New York City
Citywide Immunization Registry (CIR),
Online Registry:
Coverage Reports,
Reminder/Recall and
Text Messaging

NYC Department of Health & Mental Hygiene
Bureau of Immunization
August 2019
CIR Information Website homepage:

- Contact CIR at (347) 396-2400 for Online Registry access, or

nyc.gov/health/cir

[https://immunize.nyc/provider-client/servlet/PC](https://immunize.nyc/provider-client/servlet/PC)
After account set up is completed, this is the **Log in** screen to use going forward:

1. Enter User ID & Password;
2. Click **I Consent**;

Check notice boxes for updates.

CIR at (347)396-2400 or cir-reset@health.nyc.gov for Online Registry account issues.
Assess Practice Readiness for using OR Recall Text Messaging

- Do your patients (parents/guardians) accept communication for follow-up or appointments per your organization’s patient care protocol and practices, including receiving text messages for immunization recall purposes; and is it supported by staff to help collect and update contact information?

- Is cell phone information routinely and accurately updated in your EMR by training staff to enter data accurately?

- Are cell phone numbers and all data correctly sent and captured in the Online Registry and periodically verified with your IT staff, EMR vendor and CIR for accuracy?

- Is there coordinated effort and decision making on prioritizing groups for recall?

- Is the *MyList* regularly refreshed and patient information regularly updated (monthly)--patient’s Active/Inactive status (MOGE); text messaging acceptance?

- Are staff available and trained?

- Is there an available appointment phone line?

- Have Online Registry recall lists been generated for review prior to using text messaging?
Online Registry Reminder/Recall usage

• ~200 facilities have used text messaging since 2015
• 25 facilities monthly on average
• About 20,000 text messages sent each month
• 367 facilities have used any recall/reminder functions (list, letters, labels and text messaging) in the last year (7/1/2018-6/30/2019)
Overview

I. MyList, Refresh MyList, MOGE (slides 6-12)

II. Coverage located in the Tools screen (slides 14-24):
   Generate a recall list or letters from a coverage report.
   A. Up-to-Date (UTD) percentages for 7-11 mo. olds, 19-35 mo. olds, 24-35 mo. olds, or 11–18 yr. olds
   B. Influenza UTD for 6-59 mo. olds, 5-10 yr. olds, or 11–18 yr. olds

III. Outreach Type: Recall or Reminder located in the Recall screen:
   A. Recall
      1. Custom Recall –see who has vaccine Due Now (slides 24-39):
         a. Choose or specify age ranges
         b. Choose to recall patients who are missing any age-appropriate immunization, any specified vaccine series, or # of specified valid doses
      2. Standard Recall –see who in MyList is Due Now (slides 40-42)
   B. Reminder see who in MyList is Due Soon, within 28 days (slide 53-54)

IV. Contact Method:
   1. List with phone numbers, downloadable (slides 20-24, 33-36)
   2. Letters with address labels (slides 20-24, 33-36), or
   3. Text messages to mobile phones of parents/guardians of patients (slides 38-52).
Prepare **MyList** before running recall jobs: (slides 6-12)

- Check the last time **MyList** was updated and “Who’s in MyList”
- **Refresh MyList** (located in the **MyList** screen).
  - This feature retrieves patients you immunized in the past who are in the CIR, but may not already be on **MyList**.
  - Choose to limit or expand your patient list based on patients:
    - Seen within $n$ number of years
    - Looked up in CIR (have not had vaccination at the practice yet)
    - MOGEs

- Review and edit patient’s last valid contact information: address, home phone, cell/mobile phone, and email address.
  - **MyList** is sortable, downloadable to enable review of missing or outdated contact information

- Update patient’s active/inactive status (a.k.a. **Moved or Gone Elsewhere** –MOGE)

- The recall list is based on the **MyList** and the parameters you chose in Refreshing **MyList**, not what’s in your entire EMR or CIR.
MyList: Who’s in MyList? (patient list of the practice)

Click on the link to see “Who’s in MyList?”

MyList is your list of patients who have been looked up or added by your staff within the Online Registry, either manually one-by-one, or retrieved as a group by using Refresh MyList. Practices using EMRs need to regularly Refresh MyList.

- Shared
- Any changes made in MyList will affect the facility list and all users at your site!
Refresh MyList: tips

- **MyList** is shared by all of the Online Registry users at your *practice*. Any changes you make will affect all users at your site!
- Consider designating one staff person to update MyList monthly, maintain and run reports
- Customize your population (denominator) for recall
- After refreshing MyList, review your records for: duplicates/fragments to be merged (contact the CIR at (347) 396-2400), missing records reported to CIR. (contact your EMR vendor).
- Agencies and organizations that use the Online Registry to look up patient records only and do not report immunizations may not need to use these options.
Refresh MyList: example

Example: Choose patients in CIR who:

- have been looked up by your practice in the past year,
- have received an immunization at your practice in the last 3 years, and
- Do not include patients who have moved or gone elsewhere.

