

1. Prior to producing coverage reports and recall or reminder jobs, keep your **MyList** current by clicking on the **Refresh MyList** tab in the **MyList** screen. Choose to retrieve your patients from CIR or remove patients from your **MyList**, who:
  - a. have been looked up in the Online Registry (OR) but may not be immunized yet at your practice, and/or,
  - b. have received an immunization at your practice who are in the CIR, but not yet added to **MyList**, or,
  - c. have received their last immunization at your practice who are in the CIR, but not yet added to **MyList**, and
  - d. exclude patients who have been designated as "Moved and Gone Elsewhere" (MOGE) via the **Update Patient Info** screen in the Online Registry.
  - e. For each of the above, choose time ranges from 3 months to anytime.
  - f. After refreshing **MyList**, it will contain only the patients who meet the criteria you selected.
  - **MyList** is shared by all Online Registry users at the practice. **Any changes will affect all users!** Consider assigning one person at your practice to regularly update **MyList** and run reports and jobs.
  - Contact the CIR at **347-396-2400** if there are records that need to be merged.
  - At any time, users can view the criteria of the current **MyList** by clicking on the link [Who's in MyList?](#), found on **MyList** and the coverage and recall/reminder screens
  - Patients individually looked up will continue to be added to **MyList** until the next refresh, and patients individually removed from **MyList** will be removed.
  - **Note:** Practices that report to CIR using EMRs or billing systems must use **Refresh MyList**.
  
2. Before running a coverage, recall or reminder report, review and update patient contact information, such as address, cell phone number and email address, in the **Update Patient Info** screen; and update the status of patients to let CIR know of patients no longer seen [a.k.a. Moved or Gone Elsewhere – (MOGE) status] at your practice. While in **MyList**, under the **Active** column, click the [Yes/No](#) link to the left of the patient's name to bring up the **Update Patient Info** screen to change the status.
 

**Note:** **Two** things must be done to remove a record from **MyList** and its association with the practice:

  - i. Update the **Active** status to "No" in the **Update Patient Info** screen;
  - ii. From **MyList**, under the **Remove** column check the box next to the patient's name. Click the blue Remove icon at the top of the column. The record is removed from **MyList**, but remains in CIR.
  
3. **Report Options**
  - a. **Standard Coverage Report** (located in **Tools**  screen): **Up-to-Date percentages** for 7-11 month-olds, 19-35 month olds, 24-35 month olds, and 11-18 year olds.
    - i. **Influenza Coverage Report:** current season; for 6-59 month-olds, 5-10 year-olds, 11-18 year-olds.
    - ii. **COVID-19 Coverage Report:** shows any patient who received at least 1 dose at your facility.
    - iii. A recall list of patients who are not up-to-date may be generated from a coverage report.
  - b. **Recall/Reminders** (located in **Recall**  screen):
    - i. **Custom Recall:** choose or enter age ranges, then choose options to recall patients who are missing either any age-appropriate immunization(s), any specified vaccine series, or any specified number of valid doses.
    - ii. **Standard Recall – "Due Now"** ( red status icon next to patient name in **MyList**): see who in your entire **MyList** is Due Now.
    - iii. **Standard Reminder – "Due Soon"** ( orange status icon next to patient name in **MyList**): see who is due for immunizations within 28 days.
  - c. Use coverage and recall/reminder reports to produce lists, or letters and address labels. Details on page 2.

4. **Coverage Report** (located in **Tools**  screen) highlights:
  - a. View [Who's in MyList?](#) and use the **Refresh Mylist** feature to keep your list current.
  - b. **Review date:** The default date is today's date, modifiable. Up-to-date calculations will be based on the age of patient as of the date entered.
  - c. **Influenza Coverage Report** is available for the current flu season, based on a cohort of **Mylist** patients.
  - d. **COVID-19 Coverage Report** displays all patients who have received at least 1 dose at your facility.
  - e. A Report Name is automatically generated and is editable.
  - f. Report that processing or done are found in the **Recent Coverage Reports** screen. The **Report Status** will change from "Processing..." to [Done](#)."
  - g. To view the output, click on [Done](#) in the **Report Status** column.
  - h. The processing of the report takes time. You may return to the screen at a later time.
  - i. You have the option to send the results of the coverage report to produce a recall job of a list or letters and labels by clicking on the gray  button to the left of the coverage summary.
  
5. **Creating a Recall Job:** While in the **Recall**  screen, you have an additional opportunity to review and update each record. Click the links in the **Update** column on the right side for patient immunization history, address, phone numbers and MOGE status. Individual records may be removed from the recall job by unchecking the **Recall** box to the left of the patient's name.
  - a. The recall list results, downloadable to Excel, will be found in the **Recall**  screen. The list includes: name of patient, date of birth, CIR ID, address, phone numbers and immunizations that are past due.
  - b. The recall letter options are either a default or customizable letter. Individual letters for each patient, labels formatted for printing, and a list of the individual's past due immunization are the job results.
  - c. Please be patient, processing the report takes time. You may return to the screen at a later time.
  - d. The Recall jobs are found in the **Recall**  screen. Click on [Done](#) to view the results.
  - e. **Printing letters:** Office letterhead may be used to print the letters.
  - f. **Printing labels:** Use standard address labels, 30 per page, 1 inch x 2-5/8 inches. In your printer properties, choose paper option type as: Labels.
  
6. **Custom Recall**, list and letters highlights:
  - a. View [Who's in MyList?](#) and use the **Refresh Mylist** feature to keep your list current.
  - b. In the **Recall**  screen, choose from the yellow options box: 1. **Outreach Type:** Recall, 2. **Parameter Type:** Custom, **and** 3. **Contact Method:** List or Letters.
  - c. The Custom Recall Job options appear next. Select the patient and immunization criteria for the recall job (sections A, B, and C). To use custom recall with text messaging: refer to [Brief Text Messaging Guide](#).
  - d. A report name is automatically generated and is editable.
  - e. After running a Custom Recall, the next step is to review the recall list by clicking on the [Pending Review](#) link in the **Status** column.
  - f. Follow highlights outlined from **4j** to **4o**, above.
  
7. **Standard Recall** highlights:
  - a. View [Who's in MyList?](#) and use the **Refresh Mylist** feature to keep your list current.
  - b. In the **Recall**  screen, choose from the yellow options box: 1. **Outreach Type:** Recall, 2. **Parameter Type:** Standard, **and** 3. **Contact Method:** List or Letters.
  - c. Next, review the recall list as outlined in step **5** above. You may choose individual records by checking the **Recall** box to the left of the patient name, or checking the recall box at the top of the column .
  - d. Follow highlights outlined under step **5**, above.
  
8. **Standard Reminder** highlights:
  - a. View [Who's in MyList?](#) and use the **Refresh Mylist** feature to keep your list current.
  - b. In the **Recall**  screen, choose from the yellow options box: 1. **Outreach Type:** Reminder, 2. **Parameter Type:** Standard, **and** 3. **Contact Method:** List or Letters.
  - c. Next, review the reminder list as outlined in step **5**. Here, you may choose individual records by checking the **Recall** box to the left of the patient name, or check the reminder box at the top of the column .
  - d. Follow highlights outlined under step **5**, above.
  - e. For this group of patients, the results will show both vaccines that are Due Soon and Due Now.