



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:

The screenshot shows the NYC Health website homepage. At the top, there's a black header with 'NYC Health' and a tagline 'Promoting and Protecting the City's Health'. Below this is a navigation bar with links: Home, About, Our Health, Services, Providers (selected), Data, and Business. A search bar is on the right. Below the navigation bar is a blue banner with four buttons: 'Reporting and Services' (highlighted), 'Health Topics', 'Resources', and 'Emergency Prep'. The main content area is titled 'NYCMED' and features a sidebar on the left with links: 'Reporting Diseases and Conditions', 'Reporting Central', 'Citywide Immunization Registry (CIR)', 'eVital', 'Public Health Lab', and 'Reporting Animal Diseases'. The main content area has a sub-header 'Parents, Guardians & Individuals | Schools, Child Care Facilities & Camps' and a large heading 'Citywide Immunization Registry (CIR)'. Below this, it says 'adults — throughout their lives.' and 'Our Mission: To improve the immunization status of all NYC residents by consolidating immunization information and sharing it with health care providers, families and agencies concerned with public health.' There's a link 'Register your practice online.' and a button 'GO' with an arrow pointing to it. Below that, it says 'Look up records and report immunizations: Online Registry' and 'Public and private schools interested in access view immunization records, please download, fill forms to the CIR.' At the bottom, it says 'Forgot your CIR facility code? If you think you may be registered and have forgotten your facility code, enter your information on the registration page for verification to obtain your facility code.'

NYC Health

Promoting and Protecting the City's Health

NYC Health

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Reporting and Services Health Topics Resources Emergency Prep

NYCMED

Reporting Diseases and Conditions

Reporting Central

Citywide Immunization Registry (CIR)

eVital

Public Health Lab

Reporting Animal Diseases

Parents, Guardians & Individuals | Schools, Child Care Facilities & Camps

Citywide Immunization Registry (CIR)

adults — throughout their lives.

Our Mission: To improve the immunization status of all NYC residents by consolidating immunization information and sharing it with health care providers, families and agencies concerned with public health.

[Register your practice online.](#)

Look up records and report immunizations: [Online Registry](#)

Public and private schools interested in access view immunization records, please download, fill forms to the CIR.

Forgot your CIR facility code?
If you think you may be registered and have forgotten your facility code, enter your information on the [registration page](#) for verification to obtain your facility code.

[GO](#)

nyc.gov/health/cir

<https://immunize.nyc/provider-client/servlet/PC>

- Contact CIR at (347) 396-2400 for Online Registry access, or
- Visit <https://www1.nyc.gov/site/doh/providers/reporting-and-services/cir-security-admin-info.page>

After account set up is completed, this is the **Log in** screen to use going forward:

The screenshot shows the 'Online Registry' login interface. At the top, there is a logo with the text 'Online Registry' and an icon of a family under an umbrella. Below the logo, the heading 'Online Registry' is displayed. The main section is titled 'Please enter your User ID and Password'. It contains two input fields: 'User ID' and 'Password'. A red circle highlights the 'User ID' field, and a blue arrow points to it with the number '1'. Another red circle highlights the 'Password' field. Below the input fields, there is a block of text explaining the requirements for a User ID and Password, and a list of terms of use. At the bottom, there are two buttons: 'Cancel' and 'I Consent'. A blue arrow points to the 'I Consent' button with the number '2'. The footer contains two sections: 'Online Registry Resources' and 'News and Highlights'.

Online Registry

Please enter your User ID and Password

User ID

Password

To obtain a **User ID** and **Password**, each health care facility or practice must designate a **Facility Security Administrator**. The Security Administrator must be associated with a licensed physician, physician's assistant or nurse practitioner, or must be a registered professional nurse or pharmacist who administers vaccines pursuant to *NYS Public Health Law Section 2168*. The Security Administrator must mail or fax a signed confidentiality statement to the CIR. Call us at 347-396-2400 for more information or download the sign up forms from [here](#).

In proceeding beyond this point, the user:

- acknowledges the possibility that the information contained herein may be incorrect or incomplete.
- acknowledges that the medical decision to immunize or test a child for lead rests with the health care provider, based on the child's current health status and past medical history.
- agrees to report immunizations and lead test results in accordance with *NYS Public Health Law Section 2168*/*NYC Health Code Section 11.07* and *Section 11.09*.
- agrees to look up information only on his/her current patients, and to comply with the restrictions on the disclosure of information from the Online Registry in accordance with *NYC Health Code Section 11.11*.

By clicking the button below, you consent to the above.

Cancel X I Consent

Online Registry Resources

- Recall patients with text messaging via the Online Registry:

News and Highlights

- VFC Program update, June 2017

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?](#)"

Online Registry

PATIENTS Search MyList Reports Add/Edit Add Event Tools Recall VFC Set Up

MyList Refresh MyList

Each time someone at Citywide Immunization Registry finds a patient using Search, they are added to MyList. To help your list, use the [Refresh MyList](#) feature.

To view a patient record, click on the patient's name.

To Remove from List, check one or more boxes and click the "Remove" button at the bottom of the page. (The selected will no longer appear on this page. They will not be deleted from the Registry.)

You may update a patient's status to let CIR know if the patient is no longer being seen at your practice. Click the Yes/No toggle in the Active column to the left of the patient's name. Update the information at the bottom of "Update Patient Info" that appears.

Search MyList First Name OR Last Name... **GO**

View MyList Show patients accessed... Show per page... and Jump to... **GO**

Who's in MyList?

On 07/20/2019 at 03:43PM, SHIRLEY HUIE refreshed this practice's MyList with patients who met the following criteria as of that date:

- Include all patients who have been looked up at this practice within 3 months.
- Include all patients who received any immunization at this practice within 3 years.
- Do not include patients who have been designated as MOGE (Moved or Gone Elsewhere).

In addition, since the time of that refresh:

- Any patients who were looked up by users at this practice would have been added to the MyList.
- Any patients who were manually removed by users at this practice would have been removed from the MyList.
- Any patient included in a Recall List created from a Flu Coverage Report.

Remove	Active	Status	Last/First	Gender	DOB	Address	Phone	Last Accessed
<input type="checkbox"/>	Yes		Mouse, Mickey	M	03/01/2004	99 Mouse Hole Dr. 9B Brooklyn, NY 10032	212-676-2312 (H)	01/15/2014
<input type="checkbox"/>	Yes		Huie, Shirl	M	07/18/2009	2 2nd Queens, NY 11746	212-676-2400 (H) 212-676-2569 (M)	11/19/2013
<input type="checkbox"/>	No		Aardvark, Aileen	F	10/10/1990	10-10 Bowery St., 90 New York, NY 10011	212-676-2312 (H)	08/28/2013
<input type="checkbox"/>	Yes		Homer, Freddy	M	01/11/1978	131 Main New York, NY 11111	212-123-4567 (H)	06/13/2013
<input type="checkbox"/>	Yes		Mouse, Mickey	F	05/22/2004	789 Park Ave, 32C New York, NY 10013	212-676-2323 (H)	06/04/2013
<input type="checkbox"/>	Yes		Explains, Dora	F	10/01/2008	2 Lafayette St. 3A	718-555-1212 (M)	05/28/2013

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.

A screenshot of the 'Refresh My List' dialog box. It contains a section titled 'Include Patients who:' with four checkboxes and dropdown menus. The first three checkboxes are selected: 'Have been looked up at this practice:', 'Have received an immunization at this practice:', and 'Have received their last immunization at this practice:'. The fourth checkbox, 'Do not include patients who have been designated as N...', is not selected. A dropdown menu is open for the third checkbox, showing options: 'within 1 year', 'within 2 years', 'within 3 years', 'within 4 years', 'within 5 years', 'within 6 years', 'within 7 years', 'within 8 years', 'within 9 years', and 'anytime'. Below the checkboxes, there is a section titled 'Please note after refreshing MyList:' with several bullet points. At the bottom right, there are 'Cancel' and 'Continue' buttons.

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

The screenshot shows the 'Online Registry' interface. At the top, there are tabs for 'PATIENTS' (Search, MyList, Reports, Add/Edit) and 'PRACTICE' (Tools, Recall, Adv. Event, VFC, Set Up, Adult, Help). A blue arrow points to the 'Refresh My List' link in the 'MyList' tab. Below the tabs, a yellow dialog box titled 'Refresh My List' is displayed. It contains the following options:

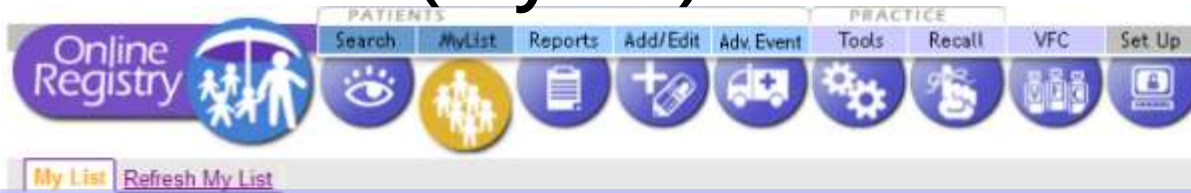
- ☒ Include Patients who:
 - ☒ Have been looked up at this practice: within 1 year
 - ☒ Have received an immunization at this practice: within 3 years
 - ☐ Have received their last immunization at this practice: [dropdown menu]
- ☒ Do not include patients who have been designated as MOGE (Moved or Gone Elsewhere).

Below the options, there is a section titled 'Please note after refreshing MyList:' with the following bullet points:

- After refreshing the Mylist, any patients who are looked up by users at this practice will be added to the MyList.
- After refreshing the Mylist, any patients who are manually removed by users at this practice will be removed from the MyList.
- Patients "removed" from the MyList are only removed from your view, but are not removed from the CIR, and remain associated with this practice.
- After refreshing the Mylist, any patients who are included in a Recall List created from a Flu Coverage Report by users at this practice will be added to the MyList.

At the bottom right of the dialog box are 'Cancel' and 'Continue' buttons.