Example Results:
Results will appear at the top of the screen above MyList:

✔ Patient list refresh complete. Patients added: 190. Patients removed: 14
Patient List (MyList): Active Status, Remove

Before running a coverage, recall or reminder report, you may update a patient's status to let CIR know if the patient is no longer being seen (a.k.a., Moved or Gone Elsewhere [MOGE] status) at your practice:

1) Click Yes/No in the Active column
2) Update Patient Info screen will appear (see next slide). Make your choice.
3) You must do two things to remove a patient from MyList and from your practice.
   a) Update the Active Status to “No.”
   b) Remove the patient from MyList by checking the box in the Remove column. Click Remove. Record is removed from MyList, but remains in CIR.

To add back a patient, search again in the Search screen.
Update Patient Info: address, phone, MOGE status

- Update patient information, address, home phone, parent/guardian cell/mobile phone, and parent/guardian email address, text message status.
- Please note: Information reported by Vital Records may not be edited online.
- You may send a copy of the revised birth certificate by fax to (347) 396-2559, or call us at (347) 396-2400.
- Mark if MOGE (Moved or Gone Elsewhere).
  - MOGE choices:
    - Not in my practice
    - Not in NYC (moved)
    - Patient deceased.
- See slide 39: notes relevant to text messaging.

---

<table>
<thead>
<tr>
<th>Patient Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>DOB</td>
</tr>
<tr>
<td>Gender</td>
</tr>
<tr>
<td>House No. / Street / Apt. No.</td>
</tr>
<tr>
<td>City / State / ZIP</td>
</tr>
<tr>
<td>Medical Rec. No.</td>
</tr>
<tr>
<td>Mom DOB</td>
</tr>
<tr>
<td>Mom First Name</td>
</tr>
<tr>
<td>Home Phone</td>
</tr>
<tr>
<td>NEW Cell/Mobile</td>
</tr>
<tr>
<td>NEW Email</td>
</tr>
</tbody>
</table>

- Data previously reported are saved in the CIR but may not be displayed.
- The NYC Health Department is expanding its reminder/recall functionality in the Online Registry for providers who choose to use it to send text messages to parents and/or guardians regarding immunizations due or soon to be due for their children. The functionality does not provide parents and/or guardians an opportunity to "opt in" to receive these text messages. However, those who receive text messages are provided an opportunity to "opt out" after receiving the initial and any subsequent messages. You may manually change a patient's status to "opt out" if you would like to ask for consent before sending these text message immunization reminders.
- If you choose to use this Online Registry tool to communicate with parents and/or guardians of the children in your practice, please consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.
Criteria of Moved or Gone Elsewhere (MOGE)

The following describes the criteria which should be used to consider a patient a MOGE:

• There is documentation in the chart that the child moved to another city/state and/or transferred to another health care provider. or

• The patient has not returned to the practice in over one year and there are 3 documented contact attempts (by letter or by phone) with no response. If there are phone call attempts with no direct contact, there should be at least one letter sent. or

• There is a “returned to sender” follow-up letter in chart, and it was sent after the last visit. Keep in mind that a letter may be returned because the facility failed to update the patient’s information. Therefore, a patient with a returned letter may be considered a MOGE if the returned letter was sent and received 6 months after the last visit. If the last visit to the practice was just recently made (< 6 months) and the provider received a “returned to sender” follow-up letter and there is no other type of follow-up attempt, the patient should be kept in the practice’s MyList. or

• If the provider has obtained records from the CIR, and the CIR record indicates additional vaccination dates after the patient’s last visit to the practice, this may mean that the patient transferred care to another provider in New York City. If the additional dates in the CIR record are at least 6 months after the last visit, then the patient can be considered a MOGE. If the CIR record indicates additional vaccination dates < 6 months after the last visit and the provider never attempted to contact the patient, then the patient should be kept in the practice’s MyList.
• The coverage or recall/reminder reports are only as good as the immunizations and contact information your practice reported to the CIR.
Tools: Coverage Report:

Before running coverage or recall/reminder lists, review **Who is in MyList**, then update MyList by using **Refresh MyList** (slide 6).

To start a **Coverage Report**, click on Create New Coverage Report **Standard or Flu Coverage**.

This page shows Coverage Reports you have created in the last year. For Coverage Report instructions, click here. For a brief guide on Influenza Coverage Reports, click here.

