Hoc Report Status				
Report Type	Started	Completed	Status	Row Count
<u>COUNT</u>	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10
LIST	07/21/2011 10:33 AM		PROCESSING	0

Ad Hoc Report Status				
Report Type	Started	Completed	Status	Row Count
<u>COUNT</u>	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10
<u>LIST</u>	07/21/2011 10:33 AM	07/21/2011 10:33 AM	DONE	54

2. Click **Refresh** occasionally to check the status of the report. Once the report type converts to underlined report type in blue, click it. The report will display directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.
4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.



**Note:** Ad hoc reports are retained for 72 hours per organization. CAIR2 will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.



### III. Assessment Reports

The Assessment Report feature in CAIR2 provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

1. Click **Assessment Report** under the Reports section of the menu panel.



**Assessment Report**

**Select Patient Population**

All Patients associated with IR Physicians

**Select Age or Birth Date Range**

Less than or equal to 72 months old

Birth date range      Earliest Birth date:        Latest Birth date:  


Age range      Youngest Age:   Days       Oldest Age:   Days

**Options for Benchmarking**

Standard Assessment

Assess Patients with Sufficient Refusal History as Covered

**Select Evaluation Date**



2. Select the patient population to be assessed by clicking one of the following:
3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:
  - a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.
  - b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
  - c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for patients older than 72 months.
  - d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.
  - e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.

**Assessment Report**

**Select Patient Population**

Patients Associated with Selected Site

All Patients associated with IR Physicians

**Select Age or Birth Date Range**

Less than or equal to 72 months old

Birth date range    Earliest Birth date:      Latest Birth date:

Age range    Youngest Age:      Oldest Age:

**Options for Benchmarking**

Standard Assessment

Assess Patients with Sufficient Refusal History as Covered

**Select Evaluation Date**

07/07/2011

5. Click **Generate**.
6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.

**Assessment Report Status**

Assessment of Patients With At Least One Missing Age Specific Benchmark

3 Months

**Assessment Report Output Options**

Job Name - Evaluation Date	Started	Status
(Assessment Report) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %
(Missed Opps Patients) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %

**Records Meeting Criteria**

Age Range - Evaluation Date	Number of Patients in Age Range	Started	Status
< 12 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
12 - 23 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
24 - 35 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
36 - 72 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
All Age Ranges - 07/07/2011	0	07/21/2011 10:41 AM	2 %

7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.
8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. To view generated reports.
9. Click the underlined job name.
10. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.
11. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.
12. A report listing all patients who have missed a vaccination opportunity will have a job name of: (Missed Opps Patients)<Organization Name>-<Date>.

13. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.
14. To generate additional reports you may do the following:
  - a. Select an age from the drop down list provided and click on Generate (to the right of the age drop down list).
  - b. Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.
15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.
16. Click **OK** in the Print Dialog box
17. To return to the Assessment Report Status screen, click the Check Assessment link in the menu bar.



**Note:** Patients with Refusals

If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.



## IV. Benchmark Reports

**Benchmark Report**

**Select Patient Population**  
 Patients Associated with Selected Site ▼  
 All Patients associated with IR Physicians  


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 Patients who did NOT meet the benchmark  
 Patients who DID meet the benchmark  
 All Patients, regardless of whether they met the benchmark or not

**Select Age or Birth Date Range**  
 Less than or equal to 72 months old  
 Birth date range    Earliest Birth date:  [calendar]    Latest Birth date:  [calendar]  
 Age range    Youngest Age:  [Days] ▼    Oldest Age:  [Days] ▼

**Options for Benchmarking**  
 Standard Assessment  
 Assess Patients with Sufficient Refusal History as Covered

**Select Evaluation Date**  
 [calendar]

**Select Benchmark**  

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

Or select one of these aggregate outcomes:

@ 19 months		431	43133	431331
@ 36 months		431	43133	431331

Benchmark reports allow CAIR2 users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in CAIR2 , exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:
  - a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop down list at the right.
  - b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.
3. Click one of the following to specify the patients to return on the report:
  - a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.

- b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.
  - c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.
4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.
    - a. Less than or equal to 72 months old: all patients who are 72 months old or younger.
    - b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
    - c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.
  5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.



**Note:** Refusals of Vaccine

In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 8 of this manual for more information.



6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.
10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

- Click the **Generate** button.
- The Benchmark Report Status screen will display.
- Click on Refresh occasionally to check on the progress of the report.
- When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, CAIR2 will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
  - Click the **Export as Text** link to display the report in text file format.
  - Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
  - Click the **Display as a PDF** link to display the report in Adobe® Reader.