Patient List (MyList): Active Status, Remove



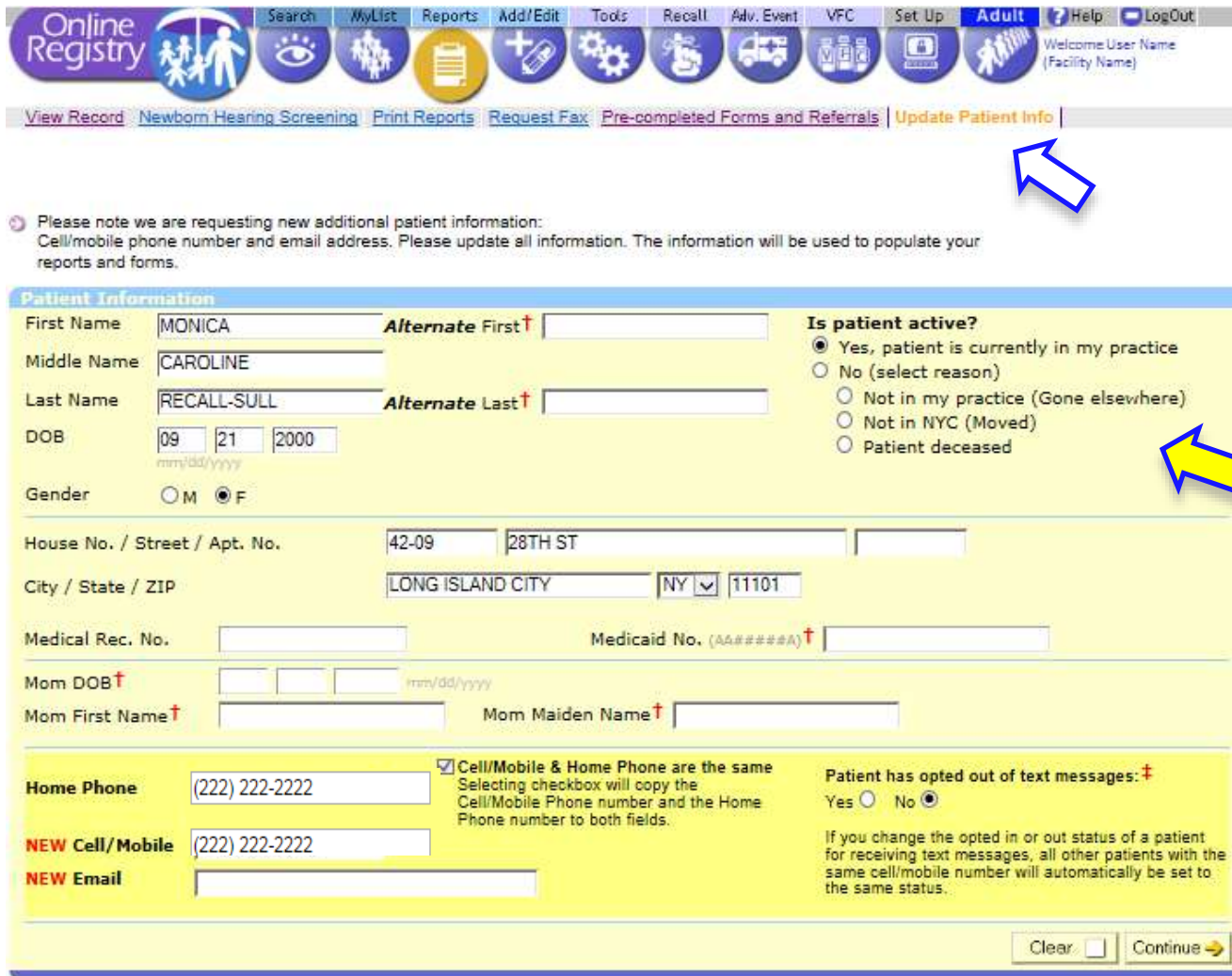
Before running a coverage, recall or reminder report, you may update a patient's status to let CIR know if the patient is no longer being seen (a.k.a., Moved or Gone Elsewhere [MOGE] status) at your practice:

- 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.

Remove	Active	Status	Last/First	Gender	DOB	Address	Phone	Last Accessed
<input type="checkbox"/>	Yes		Mouse, Mickey	M	03/01/2004	99 Mouse Hole Dr, 9B Brooklyn, NY 10032	212-676-2312 (H)	01/15/2014
<input type="checkbox"/>	Yes		Hule, Shirl	M	07/18/2009	2 2nd Queens, NY 11746	212-676-2400 (H) 212-676-2569 (M)	11/19/2013
<input type="checkbox"/>	No		Aardvark, Aileen	F	10/10/1990	10-10 Bowery St., 90 New York, NY 10011	212-676-2312 (H)	08/28/2013
<input type="checkbox"/>	Yes		Homer, Freddy	M	01/11/1978	131 Main New York, NY 11111	212-123-4567 (H)	06/13/2013
<input type="checkbox"/>	Yes		Mouse, Mickey	F	05/22/2004	789 Park Ave, 32C New York, NY 10013	212-676-2323 (H)	06/04/2013
<input type="checkbox"/>	Yes		Explora, Dora	F	10/01/2008	2 Lafayette St, 3A New York, NY 10009	718-555-1212 (M)	05/29/2013
<input type="checkbox"/>	Yes		Mcdonald, Ronald	M	01/01/2009	2 Lafayette St, 19 Ny, NY 10007	347-396-2323 (H)	05/07/2013
<input type="checkbox"/>	Yes		Doe, Jane	F	10/20/2008	2 Laf New York, NY 10013	212-676-2312 (H)	05/07/2013
<input type="checkbox"/>	Yes		Horner, Jack	M	08/01/2009	2 Laf New York, NY 10002	212-555-3333 (H) 212-555-1111 (M)	05/02/2013
<input type="checkbox"/>	Yes		Recall, Recall	F	12/15/2009	, NY		01/09/2013

To add back a patient, search again in the **Search** screen

Update Patient Info: address, phone, MOGE status



Online Registry Search MyList Reports Add/Edit Tools Recall Adv. Event VFC Set Up **Adult** ? Help LogOut
Welcome User Name (Facility Name)

[View Record](#) [Newborn Hearing Screening](#) [Print Reports](#) [Request Fax](#) [Pre-completed Forms and Referrals](#) [Update Patient Info](#)

Please note we are requesting new additional patient information: Cell/mobile phone number and email address. Please update all information. The information will be used to populate your reports and forms.

Patient Information

First Name **Alternate First**
 Middle Name
 Last Name **Alternate Last**
 DOB mm/dd/yyyy
 Gender ☐ M ☒ F

House No. / Street / Apt. No.
 City / State / ZIP
 Medical Rec. No. Medicaid No. (AA#####)
 Mom DOB mm/dd/yyyy
 Mom First Name Mom Maiden Name

Home Phone ☒ **Cell/Mobile & Home Phone are the same**
 Selecting checkbox will copy the Cell/Mobile Phone number and the Home Phone number to both fields.
NEW Cell/Mobile
NEW Email

Is patient active?
☒ Yes, patient is currently in my practice
☐ No (select reason)
☐ Not in my practice (Gone elsewhere)
☐ Not in NYC (Moved)
☐ Patient deceased

Patient has opted out of text messages:
 Yes ☐ No ☒
 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.

Clear Continue

† 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.

- 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

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:

Coverage: slides 15-25

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.

Create New Coverage Report: [Standard or Flu Coverage](#)

[Refresh](#)

Recent Coverage Reports (13 Reports)							
	Type	Name	Patients	UTD%	Coverage Status as of:	Date Created	Report Status
<input type="checkbox"/>	Standard Coverage Report	"HUIE_20190720_01"	7	42.9%	07/20/2019	07/20/2019 3:42 PM	Done
<input type="checkbox"/>	Standard Coverage Report	"Percent_UTD_HPVC_MCV_Tdap_11_18 yrs"	25	20.0%	06/07/2019	06/07/2019 11:54 AM	Done

Coverage Report: choose a report to use

Online Registry

PATIENTS: Search, MyList, Reports, Add/Edit

PRACTICE: Tools, Recall, Adv. Event, VIM, Set Up, Adult

Help, LogOut

Welcome Shirley (Demo Site)
Facility: CIR Guest (Provider)
Address: 42-09 28 STREET

Coverage Report | Immunization Schedule | Lead Guidelines

- Use this page to find out which patients are up to date and optionally create a Recall List for patients who need immunizations.
For Coverage Report instructions, click [here](#). For a brief guide on Influenza Coverage Reports, click [here](#).
Consider using [Refresh MyList](#) before running a coverage report.

The patients that will be included are all the patients in "My List" [Who's in MyList?](#) [Refresh MyList](#)

Standard Coverage Report

a Report

<input type="radio"/> 7-11 month olds with...	<input type="radio"/> 19-35 months olds with...	<input checked="" type="radio"/> 24-35 month olds with...	<input type="radio"/> 11-18 year olds with...	<input type="radio"/> 13-17 year olds with...
3 DTP,	4 DTP,	4 DTP,	1 MCV,	1 MCV,
2 Polio,	3 Polio,	3 Polio,	1 Tdap,	1 Tdap,
2 Hib,	1 MMR,	1 MMR,	HPV Complete (2 or 3 doses)	HPV Complete (2 or 3 doses)
2 HepB,	3 HepB,	3 HepB,	(Males and females included)	(Males and females included)
3 Pneumococcal	4 Hib,	4 Hib,		
	1 Varicella,	1 Varicella,		
	4 Pneumococcal	4 Pneumococcal		

b

Review date (date as of which age will be calculated and report will be run.)

08/01/2019 (mm/dd/yyyy)

a Influenza Coverage Report

The flu season runs from August 1st through June 30th. You may not run an Influenza coverage report outside the flu season time frame. The influenza coverage reports are not based on your MyList population but, instead, replicates the methodology used in the up-to-date coverage reports you receive in the mail. You may view the population parameters shown below each report option.

☐ 6-59 month-olds:

An individual is considered your patient if you reported the last immunization administered to

☐ 5-10 year-olds:

An individual is considered your patient if you reported the last immunization administered to

☐ 11-18 year-olds:

An individual is considered your patient if you reported the last immunization administered to this patient on or after 10 years of age. During the current flu season, the youngest patient in this group turned 11 years of age on September 1st and the oldest patient turns 19 years of age on April 1st.

c
d

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](#)

Online Registry

Search

MyList

Reports

Add/Edit

Tools

Recall

Adv. Event

VIM

Set Up

Adult

Help

Log Out

Welcome Shirley (Demo Site) Huie (SS)
Facility: CIR Guest (Provider)
Address: 42-09 28 STREET

Coverage Report

Immunization Schedule

Lead Guidelines

●

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!** [Refresh](#)

Recent Coverage Reports (23 Reports)

	Type	Name	Patients	UTD%	Coverage Status as of:	Date Created	Report Status
<div>f</div> <div>☐</div>	Standard Coverage Report	"Coverage_20180801_24 to 35 mo"	2	0.0%	08/01/2019	08/01/2019 2:51 PM	Done
☐	Standard Coverage Report	"HUIE_20190226_01"	18	16.7%	02/26/2019	02/26/2019 9:54 AM	Done
☐	Flu Coverage Report	"flu_coverage_11-18y"	4	0.0%	01/30/2019	01/30/2019 12:54 PM	Done
☐	Flu Coverage Report	"flu_coverage_5-10y"	3	0.0%	01/30/2019	01/30/2019 12:54 PM	Done
☐	Flu Coverage Report	"flu_coverage_6-59m"	3	33.3%	01/30/2019	01/30/2019 12:54 PM	Done

g

Coverage Report: create a recall job



This page lists the results of your Coverage report.

Standard Coverage Report: Coverage_20180801_24 to 35 mo

0 of 2 patients are up to date (0.0%).

Create Recall List

Based on MyList with an age range of: 24mo - 35mo

Doses:

DTP 4

Polio 3

MMR 1

HepB 3

Hib 4

Var. 1

Pneum.4

As Of: 08/01/2019

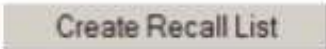
2 of 2 patients are not up to date (100.0%)

Last/First	Gender	DOB
Test, Test	M	01/01/2017
Testrecord, Child	F	04/01/2017



- 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**.