Click on the link “Done” in the Report Status column on the right to view a Coverage Report. You may use it to create a Recall List for patients who need immunizations.
Coverage Report: choose a report to use

Name your Report for you to identify easily later. The report list is shared by all users at your facility.
Coverage Report: view completed reports

Your Coverage Report is being processed. Most Coverage Reports can be processed in a few seconds, but others take longer. You can find your Coverage Report in Recent Coverage Reports.

This page shows Coverage Reports you have created in the last year. For Coverage Report instructions, click here. For a brief guide on Influenza Coverage Reports, click here. Click on the link "Done" in the Report Status column on the right to view a Coverage Report. You may use it to create a Recall List for patients who need immunizations.

Create New Coverage Report: Standard or Flu Coverage New!

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Patients</th>
<th>UTD%</th>
<th>Coverage Status as of</th>
<th>Date Created</th>
<th>Report Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Coverage Report</td>
<td>&quot;Coverage_20180801_24 to 35 mo&quot;</td>
<td>2</td>
<td>0.0%</td>
<td></td>
<td>08/01/2019 2:51 PM</td>
<td>Done</td>
</tr>
<tr>
<td>Standard Coverage Report</td>
<td>&quot;HUIE_20190226_01&quot;</td>
<td>18</td>
<td>16.7%</td>
<td></td>
<td>02/26/2019 9:54 AM</td>
<td>Done</td>
</tr>
<tr>
<td>Flu Coverage Report</td>
<td>&quot;flu_coverage_11-18y&quot;</td>
<td>4</td>
<td>0.0%</td>
<td></td>
<td>01/30/2019 12:54 AM</td>
<td>Done</td>
</tr>
<tr>
<td>Flu Coverage Report</td>
<td>&quot;flu_coverage_5-10y&quot;</td>
<td>3</td>
<td>0.0%</td>
<td></td>
<td>01/30/2019 12:54 PM</td>
<td>Done</td>
</tr>
<tr>
<td>Flu Coverage Report</td>
<td>&quot;flu_coverage_6-59m&quot;</td>
<td>3</td>
<td>33.3%</td>
<td></td>
<td>01/30/2019 12:54 PM</td>
<td>Done</td>
</tr>
</tbody>
</table>
Coverage Report: create a recall job

The results include a summary and a list of the patients who are not UTD. From here, one may create a recall list and letters.

Currently, text messaging is not available from this process but can be created using the Custom Recall functions (slides 38-52).

You may take the results to produce a Recall List or Labels and Letters. Click on Create Recall List.
Review and Update Records

(a) Review each record

The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

Select all patients in the current list

(b) Update immunization record

(c) Update patient information
Recall from Coverage Report: select List or Labels & Letters

2. Select to make Labels & Letters or make a List.

d. After marking the patients to recall and clicking “continue, select to create:

- a **List** (downloadable in Excel), or
- **Labels & Letters**.

• Click Continue. 

NOTE: To create accurate Recall letters, report all patient immunizations to the registry before continuing.

Select your preferred method:

- Create a List of names, addresses, phone numbers, and immunizations
  - Your Excel document will contain a list of names, dates of birth, genders, medical record numbers from your practice, CIR IDs, addresses, phone numbers, and the immunizations that are past due for selected patients.

- Create **Labels and Letters** to print and mail. An Excel summary report containing names, addresses, phone numbers, and the immunizations that are past due for selected patients is included in the output.
  - Your PDF document will contain (1) address labels and (2) a Recall message of your choice with the immunizations that are past due for each patient. Labels and letters will not be printed for those patients missing a street address.

Cancel   Change   Continue
Recall from Coverage Report: compose letter

- Choose an option:
  - Default letter
    - Optional:
      - add today’s date;
      - Salutation: “Dear Parent/Guardian”
  - Custom message
    - Enter extra line spaces for your letterhead
  - List of names
    - Includes: address, phone and doses that are due now.
Recall from Coverage Report: name the job

1. Mark the patients who need Recall Letters, then click Continue.
2. Select to make Labels & Letters or make a List.
3. Select or compose a Message.
4. Confirm and retrieve your Recall job.

NOTE: To create accurate Recall letters, report all patient immunizations to the registry before continuing.

You have selected a List of 2 patients.

Note: The addresses you see below will be used. Please update now if necessary.

