

# 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



1

1

CIR homepage: [nyc.gov/health/cir](https://nyc.gov/health/cir)

- Check for updates on this page.
- Click the "Online Registry GO" icon for the log in screen:



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



Check Notice boxes for updates.

- 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>



2

2

## 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 you generated and reviewed recall lists to know who and how many patients will be receiving text messages prior to setting up text messaging?



3

3

## Overview

- I. MyList, Refresh MyList, MOGE ([slides 6-11](#))
- II. Coverage located in the Tools screen ([slides 12-21](#)):
  - 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, 13-17 yr. olds, 13 yr. olds
  - B. **IQIP** Assessments: 24-35 month olds, 13 year olds
  - C. **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** –used to see who has vaccine *Due Now* ([slides 22-33](#)):
      - 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** –used see who in MyList is *Due Now* ([slides 40-42](#))
  - B. **Reminder** 📞 see who in MyList is *Due Soon*, within 28 days ([slide 51](#))
- 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](#)).



4

4

## 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
  - **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.



5

5

## MyList: Who's in MyList? (patient list of the practice)

Click on the link to see **"Who's in MyList?"**

- **Shared by site**
- **Any changes made in MyList will affect the facility list and all users at your site!**

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.



6

6

## 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.
- Results will appear at the top of the screen above MyList, for example:

✓ Patient list refresh complete. Patients added: 190. Patients removed: 14



7

## Patient List (MyList): Active Status, Remove

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

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



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

8

## Update Patient Info: address, phone, MOGE status

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

**Is patient active?**

- ☒ Yes, patient is currently in my practice
- ☐ No (select reason)
  - ☐ Not in my practice (Come elsewhere)
  - ☐ Not in NYC (Moved)
  - ☐ Patient deceased

**Home Phone:** 201.224.7572

**Cell/Mobile:** 201.222.2222

**NEW Email:**

**MOGE choices:**

- ☐ Not in my practice
- ☐ Not in NYC (moved)
- ☐ Patient deceased.

- 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


9

## 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.

10



- The coverage or recall/reminder reports are only as good as the immunizations and contact information your practice reported to the CIR.

11

Coverage: slides 12-21

## Tools: Coverage Report:

Before running coverage or recall /reminder lists, review **Who is in MyList**, then update MyList by using **Refresh MyList** ([slide 7](#)).

To start a **Coverage Report**, click on "[Create Standard, IQIP, Flu Coverage Reports](#)"



Recent Coverage Reports (10 Reported)							Refresh	
	Type	Name	On Behalf Of	Patients	UTD%	Coverage Status as of	Date Created	Report Status
	Standard Coverage Report	'username_25-35 months'		29	8.9%	04/17/2020	04/17/2020 6:00 PM	<a href="#">Done</a>
	IQIP Coverage Report	'username_IQIP_13y_HPv'		15	6.7%	04/17/2020	04/17/2020 6:00 PM	<a href="#">Done</a>
	IQIP Coverage Report	'username_IQIP_13y'		15	6.7%	04/17/2020	04/17/2020 6:00 PM	<a href="#">Done</a>
	IQIP Coverage Report	'username_IQIP_24-35m'		2	50.0%	04/17/2020	04/17/2020 6:00 PM	<a href="#">Done</a>
	Influenza Coverage Report	'username_Ru_11-18y'		93	5.4%	04/17/2020	04/17/2020 5:59 PM	Processed patient list as of 04/17/2020 5:59 PM
	Influenza Coverage Report	'username_Ru_5-10y'		135	0.7%	04/17/2020	04/17/2020 5:59 PM	<a href="#">Done</a>
	Influenza Coverage Report	'username_Ru_5-59m'		130	0.0%	04/17/2020	04/17/2020 5:59 PM	<a href="#">Done</a>




12



## Coverage Report: choose a report to use

**Standard Coverage Report:**

- Choose a report to use.
- Enter the review date. The most commonly used review date is the default date, which is today's date.
- Rename file if desired.
- Click **Continue**.

**Influenza Coverage Report:**

- Choose one or more reports.
- Rename file if desired.
- Click **Continue**.

**IQIP Assessments:**

- Choose one or more reports.
- Rename file if desired.
- Click **Continue**.

**Name your Report for you to identify easily later. The report list is shared by all users at your facility.**

13


## Coverage Report: view completed reports

**Recent Coverage Reports (33 Reports)**

Type	Name	Patients	UTD%	Coverage Status as of	Date Created	Report Status
Standard Coverage Report	"Coverage_20180801_34 to 35 mo"	2	0.0%	08/01/2018	08/01/2018 2:51 PM	Done
Standard Coverage Report	"HUIE_20180228_01"	18	16.7%	02/02/2018	02/02/2018 9:54 AM	Done
Flu Coverage Report	"flu_coverage_11-18y"	4	0.0%	01/30/2018	01/30/2018 12:54 PM	Done
Flu Coverage Report	"flu_coverage_5-10y"	3	0.0%	01/30/2018	01/30/2018 12:54 PM	Done
Flu Coverage Report	"flu_coverage_5-59m"	3	33.3%	01/30/2018	01/30/2018 12:54 PM	Done

14

## Coverage Report: create a recall job



This page lists the results of your Coverage report.

**Standard Coverage Report: Coverage 2018001\_24 to 2018001\_24**

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

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

Donors: 4  
DTP: 4  
Poli: 3  
MMR: 1  
HepB: 3  
HB: 4  
Var: 1  
Pneum: 4

As Of: 05/01/2018

**Create Recall List**

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

Last First	Gender	DOB
Test, Test	M	01/01/2017
Test, record, 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 **Create Recall List**

15

## 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.

**Recall** Select all patients in the current list

### (b) Update immunization record



### (c) Update patient information



16

16



## Recall from Coverage Report: select List or Labels & Letters

**Online Registry**

**PATIENTS** Search MyList Reports Add/Edit Tools **PRACTICE** Recall Add Email VHM Test Results Admin

**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.

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

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

17

## 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.
- ☐ Use custom message.
- ☐ No message, just a list.

If selected, the message you type to the right will be printed for each patient on your Recall list.

**Default Message Template:**

☐ Today's Date (optional)

☐ Dear Parent/Guardian (optional)

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

(Please, immunizations due will be displayed here.)

Please call our office at \_\_\_\_\_ to schedule an appointment at your earliest convenience.

Thank you,  
Recall Test Facility

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:

(Please, immunizations due will be displayed here.)