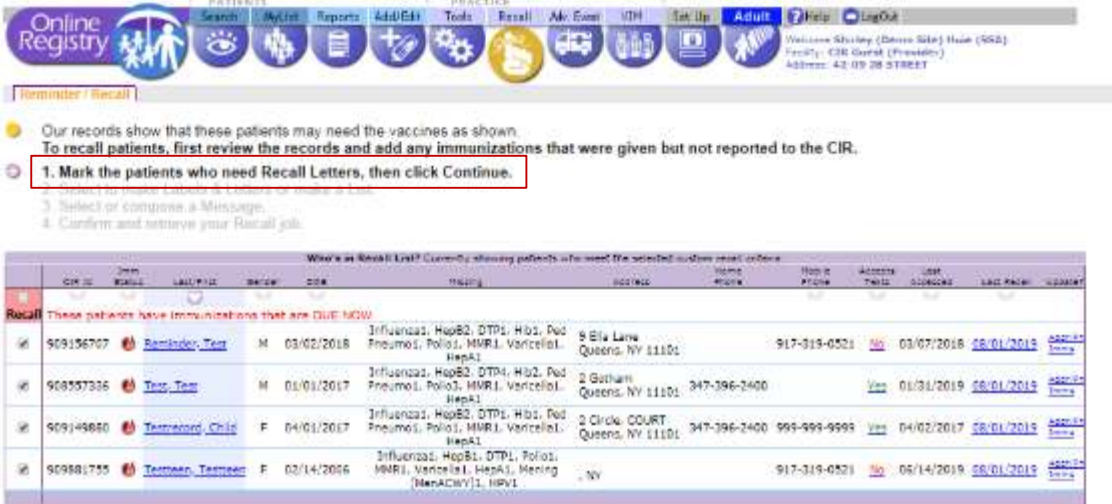
Click on 

Review and Update Records

(a) Review each record

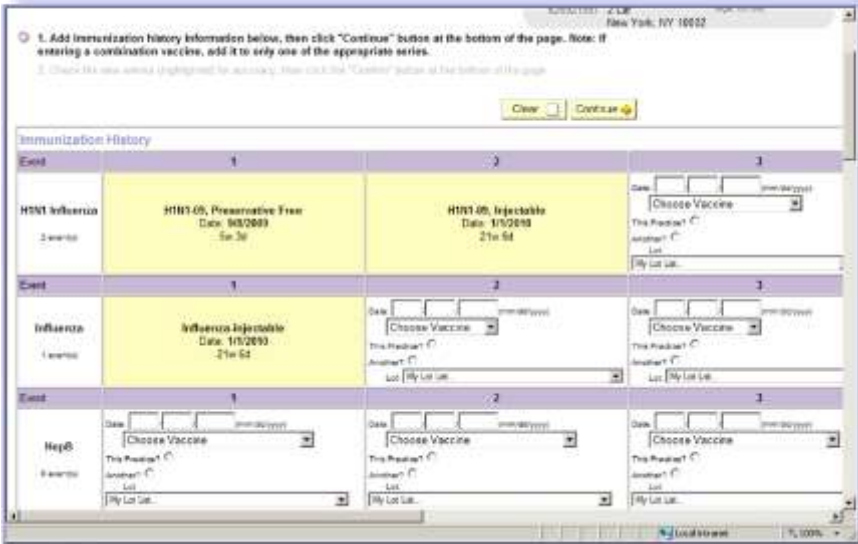
The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

 Select all patients in the current list



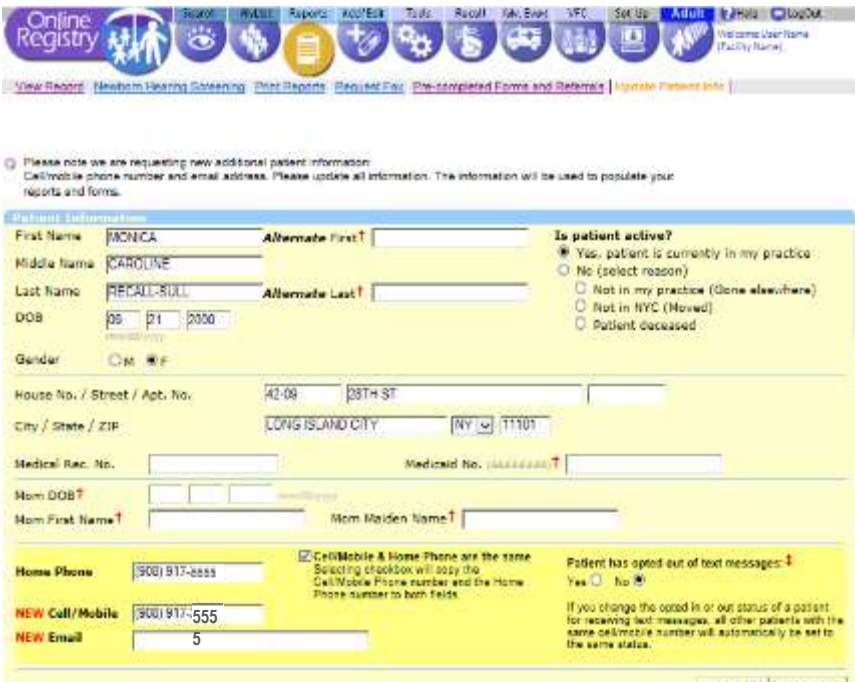
The screenshot shows the 'Online Registry' interface with a 'Recall' tab selected. A message states: 'Our records show that these patients may need the vaccines as shown. To recall patients, first review the records and add any immunizations that were given but not reported to the CIR. 1. Mark the patients who need Recall Letters, then click Continue.' Below this is a table of patients with columns for Name, Address, Phone, and a 'Recall' checkbox. The table lists four patients, all of whom have their 'Recall' checkboxes checked.

(b) Update immunization record



The screenshot shows the 'Immunization History' form. It has a table with columns for 'Vaccine', 'Date', and 'Status'. The table contains three rows: 'H1N1-09, Preservative Free', 'H1N1-09, Injectable', and 'Influenza'. Each row has a 'Date' field and a 'Status' dropdown menu. The 'Status' dropdowns are currently set to 'Not Reported'.

(c) Update patient information



The screenshot shows the 'Patient Information' form. It contains fields for 'First Name', 'Middle Name', 'Last Name', 'DOB', 'Gender', 'House No. / Street / Apt. No.', 'City / State / ZIP', 'Medical Rec. No.', 'Mom DOB', 'Mom First Name', 'Mom Maiden Name', 'Home Phone', 'NEW Call/Mobile', and 'NEW Email'. There are also checkboxes for 'Is patient active?' and 'Patient has opted out of text messages:'. The form is partially filled out with example data.

Recall from Coverage Report: select List or Labels & Letters

Online Registry

PATIENTS Search MyList Reports Add/Edit **PRACTICE** Tools Recall Adv. Event VIM Set Up Adult

Reminder / Recall

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.

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.

← Change Cancel ✕ Continue →

Recall from Coverage Report: compose letter

Reminder / Recall

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.

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,

☐ **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.

- e. Choose an option:
- Default letter
- Optional:
- ☐ add today's date;
 - ☐ Salutation: "Dear Parent/Guardian"
- Custom message
 - Enter extra line spaces for your letterheador
- List of names includes: address, phone and doses that are due now.

Recall from Coverage Report: name the job

Online Registry

PATIENTS: Search, MyList, Reports, Add/Edit, Tools, Recall, Adv. Event, VIM

PRACTICE: Set Up, Adult, ? Help, LogOut

Reminder / Recall

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.

Recall List

CIR Id	Imm Status	Last/First	Gender	DOB	Missing	Address	Home Phone	Mobile Phone	Accepts Texts	Last Accessed	Last Recall	Update?
These patients have immunizations that are DUE NOW												
908557336	Test, Test		M	01/01/2017		Influenza1, HepB2, DTP4, Hib2, Ped Pneumo1, Polio3, MMR1, Varicella1, HepA1	2 Gotham Queens, NY 11101	347-396-2400		Yes	01/31/2019	08/01/2019 Addr/Ph Imms
909149880	Testrecord, Child		F	04/01/2017		Influenza1, HepB2, DTP1, Hib1, Ped Pneumo1, Polio1, MMR1, Varicella1, HepA1	2 Circle, COURT Queens, NY 11101	347-396-2400	999-999-9999	Yes	04/02/2017	08/01/2019 Addr/Ph Imms

1-2 of 2 records

Job Name for identification later:

Accept or rename your List or Labels & Letters file.

Click

Please be patient. Processing the records takes time.

Recall from Coverage Report: access finished jobs

✓ Your Recall is being processed. Most Recalls can be processed in a few seconds, but others take longer. You can find your Recall in [Reminder/Recall Job List](#).



Reminder / Recall

● 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:	<input type="radio"/> Reminder	<input type="radio"/> Recall
2. Parameter Type:	<input type="radio"/> Standard	<input type="radio"/> Custom
3. Contact Method:	<input type="radio"/> List or Letters	<input type="radio"/> Text Message ↑
	<input type="radio"/> One Time	<input type="radio"/> Recurrent
		Continue ➡

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 this page loads completely.

[Refresh Job List](#)

Show entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"HUIE_20150410_custom recall"	List or Letters (C)	Recall	List	4	04/10/2015 5:32pm	
<input type="checkbox"/>	"MS_TEST3_3.20.15"	List or Letters (S)	Recall	List	0	03/20/2015 4:53pm	
<input type="checkbox"/>	"HUIE_20150416_recall from coverage"	List or Letters	Coverage Report	List Labels Letters	1	04/16/2015 11:58am	

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.

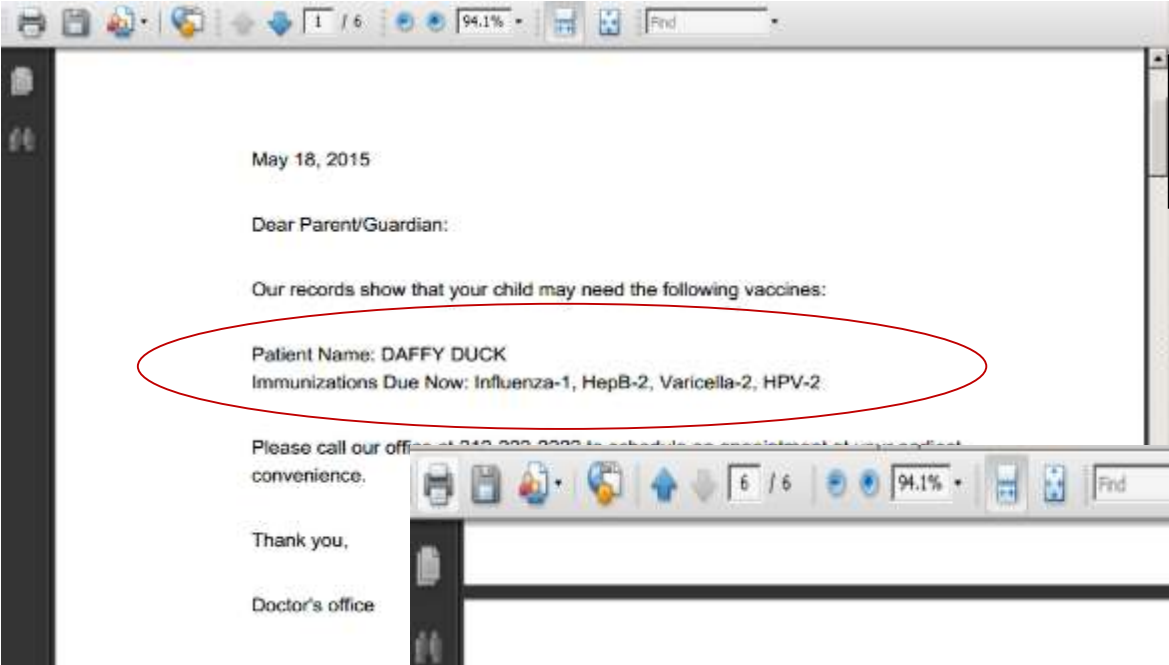
j. To view results, click on each of the links in the Status column.