<table>
<thead>
<tr>
<th>CIR ID</th>
<th>Name</th>
<th>Gender</th>
<th>DOB</th>
<th>Missing Immunizations</th>
<th>Address</th>
<th>Home Phone</th>
<th>Mobile Phone</th>
<th>Accepts Texts</th>
<th>Last Accessed</th>
<th>Last Recall</th>
<th>Update?</th>
</tr>
</thead>
<tbody>
<tr>
<td>908557336</td>
<td>Test, Test</td>
<td>M</td>
<td>01/01/2017</td>
<td>Influenza1, HepB2, DTP4, Hib2, Ped Pneumo1, Polio3, MMR1, Varicella1, HepA1</td>
<td>2 Gotham Queens, NY 11101</td>
<td>347-396-2400</td>
<td>Yes</td>
<td>01/31/2019</td>
<td>06/01/2019</td>
<td>Addr/Ph Imms</td>
<td></td>
</tr>
<tr>
<td>909149880</td>
<td>Testrecord, Child</td>
<td>F</td>
<td>04/01/2017</td>
<td>Influenza1, HepB2, DTP1, Hib1, Ped Pneumo1, Polio1, MMR1, Varicella1, HepA1</td>
<td>2 Circle, COURT Queens, NY 11101</td>
<td>347-396-2400</td>
<td>999-999-9999</td>
<td>Yes</td>
<td>04/02/2017</td>
<td>06/01/2019</td>
<td>Addr/Ph Imms</td>
</tr>
</tbody>
</table>

These patients have immunizations that are DUE NOW

Job Name for identification later: Username_Recall_20190801

Accept or rename your List or Labels & Letters file.

Click Continue ➔

Please be patient. Processing the records takes time.
Recall from Coverage Report: access finished jobs

h. A confirmation message appears

i. The processed Recall file will be found in the Recall tab under the Reminder/Recall Job List.

The Report Status will change from “Processing…” to the type of job you chose.

Please be patient. Processing the records takes time.

j. To view results, click on each of the links in the Status column.
Output: List, Letter and Labels

Letter: default or customized

Address labels: Standard 1” x 2-5/8”
Reminder/Recall:

STOP. Before running recall jobs, see how to Prepare MyList (slides 7-12)

Refresh MyList before creating a new Reminder/Recall job.

To create a new Reminder/Recall job, follow the steps below.

1. First, choose an Outreach Type. Reminders will be sent to patients due immunizations in the next 28 days. Recalls will be sent to patients due immunizations now.
2. Next, choose a Parameter Type. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a Contact Method. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

For additional Recall/Reminder instructions, click here.

To recall patients based on up-to-date rates using list or letters, use the Coverage Report Tool.

Not all combinations are possible.

1. Outreach Type: ○ Reminder ○ Recall
2. Parameter Type: ○ Standard ○ Custom
3. Contact Method: ○ List or Letters ○ Text Message † ○ One Time ○ Recurrent

Continue ➔
Recall: Custom List or Letters: set up job

To set up a custom list, or labels & letters for patients
Due Now, select the following:

- **Outreach Type**: Recall
- **Parameter Type**: Custom
- **Contact Type**: List or Letter

Click Continue ➔

In the next screen, select your criteria from sections A, B, and C.

**Important**: Please see slides 6 to 13 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
Recall: Custom List or Letters: select patient and immunization criteria

Select criteria for the Custom Recall Job.

- All patients in MyList
- Specific Age
  - 7-11 month olds
  - 12-23 month olds
  - 19-35 month olds
  - 24-36 month olds
  - 11-18 year olds
  - 13-17 year olds
  - 19+ year olds

- Age Range
  - From: ________ years ________ months
  - To: < ________ years ________ months

- DOD Range

- Include patients born between
  - ________ / ________ / ________
  - ________ / ________ / ________

- Gender
  - Male
  - Female

For immunization series, include patients who are missing:

- Any age-appropriate immunization
  - Influenza
  - HepB
  - Rotavirus
  - DTaP
  - Hib

- Any age-appropriate immunization from the series below only:
  - Pneumococcal
  - Varicella
  - HepB

- Include patients who do not have the # of specified valid doses from the series chosen below:
  - Influenza
  - HepB
  - Rotavirus
  - DTaP
  - Hib

- Pneumococcal
  - Varicella
  - HepB

- Meningococcal
  - Human Papillomavirus
Example 1:
To recall patients who are missing MMR, you may:

A. Select “Specific Age: 1-18 years,”

B. Keep the gender default options “Male” and “Female,” and

C. Select “For immunization series: Include patients who are missing...[a]ny age-appropriate immunization from the series only,” and choose “MMR.”

Results: Patients missing the correct number of age-appropriate doses of MMR.

Results will also list additional vaccines missing.
Example 2:
To recall patients who don’t have the third HPV vaccine dose, you may:

A. Select “Age Range: “11-18 year olds,”

B. Keep the gender default options “Male” and “Female,” and

C. Select “For immunization series:...Include patients who do not have the # of specified valid doses from the series chosen below: 3 Human Papillomavirus”;

Results: Patients due their 1st, 2nd, or 3rd dose of HPV, and additional vaccines missing.
Custom Recall: confirm and name job (List Name)

2. Confirm criteria for the Custom Reminder/Recall List, and accept or change List Name. We recommended you give your list a brief and clearly descriptive name.

