A Guideline for Conducting Immunization Rate Assessments using the NCIR

To assess the immunization status of your organization's 'active' two year old clients:

- To Generate the Assessment Report, Click "assessment" (located under the "reports" menu option):
  1. Select the client population (if your organization has only one site, use the default option),
  2. Select Evaluation date; use the **current month and year**; e.g., for January 2009, use "01" for the month and "2009" for the year,
  3. Click "generate" **only ONCE**! *(Note: do not leave this screen until it switches over to the status screen. This may take a few minutes. When the report has switched over to the other screen and is 'in queue', you may move to other areas within the NCIR).*

- To Check the status of your Assessment report:
  1. Click "check assessment" (located under the "reports" menu option),
  2. Once the link is underlined in blue and complete, Click the link to display the report,
  3. Print this report for later comparison, (see the document "Understanding the NCIR Assessment Summary Report" for help in understanding the report),
  4. Click "file" and then "save as" to save the report to your computer, so it can be used for future reporting,
  5. After you have printed and saved the report, Click the "back" button to return to the NCIR.

- To Generate a corresponding Request Reminder – "**Client Query Listing**" for clients whose data is contained within the Assessment Summary report, Click "request reminder" (located under the "reports" menu option):
  1. Use **Vaccine Groups Selected**, **DTaP, HepB, Hib, MMR, Polio, Varicella** *(Note: Varicella may create differences in these results when compared to the assessment report results - see the footnotes listed at the bottom of page 1 of the Assessment report for the vaccination series that is assessed per each age benchmark.)*
  2. Use the **Birth Date Range** listed in the results from the Assessment report, e.g., for the 24-35 month age group, throughout the month, (e.g., January 2009) use the birth date range 01/02/2006 to 01/01/2007. *Clients within that birth date range are two year olds based on the selected date.*
  3. Click the "generate" button- wait for the screen to switch over to the status screen.
  4. Click "check reminder status" (located under the "reports" menu option) to check the status of the request. Click refresh one or two times, and then wait until the link is ready. Depending on the size of the organization this may take a few minutes, *once the report is 'in queue' you may move to other areas within the NCIR*.
  5. Once the link is available (underlined in blue), click to review the **Reminder Request Process Summary**.
  6. Print and/or save this report for future reference and to verify the correct vaccine group(s) and the birth date range. **Please NOTE: any child who does not have a "responsible person" documented in the client information screen will be considered "omitted" from reminder/recall. If you generate the report and see** "omitted clients" **as a link, those clients need additional responsible person address information (or a responsible person who will receive "notices") in order for a reminder letter and/or label to be created.**
  7. Under the report Output Options, click the "Client Query Listing" link to generate a list of clients who are currently recommended or overdue for one or more immunizations, (based on the selected vaccine groups).
  8. Save and/or Print the client query listing for further review.
  9. Review the client query listing (and compare to the client's medical record) for:

     - Each Client's immunization status, verify that all available immunization history has been added
     - Note any invalid doses and check dose dates for accuracy
     - Verify address information is correct and current for tracking and mailing reminder letters/cards
     - Look for missed opportunities for simultaneous immunization