Output: List, Letter and Labels



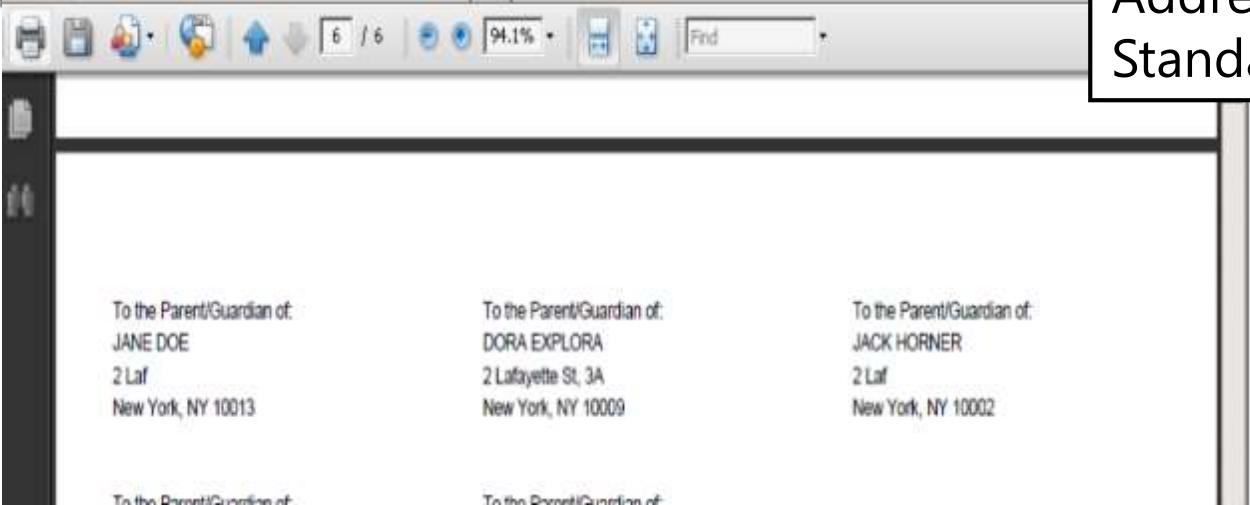
List

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Recall Name: HUIE_20190801_01													
2	Date Created: 8/1/2019 3:11:15 PM													
3	Created By: 22904													
4	Based On: Coverage Report													
5	Standard Recall: Selected 'Due Now' patients													
6	Total Patients: 2, Patients not UTD: 2 (100%) Patients UTD: 0 (0%)													
7														
8	Last Name	First Name	DOB	Gender	CIR Id	Medrec Num	Address	City	State	Zip	Home Phone	Cell Phone	Opted Out Text Msg	Due Now
9	TESTRECOR	CHILD	04/01/2017	F	909149880		2 Circle, COURT	QUEENS	NY	11101	347-396-2400	999-999-9999	N	Influenza1, HepB2, DTP1, Hib1, Ped Pneumo1, Polio1, MMR1, Varicella1, HepA1
10	TEST	TEST	01/01/2017	M	908557336		2 Gotham	QUEENS	NY	11101	347-396-2400		N	Influenza1, HepB2, DTP4, Hib2, Ped Pneumo1, Polio3, MMR1, Varicella1, HepA1

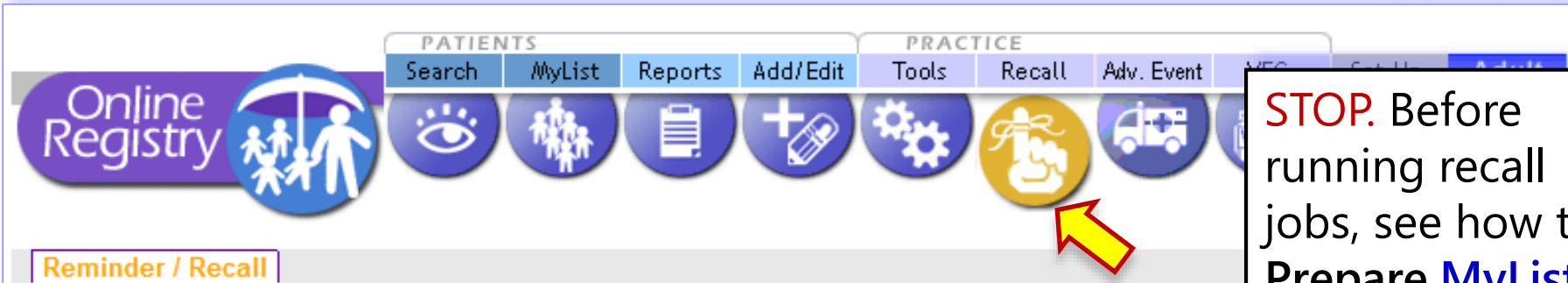


Letter: default or customized

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:	<input type="radio"/> Reminder	<input type="radio"/> Recall		
2. Parameter Type:	<input type="radio"/> Standard	<input type="radio"/> Custom		
3. Contact Method:	<input type="radio"/> List or Letters	<input type="radio"/> Text Message †		
	<input type="radio"/> One Time	<input type="radio"/> Recurrent	Continue ➡	

Recall: Custom List or Letters: set up job

Online Registry

PATIENTS

Search

MyList

Reports

Add/Edit

Tools

Recall

Adv. Event

VFC

Set Up

Adult

Help

LogOut

PRACTICE

Tools

Recall

Adv. Event

VFC

Set Up

Adult

Help

LogOut

Welcome Monica Sull
Facility: Recall Test Facility (Provider)
Address: 123 Recall Lane

Reminder / Recall

● 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 text 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 ➔

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 this page loads completely.

Refresh Job List

Show 20 entries

Delete

Job Name

Contact Method

Based On

Status

Patients

Date Created

Cancel Job

a.

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 ➔

b.

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

CIR

Citywide Immunization Registry

NYC

Health

26

Recall: Custom List or Letters: select patient and immunization criteria



- The Registry will find the patients that fit the criteria you chose and save them in a list with the name you choose. To recall patients based on up to date rates, use the [Coverage Report Tool](#). For Coverage, Recall/Reminder instructions, click [here](#). Consider using [Refresh MyList](#) before running a Custom Recall.
- Select criteria for the Custom Recall Job.**
 - Confirm criteria for the Custom Recall Job, and accept or change Job Name.
 - Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
 - Review patients, update addresses and immunizations.
 - Select to make Labels & Letters or make a List.
 - Select or compose a Message.
 - Confirm and retrieve your Recall job.

The patients that will be included are all the patients in "My List" [Who's in MyList?](#) [Refresh MyList](#)

Create Custom Recall Job

A ☐ All patients in MyList

Specific Age

☐ 7-11 month olds ☐ 11-18 year olds

☐ 19-35 month olds ☐ 13-17 year olds

☒ 24-35 month olds ☐ 19+ year olds

Age Range

From ≥ ☐ years ☐ months

To < ☐ years ☐ months

DOB Range

Include patients born between / /

and / /

B **Gender**

☒ Male ☒ Female

C **For immunization series**

Include patients who are missing:

☐ Any age-appropriate immunization

☒ Any age-appropriate immunization from the series below only:

<input type="checkbox"/> Influenza	<input type="checkbox"/> Pneumo, Conjugate	<input type="checkbox"/> MMR
<input type="checkbox"/> HepB	<input type="checkbox"/> Pneumo, Polysaccharide	<input type="checkbox"/> Varicella
<input type="checkbox"/> Rotavirus	<input type="checkbox"/> Polio	<input type="checkbox"/> HepA
<input type="checkbox"/> DTaP	<input type="checkbox"/> Tdap	<input type="checkbox"/> Meningococcal
<input checked="" type="checkbox"/> Hib		<input type="checkbox"/> Human Papilloma virus

☐ Include patients who do not have the # of specified valid doses from the series chosen below:

--0-- Influenza	--0-- Pneumo, Conjugate	--0-- MMR
--0-- HepB	--0-- Pneumo, Polysaccharide	--0-- Varicella
--0-- Rotavirus	--0-- Polio	--0-- HepA
--0-- DTaP	--0-- Tdap	--0-- Meningococcal
--0-- Hib		--0-- Human Papilloma virus

Cancel X Clear Clear Continue ➔

Custom List or Letters – Example 1

Online Registry

PATIENTS Search MyList Reports Add/Edit Tools Recall Adv. Event VIM Set Up **Adult** ? Help LogOut

Welcome Shirley (Demo Site) Huie (SSA)
Facility: CIR Guest (Provider)
Address: 42-09 28 STREET

Reminder / Recall

The Registry will find the patients that fit the criteria you chose and save them in a list with the name you choose. To recall patients based on up to date rates, use the [Coverage Report Tool](#). For Coverage, Recall/Reminder instructions, click [here](#). Consider using [Refresh MyList](#) before running a Custom Recall.

1. Select criteria for the Custom Recall Job.
2. Confirm criteria for the Custom Recall Job, and accept or change Job Name.
3. Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
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.

The patients that will be included are all the patients in "My List" [Who's in MyList?](#) [Refresh MyList](#)

Create Custom Recall Job

A ☐ All patients in MyList

Specific Age

☐ 7-11 month olds ☐ 11-18 year olds
☐ 18-35 month olds ☐ 13-17 year olds
☐ 24-35 month olds ☐ 19+ year olds

Age Range

From ≥ 1 years months
To < 18 years months

DOB Range

Include patients born between
and
and

B **Gender**

☒ Male
☒ Female

C **For immunization series: Include patients who are missing:**

☐ Any age-appropriate immunization

☐ Any age-appropriate immunization from the series below only:

☐ Influenza ☐ Pediatric Pneumococcal ☒ MMR
☐ HepB ☐ Adult Pneumococcal ☐ Varice
☐ Rotavirus ☐ Polio ☐ HepA
☐ DTaP ☐ Tdap ☐ Menin
☐ Hib ☐ Huma

☐ Include patients who do not have the # of specified valid doses from the series chose

--D-- Influenza --D-- Pediatric Pneumococcal --D--
--D-- HepB --D-- Adult Pneumococcal --D--
--D-- Rotavirus --D-- Polio --D--
--D-- DTaP --D-- Tdap --D--
--D-- Hib --D--

Cancel

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.

Custom List or Letters – Example 2



Reminder / Recall

- The Registry will find the patients that fit the criteria you chose and save them in a list with the name you choose. To recall patients based on up to date rates, use the [Coverage Report Tool](#). For Coverage, Recall/Reminder instructions, click [here](#). Consider using [Refresh MyList](#) before running a Custom Recall.
1. Select criteria for the Custom Recall Job.
 2. Confirm criteria for the Custom Recall Job, and accept or change Job Name.
 3. Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
 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.

The patients that will be included are all the patients in "My List" [Who's in MyList?](#) [Refresh MyList](#)

Create Custom Recall Job

A

☐ All patients in MyList

Specific Age

☐ 7-11 months

☒ 11-18 year olds

☐ 19-35 month olds

☐ 13-17 year olds

☐ 24-35 month olds

☐ 19+ year olds

Age Range

From ≥ years ☐ months

To < years ☐ months

DOB Range

Include patients born between / /

and / /

B

Gender

☒ Male

☐ Female

C

For immunization series

Include patients who are missing:

☐ Any age-appropriate immunization

☐ Any age-appropriate immunization from the series below only:

☐ Influenza

☐ HepB

☐ Rotavirus

☐ DTaP

☐ Hib

☐ Pneumo, Conjugate

☐ Pneumo, Polysaccharide

☐ Polio

☐ Tdap

☐ MMR

☐ Varicella

☐ HepA

☐ Meningococcal

☐ Human Papillomavirus

☒ Include patients who do not have the # of specified valid doses from the series chosen below:

Influenza

HepB

Rotavirus

DTaP

Hib

Pneumo, Conjugate

Pneumo, Polysaccharide

Polio

Tdap

MMR

Varicella

HepA

Meningococcal

Human Papilloma virus

Cancel

Clear

Continue

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)



1. Select criteria for the Custom Reminder/Recall List.
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.
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 list/job.

Confirm criteria for Custom Reminder/Recall List

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

List Name for identification later: HPV_11to18yrsMissingDose
We recommended you give your list a brief and clearly descriptive name.

Custom Recall: view patients retrieved for this job

Online Registry

PATIENTS

Search

MyList

Reports

Add/Edit

PRACTICE

Tools

Recall

Adv. Event

VFC

Set Up

Adult

Help

LogOut

Welcome Monica Sull
Facility: Recall Test Facility (Provider)
Address: 123 Recall Lane

Reminder / Recall

- 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:	<input type="radio"/> Reminder	<input type="radio"/> Recall
2. Parameter Type:	<input type="radio"/> Standard	<input type="radio"/> Custom
3. Contact Method:	<input type="radio"/> List or Letters	<input type="radio"/> Text Message †
	<input type="radio"/> One Time	<input type="radio"/> Recurrent

Continue ➡

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](#)."

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 this page loads completely.

