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For assistance navigating VIIS contact your VIIS Consultant or:

VIIS Help Desk
804-864-7028
viis_helpdesk@vdh.virginia.gov
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**Introduction**

The Virginia Immunization Information System (VIIS) is Virginia’s statewide immunization registry that contains immunization data of persons of all ages. VIIS is a free, web-based system for data that documents all immunizations a person has received into one definitive, accurate record. The Virginia Division of Immunization staff can run assessment reports to help identify coverage rates of a particular clinic or provider. In order for these activities to produce accurate results, client status should be maintained and up-to-date. Clients can either have a status of Active, Inactive or Permanently Inactive - deceased. This document helps determine when and how clients should be active or inactive. It also covers how to add demographic information under the Responsible Person(s) which will be essential in generating information for some current reports and future enhanced reports.

All clients in the Immunization registry are classified as “Inactive” by default for a VIIS organization. Any client that could potentially need services from your clinic should be identified as “Active”. Assigning an “Active” status to a client by a provider may be done in any of the following ways:

- A provider manually sets status to “Active” via user interface (UI) or electronic data exchange (DE).
- A provider conducts a vaccination event for the client and enters the administered vaccine into the UI or DE.
- A provider creates a new client’s record in VIIS (this includes adding historical immunization information for a client).

Inactivating clients in VIIS will give you a more realistic assessment of your client’s immunization rates. A client should be “Inactive” with a particular organization when:

- They have “Moved or Gone Elsewhere” (MOGE). This includes clients for whom you have documented in your charts/Electronic Health Record (EHR) that you are certain they are going elsewhere for care and will not be returning for care at your health center.
- They are considered “Lost to follow-up”. Clients for whom you have documented in your charts/EHR that you have made multiple unsuccessful attempts and cannot locate them.

When the client is deceased, he or she will be permanently inactivated from all organizations in VIIS. This should be done when a provider receives information that a client has died. A provider manually sets status to “Permanently Inactive- Deceased”.

**PLEASE NOTE:** A provider may decide that a client who has not been seen in an extended period of time is no longer a client and should be changed to inactive. It is important to note that “an extended period of time” will vary by age group. In particular, adolescents and adults do not routinely visit providers as frequently as children. Reminder recalls and coverage assessments help identify those clients who have “slipped through the cracks” and are overdue for immunizations. **Therefore, it is important to err on the side of caution when choosing to inactivate clients who have not had a visit for an extended period of time.**
How to Activate/ Inactivate a Client in VIIS:

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the “Client Search” screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results
3. Click on the Find button.
   a. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
4. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
5. Click on the Client Information tab right under the Personal Information section houses more demographic information.
   a. Complete chart number, ethnicity and race as indicated by the client
   b. The client’s status should be set to “Active”
   c. The client’s status should be set to “Inactive” if they have moved or have not been seen at your practice for a set amount of time
   d. Allow sharing of immunization data should be set to either “Unknown” or “Yes”
   e. Allow reminder/recall contact notices should be set to “Yes”
6. Click the Save button on the upper right section of this page
How to Add a Responsible Person(s)

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the "Client Search" screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
5. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
6. Click on the Responsible Person(s) tab.
7. In this section, fill in the following:
   a. Last and First names for the Responsible Person
   b. Relationship to Client (Select “Self” if entering the client’s information)
   c. Phone number
   d. Email Address
   e. Full Mailing Address
   f. Check the Notices box
   g. Check the Primary box for relationships identified as “Self”, “Guardian”, “Mother” or “Father”
8. Click on the Next button to add a new entry and repeat Step 7 above.
9. Click the Save button on the upper right section of this page.
How to Update a Responsible Person(s)

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the “Client Search” screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
5. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
6. Click on the Responsible Person(s) tab.
7. In this section, verify the following information is accurate and up to date for each responsible person(s) entry:
   a. Last and First names for the Responsible Person
   b. Relationship to Client (Select “Self” if this segment contains the client’s information)
   c. Phone number
   d. Email Address
   e. Full Mailing Address
   f. Check the Notices box if it is unchecked
   g. Check the Primary box for relationships identified as “Self”, “Guardian”, “Mother” or “Father” if it is unchecked
8. Click the Save button on the upper right section of this page.

