

Text Messaging via the Online Registry to Recall Patients Due/Overdue COVID 19 Vaccination

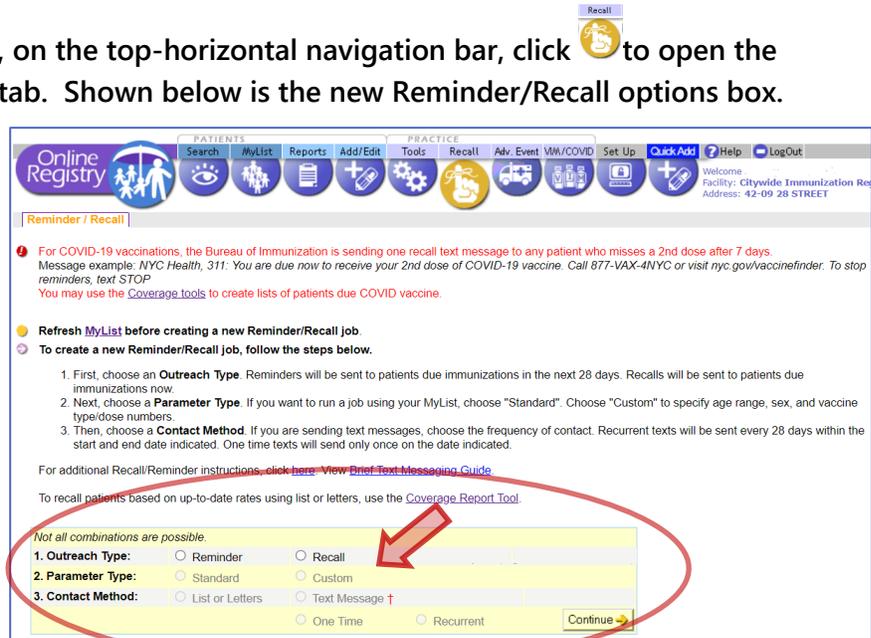
Your practice may now be able to use text messaging via the Online Registry at no cost to your practice to recall patients Due/Overdue COVID 19 vaccination. This brief guide illustrates important steps. See the [full guide](#) online.

1. Log in to the Online Registry, on the top-horizontal navigation bar, click  to open the Reminder/Recall section and tab. Shown below is the new Reminder/Recall options box.

2.

To set up text messaging choose:

- Recall
- Custom
- Text Message
- One-Time or Recurrent



Reminder / Recall

For COVID-19 vaccinations, the Bureau of Immunization is sending one recall text message to any patient who misses a 2nd dose after 7 days. Message example: NYC Health, 311. You are due now to receive your 2nd dose of COVID-19 vaccine. Call 877-VAX-ANYC or visit nyc.gov/vaccinefinder. To stop reminders, text STOP. You may use the Coverage tools to create lists of patients due COVID vaccine.

Refresh MyList before creating a new Reminder/Recall job.

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

- 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.
- Next, choose a Parameter Type. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, sex, and vaccine type/dose numbers.
- 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: [View Brief Text Messaging Guide](#).

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

Not all combinations are possible.