[Refresh Job List](#)

Show 20 entries

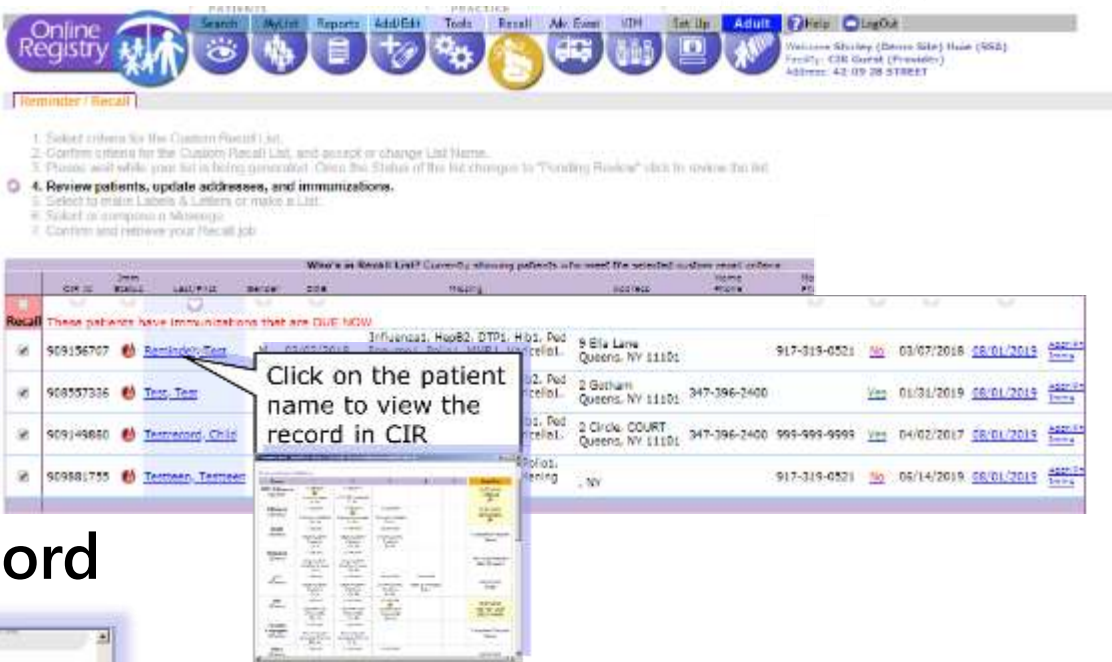
Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"Sull_20150420_01"	List or Letters (C)	Recall	Pending Review	0	04/20/2015 4:50pm	
<input type="checkbox"/>	"MS_coverage_recall_4.17.15"	List or Letters	Coverage Report	List	2	04/17/2015 4:37pm	

Review and Update Records

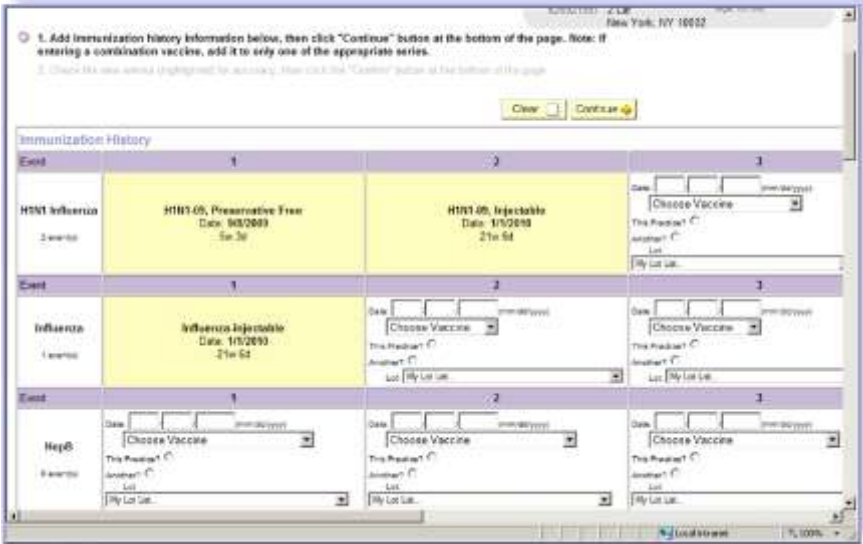
(a) Review each record

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

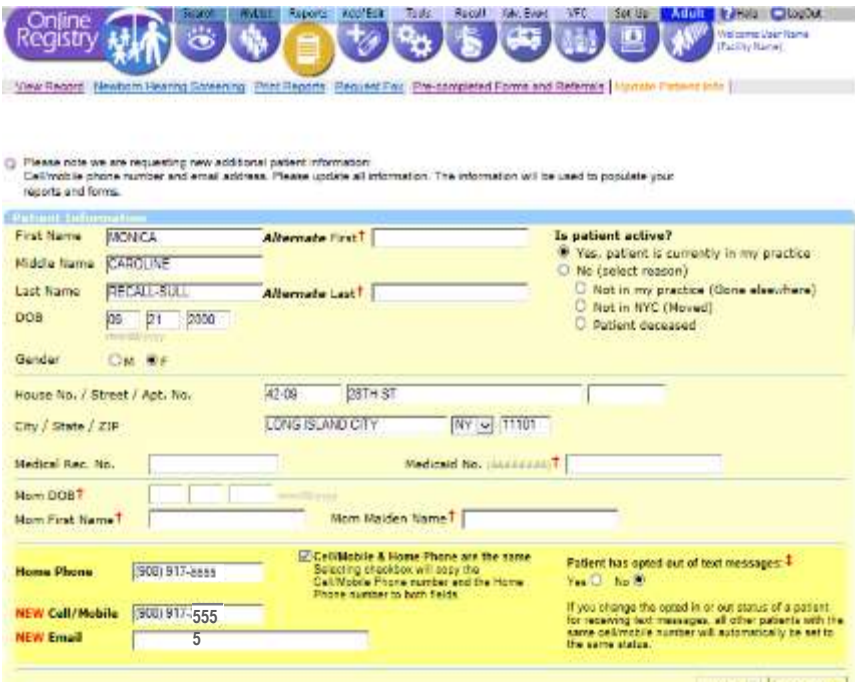
 Select all patients in the current list



(b) Update immunization record



(c) Update patient information



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.

[← Change](#) [Cancel X](#) [Continue →](#)

Custom Recall: compose letter

Online Registry

PATIENTS Search MyList Reports Add/Edit **PRACTICE** Tools Recall Adv. Event VFC Set Up Adult

Reminder / Recall

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 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,

☐ **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.

- e. Choose an option:
 - Default letter
 - Optional:
 - ☐ add today's date;
 - ☐ Salutation: "Dear Parent/Guardian"
 - Custom message
 - Enter extra line spaces for your letterhead
 - or
 - List of names includes: address, phone and doses that are due now.

Custom Recall: view List, Labels, Letters

✔ Your Recall is being processed. Most Recalls can be processed in a few seconds, but others take longer. You can find your Recall in [Reminder/Recall Job List](#).

Online Registry

PATIENTS

Search

MyList

Reports

Add/Edit

PRACTICE

Tools

Recall

Adv. Event

VFC

Set Up

Adm

Reminder / Recall

● 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 →

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 this page loads completely.

[Refresh Job List](#)

Show 20 entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"HUIE_20150410_custom recall"	List or Letters (C)	Recall	List	4	04/10/2015 5:32pm	
<input type="checkbox"/>	"Sull_20150420_02"	List or Letters (C)	Recall	List Labels Letters	4	04/20/2015 5:02pm	
<input type="checkbox"/>	"Sull_20150420_01"	List or Letters (C)	Recall	List Labels Letters	4	04/20/2015 4:50pm	

Citywide Immunization Registry

NYC Health

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Output: List, Letter and Labels



List

	A	B	C	D	E	F	G	H	I	J	K	L
1	Recall Name: Sull, 20150420_02											
2	Date Created: 4/20/2015 5:02:26 PM											
3	Created By: msull1											
4	Based On: Patients in 'My List'											
5	Based On: Patients in 'My List' Gender: Males and Females											
6	Total Patients: 0, Patients not UTD: 4 (=%) Patients UTD: 4 (=-%)											
7	Doses: Patients missing any age appropriate immunization											
8												
9	Last Name	First Name	DOB	Gender	CIR Id	Medrec Num	Address	City	State	Zip	Phone	Due Now
10	RECALL-BARC NICK		12/31/2001	M	788184665							Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-1
11	RECALL-SULL JUNO		01/01/2010	M	788184526							Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1
12	RECALL-SULL MONICA		09/21/2000	F	788184504		42-09 28th St	LONG ISLAND CIT NY		11101 908-917-3370		Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-2

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 345-333-3333 to schedule an appointment at your convenience.

Thank you,

Doctor's office

Letter: default or customized

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, 3A
New York, NY 10009

To the Parent/Guardian of:
JACK HORNER
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.

- 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](#).

Not all combinations are possible.

- | | | |
|--------------------|--|---|
| 1. Outreach Type: | <input type="radio"/> Rem | <input checked="" type="radio"/> Recall |
| 2. Parameter Type: | <input checked="" type="radio"/> Standard | <input type="radio"/> Custom |
| 3. Contact Method: | <input checked="" type="radio"/> List or Letters | <input type="radio"/> Text Message † |
| | <input type="radio"/> One Time | <input type="radio"/> Recurrent |

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.

Reminder/Recall Job List

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

Follow slides 32-36

Show 20 entries

	Job Name	Contact Method	Based On	Status
<input type="checkbox"/>	"DOB no MMR VAR 20150511 01"	List or Letters (C)	Recall	List Labels
<input type="checkbox"/>				

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

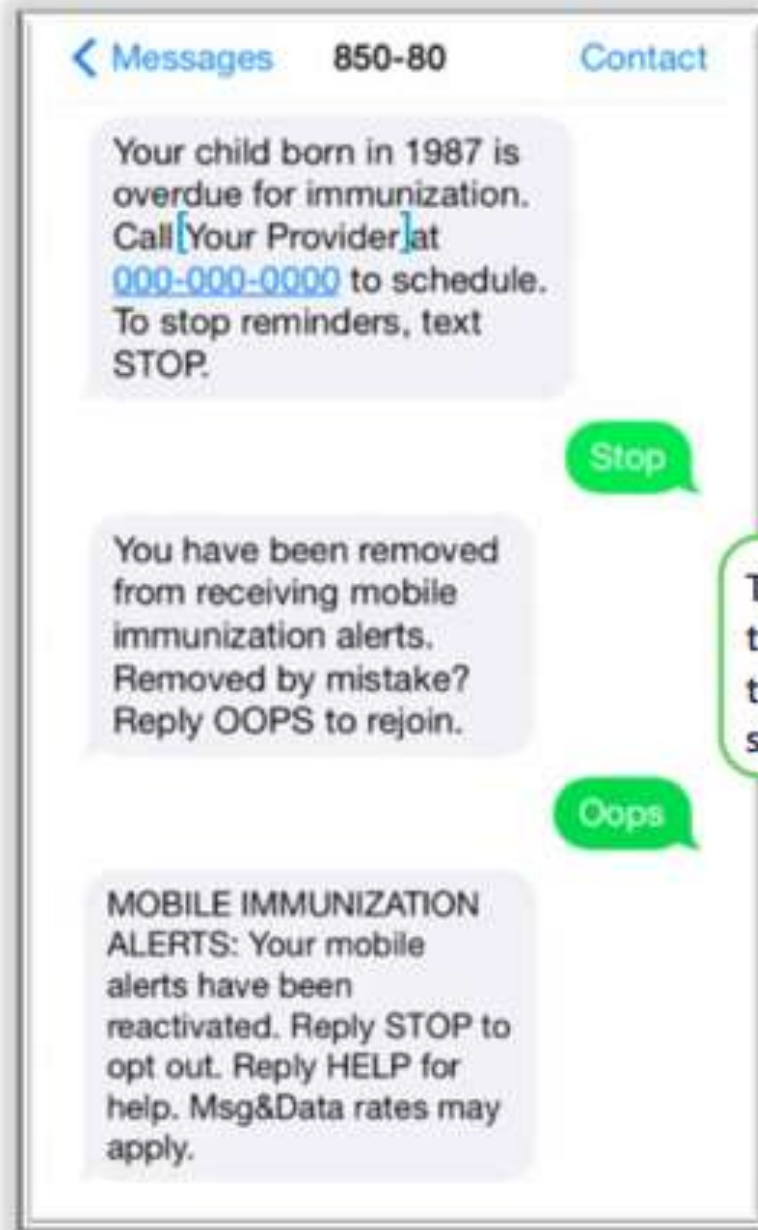
Recall: Custom Text Message –

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

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".