Please Note: There can only be 4 responsible person(s) saved in this section. Please update existing entries and delete invalid and/or duplicate contacts.
How to Add a Client Comment(s)

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the “Client Search” screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
5. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
6. Click on the Client Comment(s) tab.
7. At the bottom of the client comments tab, click on the 'Client Comment' pick list to display the available comments.
8. Select a comment from the list.
9. You should enter an 'Applies-To Date'. This would be a date that applies to the comment. Do not guess on the date the comment occurred. Although this is not a required field it is highly recommended.
10. To add additional comments click on the Next button to add the current selection and select a new comment.
11. You must save the record to save any added comments. Click on the Save button in the upper right hand corner to save the record with the new comments.

Please Note: Any comment selected will appear under “The Client Comment Listing” section as well as on the clients’ immunization record. Most comments consist of Allergies, Immunity, History of Disease, Medical Exemptions, Counter-Indications, Refusal of Vaccine and/or Vaccine Unavailability
How to Edit a Client Comment(s)

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the “Client Search” screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
5. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
6. Click on the Client Comment(s) tab.
7. The comment you would like to update is listed in the Client Comment Listing section.
8. Click on the ‘Select’ circle next to the comment you would like to update to select it.
9. The information for the comment will appear at the bottom of the screen.
10. Now you can either select a different comment from the 'Client Comment' pick list or change the 'Applies-To Date' if there is one.
11. To add additional comments click on the Next button to add the current selection and select a new comment.
12. You must save the record to save any updated or added comments. Click on the Save button in the upper right hand corner to save the record with the updated/new comments.
How to Print Client Report(s)

1. From the “VIIS Home” page, click on Manage Client in the left menu bar.
2. On the “Client Search” screen, you can search by Name. Enter the first 3 letters of the last name and the first 3 letters of the first name for best results.
3. Click on the Find button.
4. If more than one name comes up, click on the relevant one by matching Date of Birth and other possible information including Middle Name, Mother’s Name or Phone Number.
5. You will arrive at the “Personal Information” screen, where you can view the client’s demographic information.
6. Update the Client Information Tab, Responsible Person(S) Tab and the Client Comment(s) tab
7. Click on the Reports tab.
8. The reports you can select are found under the Reports Available for this Client section
9. Select Confidential Immunization to avoid sharing records with too much patient health information
10. A PDF document will pop up. Click on the Print icon that appears when you hover at the bottom of the PDF page
11. Click the Back button at the top left side of the page to exit

![Client Information and Reports Available for this Client](image-url)
**How to a Run a Reminder/Recall Report**

The Reminder Request exists so that a user is able to generate mailing reports, address labels, or a client listing for clients in their organization. Read further to find out how to use criteria to improve the results of your report. The filters Reminder/Recall Report can be selected if desired however clients will only be included if the information is populated on their record.

For a client to be included in the report they must:

1. Be active with your organization and allow contact reminder notices
2. Have a full mailing address for a responsible person with notices checked.

**Note:** Clients must also have been immunized by your organization to be included in this report.

1. From the “VIIS Home” page, click on Reports in the left menu bar.
2. Select the “Reminder Recall” hyperlink
3. You will land on the Reminder/Recall Request screen.
   a. This page is used to select and submit the client, immunization, date, and sort order criteria used to determine which clients must be contacted resulting from being overdue for immunizations.

**Selecting Tracking Schedule**

4. Choosing a tracking schedule will determine the set of recommended immunizations and corresponding dates that will be compared to each client’s immunization history. If the client is overdue for any vaccinations according to the selected tracking schedule, then he or she will be included in the reminder report outcome, given all other report criteria is met.
   a. Within the 'Indicate the Tracking Schedule ...' section, select the 'Use Tracking Schedule Associated with Each Client' option, or select the 'Use Tracking Schedule Selected for All Clients' option.
   b. If the 'Use Tracking Schedule Selected for All Clients' option is selected, then choose a tracking schedule to base the entire reminder report on by selecting a tracking schedule from the pick list.