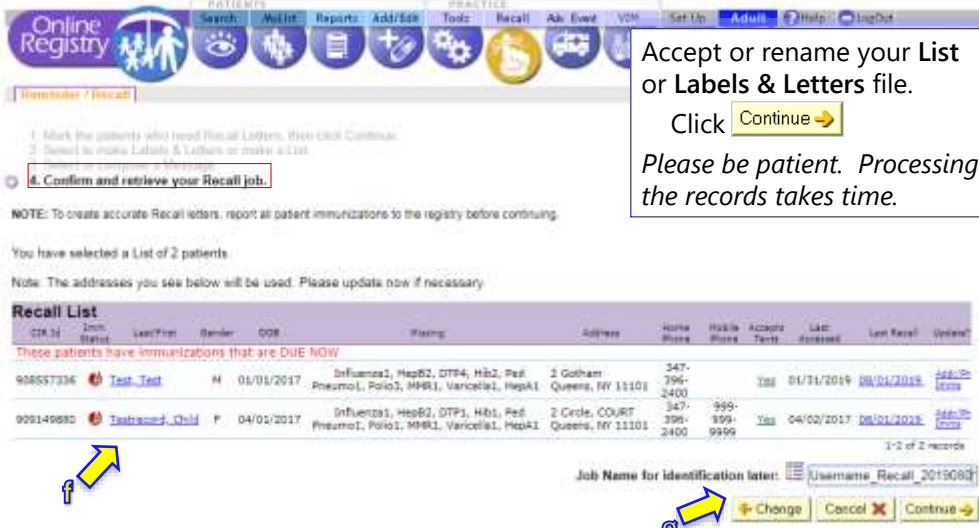
If selected, only a list of names in your Recall list will be printed.

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.

18

## Recall from Coverage Report: name the job



Accept or rename your List or Labels & Letters file.

Click **Continue**

*Please be patient. Processing the records takes time.*

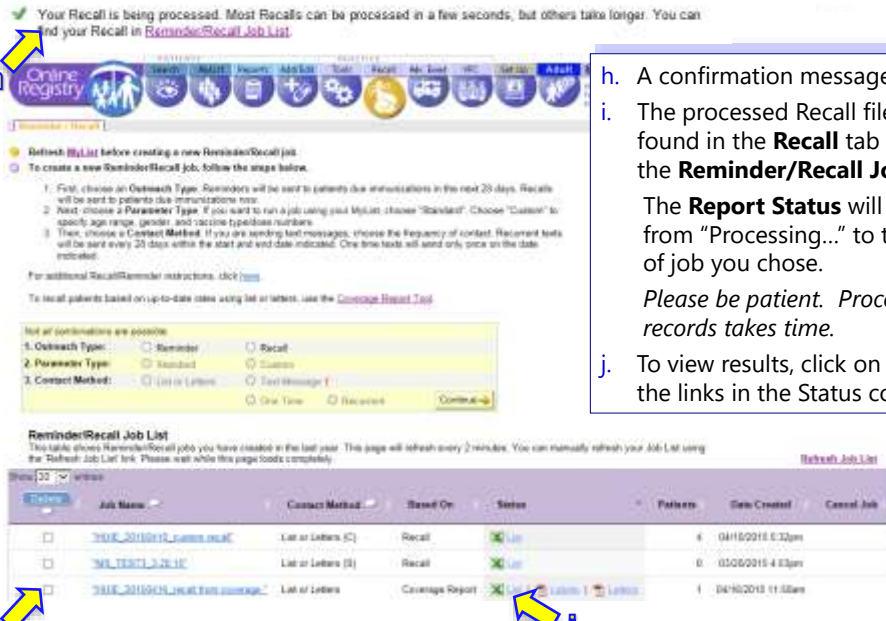
**Recall List**

CR ID	Job Status	Last Print	Gender	DOB	Vaccine	Address	Home Phone	Mobile Phone	Accepts Text	Last Processed	Last Recall	Update
908557336	Test Test		M	01/01/2017	Influenza1, HepB2, DTP4, Hib2, Polio1, Pneumo1, Polio2, MMR1, Varicella1, HepA1	2 Gotham Queens, NY 11101	347-796-2400		Yes	01/31/2019	08/04/2018	Job Status
909149880	Test Record Child		F	04/01/2017	Influenza1, HepB2, DTP1, Hib1, Polio1, Pneumo1, Polio2, MMR1, Varicella1, HepA1	2 Circle COURT Queens, NY 11101	347-396-9999	999-9999	Yes	04/02/2017	08/01/2018	Job Status

Job Name for identification later:  **Change** **Cancel** **Continue**

19

## Recall from Coverage Report: access finished jobs



h. A confirmation message appears

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

The **Report Status** will change from "Processing..." to the type of job you chose.

*Please be patient. Processing the records takes time.*

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

**Reminder/Recall Job List**

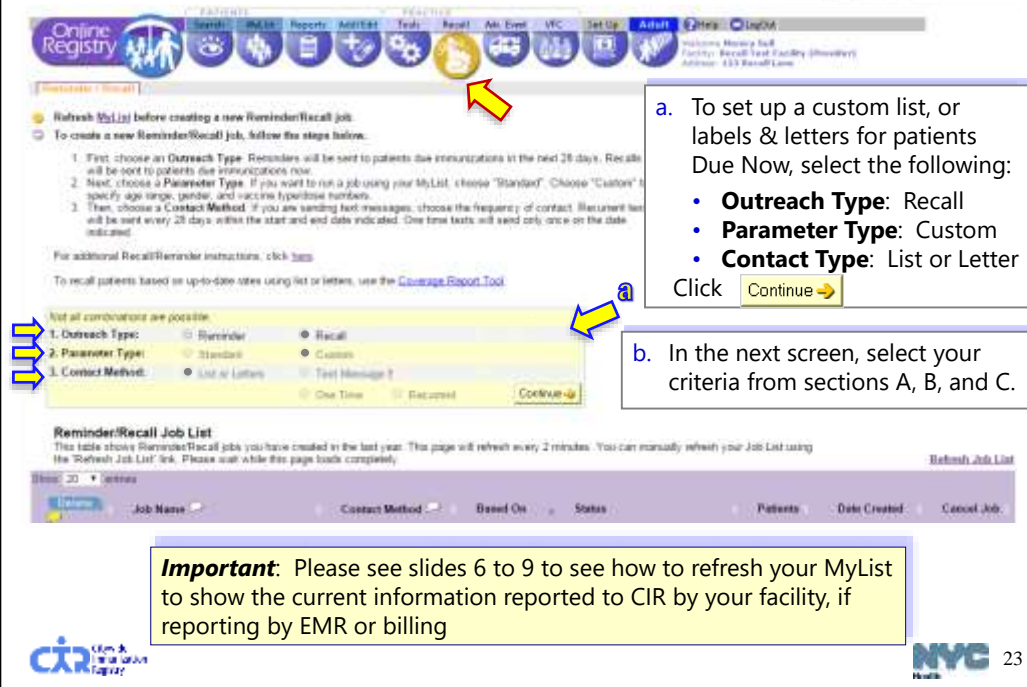
Job ID	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
2018_20190802_summary_recall	List or Letters (C)	Recall	Job List	Job Status	6	08/16/2018 6:32pm	
2018_20190802_summary_recall	List or Letters (S)	Recall	Job List	Job Status	6	03/06/2018 4:03pm	
2018_20190802_summary_recall	List or Letters	Coverage Report	Job List	Job Status	6	04/10/2018 11:55am	