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

Include an appointment phone number.

The recipient always has the option of continuing to receive messages or stopping them.

Recall: Custom Text Message – prepare and update patient information

Online Registry

PATIENTS: Search, MyList, Reports, Add/Edit, Tools, Recall, Adv. Event, VFC, Set-Up, Adult, Help, LogOut

PRACTICE: View Record, Newborn Hearing Screening, Print Report, Post Fax, Pre-completed Forms and Referrals, Update Patient Info

Welcome Monica Sull
Facility: Recall Test Facility
Address: 323 Recall Lane

Please note we are requesting new additional patient information:
Cell/mobile phone number and email address. Please update all information. The information will be used to populate your reports and forms.

Patient Information

First Name: MONICA Alternate First: Is patient active?
☒ Yes, patient is currently in my practice
☐ No (select reason)
☐ Not in my practice (Gone elsewhere)
☐ Not in NYC (Moved)
☐ Patient deceased

Middle Name: CAROLINE

Last Name: RECALL-SULL Alternate Last:

DOB: 09 / 21 / 2000

Gender: ☐ M ☒ F

House No. / Street / Apt. No.: 42-09 28TH ST

City / State / ZIP: LONG ISLAND CITY NY 11101

Medical Rec. No.: Medicaid No. (A*****):

Mom DOB: Mom First Name: Mom Maiden Name:

Home Phone: (908) 917-3370 ☒ Cell/Mobile & Home Phone are the same
Selecting checkbox will copy the Cell/Mobile Phone number and the Home Phone number to both fields.

NEW Cell/Mobile: (908) 917-3370

Email:

Patient has opted out of text messages: ☒ Yes ☐ No

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.

Clear Continue

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.

Recall: Custom One-Time Text Message – set up job

Online Registry Search MyList Reports Add/Edit Tools Recall Adv. Event VFC Set Up Adult Help

Welcome Facility: Address:

Reminder / Recall

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 im will be sent to patients due immunizations now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose will be sent every 28 days within the start and end date indicated. One time indicated.

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

To recall patients based on up-to-date rates using list or letters, use the [Coverage](#)

Not all combinations are possible.

1. Outreach Type:	<input type="radio"/> Reminder	<input checked="" type="radio"/> Recall
2. Parameter Type:	<input type="radio"/> Standard	<input checked="" type="radio"/> Custom
3. Contact Method:	<input type="radio"/> List or Letters	<input checked="" type="radio"/> Text Message ↑
		<input checked="" type="radio"/> One Time <input type="radio"/> Recurrent

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 the 'Refresh Job List' link. Please wait while this page loads completely.

Show 20 entries

Delete

a. 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](#)

b. 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

Recall: Custom One-Time Text Message – select patient immunization criteria

Online Registry

Search MyList Reports Add/Edit Tools Recall Adv. Event VFC Set Up Adult ? Help LogOut

Welcome Shirley Hule
Facility: Recall Test Facility (Provider)
Address: 123 Recall Lane

Reminder / Recall

If you have not already done so, before selecting custom recall criteria please review patients in MyList and update addresses, cell phone numbers, email fields, and immunizations. Patients without cell phone numbers will not receive recall notices via text message.
Note: Collecting cell phone number data in the CIR is relatively new. Please check that your EMR is set up to report cell phone numbers and/or use the Update Patient Information screen to update cell phone numbers at the time of the patient's visit.

Follow the steps below to create custom recall text one-time messages:

1. Select age, gender, and immunization criteria (sections A, B, and C) for your Custom Recall job.
2. Schedule your job by entering a run date; select and complete your text message (section D).
3. Confirm criteria for the Custom Recall job and accept or change the name of your job.
4. Click Continue to submit your Custom Recall job and generate text messages. Messages will be sent to each patient in your MyList that has a cell number on record and meets the selection criteria.

Create Custom Recall Job

A All patients in MyList

Specific Age

☐ 7-11 month olds ☐ 11-15 year olds

☐ 12-15 month olds ☐ 13-17 year olds

☐ 16-18 month olds ☐ 18+ year olds

Age Range

From a years months

To < years months

DOB Range

Include patients born between / /

and / /

B Gender

☒ Male

☒ Female

C For immunization series: Include patients who are missing:

☐ Any age-appropriate immunization

☐ Any age-appropriate immunization from the series below only:

☐ Influenza ☐ Pneumo. Conjugate ☐ MMR

☐ HepB ☐ Pneumo. Polysaccharide ☐ Varicella

☐ Rotavirus ☐ Polio ☐ HepA

☐ DTaP ☐ Tdap ☐ Meningococcal

☐ Hib ☐ Human Papillomavirus

D Send out job on this date: / /

Select Message. This message will be sent to each patient on your recall list.

☒ Use default message

☐ Fill in the fields for the sample message provided.

☐ Use custom message

☒ Type in your message.

Your child born in

CIR will insert patient birth YEAR here

is overdue for immunization. Call

FACILITY NAME (up to 42 characters):

Characters remaining: 42

at CONTACT NUMBER:

to schedule.

132 character limit

Characters remaining: 132

NOTE: To allow patients to opt out of rec text message reminders, the line "To stop reminders, text STOP" will be added to the of your message.

Patients who text "STOP" will not receive future text messages via the CIR.

Please note that it is your responsibility to adhere to the laws, rules, and regulations apply to the disclosure of confidential and sensitive information in the content of your custom text message.

Cancel X Clear Confirm

b. Select patient and immunization criteria:

- Choose one of the three age range choices in the left column.
- Specify gender, optional.
- Next, choose one of the three choices in the right column to include patients to recall who are:
 - missing age-appropriate immunizations, or
 - missing any age-appropriate immunizations from a specified vaccine series, or
 - 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.

D Send out job on this date: / /

Select Message. This message will be sent to each patient on your recall list.

☒ Use default message
Fill in the fields for the sample message provided.

☐ Use custom message
Type in your message.

Your child born in CIR will insert patient birth YEAR here is overdue for immunization. Call

FACILITY NAME (up to 42 characters):
Characters remaining: 42

at **CONTACT NUMBER**:
to schedule.

132 character limit

Characters remaining: 132

NOTE: To allow patients to opt out of receiving text message reminders, the line "To stop reminders, text STOP" will be added to the end of your message.
Patients who text "STOP" will not receive any future text messages via the CIR.

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.

Cancel ☒ Clear ☐ Continue

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

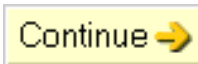


Reminder / Recall

1. Select age, gender, and immunization
2. Schedule your job by entering

3. Confirm criteria for the Custom Recall job and accept or change the name of your job.
4. Click Continue to submit your Custom Recall job and generate text messages. Messages will be sent to each patient in your MyList that has a cell number on record and meets the selection criteria.

Note: This is your last chance to update your MyList before creating this Recall job. [Who's in MyList?](#) [Refresh MyList](#)
If you schedule a recurrent job, we encourage you to regularly refresh your MyList and review your patient's information in the CIR. Scheduled text messages will be based on the latest refresh of your MyList.

- 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  to schedule the job.

Confirm criteria for Custom Recall Job

All patients in MyList

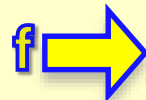
Gender: Males and Females


Text Message Type: One Time

Date of Run: 04/23/2015


Custom Message: rest


For immunization series: Include patients who are missing:
Patients missing any age appropriate immunization




Job Name for identification later:  Sull_20150423_02

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

 Change

Cancel 

Continue 

Recall: Custom Recurrent Text Message – set up job



Reminder / Recall

- 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 n... 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" 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 c... will be sent every 28 days within the start and end date indicated. One time texts will send only 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 T](#)

Not all combinations are possible.

- | | | |
|-------------------|---------------------------------------|---|
| ● Outreach Type: | <input type="radio"/> Reminder | <input checked="" type="radio"/> Recall |
| ● Parameter Type: | <input type="radio"/> Standard | <input checked="" type="radio"/> Custom |
| ● Contact Method: | <input type="radio"/> List or Letters | <input checked="" type="radio"/> Text Message † |
| | <input type="radio"/> One Time | <input checked="" type="radio"/> Recurrent |

Continue →

a. 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 →](#)

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

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 this page loads completely.

Show 20 entries

Delete

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 Recurrent Text Message – select patient and immunization criteria

Online Registry Search MyList Reports Add/Edit Tools Recall Adv. Event VFC Set Up Adult Help LogOut

Welcome Shirley Hule (SSA)
Facility: Citywide Immunization Registry (CIR)
Address: 4209 28 STREET

Reminder / Recall

If you have not already done so, before selecting custom recall criteria please review patients in MyList and update addresses, cell phone numbers, email fields, and immunizations. Patients without cell phone numbers will not receive recall notices via text message.
Note: Collecting cell phone number data in the CIR is relatively new. Please check that your EMR is set up to report cell phone numbers and/or use the Update Patient Information screen to update cell phone numbers at the time of the patient's visit.

Follow the steps below to create custom recall text recurrent messages:
1. Select age, gender, and immunization criteria (sections A, B, and C) for your Custom Recall job.
2. Schedule your job by entering a start and stop date; select and complete your text message (section D).
3. Confirm criteria for the Custom Recall job and accept or change the name of your job.
4. Click Continue to submit your Custom Recall job and generate text messages. Messages will be sent to each patient in your MyList that has a cell number on record and meets the selection criteria.

Create Custom Recall Job

A All patients in MyList

Specific Age

☐ 7-11 month olds ☐ 11-18 year olds
☐ 19-35 month olds ☐ 13-17 year olds
☐ 24-35 month olds ☐ 19+ year olds

Age Range

From: [] years [] months
 To: [] years [] months

DOB Range

Include patients born between []/[/]/[] and []/[/]/[]

B Gender

☒ Male ☒ Female

C For immunization series: Include patients who are missing:

☐ Any age-appropriate immunization

☐ Any age-appropriate immunization from the series below only:

☐ Influenza ☐ Pneumo. Conjugate ☐ MMR
☐ HepB ☐ Pneumo. Polysaccharide ☐ Varicella
☐ Rotavirus ☐ Polio ☐ HepA
☐ DTaP ☐ Tdap ☐ Meningococcus
☐ Hib ☐ Human Papilloma

☐ Include patients who do not have the # of specified valid doses from the series chosen below:

[] Influenza [] Pneumo. Conjugate [] MMR
 [] HepB [] Pneumo. Polysaccharide [] Vari
 [] Rotavirus [] Polio [] Hep
 [] DTaP [] Tdap [] Men
 [] Hib [] [] Hum

D Enter the date range this message will run.
 NOTE: All recurrent jobs will run every 28 days from your start date. Once this job is created, you may stop future recurrent messages by turning off the job on the Reminder/Recall Job List.

From: []/[/]/[]
 To: []/[/]/[]

Select Message. This message will be sent to each patient on your recall list.

☐ Use default message
☒ Fill in the fields for the sample message provided.

Your child born in [] is overdue for immunization. Call []
 FACILITY NAME (up to 42 characters): []
 Characters remaining: 42
 at CONTACT NUMBER: [] to schedule.

☐ Use custom message
☒ Type in your message.

132 character limit:
 []
 Characters remaining: 132

NOTE: To allow patients text message reminders, text "STOP" w of your message.
 Patients who text "STOP" future text messages via

Please note that it is your adhere to the laws, rules, apply to the disclosure of sensitive information in t custom text message.