Confirm criteria for Custom Reminder/Recall List

- **Age Range:** At least 11 yr, not yet 19 yr
- **Gender:** Males and Females
- **For immunization series:** Include patients who are missing:
  - Patients missing the following specific number of doses:
  - Human Papillomavirus 3

List Name for identification later: **HPV_11to18yrsMissingDo**

We recommended you give your list a brief and clearly descriptive name.

- Change
- Cancel
- Continue
Custom Recall: view patients retrieved for this job

The status changes from “Selecting patients...” to “Pending Review” (Done)

It may take some time but
Click on the list of patients that are “Pending Review.”
Review and Update Records

(a) Review each record

The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

Select all patients in the current list

(b) Update immunization record

(c) Update patient information

Click on the patient name to view the record in CIR
Custom Recall: select contact List or Labels & Letters

1. Select criteria for the Custom Recall List.
2. Confirm criteria for the Custom Recall List, and accept or change List Name.
3. Please wait while your list is being generated. Once the Status of the list changes to “Pending Review” click to review the list.
4. Review patients, update addresses and immunizations.

5. **Select to make Labels & Letters or make a List.**
6. Select or compose a Message.
7. Confirm and retrieve your Recall job.

**NOTE:** To create accurate Recall letters, report all patient immunizations to the registry before continuing.

**Select your preferred method:**

- Create a **List** of names, addresses, phone numbers, and immunizations
  - Your Excel document will contain a list of names, dates of birth, genders, medical record numbers from your practice, CIR IDs, addresses, phone numbers, and the immunizations that are past due for selected patients.

- Create **Labels and Letters** to print and mail. An Excel summary report containing names, addresses, phone numbers, and the immunizations that are past due for selected patients is included in the output.
  - Your PDF document will contain (1) address labels and (2) a Recall message of your choice with the immunizations that are past due for each patient.

[Options to change, cancel or continue]
Custom Recall: compose letter

6. Select or compose a Message.

NOTE: To create accurate Recall letters, report all patient immunizations to the registry before continuing.

Select Message:

- Use default message.
  - If selected, this message will be printed for each patient on your Recall list:
    - Today's Date (optional)
    - Dear Parent/Guardian (optional)
    - Our records show that your child may need the following vaccines:
      [Note: Immunizations due will be displayed here.]
      Please call our office at [ ] to schedule an appointment at your earliest convenience.
      Thank you.
    - Recall Test Facility

- Use custom message.
  - If selected, the message you type to the right will be printed for each patient on your Recall list.
  - Enter the message of your choice in the field below:
    [Note: Immunizations due will be displayed here.]
- No message, just a list.
  - If selected, only a list of names in your Recall list will be printed.

Choose an option:

- Default letter
  - Optional:
    - add today’s date;
    - Salutation: “Dear Parent/Guardian
- Custom message
  - Enter extra line spaces for your letterhead
  - List of names includes: address, phone and doses that are due now.
f. A confirmation message appears.

Please be patient. Processing the records takes time.

The processed Recall file will be found in the **Reminder/Recall** tab.

g. To view output, click on a
Output: List, Letter and Labels

<table>
<thead>
<tr>
<th>List</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Recall Name: Sull_20150420_02</td>
</tr>
<tr>
<td>2. Date Created: 4/20/2015 5:22:26 PM</td>
</tr>
<tr>
<td>3. Created By: msltl1</td>
</tr>
<tr>
<td>4. Based On: Patients in 'My List'</td>
</tr>
<tr>
<td>5. Based On: Patients in 'My List'/Gender: Males and Females</td>
</tr>
<tr>
<td>6. Total Patients: 0, Patients not UTD: 4 (+%), Patients UTD: 4 (+%)</td>
</tr>
<tr>
<td>7. Doses: Patients missing any age appropriate immunization</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>RECALL-BAR-CNIK</td>
<td>12/31/2001</td>
<td>M</td>
<td>788184685</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>RECALL SULL-UNO</td>
<td>01/10/2010</td>
<td>M</td>
<td>788184626</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>RECALL SULL-MONDA</td>
<td>09/21/2000</td>
<td>F</td>
<td>788184504</td>
<td>42-39 28th St, LONG ISLAND CITY NY 11102</td>
<td>988-897-3370</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Letter:**

May 18, 2015

Dear Parent/Guardian:

Our records show that your child may need the following vaccines:

Patient Name: DAFFY DUCK
Immunizations Due Now: Influenza-1, HepB-2, Varicella-2, HPV-2

Please call our office at your convenience.