20

## 21

## 22

## Recall: Custom List or Letters: set up job



**Recall: Custom List or Letters: set up 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

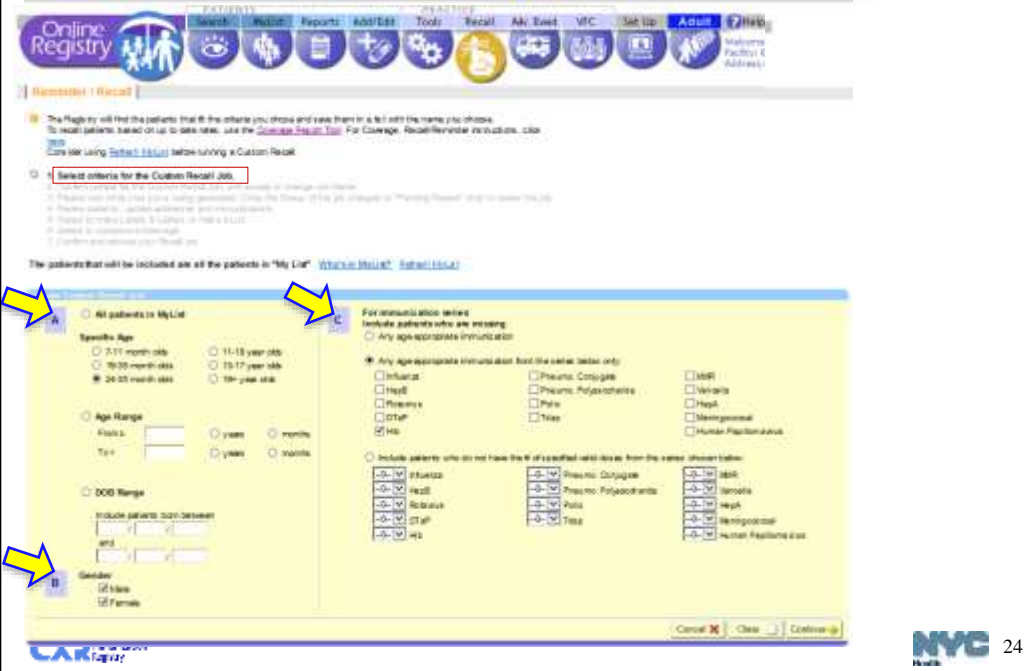
Click **Continue**

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

**Important:** Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing

23

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



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

The Recall job will find the patients that fit the criteria you choose and save them in a list with the name you choose. To recall patients based on up-to-date data, use the [Coverage Report Tool](#). For Coverage, Recall/Reminder immunizations, click [Recall](#) using [Select Job List](#) below running a Custom Recall.

**Select criteria for the Custom Recall Job**

1. Select criteria for the Custom Recall Job. (This step is required to create a Custom Recall job.)

2. Specify age, age range, DOB range, gender, and immunization status. (This step is required to create a Custom Recall job.)

3. Specify criteria for the Custom Recall Job. (This step is required to create a Custom Recall job.)

4. Select the criteria for the Custom Recall Job. (This step is required to create a Custom Recall job.)

5. Confirm your criteria for the Custom Recall Job.

The patients that will be included are all the patients in "My List". [View My List](#) [Refresh My List](#)

**A** **B** **C**

**Section A: All patients in My List**

**Section B: Specify Age**

- ☐ 7-11 month old
- ☐ 11-15 year old
- ☐ 15-17 year old
- ☒ 18-24 month old
- ☐ 18+ year old

**Section C: Age Range**

From:  To:

**Section D: DOB Range**

Include patients born between:  and

**Section E: Gender**

☐ Male ☐ Female

**Section F: Immunization Status**

☐ Any age-appropriate immunization

**Section G: Any age-appropriate immunization that has the series status only**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section H: Include patients who do not have the # of specified series status from the series status below:**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section I: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section J: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section K: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section L: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section M: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section N: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section O: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section P: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section Q: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section R: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section S: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section T: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section U: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section V: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section W: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section X: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section Y: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section Z: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AA: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AB: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AC: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AD: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AE: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AF: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AG: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AH: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AI: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AJ: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AK: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AL: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AM: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AN: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AO: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AP: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AQ: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AR: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AS: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AT: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AU: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AV: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AW: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AX: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AY: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section AZ: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section BA: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

**Section BB: Immunization Status**

- ☐ Influenza
- ☐ HepB
- ☐ HepC
- ☐ Hib
- ☐ IPV
- ☐ MMR
- ☐ Pneumo, Conjugate
- ☐ Pneumo, Polysaccharide
- ☐ Polio
- ☐ Tetap
- ☐ Tdap
- ☐ Varicella
- ☐ HepA
- ☐ Meningococcal
- ☐ Human Papillomavirus

## Custom List or Letters – Example 1

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

1. Select criteria for the Custom Recall Job:

- 2. Enter criteria for the Custom Recall Job:
  - 3. Review and edit your criteria (including generalizing, narrowing, or saving criteria as a "Prescribed Recall" job in the system Recall).
  - 4. Review and edit your criteria (including generalizing, narrowing, or saving criteria as a "Prescribed Recall" job in the system Recall).
  - 5. Review and edit your criteria (including generalizing, narrowing, or saving criteria as a "Prescribed Recall" job in the system Recall).
  - 6. Review and edit your criteria (including generalizing, narrowing, or saving criteria as a "Prescribed Recall" job in the system Recall).
  - 7. Review and edit your criteria (including generalizing, narrowing, or saving criteria as a "Prescribed Recall" job in the system Recall).