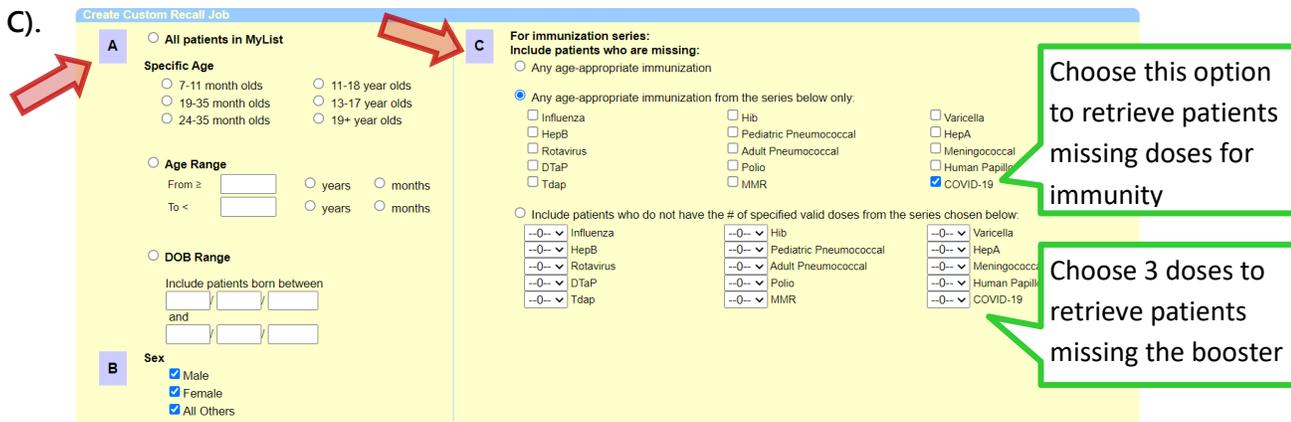
1. Outreach Type: Reminder Recall

2. Parameter Type: Standard Custom

3. Contact Method: List or Letters Text Message One Time Recurrent

Continue

3. In the Custom Recall screen, select your patient criteria and COVID-19 for the recall job (sections A, B and C).



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 Sex Male Female All Others

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

Any age-appropriate immunization

Any age-appropriate immunization from the series below only:

Influenza Hib Varicella

HepB Pediatric Pneumococcal HepA

Rotavirus Adult Pneumococcal Meningococcal

DTaP Polio Human Papill

Tdap MMR COVID-19

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

[] Influenza [] Hib [] Varicella

[] HepB [] Pediatric Pneumococcal [] HepA

[] Rotavirus [] Adult Pneumococcal [] Meningococcal

[] DTaP [] Polio [] Human Papill

[] Tdap [] MMR [] COVID-19

Choose this option to retrieve patients missing doses for immunity

Choose 3 doses to retrieve patients missing the booster

4. At the bottom left of the same screen enter a date for the One-Time text message (section D):

D Send out job on this date:

[]/[]/[]

If you chose to run a recurrent job, you will be prompted to enter a date range (section D):

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 []/[]/[]

Recurrent jobs are set to run every 28 days within the custom date range.

5. On the bottom right of the same screen select either the default message or customize your own message. For both message types, **be sure to include your facility name and contact information.**

Default message is best used for recall of children

Custom message is best used for recall of adults, or as a general 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.

Please note that it is your responsibility to compose appropriate messages, and 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.

6. In the next screen (not shown), you will name your Recall Job.

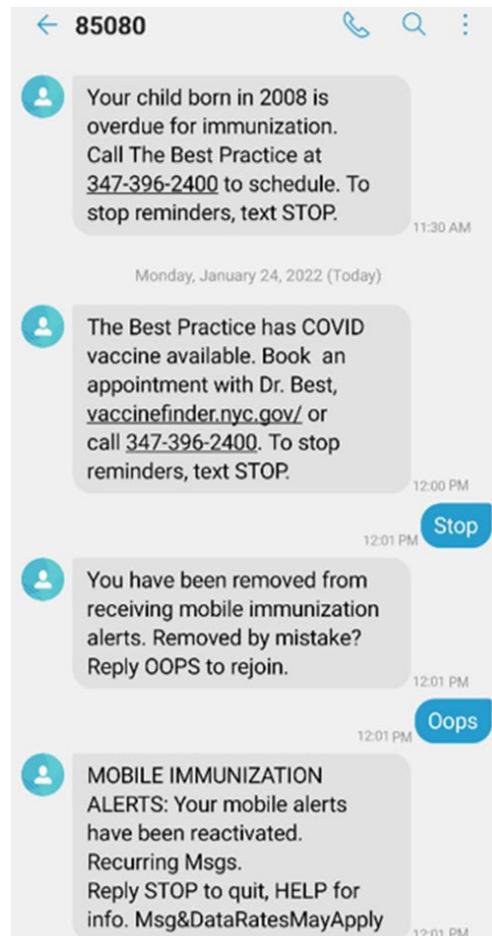
7. A sample of how the messages you send will look on the screen of a mobile phone:

It is important to list the **practice phone number** and **practice name**, shown here as "The Best Practice," so your patient knows who is sending the message.

Shown are examples of a (1) default message and (2) custom 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: 85080.
This is the number that recipients will see when you text them.

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

8. View your scheduled and completed recall jobs in the **Reminder/Recall Job List** in the

“Reminder/Recall” section.

9. Click on a job name to view details of the recall.

10. After clicking on a job name, on this screen you can view:

- (a) the Details for the Job: parameters that were chosen for the recall, date of the job, and text message;
- (b) a list of completed runs by date, status of jobs, and number of patients in the recall .
- (c) patients who were included in the recall, by clicking on the Date of Run

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 the Job List page using the 'Refresh Page' link. [Refresh Page](#)

Show: 20 entries

Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
COVID past due_20220125	One-time Text Message	Recall	Complete	1	01/25/2022 9:15pm	

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 "COVID past due_20220125"

Criteria

Created On: 01/25/2022 9:15 pm	Based On: Patients in 'My List'	DOB Range: 10/01/2008 - 10/03/2008	Doses: Patients missing any age appropriate immunization from the following series: • COVID-19
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Text Message Type: One Time
Date of Run: 01/25/2022
Custom Message: The Best Practice has COVID vaccine. Book an appointment with Dr. Best through vaccinefinder.nyc.gov/ or call 347-396-2400.