**Note:** VIIS only contains the ACIP Tracking schedule, no selection is needed.

**Selecting Vaccine Groups**

5. Choosing vaccine groups allows you to single out any given vaccines within the selected tracking schedule. If the client is overdue for any of the selected vaccine groups according to the selected tracking schedule, then he or she will be included in the reminder report outcome, given all other report criteria is met.
   a. Within the 'Select the Vaccine Group(s) ...' section, select the 'Use All Vaccine Groups' option, or select the 'Use Vaccine Groups Selected' option.
   b. If the 'Use Vaccine Groups Selected' option is selected, choose the vaccine groups to include. Scroll through the vaccine group list and either double-click on the desired vaccine group name, or click on the vaccine group name and then click the Add> button. All selected vaccine groups will appear in the right list box in green font.

**Note:** To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click on the selected vaccine group name from the right list box and then click the <Remove button.
Selecting a School or Primary Care Provider (Optional Field)

6. Choosing a school or primary care provider allows you to look only at those clients who have been assigned to a particular school or physician. If the client has been assigned to the selected school or to the selected physician, then he or she will be included in the reminder report outcome, given all other report criteria is met.
   a. To choose a school, within the 'Select the School & Primary Care Provider ...' section, select a school name from the 'School' pick list.
   b. To choose a primary care provider, within the 'Select the School & Primary Care Provider ...' section, select a physician name from the 'Provider (PCP)' pick list.

Entering/Selecting Additional Demographic Information

7. Entering and or selecting additional demographic information allows you to look at only those clients who match specific demographic information within their records. If the client has a specific city, zip code, or county associated with their record then he or she will be included in the reminder report outcome, given all other report criteria is met.
   a. To enter in a specific city, within the 'Enter Additional Demographic Information ...' section, type in the name of the city in the text box labeled 'City'.
   b. To enter in a specific zip code, within the 'Enter Additional Demographic Information ...' section, type in the first five digits of the clients zip code in the text box labeled 'Zip Code'.
   c. To choose a county, within the 'Enter Additional Demographic Information ...' section, select a county from the 'County' pick list.

Selecting Dates

8. Date criteria can be entered as a Target Date Range, a Birth Date Range, and a number of Weeks since Last Notice, as described in the table below. None of this information is required to run the report.

<table>
<thead>
<tr>
<th>Date Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Date Range</td>
<td>When these dates are specified, the report will only return those clients that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.</td>
</tr>
<tr>
<td>Birth Date Range</td>
<td>When these dates are specified, the report will only return those clients who have a birth date that falls between the birth date range entered.</td>
</tr>
<tr>
<td>Weeks Since Last Notice</td>
<td>When a number of weeks is specified here, the system will look at the clients who have had a notice generated in that last number of weeks and exclude them from the report.</td>
</tr>
<tr>
<td>Exclude clients more than X months overdue</td>
<td>If you select a number of months the system will exclude clients overdue by more than what you have selected. Example: You select 6 months, all clients overdue for any vaccines by more than 6 months will not show on the report.</td>
</tr>
<tr>
<td>Exclude from: Today's Date</td>
<td>The &quot;Exclude from&quot; option works with the &quot;Exclude clients more than X months overdue&quot; option. Once you select to exclude clients more than X months old you can</td>
</tr>
</tbody>
</table>
also specify whether you want to exclude from Today's Date. Excluding from Today's Date will exclude any clients overdue X months more from today's date.

| Exclude from: Target From Date | The "Exclude from" option works with the "Exclude clients more than X months overdue" option. Once you select to exclude clients more than X months old you can also specify whether you want to exclude from the Target From Date. Excluding from Target From Date will exclude any clients overdue X months more from any target date range you have specified. NOTE: If target date range is left blank today's date will be used. |

**Note:** The last notice date for a client can be viewed in the Edit/Enter New Client screen. This date is the last date a reminder report (letter, card, mailing label or client list) was generated for that client.

a. Enter the Target Date Range in the From and To text boxes in the format MM/DD/CCYY, or click on the calendar icon to set the date.

b. Enter the Birth Date Range in the From and To text boxes in the format MM/DD/CCYY, or click on the calendar icon to set the date.