Thank you,

Doctor's office

**Address labels**

To the Parent/Guardian of: JANE DOE
2 Laf
New York, NY 10013

To the Parent/Guardian of: DORA EXPLORA
2 Lafayette St, A
New York, NY 10009

To the Parent/Guardian of: JACK HORNAN
2 Laf
New York, NY 10002
Recall: Standard recall based on MyList

If you want to simply recall all patients in MyList, choose the “Standard” parameter type. This option is also located in the Custom Recall screen.

Schools and other agencies that only look up records may consider looking up a roster of individuals to add to MyList. Then, run Recall/Reminder or Coverage Reports.

Follow slides 32-36

Important: Please see slides 6 to 13 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
Recall: Custom Text Message –

A sample of how the messages you send will look on the screen of a mobile phone:

- Short Code: 850-80. This is the number that recipients will see when you text them.
- Include an appointment phone number.

It is important to list your facility name, shown here as “Your Provider,” so your patient knows who is sending the message.

Auto-reply confirming patient has opted out of receiving text messages after replying, “STOP”.

Auto-reply confirming patient has opted back in to receiving text messages after replying, “OOPS”.

MOBILE IMMUNIZATION ALERTS: Your mobile alerts have been reactivated. Reply STOP to opt out. Reply HELP for help. Msg&Data rates may apply.
Recall: Custom Text Message – prepare and update patient information

Before creating a custom recall text message job, please do the following:

1. Refresh MyList
2. Review patients in MyList
3. Update patient information to include a cell/mobile number
4. Update the opted in or out status of patients for receiving text messages.
   • By default, all patients with a cell number will be opted in to receive text messages.
   • If patients ever want to opt out or opt back in to receive text messages, update their status here.

If you change the opted in or out status of a patient for receiving text messages, all other patients with the same cell/mobile number will automatically be set to the same status.
To set up text message to run one time, select the following:

- **Outreach Type**: Recall
- **Parameter Type**: Custom
- **Contact Type**: Text Message
- **Select**: One Time

Click Continue.

In the next screen, select your criteria from sections A, B, and C.

**Important**: First, run your criteria as a Custom List job to review the patients who will receive the text messages. You will not be able to see a list of patients until after the messages are sent out. Please see slides 7 to 12 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
b. Select patient and immunization criteria:

A. Choose one of the three age range choices in the left column.

B. Specify gender, optional.

C. Next, choose one of the three choices in the right column to include patients to recall who are:

1. missing age-appropriate immunizations, or

2. missing any age-appropriate immunizations from a specified vaccine series, or

3. missing a specified # of valid doses from specified series.
Recall: Custom One-Time Text Message – send date, compose message

c. Enter the date, but avoid entering today’s date.
d. Next, choose a **default message** or **choose custom** message.

If you choose to send a **default message**, fill in your **facility name** and **contact number** to schedule an appointment. Each patient’s year of birth will be populated by the CIR.

If you choose to send a **custom message**, please note that it is your responsibility to adhere to the laws, rules, and regulations that apply to the disclosure of confidential and sensitive information in the content of your custom text message.

A note to practices with adult patients: Please do not use the default message, which says, “Your child born...” Instead create a recall for 0 to 19 year olds. Then create a group of ≥ 19 year olds. And use the custom message for adults.
Recall: Custom Text Message – view jobs

e. Confirm criteria for the **custom one-time text message**. This is your last chance to update your **MyList** before creating the recall job. Click on the link to see “Who's in MyList?” or click the “Refresh MyList” link.

f. Accept or change the Job Name.

g. Click **Continue** to schedule the job.
To set up text message to run recurrently, select the following:

- **Outreach Type**: Recall
- **Parameter Type**: Custom
- **Contact Type**: Text Message
- **Select**: Recurrent

Click Continue

In the next screen, select your criteria from sections A, B, and C.

**Important**: Please see slides 6 to 13 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
b. Select patient and immunization criteria:

A. Choose one of the three age range choices in the left column.

B. Specify gender, optional.

C. Next, choose one of the three choices in the right column to include patients to recall who are:
   1. missing age-appropriate immunizations, or
   2. missing any age-appropriate immunizations from a specified vaccine series, or
   3. missing a specified # of valid doses from specified series.
c. Enter the date range, but avoid entering today’s date. Messages will be sent every 28 days. Patients in *Mylist* will automatically age in and out, and be added or removed depending on UTD status.

d. Next, choose a **default message** or **choose custom** message.

If you choose to send a **default message**, fill in your *facility name* and *contact number* to schedule an appointment. Each patient’s year of birth will be populated by the CIR. Use the default message only for patients under 19 years old.

If you choose to send a **custom message**, please note that it is your responsibility to adhere to the laws, rules, and regulations that apply to the disclosure of confidential and sensitive information in the content of your custom text message, and include your *facility name* and *contact number*.
Accept or change the Job Name.
Click Continue to schedule the job.
Recall: Custom Text Message – view jobs

Refresh My List before creating a new Reminder/Recall job.