The patients that will be included are all the patients in "My List" [Click on My List](#) [Printed Instructions](#)

**A** All patients in My List

**B** Specific Age

- ☐ 7-11 month olds
- ☐ 11-18 year olds
- ☐ 18-24 month olds
- ☐ 24-36 month olds
- ☐ 36-48 month olds
- ☐ 48-60 month olds
- ☐ 60-72 month olds
- ☐ 72-84 month olds
- ☐ 84-96 month olds
- ☐ 96-108 month olds
- ☐ 108-120 month olds
- ☐ 120-132 month olds
- ☐ 132-144 month olds
- ☐ 144-156 month olds
- ☐ 156-168 month olds
- ☐ 168-180 month olds
- ☐ 180-192 month olds
- ☐ 192-204 month olds
- ☐ 204-216 month olds
- ☐ 216-228 month olds
- ☐ 228-240 month olds
- ☐ 240-252 month olds
- ☐ 252-264 month olds
- ☐ 264-276 month olds
- ☐ 276-288 month olds
- ☐ 288-300 month olds
- ☐ 300-312 month olds
- ☐ 312-324 month olds
- ☐ 324-336 month olds
- ☐ 336-348 month olds
- ☐ 348-360 month olds
- ☐ 360-372 month olds
- ☐ 372-384 month olds
- ☐ 384-396 month olds
- ☐ 396-408 month olds
- ☐ 408-420 month olds
- ☐ 420-432 month olds
- ☐ 432-444 month olds
- ☐ 444-456 month olds
- ☐ 456-468 month olds
- ☐ 468-480 month olds
- ☐ 480-492 month olds
- ☐ 492-504 month olds
- ☐ 504-516 month olds
- ☐ 516-528 month olds
- ☐ 528-540 month olds
- ☐ 540-552 month olds
- ☐ 552-564 month olds
- ☐ 564-576 month olds
- ☐ 576-588 month olds
- ☐ 588-600 month olds
- ☐ 600-612 month olds
- ☐ 612-624 month olds
- ☐ 624-636 month olds
- ☐ 636-648 month olds
- ☐ 648-660 month olds
- ☐ 660-672 month olds
- ☐ 672-684 month olds
- ☐ 684-696 month olds
- ☐ 696-708 month olds
- ☐ 708-720 month olds
- ☐ 720-732 month olds
- ☐ 732-744 month olds
- ☐ 744-756 month olds
- ☐ 756-768 month olds
- ☐ 768-780 month olds
- ☐ 780-792 month olds
- ☐ 792-804 month olds
- ☐ 804-816 month olds
- ☐ 816-828 month olds
- ☐ 828-840 month olds
- ☐ 840-852 month olds
- ☐ 852-864 month olds
- ☐ 864-876 month olds
- ☐ 876-888 month olds
- ☐ 888-900 month olds
- ☐ 900-912 month olds
- ☐ 912-924 month olds
- ☐ 924-936 month olds
- ☐ 936-948 month olds
- ☐ 948-960 month olds
- ☐ 960-972 month olds
- ☐ 972-984 month olds
- ☐ 984-996 month olds
- ☐ 996-1008 month olds
- ☐ 1008-1020 month olds
- ☐ 1020-1032 month olds
- ☐ 1032-1044 month olds
- ☐ 1044-1056 month olds
- ☐ 1056-1068 month olds
- ☐ 1068-1080 month olds
- ☐ 1080-1092 month olds
- ☐ 1092-1104 month olds
- ☐ 1104-1116 month olds
- ☐ 1116-1128 month olds
- ☐ 1128-1140 month olds
- ☐ 1140-1152 month olds
- ☐ 1152-1164 month olds
- ☐ 1164-1176 month olds
- ☐ 1176-1188 month olds
- ☐ 1188-1200 month olds
- ☐ 1200-1212 month olds
- ☐ 1212-1224 month olds
- ☐ 1224-1236 month olds
- ☐ 1236-1248 month olds
- ☐ 1248-1260 month olds
- ☐ 1260-1272 month olds
- ☐ 1272-1284 month olds
- ☐ 1284-1296 month olds
- ☐ 1296-1308 month olds
- ☐ 1308-1320 month olds
- ☐ 1320-1332 month olds
- ☐ 1332-1344 month olds
- ☐ 1344-1356 month olds
- ☐ 1356-1368 month olds
- ☐ 1368-1380 month olds
- ☐ 1380-1392 month olds
- ☐ 1392-1404 month olds
- ☐ 1404-1416 month olds
- ☐ 1416-1428 month olds
- ☐ 1428-1440 month olds
- ☐ 1440-1452 month olds
- ☐ 1452-1464 month olds
- ☐ 1464-1476 month olds
- ☐ 1476-1488 month olds
- ☐ 1488-1500 month olds
- ☐ 1500-1512 month olds
- ☐ 1512-1524 month olds
- ☐ 1524-1536 month olds
- ☐ 1536-1548 month olds
- ☐ 1548-1560 month olds
- ☐ 1560-1572 month olds
- ☐ 1572-1584 month olds
- ☐ 1584-1596 month olds
- ☐ 1596-1608 month olds
- ☐ 1608-1620 month olds
- ☐ 1620-1632 month olds
- ☐ 1632-1644 month olds
- ☐ 1644-1656 month olds
- ☐ 1656-1668 month olds
- ☐ 1668-1680 month olds
- ☐ 1680-1692 month olds
- ☐ 1692-1704 month olds
- ☐ 1704-1716 month olds
- ☐ 1716-1728 month olds
- ☐ 1728-1740 month olds
- ☐ 1740-1752 month olds
- ☐ 1752-1764 month olds
- ☐ 1764-1776 month olds
- ☐ 1776-1788 month olds
- ☐ 1788-1800 month olds
- ☐ 1800-1812 month olds
- ☐ 1812-1824 month olds
- ☐ 1824-1836 month olds
- ☐ 1836-1848 month olds
- ☐ 1848-1860 month olds
- ☐ 1860-1872 month olds
- ☐ 1872-1884 month olds
- ☐ 1884-1896 month olds
- ☐ 1896-1908 month olds
- ☐ 1908-1920 month olds
- ☐ 1920-1932 month olds
- ☐ 1932-1944 month olds
- ☐ 1944-1956 month olds
- ☐ 1956-1968 month olds
- ☐ 1968-1980 month olds
- ☐ 1980-1992 month olds
- ☐ 1992-2004 month olds
- ☐ 2004-2016 month olds
- ☐ 2016-2028 month olds
- ☐ 2028-2040 month olds
- ☐ 2040-2052 month olds
- ☐ 2052-2064 month olds
- ☐ 2064-2076 month olds
- ☐ 2076-2088 month olds
- ☐ 2088-2100 month olds
- ☐ 2100-2112 month olds
- ☐ 2112-2124 month olds
- ☐ 2124-2136 month olds
- ☐ 2136-2148 month olds
- ☐ 2148-2160 month olds
- ☐ 2160-2172 month olds
- ☐ 2172-2184 month olds
- ☐ 2184-2196 month olds
- ☐ 2196-2208 month olds
- ☐ 2208-2220 month olds
- ☐ 2220-2232 month olds
- ☐ 2232-2244 month olds
- ☐ 2244-2256 month olds
- ☐ 2256-2268 month olds
- ☐ 2268-2280 month olds
- ☐ 2280-2292 month olds
- ☐ 2292-2304 month olds
- ☐ 2304-2316 month olds
- ☐ 2316-2328 month olds
- ☐ 2328-2340 month olds
- ☐ 2340-2352 month olds
- ☐ 2352-2364 month olds
- ☐ 2364-2376 month olds
- ☐ 2376-2388 month olds
- ☐ 2388-2400 month olds
- ☐ 2400-2412 month olds
- ☐ 2412-2424 month olds
- ☐ 2424-2436 month olds
- ☐ 2436-2448 month olds
- ☐ 2448-2460 month olds
- ☐ 2460-2472 month olds
- ☐ 2472-2484 month olds
- ☐ 2484-2496 month olds
- ☐ 2496-2508 month olds
- ☐ 2508-2520 month olds
- ☐ 2520-2532 month olds
- ☐ 2532-2544 month olds
- ☐ 2544-2556 month olds
- ☐ 2556-2568 month olds
- ☐ 2568-2580 month olds
- ☐ 2580-2592 month olds
- ☐ 2592-2604 month olds
- ☐ 2604-2616 month olds
- ☐ 2616-2628 month olds
- ☐ 2628-2640 month olds
- ☐ 2640-2652 month olds
- ☐ 2652-2664 month olds
- ☐ 2664-2676 month olds
- ☐ 2676-2688 month olds
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- ☐ 2724-2736 month olds
- ☐ 2736-2748 month olds
- ☐ 2748-2760 month olds