Patients Associated with Provider: IR Physicians - Report generated on 08/22/2016Page

CAIR, the California Immunization Registry  
 Report generated on 08/22/2016  
 Report generated by Regular Reed  
 IR Physicians - IRPH - TEST12

**Filter conditions used for this report:**  
 Patients Associated with Provider: IR Physicians  
 Patients who did NOT meet the selected benchmark(s)  
 Just consider immunizations as meeting the benchmark  
 Age less than or equal to 72 months  
 Evaluation date: 08/22/2016  
 Benchmark age @ 21 months

Selected benchmarks: DTaP (4), HepB (3), Hib (3), MMR (1), Polio (3), Pneumo (3), Varicella (1)  
 Total patients: 2045; 0 patients (0%) met all benchmark criteria, 2045 patients did not  
 Number of rows in this report: 2045

No	First Name	Last Name	Birth Date	Primary Phone Number	Cell Phone Number	Street	City	State	Zipcode	DTaP (4)	HepB (3)	Hib (3)	MMR (1)	Polio (3)	Pneumo (3)	Varicella (1)
1	GAIGE	ADAIR	08/08/2012	(734) 497-6635		25 INDIANA CIR	HAMBURG	MI	48189	N	N	N	Y	N	N	Y
2	JORDAN	ADAIR	08/15/2012	(269) 486-4182		201 KNOX ST	AUGUSTA	MI	49012	N	N	N	Y	N	N	N
3	MORVEN	ADAIR	08/01/2011	(810) 952-3201		3 KARTWOLD CIR	MARINE CITY	MI	48039	N	N	N	N	N	N	N
4	DEACON	ADAMS	08/03/2012	(818) 333-8915		149 WILLIAMS FL	RADIO BIBLE CLASS	MI	48555	N	N	N	Y	N	N	Y
4	LEVINIA	ADAMS	08/06/2012	(734) 934-2890		276 N ARSEV AVE		MI	48405	N	N	N	Y	N	N	Y

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

## V. Group Patients Report

The purpose of Group patients is to run the Immunization History Report for a group of selected patients. To run one of these reports, complete the following steps:

1. Click **Group Patients** under the Reports section of the menu panel.

The screenshot shows a web form titled "Immunization History Report". It contains three filter criteria, each with a checkbox and a date range input field with a calendar icon. The first criterion is checked and reads "All patients within date of birth range". The second is unchecked and reads "All patients with immunization(s) administered by site" with a dropdown menu showing "IR Physicians". The third is unchecked and reads "All patients who received immunization(s) within dates". Below these is a section titled "Specify how to sort data" with a "Sort By:" label and a dropdown menu set to "Last Name, then by Age". At the bottom are "Generate" and "Reset" buttons.

2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.



**Note:** You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.



5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) The system starts to generate the report and takes you to the Group Patient Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.



Group Patient Reports Request Status				Refresh
Report Name	Started	Completed	Status	Patients
<a href="#">Immunization History Report</a>	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3
<a href="#">Immunization History Report</a>	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5

- The system displays the report output in PDF.

## VI. Reminder/Recall

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

Reminder/Recall allows users to create listings, letters, and mailing labels for patients that are due or overdue for immunizations. Reminder and recall notices can be generated for each patient, provided that the following conditions are met:

- The status is “Active” in the Patient Information section for your organization.
- The “Allow Reminder and Recall Contact?” indicator in the Patient Information section is “Yes”.
- The patient has complete address information is listed in the Address Information section.

### Reminder/Recall Requests

To generate a reminder/recall request:

- Click **Reminder/Recall** underneath “Reports” from the menu panel.

On the new page, you can select the following criteria:

- Create New List: Allows you to create a name for the new list or use previous Reminder/Recall Request Criteria.

**Create New List ...**

Enter new Reminder Recall Request Criteria  List Name

Use a previous Reminder Recall Request Criteria

- Tracking Schedule: CAIR2 only uses the tracking schedule recommended by the Advisory Committee on Immunization Practices (ACIP). You can choose to use a tracking schedule associated with each patient or to use a tracking schedule selected for all patients.