Cancel X Clear Continue

b. Select patient and immunization criteria:

- Choose one of the three age range choices in the left column.
- Specify gender, optional.
- Next, choose one of the three choices in the right column to include patients to recall who are:
 - missing age-appropriate immunizations, or
 - missing any age-appropriate immunizations from a specified vaccine series, or
 - missing a specified # of valid doses from specified series.

Recall: Custom Recurrent Text Message – enter date range, select and compose message

The screenshot shows a web form for creating a custom recurrent text message. It is divided into two main sections: 'Enter the date range' and 'Select Message'.

Section 1: Enter the date range this message will run.
NOTE: All recurrent jobs will run every 28 days from your start date. Once this job is created, you may stop future recurrent messages by turning off the job on the Reminder/Recall Job List.
From: [] / [] / [] d
To: [] / [] / []

Section 2: Select Message. This message will be sent to each patient on your recall list.
☒ Use default message
Fill in the fields for the sample message provided.
☐ Use custom message
Type in your message.

Default Message Fields:
Your child born in [CIR will insert patient birth YEAR here] is overdue for immunization. Call [FACILITY NAME (up to 42 characters):] at [CONTACT NUMBER:] to schedule.
Characters remaining: 42

Custom Message Field:
132 character limit
[Text area]
Characters remaining: 132

Notes:
NOTE: To allow patients to opt out of receiving text message reminders, the line "To stop reminders, text STOP" will be added to the end of your message.
Patients who text "STOP" will not receive any future text messages via the CIR.
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.

Yellow arrows indicate the flow: one arrow points to the 'From' field, and another points to the 'Use default message' radio button.

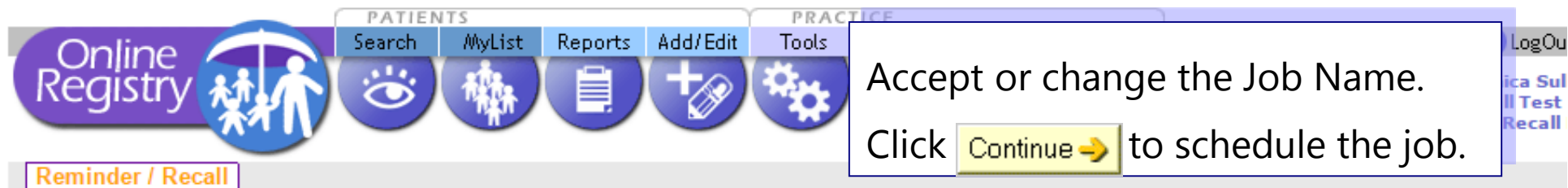
c. Enter the date range, but avoid entering today's date. Messages will be sent every 28 days. Patients in **Mylist** will automatically age in and out, and be added or removed depending on UTD status

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**.

Recall: Custom Text Message – confirm and name job



The screenshot shows the 'Online Registry' interface with a navigation bar containing 'PATIENTS' (Search, MyList, Reports, Add/Edit) and 'PRACTICE' (Tools). A 'Reminder / Recall' tab is selected. A dialog box is open with the text: 'Accept or change the Job Name. Click **Continue** to schedule the job.' The 'Continue' button is highlighted with a yellow arrow.

1. Select age, gender, and immunization criteria (sections A, B, and C) for your Custom Recall job.
2. Schedule your job by entering a run date; select and complete your text message (section D).
3. Confirm criteria for the Custom Recall job and accept or change the name of your job.
4. Click Continue to submit your Custom Recall job and generate text messages. Messages will be sent to each patient in your MyList that has a cell number on record and meets the selection criteria.

Note: This is your last chance to update your MyList before creating this Recall job. [Who's in MyList?](#) [Refresh MyList](#)

If you schedule a recurrent job, we encourage you to regularly refresh your MyList and review your patient's information in the CIR. Scheduled text messages will be based on the latest refresh of your MyList.

Confirm criteria for Custom Recall Job

All patients in MyList	For immunization series: Include patients who are missing: Patients missing any age appropriate immunization
Gender: Males and Females	
Text Message Type: Recurrent	
Date of Run: 04/23/2015	
Custom Message: rest	
Job Name for identification later: <input type="text" value="Sull_20150423_02"/> We recommended you give your list a brief and clearly descriptive name.	
<div>← Change Cancel X Continue →</div>	

Recall: Custom Text Message – view jobs

PATIENTS

[Search](#)
[MyList](#)
[Reports](#)
[Add/Edit](#)

PRACTICE

[Tools](#)
[Recall](#)

Reminder / Recall

● 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 now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose a specific age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose the method you will be sent every 28 days within the start and end date indicated. One time text messages will be sent every 28 days within the start and end date indicated.

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

To recall patients based on up-to-date rates using list or letters, use the [Contact Method](#).

Not all combinations are possible.

1. Outreach Type:	<input type="radio"/> Reminder	<input type="radio"/> Recall
2. Parameter Type:	<input type="radio"/> Standard	<input type="radio"/> Custom
3. Contact Method:	<input type="radio"/> List or Letters	<input type="radio"/> Text Message
	<input type="radio"/> One-time	<input type="radio"/> Recurrent

[Continue](#)

Online Registry

PATIENTS

[Search](#)
[MyList](#)
[Reports](#)
[Add/Edit](#)

PRACTICE

[Tools](#)
[Recall](#)

Reminder / Recall

● This page shows the details for your Recall job. You may use this page to (1) view the details, or (2) cancel your job. If you cancel a job in error, you will be given an opportunity to "Keep" the job.

➤ To view the list of patients included in a previously completed job run, click on the date of run of interest in the "Completed Run(s)" section below.

Details for Job Name "Sull_20150423_03"

Criteria

Created On:
04/23/2015 11:48 am

Based On:
Patients in 'My List'

Age Range:
0 yr - 12 yr

Gender:
Males and Females

Doses:
Patients missing any age appropriate immunization

[Rename](#)
[Rename this Job](#)

Text Message Type:
Date of Run:
Custom Message:

One Time
04/23/2015
test

Job State:

Complete

[Previous](#)

Completed Run(s)

Date of Run	Status	Number of Patients
04/23/2015 11:51 am	COMPLETED	3

[Continue](#)

Reminder/Recall Job List

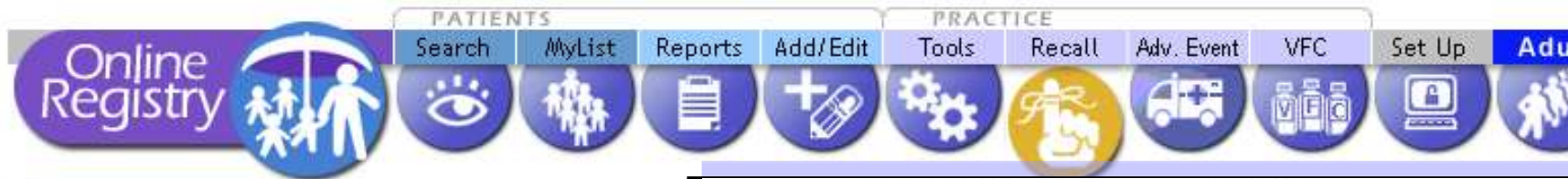
This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 2 minutes. You can manually refresh your Job List using the 'Refresh Job List' link. Please wait while the page loads completely.

[Refresh Job List](#)

Show entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"Sull_20150423_03"	One-time Text Message	Recall	Complete	3	04/23/2015 11:48am	
<input type="checkbox"/>	"Sull_20150423_02"	One-time Text Message	Recall	Active (Next Run: 04/25/15)		04/23/2015 11:45am	Cancel Job

Recall: Custom Text Message – view job run details



Reminder / Recall

- This page shows the details for your Recall job. You can cancel a job in error, you will be given an opportunity to view the list of patients included in a previously completed Run(s) section below.
- To view the list of patients included in a previously completed Run(s) section below.

In the completed runs table, click on the date of your completed job run to view details about the patients included.

Text Message Type:
Date of Run:
Custom Message:

Job State:

Completed Run(s)

Date of Run

Status

Number of Patients

04/23/2015 11:51 am

COMPLETED

3

Details for Job Name "Sull_20150423_03"

Criteria
Created On: 04/23/2015 11:48 am
Based On: Patients in 'My List'
Age Range: 0 yr - 12 yr
Gender: Males and Females

Text Message Type: One Time
Date of Run: 04/23/2015
Custom Message: test

Job State: Complete

[Previous](#)

Run Date: 04/23/2015 11:51 am
Job Status: COMPLETED
Patient Count: 3

	Last Name	First Name	Sex	Date of Birth	Mobile Phone
1	Recall	Nala	F	05/10/2004	908-917-3370
2	Reynolds	Chloe	F	10/03/2008	917-319-0521
3	Recall-Sull	Juno	M	01/01/2010	908-917-3370

[View Job Run Details](#)

Click the Excel [View Job Runs Details](#) link to view your job run details.

Recall: Custom Text Message – job run details

(Excel output)

- 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.

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.

	A	B	C	D	E	F	G	H	I							
1	Job Name:	Sull_20150423_03														
2	Facility Code:	5555R56	Facility Name:	Recall Test Facility												
3	Created By:	msull1														
4	Created On:	04/23/2015 11:48 am	Date of Run:	04/23/2015												
5	Date of Run:	04/23/2015 11:51 am														
6																
7	Outreach Type:	Recall														
8	Contact Method:	Text message														
9	Based On:	Patients in MyList with Age Range: 0 yr - 12 yr														
10		Gender: Males and Females														
11		Doses: Patients missing any age appropriate immunization														
12																
13	Total Patients who met Age/Gender criteria: 3, Patients UTD: 0 (0.0%), Patients not UTD: 3 (100.0%)															
14	Total Patients not UTD who have a cell #: 3															
15	Total Patients sent text msg (did not opt-out): 3															
16																
17	Sent Text Msg	Opted Out Text Msg	Last Name	First Name	DOB	Gender	MRN	CIR Id	Address	City	State	ZIP	Home Phone	Cell Phone	Email Address	Due Now
18	Y	N	RECALL	NALA	05/10/2004	F		788187049						908-917-3370		Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1
19	Y	N	REYNOLDS	CHLOE	10/03/2008	F	3395358	598991736	484 W 43RD STREET	NEW YORK	NY	10036	3473962537	917-319-0521	shuie@health.nyc.gov	Influenza-1, DTP-5, MMR-2, Varicella-2
20	Y	N	RECALL-SULL	JUNO	01/01/2010	M		788184526						908-917-3370		Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1

Recall: Custom Text Message – Cancel Job (a)



You can cancel a scheduled recall text message job (one-time or recurrent) through the **Reminder/Recall Job List**.

- Click "[Cancel Job](#)" link to review your job before canceling.
- 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.

1. Outreach Type: ☐ Reminder ☐ Recall

2. Parameter Type: ☐ Standard ☐ Custom

3. Contact Method: ☐ List or Letters ☒ Text Message †

☐ One Time ☐ Recurrent [Continue](#)

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 this page loads completely.

[Refresh Job List](#)

Show 20 entries

[Delete](#)

	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"Sull_20150423_03"	One-time Text Message	Recall	Complete	3	04/23/2015 11:48am	
<input type="checkbox"/>	"Sull_20150423_02"	One-time Text Message	Recall	Active (Next Run: 04/25/15)		04/23/2015 11:45am	Cancel Job

Recall: Custom Text Message – Cancel Job (b)

Online Registry

PATIENTS

Search

MyList

Reports

Add/Edit

Tools

Re

PRACTICE

Reminder / Recall

This page shows the details for your Recall job. You may use this page to (1) view t
cancel a job in error, you will be given an opportunity to "Keep" the job.

To view the list of patients included in a previously completed job run, click on the d
Run(s)" section below.