- ☐ 2760-2772 month olds
- ☐ 2772-2784 month olds
- ☐ 2784-2796 month olds
- ☐ 2796-2808 month olds
- ☐ 2808-2820 month olds
- ☐ 2820-2832 month olds
- ☐ 2832-2844 month olds
- ☐ 2844-2856 month olds
- ☐ 2856-2868 month olds
- ☐ 2868-2880 month olds
- ☐ 2880-2892 month olds
- ☐ 2892-2904 month olds
- ☐ 2904-2916 month olds
- ☐ 2916-2928 month olds
- ☐ 2928-2940 month olds
- ☐ 2940-2952 month olds
- ☐ 2952-2964 month olds
- ☐ 2964-2976 month olds
- ☐ 2976-2988 month olds
- ☐ 2988-3000 month olds
- ☐ 3000-3012 month olds
- ☐ 3012-3024 month olds
- ☐ 3024-3036 month olds
- ☐ 3036-3048 month olds
- ☐ 3048-3060 month olds
- ☐ 3060-3072 month olds
- ☐ 3072-3084 month olds
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- ☐ 3096-3108 month olds
- ☐ 3108-3120 month olds
- ☐ 3120-3132 month olds
- ☐ 3132-3144 month olds
- ☐ 3144-3156 month olds
- ☐ 3156-3168 month olds
- ☐ 3168-3180 month olds
- ☐ 3180-3192 month olds
- ☐ 3192-3204 month olds
- ☐ 3204-3216 month olds
- ☐ 3216-3228 month olds
- ☐ 3228-3240 month olds
- ☐ 3240-3252 month olds
- ☐ 3252-3264 month olds
- ☐ 3264-3276 month olds
- ☐ 3276-3288 month olds
- ☐ 3288-3300 month olds
- ☐ 3300-3312 month olds
- ☐ 3312-3324 month olds
- ☐ 3324-3336 month olds
- ☐ 3336-3348 month olds
- ☐ 3348-3360 month olds
- ☐ 3360-3372 month olds
- ☐ 3372-3384 month olds
- ☐ 3384-3396 month olds
- ☐ 3396-3408 month olds
- ☐ 3408-3420 month olds
- ☐ 3420-3432 month olds
- ☐ 3432-3444 month olds
- ☐ 3444-3456 month olds
- ☐ 3456-3468 month olds
- ☐ 3468-3480 month olds
- ☐ 3480-3492 month olds
- ☐ 3492-3504 month olds
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- ☐ 3528-3540 month olds
- ☐ 3540-3552 month olds
- ☐ 3552-3564 month olds
- ☐ 3564-3576 month olds
- ☐ 3576-3588 month olds
- ☐ 3588-3600 month olds
- ☐ 3600-3612 month olds
- ☐ 3612-3624 month olds
- ☐ 3624-3636 month olds
- ☐ 3636-3648 month olds
- ☐ 3648-3660 month olds
- ☐ 3660-3672 month olds
- ☐ 3672-3684 month olds
- ☐ 3684-3696 month olds
- ☐ 3696-3708 month olds
- ☐ 3708-3720 month olds
- ☐ 3720-3732 month olds
- ☐ 3732-3744 month olds
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- ☐ 3756-3768 month olds
- ☐ 3768-3780 month olds
- ☐ 3780-3792 month olds
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- ☐ 3972-3984 month olds
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- ☐ 3996-4008 month olds
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- ☐ 4092-4104 month olds
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- ☐ 4116-4128 month olds
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- ☐ 4152-4164 month olds
- ☐ 4164-4176 month olds
- ☐ 4176-4188 month olds
- ☐ 4188-4200 month olds
- ☐ 4200-4212 month olds
- ☐ 4212-4224 month olds
- ☐ 4224-4236 month olds
- ☐ 4236-4248 month olds
- ☐ 4248-4260 month olds
- ☐ 4260-4272 month olds
- ☐ 4272-4284 month olds
- ☐ 4284-4296 month olds
- ☐ 4296-4308 month olds
- ☐ 4308-4320 month olds
- ☐ 4320-4332 month olds
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- ☐ 4428-4440 month olds
- ☐ 4440-4452 month olds
- ☐ 4452-4464 month olds
- ☐ 4464-4476 month olds
- ☐ 4476-4488 month olds
- ☐ 4488-4500 month olds
- ☐ 4500-4512 month olds
- ☐ 4512-4524 month olds
- ☐ 4524-4536 month olds
- ☐ 4536-4548 month olds
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- ☐ 4572-4584 month olds
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- ☐ 4680-4692 month olds
- ☐ 4692-4704 month olds
- ☐ 4704-4716 month olds
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- ☐ 4740-4752 month olds
- ☐ 4752-4764 month olds
- ☐ 4764-4776 month olds
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- ☐ 4884-4896 month olds
- ☐ 4896-4908 month olds
- ☐ 4908-4920 month olds
- ☐ 4920-4932 month olds
- ☐ 4932-4944 month olds
- ☐ 4944-4956 month olds
- ☐ 4956-4968 month olds
- ☐ 4968-4980 month olds
- ☐ 4980-4992 month olds
- ☐ 4992-5004 month olds
- ☐ 5004-5016 month olds
- ☐ 5016-5028 month olds
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- ☐ 5052-5064 month olds
- ☐ 5064-5076 month olds
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- ☐ 5100-5112 month olds
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- ☐ 5124-5136 month olds
- ☐ 5136-5148 month olds
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- ☐ 5280-5292 month olds
- ☐ 5292-5304 month olds
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- ☐ 5376-5388 month olds
- ☐ 5388-5400 month olds
- ☐ 5400-5412 month olds
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- ☐ 5460-5472 month olds
- ☐ 5472-5484 month olds
- ☐ 5484-5496 month olds
- ☐ 5496-5508 month olds
- ☐ 5508-5520 month olds
- ☐ 5520-5532 month olds
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- ☐ 5640-5652 month olds
- ☐ 5652-5664 month olds
- ☐ 5664-5676 month olds
- ☐ 5676-5688 month olds
- ☐ 5688-5700 month olds
- ☐ 5700-5712 month olds
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- ☐ 5736-5748 month olds
- ☐ 5748-5760 month olds
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- ☐ 5880-5892 month olds
- ☐ 5892-5904 month olds
- ☐ 5904-5916 month olds
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- ☐ 5952-5964 month olds
- ☐ 5964-5976 month olds
- ☐ 5976-5988 month olds
- ☐ 5988-6000 month olds
- ☐ 6000-6012 month olds
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- ☐ 6144-6156 month olds
- ☐ 6156-6168 month olds
- ☐ 6168-6180 month olds
- ☐ 6180-6192 month olds
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- ☐ 6204-6216 month olds
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- ☐ 6240-6252 month olds
- ☐ 6252-6264 month olds
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## Custom Recall: confirm and name job (List Name)