**Indicate the Tracking Schedule ...**

Use Tracking Schedule Associated with Each Patient

Use Tracking Schedule Selected for All Patients ▼

4. Vaccine Groups: Allows you to indicate which vaccine groups to report on.

**Select the Vaccine Group To Report on ...**

Use All Vaccine Groups

Use Vaccine Groups Selected

Vaccines Due Now

Vaccines Past Due

Both

Adeno  
 Anthrax

▲  
▼

Add

Remove

5. Subpotent Recall: Selecting the Use Subpotent Vaccinations check box includes partially administered vaccinations.

**Select Subpotent Recall ...**

Use Subpotent Vaccinations

6. School/Primary Care Providers: This is not currently available.
7. Additional Demographic Criteria: Entering a city and/or ZIP code narrows your search to only the patients associated with the entered geographical area. Clicking only a county will allow you to search for all patients residing in the selected county.
8. Date Criteria:
- a. Target Date Range: When a target date range is specified, the report will include those patients that are due/overdue for immunizations within the date range. To choose a target date range, enter a **From** and **To** date in MM/DD/YYYY format.
  - b. Birth Date Range: when a birth date range is specified, the report will return those patients who have a birth date that falls within the range entered. To choose a birth date range, enter the beginning date in the **From** and **To** date in MM/DD/YYYY format.

**Enter the Date Criteria ...**

Target Date Range	From	<input type="text"/>	▲ ▼	To	<input type="text"/>	▲ ▼
Birth Date Range	From	<input type="text"/>	▲ ▼	To	<input type="text"/>	▲ ▼

9. Vaccine Groups to Display: “Use All Vaccine Groups” will be the default. However, users have the options to select specific Vaccine Groups to be displayed in the report. Click the “Use Vaccine Group Selected” radio button to select specific Vaccine Groups to display in your report.
10. Sorting Criteria: This selection allows you to specify how the data will be sorted. If a sort order is not specified, CAIR2 will sort the report results first by the patient’s last name in ascending order

(A to Z), then by the first name in ascending order.

**Specify How to Sort the Report Data ...**

Sort 1 <sup>st</sup> By	Last Name	Ascending	Sort 3 <sup>rd</sup> By		
Sort 2 <sup>nd</sup> By	First Name	Ascending	Sort 4 <sup>th</sup> By		

11. Generating the Report: Click the **Generate** button.

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Request and Output status page indicates the percentage of completion.

Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in CAIR2 while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of CAIR2 and return to the status screen by clicking on the Check Reminder Status link after logging in again.

## Summary Screen

When the report is complete, click the hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Reminder Request Criteria Name:		
Step	Criteria Evaluated at this Step	Patients
1	Patients <b>associated</b> with <i>IR Physicians</i> .	936
2	Patients <b>immunized</b> by <i>IR Physicians</i> .	929
3	Patients that are <b>active</b> within <i>IR Physicians</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>● Patients <b>born between 01/01/2007 and 03/16/2011</b>;</li> <li>● <b>County</b> is not specified;</li> <li>● <b>School</b> is not specified;</li> <li>● <b>Provider</b> is not specified;</li> </ul>	321
4	Patients that have a <b>Valid Address</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>● <b>City</b> is not specified</li> <li>● <b>Zip Code</b> is not specified.</li> </ul>	306
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> <li>● Patients that are <b>Due Now or Past Due</b> for one or more vaccinations <b>as of 03/16/2011</b>;</li> <li>● Use all <b>vaccine groups</b>;</li> <li>● Use <b>tracking schedule</b> associated with each patient..</li> </ul>	306
<b>Total Number of Patients Eligible for Reminder</b>		<b>306</b>

**Additional information:**

- If either the From date or To date is unspecified from the Target date Range, the system will use the date that you ran the report for that field. If they are both left blank, the system will find those patients who are due or overdue as of the date that you run the report.
- If the From date is unspecified for the Birth Date Range, the report will include the oldest patients in the system.
- If the To date is unspecified from the Birth Date Range, the system will use the date that you run the report for that field.

## Managing Custom Letters

Managing Custom Letters—use this option to create up to three custom letter templates for your reminder/recall report.

To manage custom letters:

1. Click **Manage Custom letter** underneath “Reports” from the menu panel.
2. Click **New Custom Letter**.
3. Top Margin: Click the number of blank lines you would like at the top of the letter from the drop-down menu. The margin is used to leave room for your office letterhead to display on each letter generated from this report.
4. Include Patient Address: Check the box to include the patient's address at the top of the letter.
5. Salutation: Enter a greeting and then click the name from the drop-down menu.
6. Paragraph 1: Enter desired text in the field titled “First Part”. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a space. Next, choose the name you would like to appear. In the field titled “Second Part”, continue to enter the rest of the text.
7. Immunization History: Check the box to include the patient's immunization history in the letter.
8. Paragraph 2: Enter the desired text, if any.
9. Immunization Recommendations: Check this box to include the immunizations recommended for the patient in the letter.