For either date range, the From date, To date, or both dates can be left unspecified, described as follows:

| -- | If the To date is unspecified for the Target Date Range, the report date range will include the From date up to and including today's date. |
| -- | If the To date is unspecified for the Birth Date Range, the report date range will include the From date and all days in the future up to and including today's date. |
| -- | If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To. |
| -- | If both dates are left unspecified for the Birth Date Range, then all dates up to and including today's date will be considered. |

c. Enter a number of weeks in Weeks Since Last Notice. All clients who have a notice generated within the number of weeks specified will be excluded from the report.

Example: Little Johnny had a notice generated 1 week ago. For Weeks Since Last notice you enter 2 weeks. Little Johnny will be excluded from the report because he has had a notice sent in the last 2 weeks.

d. Enter a number of months from which you wish to exclude clients from. If you enter 1 month all clients overdue for any vaccine past 1 month will be excluded from the report.

e. Enter whether you wish to exclude clients overdue more than X month's from Today's Date or the Target From Date.

**Selecting Sort Order**

9. The Sort Order will determine the sequence which the clients are listed for whatever report output is selected.

a. Within the 'Specify How to Sort the Report Data ...' section, choose the primary information field to sort the report on by selecting the information field name from the 'Sort 1st By' pick list.

b. Then choose how to sort the information field selected in step one by selecting
Ascending or Descending from the second 'Sort 1st By' pick list.
c. Repeat steps one and two for any additional ordering sequences using the 'Sort 2nd By',
'Sort 3rd By', and 'Sort 4th By' pick lists.
d. If the sort order is not specified, the system will default to ordering the report results
first by last name ascending and second by first name ascending.

<table>
<thead>
<tr>
<th>Report Criteria Submission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generate</strong></td>
<td>When the Generate button is clicked, a query executes in the database according to the report criteria selected. Depending on the number of clients associated with the provider organization that submitted the report request, the query may take several minutes to complete. After clicking on Generate, you will be redirected to the Check Reminder Status screen where you can monitor the progress of the report query.</td>
</tr>
</tbody>
</table>

**Note:**

- After submitting your report by clicking on the Generate button you can work in any area of the system without interrupting your report or causing system problems. To check on the status of your report click on the Check Reminder Status link in the Menu Panel on the left hand side of the page.
- Note: If you do not want to set filters, click Generate at the bottom of the screen. The report will run using the current date as the target.
How to Understand the Reminder/Recall Summary Page

The Reminder Request Process Summary & Reminder Request Output Options screen is used to see the step by step details of the reminder request, such as how many clients exist in the organization and how many will be included in the report. This screen is also for selecting the final format of the report to be printed resulting from the submission of a report query from the Request Reminder screen.

Once the report has run, you can view how many clients were included in the report based on the filters. Output options are listed at the bottom to select how you want to view the results.

Output options include:
- Reminder Letter
- Reminder Card
- Mailing Labels
- Client Query Listing
- Customized Letter

Note: to be HIPAA compliant, the Reminder Card must be mailed in an envelope.
Letters
The letter output option allows you to generate a standard form letter for the responsible person(s) for each client returned on your query. The letter is formatted to allow room at the top for your organization’s letterhead. The body of the letter includes the client’s immunization history, recommended immunizations and due dates, and up to two lines of free text and/or a telephone number.

To generate letters, follow these steps:
1. Under the Additional Input column or the Letter section of the table, enter:
   - A report name in the appropriate field, if desired.
   - Additional information in the Free Text field, if desired. You may include a maximum of 400 characters in this field.
   - A telephone number in the appropriate field, if desired.