### Reminder / Recall

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

Gender: Males and Females

##### For immunization series: Include patients who are missing:

Patients missing the following specific number of doses:  
Human Papillomavirus 3

List Name for identification later: HPV\_11to18yrsMissingDose

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

[Change](#) [Cancel](#) [Continue](#)



27

27

## Custom Recall: view patients retrieved for this 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 next 30 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 24 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

#### 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.

Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/> "Sub_20150420_01"	List or Letters (C)	Recall	Pending Review	0	04/20/2015 4:50pm	
<input type="checkbox"/> "Sub_20150420_02"	List or Letters	Coverage Report	List	2	04/17/2015 4:37pm	

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](#)."




28

28

## 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



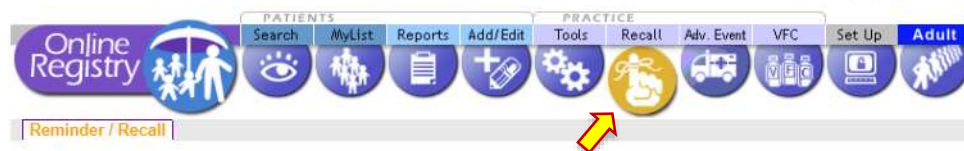
### (c) Update patient information




29

29

## 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  Continue



30

30

## Custom Recall: compose letter

**Online Registry**

**Compose Message**

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

**Select Message:**

☐ Use default message.

☐ If selected, this message will be printed for each patient on your Recall list.

☐ Today's Date (required)

☐ Dear Parent/Guardian (required)

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

(Please, immunizations due will be displayed here.)

Please call our office at \_\_\_\_\_ to schedule an appointment at your earliest convenience.

Thank you.

Recall Test Facility

☐ Use custom message.

☐ If selected, the message you type in the field below to the right will be printed for each patient on your Recall list.

(Please, 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.

[Change](#) [Cancel](#) [Continue](#)

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.

31

## 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**

**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.

Job Name	Contact Method	Status	Patients	Date Created	Cancel Job
JOB_20100101_0001	List or Letters (C)	List	4	01/01/2010 8:24pm	
JOB_20100420_0001	List or Letters (C)	Recall	4	04/20/2010 6:02pm	
JOB_20100420_0001	List or Letters (C)	Recall	4	04/20/2010 4:02pm	

f. A confirmation message appears.

*Please be patient. Processing the records takes time.*

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

g. To view output, click on a

[List](#) | [Labels](#) | [Letters](#)

32





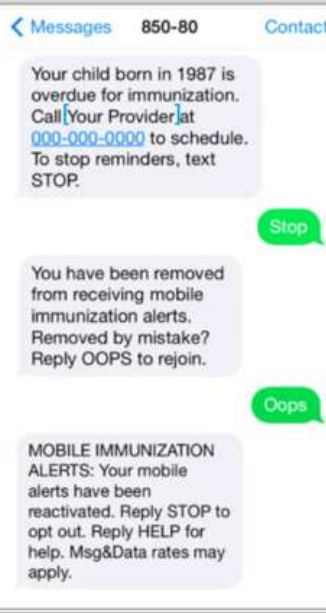
## Recall: Custom Text Message –

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.



35

35

## Recall: Custom Text Message – prepare and update patient information

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

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

If you change the opted in or out status of a patient for receiving text messages, all other patients with the same cell/mobile number will automatically be set to the same status.



36

36



## Recall: Custom One-Time 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 for 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 Text Message. Messages 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](#) link.

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 <b>↑</b>
	<input 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.

**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 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing

37

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

**Select Patient Immunization Criteria**

If you have already done so, follow the steps below to create a new Reminder/Recall job. If you have not, follow the steps below to create a new Reminder/Recall job.

Follow the steps below to create a new Reminder/Recall job:

- a. Select age, gender, and immunization criteria (optional). If you are using your Custom Recall job, you must select age, gender, and immunization criteria.
- b. Complete your job by entering a start date, select and complete your text message (optional).
- c. Click the 'Create Job' button to create a new Reminder/Recall job.