<b>Top Margin</b>
Number of blank lines at the top of the letter: <input type="text" value="10"/>
<b>Patient Address</b>
<input checked="" type="checkbox"/> Include patient address
<b>Salutation</b>
Enter a salutation for the letter: <input type="text" value="Dear"/>
Include a name at the end of the salutation: <input type="text" value="Responsible person"/>
<b>Paragraph 1</b>
First Part
<input type="text" value="According to our records, your child"/>
Include a name between the first and second parts of this paragraph: <input type="text" value="Patient name"/>
Second Part
<input type="text" value=", will be entering kindergarten this September. In order for you to successfully register your child for school they are required to receive specific immunizations. We have included your child's immunization history for your review."/>
<b>Immunization History</b>
<input checked="" type="checkbox"/> Include immunization history
<b>Paragraph 2</b>
<input type="text" value="Our office has carefully reviewed your child's Immunization History and recommend they receive the following vaccines before school begins this Fall."/>

10. Paragraph 3: Enter the desired text, if any.
11. Closing: enter a closing word or statement in this field. If you wish to included your provider organization's name and/or telephone number after the closing, click the corresponding check box(es).
12. Name and Save the Custom Letter: Enter a name for the letter in the field provided.
13. Click the **Save** button.

## Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To generate a custom letter from the Reminder Request Process Summary screen:

1. Click the link with the name of the custom letter. The letter will begin generating immediately.
2. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
3. Once the report name becomes a hyperlink, the letter is ready. Click the report name to view or print the letters in Adobe Acrobat Reader®



**Note:** Generation of reminder and recall notices

Reminder and recall notices can be generated for each patient, if the following conditions are met:

- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.



### **Reminder Request Status screen**

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.



**Note:** Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in CAIR2 while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of CAIR2 and return to the status screen by clicking on the Check Reminder Status link after logging in again.



### **Summary Screen**

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Reminder Request Criteria Name:		
Step	Criteria Evaluated at this Step	Patients
1	Patients <b>associated</b> with <i>IR Physicians</i> .	39
2	Patients <b>immunized</b> by <i>IR Physicians</i> .	30
3	Patients that are <b>active</b> within <i>IR Physicians</i> and <b>allow Reminder &amp; Recall Contact</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>● Patients <b>born between 01/01/2007 and 01/01/2010</b>;</li> <li>● <b>County</b> is not specified;</li> <li>● <b>School</b> is not specified;</li> <li>● <b>Provider</b> is not specified;</li> </ul>	17
4	Patients that have a <b>Valid Address</b> . Additional criteria includes: <ul style="list-style-type: none"> <li>● <b>City</b> is not specified</li> <li>● <b>Zip Code</b> is not specified.</li> </ul>	10
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none"> <li>● Patients that are <b>Due Now</b> for one or more vaccinations <b>on or before</b> ;</li> <li>● Use all <b>vaccine groups</b>;</li> <li>● Use <b>tracking schedule</b> associated with each patient..</li> </ul>	5
<b>Total Number of Patients Eligible for Reminder</b>		<b>5</b>

### Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

### Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Output	Description	Additional Input
<a href="#">Reminder Letter</a>	Standard Reminder Letter.	Report Name <input type="text"/> Free Text <input type="text"/> Phone # <input type="text"/>

- a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
  - b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
  - c. The telephone number is presented in the closing for each of the letters generated in your report.
2. Click **Reminder Letter**, which is a hyperlink.

3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.
  - a. You have the option of moving to other portions of CAIR2 or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
  - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

## Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. The card allows room at the top for a greeting. The body of the card includes the patient's recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Cards, follow these steps:

- Under the Additional Input column or the Letter section of the table, you have the option of entering the following information:
  - If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
  - You may include a maximum of 400 characters in the Free Text field. Any information entered in this text box will be presented as the closing for each of the cards generated in your report.
  - The telephone number is presented in the closing for each of the cards generated in your report.

Dear Parent of Violet Georgia Dallman,

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

Immunizations Due
DTaP, NOS
HepA, NOS
HepB, NOS
Hib, NOS
MMR
PCV13
Polio, NOS
Varicella



## Mailing Labels

The labels output option produces on Avery Mailing Labels #5160 and #3256. To generate mailing labels, follow these steps:

<a href="#">Mailing Labels</a>	Avery Mailing Labels.	Report Name <input type="text"/>
--------------------------------	-----------------------	----------------------------------

1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of CAIR2 or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
  - a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
  - b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

## 4 Up Card

The 4 Up Card is an additional postcard option within CAIR 2. '4-up postcards are available by contacting your local Immunization Coordinator or Local CAIR Representative (LCR). These postcards allow you to print 4 individual postcards per each 8.5x11 postcard sheet. Once printed, just tear along the perforation, stamp and mail to your patients. To generate the 4 Up Card:

1. Click **CAIR 4 Up Cards**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of CAIR2 or using other functions of your computer while you are waiting for your postcards to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
  - a. Once the report name becomes a hyperlink, your postcards are ready. Click the report name to view or print the postcards in Adobe Reader®.
  - b. To print the postcards, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.

## Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the **Patient Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
  - a. You have the option of moving to other portions of CAIR2 or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
  - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

## Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

Reminder Request Status						
Started	Completed	Status	Patients	Target From	Target To	
<a href="#">08/01/2011 05:58 AM</a>	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011	
<a href="#">07/29/2011 07:11 AM</a>	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011	
<a href="#">07/29/2011 07:06 AM</a>	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011	
<a href="#">07/29/2011 07:06 AM</a>	07/29/2011 07:07 AM	100 %	2			

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
<a href="#">Client XML</a>	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
<a href="#">Reminder Letter</a>	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

## Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

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

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient's demographic record.
2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient's demographic record under the organization information section.
3. Increment last notice date for all patients immunized by your organization.
4. Click **Cancel** to return to the Reminder Request Status screen.

## Creating Custom Letters

In addition to the standard letter, CAIR2 allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

1. Click **Manage Custom Letter** under Reports on the menu panel.

- **Manage custom letters**

<a href="#">Long Test Nov 18 2010</a>	<input type="button" value="Delete"/>
<a href="#">Long Test Oct 29 2010</a>	<input type="button" value="Delete"/>
<a href="#">New Custom Letter</a>	

2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
  - a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
  - b. Include Patient Address:
    - i. Check the box to include the patient's address at the top of the letter.
  - c. To include a name with the patient address, choose from the drop down list one of the following:

- i. (no name) - default
    - i. Patient name
    - ii. To the parent/guardian of patient name
  - b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.
    - i. If name is chosen, the name of the patient will show up after the salutation.
    - ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>
- 4. Paragraph 1:
  - a. In the field marked First Part, enter desired text.
  - b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.
  - c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name or no name).
  - d. In the field marked Second Part, continue to enter the rest of the text.
  - e. Immunization History: Check the box to include the patient's immunization history in the

The screenshot shows a software interface for creating a custom letter. It is divided into several sections:

- Immunization Recommendations:** A section with a checked box labeled "Include immunization recommendations".
- Paragraph 3:** A text area containing the text: "These letters will allow you to schedule your next visit at any point in time this summer and avoid a last minute appointment in late August. Please contact our office at your earliest convenience to make an appointment. We look forward to hearing from you." There are scroll bars on the right side of this text area.
- Closing:** A section with a text field containing "Sincerely,". Below the field are two checked boxes: "Include provider organization name in the closing" and "Include provider organization phone number in the closing".
- Name and save the custom letter:** A section with a text field containing "kindergarten".

At the bottom of the interface are two buttons: "Save" and "Cancel".

- letter.
    - f. The maximum amount of allowed characters in this field is 4,000.
  - 5. Paragraph 2: You may enter more text in this field.
    - a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.
    - b. The maximum amount of allowed characters in this field is 4,000.
  - 6. Paragraph 3: You may enter text in this field.
    - a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.
    - b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
    - c. The maximum amount of allowed characters in this field is 4,000.

**Top Margin**  
 Number of blank lines at the top of the letter: 3 ▼

**Patient Address**  
 Include patient address

**Salutation**  
 Enter a salutation for the letter:   
 Include a name at the end of the salutation: (no name) ▼

**Paragraph 1**  
 First Part  
  
 Include a name between the first and second parts of this paragraph: (no name) ▼  
 Second Part

**Immunization History**  
 Include immunization history

**Paragraph 2**

**Immunization Recommendations**  
 Include immunization recommendations

**Paragraph 3**

**Closing**  
 Enter a closing for the letter:   
 Include provider organization name in the closing  
 Include provider organization phone number in the closing

**Name and save the custom letter**  
 Name the custom letter



**Note:** Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.



## Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

<a href="#">Patient Query Listing</a>	A list of patients based on the report criteria.	Report Name <input type="text"/>
<a href="#">Extract Client Data</a>	Extract client data in XML format.	Report Name <input type="text"/>
<a href="#">Long Test Nov 18 2010</a>	Custom Letter.	Report Name <input type="text"/>
<a href="#">Long Test Oct 29 2010</a>	Custom Letter.	Report Name <input type="text"/>

3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
  - a. You have the option of moving to other portions of CAIR2 or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
  - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process Summary screen.