1. First, choose an Outreach Type. Reminders will be sent to patients due to immunizations now.
2. Next, choose a Parameter Type. If you want to run a job using your My List, choose recall, specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a Contact Method. If you are sending text messages, choose that and text will be sent every 20 days within the start and end date indicated. One time is indicated.

For additional Recall/Reminder instructions, click here.

To recall patients based on up-to-date rates using list or letters, use the Custom Message:

Not all combinations are possible.

1. Outreach Type:
   - Reminder
   - Recall

2. Parameter Type:
   - Standard
   - Custom

3. Contact Method:
   - List or Letters
   - Text
   - One-time

Reminder/Recall Job List

This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 2 minutes. You can manually refresh your Job List using the 'Refresh Job List' link. Please wait while the page loads completely.

<table>
<thead>
<tr>
<th>Job Name</th>
<th>Contact Method</th>
<th>Based On</th>
<th>Status</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Sull_20150423_03</em></td>
<td>One-time Text Message</td>
<td>Recall</td>
<td>Complete</td>
<td>04/23/2015 11:48am</td>
</tr>
<tr>
<td><em>Sull_20150423_02</em></td>
<td>One-time Text Message</td>
<td>Recall</td>
<td>Active (Next Run: 04/25/15)</td>
<td>04/23/2015 11:45am</td>
</tr>
</tbody>
</table>
In the completed runs table, click on the date of your completed job run to view details about the patients included.

Click the Excel **View Job Runs Details** link to view your job run details.
The downloadable list of patients contains:

- Summary of the criteria for the recall job
- Number of patients UTD and not UTD
- Text message sent status
- Patient status for accepting text messages
- Medical record number, CIR ID, contact information, and immunizations past due.
You can cancel a scheduled recall text message job (one-time or recurrent) through the **Reminder/Recall Job List**.

a. Click **"Cancel Job"** link to review your job before canceling.

b. Click the **"Delete"** button to cancel a job without review. All jobs selected (✓) will be canceled and permanently removed from your Reminder/Recall Job List.
If you click the “Cancel Job” link from the Reminder/Recall Job List, you are taken to the View Job screen.

a. Review your job details.

b. Click **Cancel Job** button

c. Read pop-up and click the button to cancel your remaining scheduled jobs, if recurrent.
   - If you are trying to cancel a one-time job, we cannot ensure that a job run scheduled the same day as your cancellation request will be terminated in time.
Recall: Replies to Text Message –

• The current text messaging functionalities do not allow direct two-way communication to providers; BOI is able to view replies
• The majority of recipients do not reply to the messages.
• <5% of the recipients have opted out.
• The relatively few replies received have been of this nature:
  – Thank you
  – Have an appointment already
  – Can you make me an appointment?
  – We were just there. Why wasn’t this mentioned?
  – We moved and no longer going that practice
  – I’m not a child
  – Wrong number/I don’t have a child
  – A belief they are UTD
  – Don’t believe in a particular vaccination/vaccinations
  – I’m not a child
  – Who is this?
To create a list, or labels & letters for patients **Due Soon**, select the following:

- **Outreach Type**: Reminder
- **Parameter Type**: Standard
- **Contact Type**: List or Letter

Orange status circle indicates there is a vaccine that is **Due Soon** (within a month).

This list is based on patients in the **MyList**.

Follow the instructions.

For this group of patients the output will show both vaccines that are **Due Soon** and **Due Now**.

**Important**: Please see slides 6 to 13 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.

For additional Recall/Reminder instructions, click [here](#).

To recall patients based on up-to-date rates using list or letters, use the **Coverage Report Tool**.

Follow the instructions that will appear at the top, or slides 32-36.
Review and Update Records

(a) Review each record

The recall process allows multiple chances to update records. Step through these screens and record maintenance has been done.

(b) Update immunization record

Select all patients in the current list

(c) Update patient information

Click on the patient name to view the record in CIR
Best Practice Tips for using OR Reminder/Recall and Text Messaging (1)

1. Routinely update cell phone information in your EMR. Train all staff to enter data accurately in the appropriate screen(s) and field(s).

2. Verify with your IT staff, EMR vendor and CIR that immunizations (see VIM guide, slide 27) and cell phone numbers are correctly captured in the Online Registry.

3. Support patient buy-in to text messaging for follow-up.

4. Review and update your facility’s *MyList*:
   - Status: Active/Inactive (MOGE). Develop easy process for patients to notify your practice if they’ve gone elsewhere.
   - Accepts text messages Y/N?