**Age Range:** 1-11 years old, 12-17 years old, 18-24 years old, 25-34 years old, 35-44 years old, 45-54 years old, 55-64 years old, 65+ years old

**Gender:** Male, Female

**Immunization Status:** Missing, Up-to-date, Unknown

**Text Message:** Select a text message to send. You can create a new text message or select an existing one.

**Start Date:** Select a start date for the text message campaign.

**End Date:** Select an end date for the text message campaign.

**Frequency:** Select how often to send the text messages.

**Recipients:** Select the recipients for the text messages.

**Preview:** Preview the text message content.

**Create Job:** Click to create the new Reminder/Recall job.

38

## 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.

**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  $\geq 19$  year olds. And use the custom message for adults.

39

## Recall: Custom Text Message – view jobs



Reminder / Recall

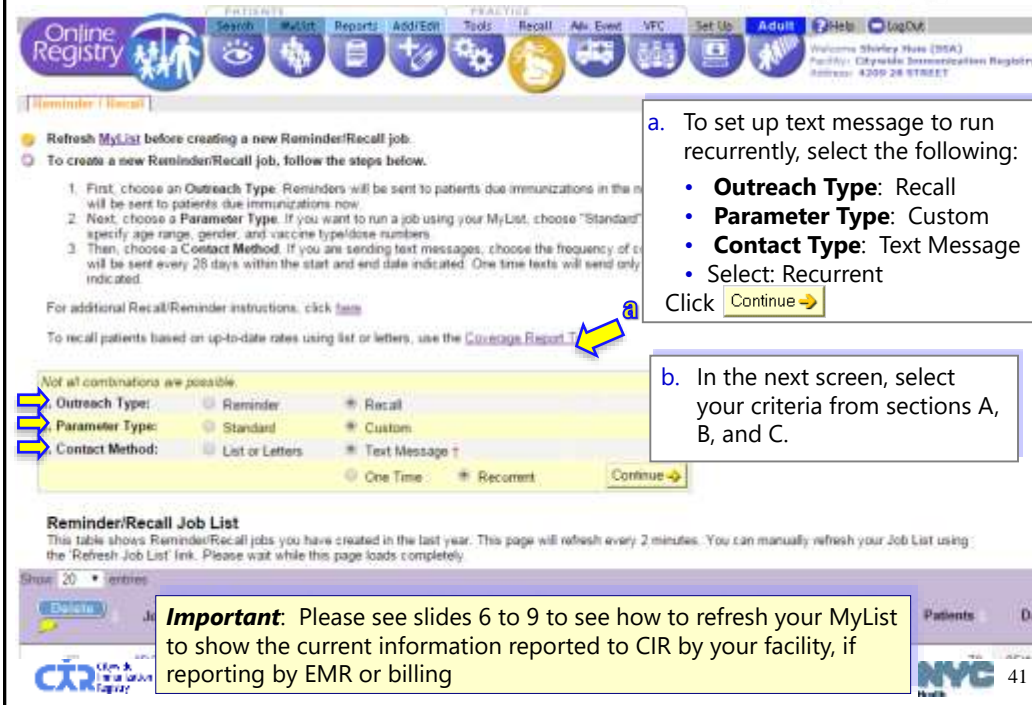
1. Select age, gender, and immunization.
2. Schedule your job by entering the date.
3. Confirm criteria for the Custom Recall job and accept or change the name of your job.
4. Click Continue to submit your Custom Recall job and generate text messages. Messages will be sent to each patient in your MyList 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.



40

## 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.

- First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the n... 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" specify age range, gender, and vaccine type/dose numbers.
- Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of c... will be sent every 25 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](#).

Not all combinations are possible.

Outreach Type: ☐ Reminder ☒ Recall

Parameter Type: ☐ Standard ☒ Custom

Contact Method: ☐ List or Letters ☒ Text Message

☐ One Time ☒ Recurrent

**Continue**

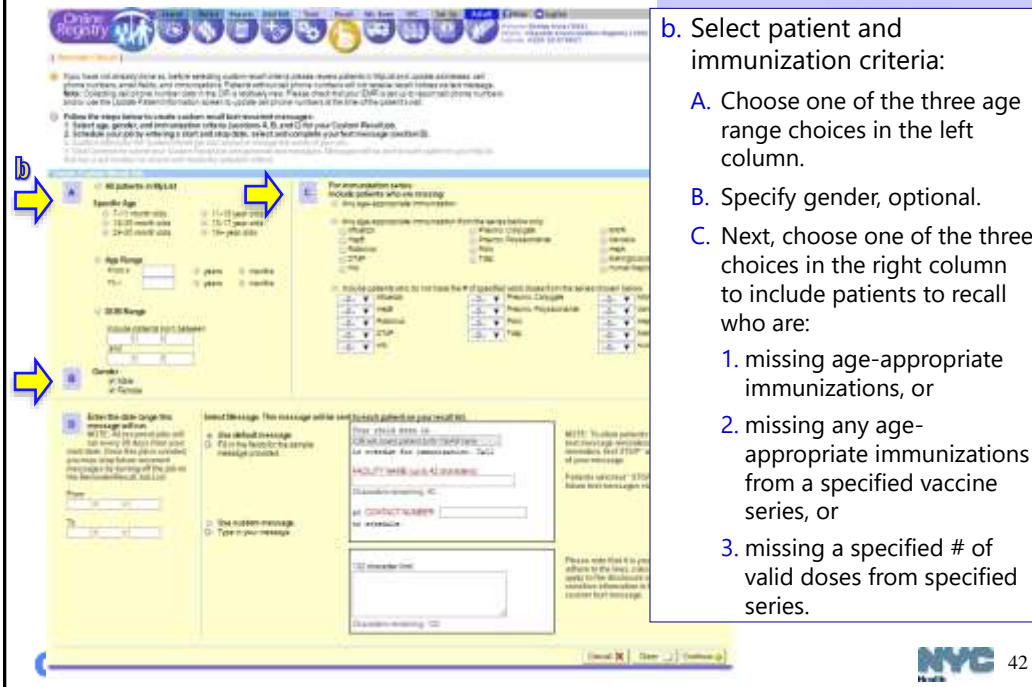
**Reminder/Recall Job List**

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.

**Important:** Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing

41

## Recall: Custom Recurrent Text Message – select patient and immunization criteria



**Reminder/Recall**

Follow the steps below to create a custom recall text message:

- Select age, gender, and immunization criteria (sections A, B, and C) for your Custom Recall.
- Schedule your job by entering a start and stop date. Select whether you want to include patients who are missing any age appropriate immunization, or patients who are missing any age appropriate immunization from the series before only.
- Specify the message content (section D).
- Click 'Continue' to save your custom recall text message. A confirmation message will be displayed.