2. Click on Reminder Letter, which is underlined and in blue 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.
   - You have the option of moving to other portions of VIIS 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, press Check Reminder Status under Reports on the menu panel.
   - If you choose to stay at the Reminder Request Status screen while your request is processing, press Refresh occasionally to check the status.
4. Once the report name is underlined and appears in blue, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
6. To print additional notices, press the BACK button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Custom Letter
The custom letter output option allows you to generate a customized form letter for the responsible person(s) for each client 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, follow these steps:
1. Enter a report name for the custom letter you wish to generate. Click the link with the name of the custom letter. The letter and mailing labels 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.
• You have the option of moving to other portions of VIIS 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, press Check Reminder Status under Reports on the menu panel.
• If you choose to stay at the Reminder Request Status screen while your request is processing, press occasionally to check the status.

3. Once the report name is underlined and appears in blue, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.

4. To print the letters, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.

5. To print additional notices, press the Back button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Cards

**NOTE:** In order to comply with HIPAA requirements, cards must be mailed in envelopes. The card output option allows you to generate a standard (4x6 inch) postcard, printed one card per page. The body of the card includes the client’s recommended immunizations and due dates, up to two lines of free text, and a telephone number.

1. To generate reminder cards, follow these steps:
   1. Under the Additional Input column for the Cards section of the table, enter:
      a. A report name in the appropriate field, if desired.
      b. Additional information in the Free Text filed, if desired. You may include a maximum of 275 characters in this field.
      c. A telephone number in the appropriate field, if desired.
   2. Click on Reminder card, which is underlined and in blue text.
   3. 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. • You have the option of moving to other portions of VIIS or using other functions of your computer while you are waiting for your cards to process. To return to check the progress of your request, press Check Reminder Status under Reports on the menu panel.
      d. If you choose to stay at the Reminder Request Status screen while your request is processing, press **REFRESH** occasionally to check the status.
   4. Once the report name is underlined and appears in blue, your cards are ready. Click on the report name to view or print the cards in Adobe Reader®.
   5. To print the cards, press the printer icon on the Adobe® toolbar. Press **OK** in the Print dialog box.
   6. To print additional notices, press the **BACK** button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.
Labels
The labels output option produces 30 labels per page on Avery Mailing Labels #5160.
To generate mailing labels, follow these steps:
1. Under the Additional Input column for the Labels section of the table, enter a report name, if desired.
2. Click on Mailing Labels, which is underlined and in blue text.
3. 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 VIIS 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, press 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, press occasionally to check the status.
4. Once the report name is underlined and appears in blue, your labels are ready. Click on the report name to view or print the labels in Adobe Reader®.
5. To print the labels, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
6. To print additional notices, press the Back button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.

Client Query Listings
The Client Query Listing is produced for the provider organization administrator’s records. This report lists every client that was returned in the report query process, along with the phone number and address of every responsible person associated with each client. Insufficient addresses or telephone numbers on this report represent missing information on a responsible person.
To generate a Client Query Listing, follow these steps:
1. Under the Additional Input column for the Client Query Listing section of the table, enter a report name, if desired.
2. Click on Client Query Listing, which is underlined and in blue text.
3. 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.
   • You have the option of moving to other portions of VIIS 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, press Check Reminder Status under Reports on the menu panel.
   • If you choose to stay at the Reminder Request Status screen while your request is processing, press Refresh occasionally to check the status.
4. Once the report name is underlined and appears in blue, your report is ready. Click on the report name to view or print the report in Adobe Reader®.
5. To print the report, press the printer icon on the Adobe® toolbar. Press OK in the Print dialog box.
6. To print additional notices, press the Back button on your browser. At the Reminder Request Status screen, click on the underlined reminder request (top box) to return to the Reminder Request Process Summary screen.
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:

1. Set the last notice date to today’s date. This is the default option and is indicated by a check mark.
2. Set the last notice date to reflect the previous last notice date for all clients eligible for this reminder by pressing Revert Eligible. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for the recipients of this reminder.
3. Set the last notice date to reflect the previous last notice date for all clients immunized by your organization by pressing Revert All. Use this option if you choose not to have the current report generation reflected in the Last Notice Date option on the Reminder Request screen for all clients immunized by your organization.
4. Return to the previous screen. Press Cancel to return to the Reminder Request Status screen.