5. Actively coordinate efforts and decisions on prioritizing groups for recall.

6. Run a recall list to preview the group that will receive the message before setting up and sending text messages.
6. Inform patients the text messages are one-way and are general (cannot reply or set up appointments, but must call)

7. Inform patients that opting-out means opting out of all messages and any family members associated with that number

8. Avoid excessive text messages that will lead to opting-out

9. Compose professional, grammatically correct messages

10. Include the practice name and phone number for appointments

11. Do not copy and paste text into the message box

12. Do not use foreign languages since the system is unable to translate other languages.

13. Avoid scheduling text messages the same day you create them to allow time to cancel job.

14. Have dedicated or available appointment phone line(s).

15. Cancel recurrent jobs set up when staff exit.
Future Enhancements

- Reminders to patients via texting
- Additional languages
- Capture MOGE through webservice
- Streamline some features

Have a suggestion? Please let us know...
Contact Information

Citywide Immunization Registry
NYC Department of Health and Mental Hygiene

General CIR contact information:
Tel: (347) 396-2400
Fax: (347) 396-2559
nyc.gov/health/cir
E-mail: cir@health.nyc.gov
(Subject line: Recall; Facility Name)
In general, studies are showing that reminder/recall efforts can improve immunization coverage.

# Standard Up-To-Date Measures

## Table 1: Recommended Child and Adolescent Immunization Schedule for ages 18 years or younger

United States, 2019

These recommendations must be read with the Notes that follow. For those who fall behind or start late, provide catch-up vaccination at the earliest opportunity as indicated by the green bars in Table 1. To determine minimum intervals between doses, see the catch-up schedule (Table 2). School-entry and adolescent vaccine age groups are shaded in gray.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>Birth</th>
<th>1 mo</th>
<th>2 mos</th>
<th>4 mos</th>
<th>6 mos</th>
<th>9 mos</th>
<th>12 mos</th>
<th>15 mos</th>
<th>18 mos</th>
<th>18-36 mos</th>
<th>2-3 yrs</th>
<th>4-6 yrs</th>
<th>7-10 yrs</th>
<th>11-12 yrs</th>
<th>13-15 yrs</th>
<th>16 yrs</th>
<th>17-18 yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis B (HepB)</td>
<td>1 dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3rd dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotavirus (RV) RV1 (2-dose series); RV5 (3-dose series)</td>
<td>1 dose</td>
<td>2nd dose</td>
<td></td>
<td>See Notes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diphtheria, tetanus, &amp; acellular pertussis (DTP, 1 dose)</td>
<td>1 dose</td>
<td>2nd dose</td>
<td></td>
<td>3rd dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haemophilus influenza type b (Hib)</td>
<td>1 dose</td>
<td>2nd dose</td>
<td></td>
<td>See Notes</td>
<td></td>
<td>4th dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pneumococcal conjugate (PCV 13)</td>
<td>1 dose</td>
<td>2nd dose</td>
<td></td>
<td>3rd dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inactivated poliovirus (IPV, &lt;18 yrs)</td>
<td>1 dose</td>
<td>2nd dose</td>
<td></td>
<td></td>
<td></td>
<td>3rd dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Influenza (IIV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Annual vaccination 1 or 2 doses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measles, mumps, rubella (MMR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1st dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Varicella (VAR)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1st dose</td>
<td>1st dose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hepatitis A (HepA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meningococcal (MenACWY-D ≥11 mos; MenACWY-CRM ≥2 mos)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tetanus, diphtheria, &amp; acellular pertussis (Td, ≥7 yrs)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human papillomavirus (HPV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meningococcal C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pneumococcal polysaccharide (PPSV23)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Range of recommended ages for all children**
- **Range of recommended ages for catch-up immunization**
- **Range of recommended ages for certain high-risk groups**
- **Range of recommended ages for non-high-risk groups that may receive vaccine, subject to individual clinical decision-making**

**7-11 months**
- 7-11 month olds with...
  - 3 DTP
  - 2 Polio
  - 2 Hib
  - 2 HepB
  - 3 Pneumococcal

**19-35 months**
- 19-35 months olds with...
  - 4 DTP
  - 3 Polio
  - 1 MMR
  - 3 HepB
  - 4 Hib
  - 1 Varicella

**24-35 months**
- 24-35 month olds with...
  - 4 DTP
  - 3 Polio
  - 1 MMR
  - 3 HepB
  - 4 Hib
  - 1 Varicella

**13-17 years**
- 13-17 year olds with...
  - 1 MCV
  - 1 Tdap
  - HPV Complete (2 or 3 doses) (Males and females included)

**11-18 years**
- 11-18 year olds with...
  - 1 MCV
  - 1 Tdap
  - HPV Complete (2 or 3 doses) (Males and females included)