**A. Select age, gender, and immunization criteria**

**MyList**

Specific Age: ☐ 1-12 years old ☐ 13-17 years old ☐ 18-24 years old ☐ 25-34 years old ☐ 35-44 years old ☐ 45-54 years old ☐ 55-64 years old ☐ 65-74 years old ☐ 75-84 years old ☐ 85-94 years old ☐ 95-104 years old

Age Range: ☐ 1-12 years old ☐ 13-17 years old ☐ 18-24 years old ☐ 25-34 years old ☐ 35-44 years old ☐ 45-54 years old ☐ 55-64 years old ☐ 65-74 years old ☐ 75-84 years old ☐ 85-94 years old ☐ 95-104 years old

Gender: ☐ Male ☐ Female

**B. For immunization series**

☐ Include patients who are missing any age appropriate immunization

☐ Include patients who are missing any age appropriate immunization from the series before only

**C. Select Message**

Select Message: This message will be sent to patients on your result list.

☐ Use default message

☐ Use custom message

**Default Message:**

Dear [Patient Name],

It is time for your [Vaccine Name] immunization. Please call [Phone Number] to schedule your appointment.

**Custom Message:**

Dear [Patient Name],

It is time for your [Vaccine Name] immunization. Please call [Phone Number] to schedule your appointment.

**Important:** Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing

42

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

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**.

43

43

## Recall: Custom Text Message – confirm and name job

44

44



## Recall: Custom Text Message – view jobs

**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.

**Criteria**

Created On: 04/23/2015 11:48 am Based On: Patients in My List Age Range: 0 yr - 12 yr Doses: Patients missing any age appropriate immunization

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

Job State: Complete

**Completed Run(s)**

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

**Reminder/Recall Job List**

This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 3 minutes. You can manually refresh your Job List using the "Refresh Job List" link. Please wait while the job loads complete.

Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
Sub_20150423_02	One-time Text Message	Recall	Complete	3	04/23/2015 11:48am	
Sub_20150423_02	One-time Text Message	Recall	Active (Next Run: 04/25/15)		04/23/2015 11:45am	Cancel Job

45

## Recall: Custom Text Message – view job run details

**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.

**Criteria**

Created On: 04/23/2015 11:48 am Based On: Patients in My List Age Range: 0 yr - 12 yr Doses: Patients missing any age appropriate immunization

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

Job State: Complete

**Completed Run(s)**

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

**Run Details for Job Name "Sub\_20150423\_02"**

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

Run Date	First Name	Sex	Date of Birth	Mobile Phone
04/23/2015	Hale	F	02/16/2009	888-917-3370
04/23/2015	Chloe	F	10/05/2008	817-219-0023
04/23/2015	June	F	01/01/2010	888-917-3370

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

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

46



## Recall: Custom Text Message – job run details (Excel output)

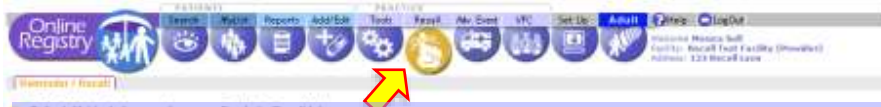
The downloadable list of patients contains:

- 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.

A	B	C	D	E	F	G	H	I
1	Job Name:	Bull_20150423_02						
2	Facility Code:	0004000	Facility Name:	Recall Test Facility				
3	Created By:	rsuall						
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 MyCal with Age Range: 0 yr - 12 yr						
10		Gender: Males and Females						
11		Exclude: 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 pet:	3						
15	Total Patients sent text msg (job not opt-out):	3						
16								
17	Send Text Msg	Opted Out Text Msg	Last Name	First Name	DOB	Gender	MRN	CIR ID
18	Y	N	RECALL	NALA	05/10/2004	F	708157045	
19	Y	N	REYNOLDS	CHLOE	09/01/2000	F	708157045	404 W 43RD STREET NEW YORK NY
20	Y	N	RECALL-BULLIARD	JAMES	01/01/2010	M	708157045	

47

## 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:	<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 in Letters	<input type="radio"/> Text Message
	<input type="radio"/> One Time	<input type="radio"/> Recurrent
<input type="button" value="Continue"/>		

Reminder/Recall Job List							
This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 3 minutes. You can manually refresh your Job List using the Refresh Job List link. Please wait while this page loads completely.							
Items: 25	<input type="button" value="Delete"/>	Job Name	Contact Method	Based On	Status	Patients	Date Created
		Bull_20150423_02	One-time Text Message	Recall	Complete	3	04/23/2015 11:48am
		Bull_20150423_02	One-time Text Message	Recall	Active (Next Run: 04/25/15)		04/23/2015 11:45am
							<a href="#">Cancel Job</a>

48

## Recall: Custom Text Message – Cancel Job (b)

The screenshot shows the 'Online Registry' interface. At the top, there are tabs for 'PATIENTS', 'Recall', 'Reports', 'Add/Edit', 'Tools', and 'Help'. Below the tabs, there's a navigation bar with 'Home' and 'Recall'. The main content area displays details for a job named 'HURF\_20150410\_02'. It includes criteria like 'Created On: 04/10/2015 4:07 pm', 'Based On: Patients in My List', 'Age Range: 6 yr - 7 yr', and 'Gender: Male and Female'. It also shows 'Text Message Type: Recurrent', 'Start Date: 04/10/2015', 'End Date: 06/15/2015', and 'Custom Message: Please ignore this message. Text:'. Below this, it shows 'Job State: Active (Next Run: 05/09/15)', 'Last Run: 05/09/2015', and 'Next Run: 05/09/2015'. A 'Previous' button and a 'Cancel Job X' button are visible. A table titled 'Completed Run(s)' shows a list of completed runs with columns for 'Date of Run', 'Status', and 'Number of Patients'. A pop-up window titled 'Cancel Job?' is shown, asking 'Are you sure you want to cancel this job?'. It includes a note: 'Note: We cannot ensure that a job run scheduled the same day as your cancellation request will be terminated in time.' and two options: 'To cancel this job, click "Cancel Job."' and 'If you would like to continue running this recall job, select "Keep Job."'. The 'Cancel Job' button is highlighted with a yellow arrow.

If you click the "**Cancel Job**" link from the Reminder/Recall Job List, you are taken to the View Job screen.

- Review your job details.
- Click **Cancel Job X** button
- 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.

49

## 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
  - We had all the shots. Check your records
  - I don't believe in a particular vaccination/ vaccinations
  - Who is this?

50

## Reminder: "Due Soon"



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).

- 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

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

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 9 to see how to refresh your **MyList** to show the current information reported to CIR by your facility, if reporting by EMR or billing



51

51

## 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



52

52

## 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.



53

53

## 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.



54

54

## 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](http://nyc.gov/health/cir)

E-mail: [cir@health.nyc.gov](mailto:cir@health.nyc.gov)

(Subject line: Recall; Facility Name)



55

55

## 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.



56

56



# Standard Up-To-Date Measures

## 7- 11 months

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

## 19-35 months

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

## 24-35 months

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

## 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)