Job State: Complete

Completed Run(s)

Date of Run	Status	Number of Patients
01/25/2022 09:18 pm	COMPLETED	1

Reminder / Recall

This page displays the list of patients included in the completed job run selected.

To view a full summary of details for this completed job run, click the "Job Run Details" Excel icon.

Details for Job Name "COVID past due_20220125"

Criteria

Created On: 01/25/2022 9:15 pm	Based On: Patients in 'My List'	DOB Range: 10/01/2008 - 10/03/2008	Doses: Patients missing any age appropriate immunization from the following series: • COVID-19
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Text Message Type: One Time
Date of Run: 01/25/2022
Custom Message: The Best Practice has COVID vaccine. Book an appointment with Dr. Best through vaccinefinder.nyc.gov/ or call 347-396-2400.

Job State: Complete

Run Date: 01/25/2022 09:18 pm
Job Status: COMPLETED
Patient Count: 1

[View Job Run Details](#)

Last Name	First Name	Sex	Date of Birth	Mobile Phone
1 Overdue Jr	Iam	M	10/01/2008	917-319-0521

11. Click on [View Job Run Details](#) which can be downloaded and saved. See Excel example below:

12. Jobs may be canceled in the Reminder/Recall Job List screen under the Cancel Job column, or while in the Details for Job screen. Canceling jobs scheduled the same day may not stop the process in time. Some messages may still get sent.

Job Name	Facility Code	Created By	Created On	Date of Run	Outreach Type	Contact Method	Based On	Sex	Doses	Total Patients who met Age/Sex criteria	Total Patients not UTD who have a cell #	Total Patients sent text msg (did not opt-out)	Sent Text Msg	Opted Out Text Msg	Last Name	First Name	DOB	Sex	MRN	CIR Id	Address	City	State	ZIP Home Phone	Cell Phone	Email Address	Due Now
COVID past due_20220125	555SR50	dbest	01/25/2022 9:15 pm	01/25/2022	Recall	Text message	Patients in MyList with DOB Range: 10/01/2008 - 10/03/2008	All	Patients missing any age appropriate immunization from the following series: COVID-19	1	0	1	N		OVERDUE JR	IAM	10/01/2008	M	907512930					917-319-0527	iamr@health.nyc.g	Influenza1, HepB1, DTP1, Polio1, MM1, HepA1, Mening (MenACVY)1, HPV1, COVID-192	

Important Steps for Managing and Preparing your Patient Lists for Recall

For complete instructions, visit: <https://www1.nyc.gov/assets/doh/downloads/pdf/cir/cir-recall-guide.pdf>

- A. (1) Review and confirm the inclusion criteria of your MyList (slides 6 to 13), and (2) refresh your MyList to retrieve current information reported to CIR by your facility, particularly if reporting by EMR or billing.
- B. Run a custom recall list prior to generating a text message job to view the patients who fit the custom criteria and who will be sent a text message (slides 31-38). You may use the list to help you manage contact information and update immunization histories.
- C. In the Update Patient Info screen: (1) update the Cell/Mobile number; (2) select patient's status for receiving text messages. By default, all patients with a cell/mobile number will be opted in to receive text messages.

Important notes:

1. If the mobile number is shared by family members, opting out of receiving a message means opting out all members from receiving future messages.
2. Staffing: Large sites may want to designate a staff person to manage refreshing MyList and manage recall jobs. If a recurrent recall text message job is set up, refresh the MyList at anytime; however, subsequent recall jobs will be based on the new refreshed criteria.
3. Mobile Phone Data: Determine the workflow for updating cell phone information in the Online Registry. Facilities using HL7 messaging to report to CIR should consider sending mobile phone numbers. Please contact your EMR vendor.
4. If you choose to use this text messaging tool to communicate with parents and/or guardians of the children in your practice, please check your current protocols for contacting patients for follow-up and consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.
5. The Bureau of Immunization is sending recall messages to individuals seven days past due dose 2 for COVID-19 vaccination, however, messages are more effective when sent by the patient's provider. BOI will not send a message if you already sent a message for missed vaccinations.