Details for Job Name "HUIE_20150410_02"

Criteria

Created On:
04/10/2015 4:07 pm

Based On:
Patients in 'My List'

Age Range:
6 yr - 7 yr

Gender:
Males and Females

Doses:
Patients
age app
immuniz
following
• In

Text Message Type: Recurrent

Start Date: 04/10/2015

End Date: 06/15/2015

Custom Message: Please ignore this message. Test.

Job State: Active (Next Run: 05/09/15)

Last Run: 05/08/2015

Next Run: 05/09/2015

Completed Run(s)

Date of Run	Status	Number of Patients
04/11/2015 09:27 am	COMPLETED	1
04/12/2015 09:28 am	COMPLETED	1
04/16/2015 09:27 am	COMPLETED	0
04/19/2015 09:27 am	COMPLETED	1
04/20/2015 09:27 am	COMPLETED	1
04/24/2015 09:27 am	COMPLETED	1

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 **Cancel Job** 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.



b

Cancel Job?

Are you sure you want to cancel this job? If you cancel this job, your remaining scheduled jobs will be cancelled. You will still be able to view previously completed jobs.

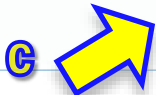
Note: We cannot ensure that a job run scheduled the same day as your cancellation request will be terminated in time.

To cancel this job, click "Cancel Job."

If you would like to continue running this recall job, select "Keep Job."

Cancel Job

Keep Job



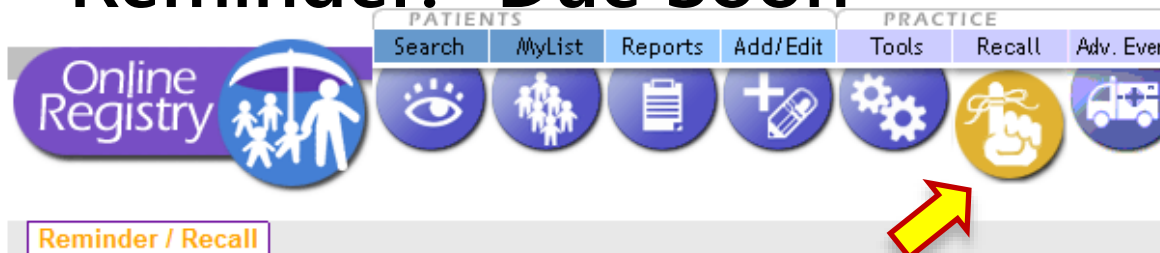
c

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?

Reminder: "Due Soon"



- 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:	<input checked="" type="radio"/> Reminder	<input type="radio"/> Recall		
2. Parameter Type:	<input checked="" type="radio"/> Standard	<input type="radio"/> Custom		
3. Contact Method:	<input checked="" type="radio"/> List or Letters	<input type="radio"/> Text Message †		
	<input type="radio"/> One Time	<input type="radio"/> Recurrent	Continue ➔	

Follow the instructions that will appear at the top, or slides 32-36

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*.

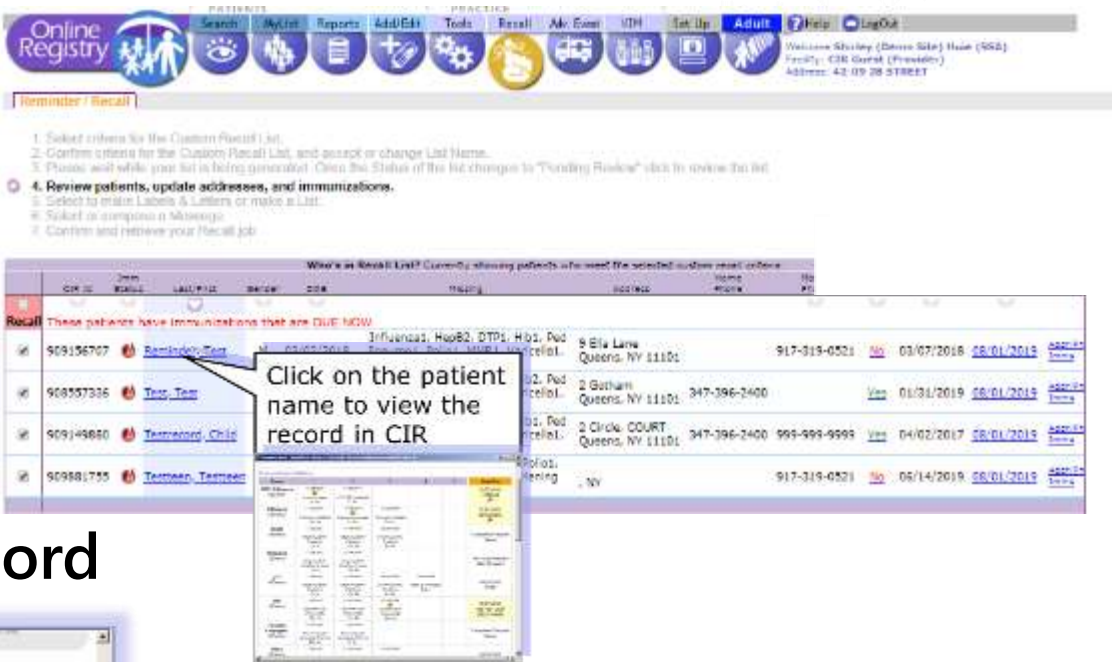
Important: Please see slides 6 to 13 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing

Review and Update Records

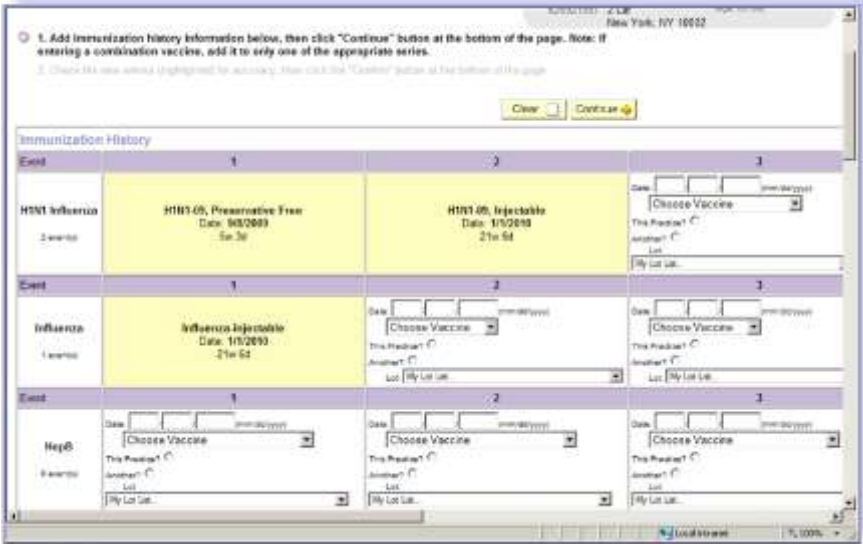
(a) Review each record

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

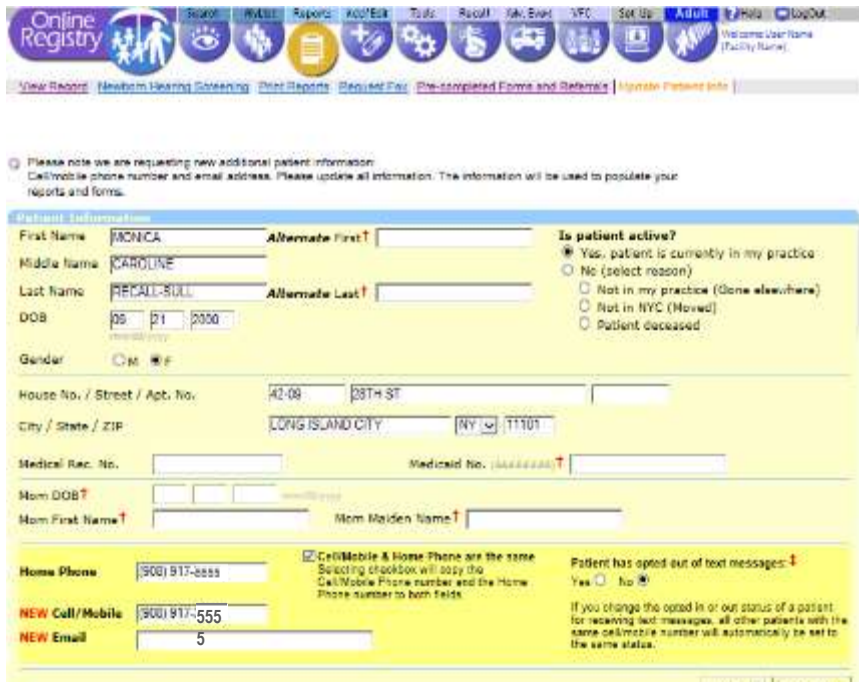
 Select all patients in the current list



(b) Update immunization record



(c) Update patient information



Best Practice Tips for using OR Reminder/Recall and Text Messaging (1)

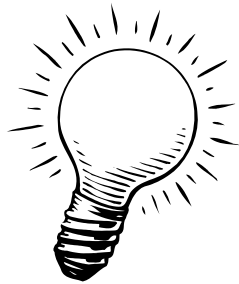
- ☐ 1. Routinely update cell phone information in your EMR. Train all staff to enter data accurately in the appropriate screen(s) and field(s)
- ☐ 2. Verify with your IT staff, EMR vendor and CIR that immunizations (see **VIM** guide, slide 27) and cell phone numbers are correctly captured in the Online 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.

Best Practice Tips for using OR Reminder/Recall and Text Messaging (2)

- ☐ 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)



Further reading

In general, studies are showing that reminder/recall efforts can improve immunization coverage..

Jacobson Vann JC, Jacobson RM, Coyne-Beasley T, Asafu-Adjei JK, Szilagyi PG. *Patient reminder and recall interventions to improve immunization rates*. **Cochrane Database of Systematic Reviews** 2018, Issue 1. Art. No.: CD003941. DOI: 10.1002/14651858.CD003941.pub3.

Standard Up-To-Date Measures

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)

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.

Vaccine	Birth	1 mo	2 mos	4 mos	6 mos	9 mos	12 mos	15 mos	18 mos	19-23 mos	2-3 yrs	4-6 yrs	7-10 yrs	11-12 yrs	13-15 yrs	16 yrs	17-18 yrs
Hepatitis B (HepB)	1 st dose	2 nd dose					3 rd dose										
Rotavirus (RV) RV1 (2-dose series); RV5 (3-dose series)			1 st dose	2 nd dose	See Notes												
Diphtheria, tetanus, & acellular pertussis (DTaP: <7 yrs)			1 st dose	2 nd dose	3 rd dose			4 th dose				5 th dose					
Haemophilus influenzae type b (Hib)			1 st dose	2 nd dose	See Notes		3 rd or 4 th dose, See Notes										
Pneumococcal conjugate (PCV13)			1 st dose	2 nd dose	3 rd dose		4 th dose										
Inactivated poliovirus (IPV: <18 yrs)			1 st dose	2 nd dose			3 rd dose					4 th dose					
Influenza (IIV)							Annual vaccination 1 or 2 doses								Annual vaccination 1 dose only		
OR																	
Influenza (LAIV)												Annual vaccination 1 or 2 doses				Annual vaccination 1 dose only	
Measles, mumps, rubella (MMR)						See Notes	1 st dose					2 nd dose					
Varicella (VAR)							1 st dose					2 nd dose					
Hepatitis A (HepA)						See Notes	2-dose series, See Notes										
Meningococcal (MenACWY-D ≥9 mos; MenACWY-CRM ≥2 mos)														1 st dose		2 nd dose	
Tetanus, diphtheria, & acellular pertussis (Tdap: ≥7 yrs)														Tdap			
Human papillomavirus (HPV)														See Notes			
Meningococcal B															See Notes		
Pneumococcal polysaccharide (PPSV23)														See Notes			

12 months

35 months

18 years

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

No recommendation