

Text Messaging via the Online Registry to Recall Patients Due/Overdue Immunizations

Your practice may now be able to use text messaging via the Online Registry at no cost to your practice to recall patients Due or Overdue immunizations. This brief guide illustrates some of the new features. See the [recall guide](#) online.

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

To set up text messaging choose the combination:

Recall,
Custom,
Text Message, and
One-Time or Recurrent.

Click "Continue."



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 →

2. The Custom Recall screen will appear next. Select the patient and immunization criteria 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 Papillomavirus

Tdap MMR COVID-19

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

--0-- Influenza --0-- Hib --0-- Varicella

--0-- HepB --0-- Pediatric Pneumococcal --0-- HepA

--0-- Rotavirus --0-- Adult Pneumococcal --0-- Meningococcal

--0-- DTaP --0-- Polio --0-- Human Papillomavirus

--0-- Tdap --0-- MMR --0-- COVID-19

3. 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.

- 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.**

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: 07 / 29 / 2022
To: 07 / 31 / 2023

Select message (default recommended.)
 Use default message
 Use custom message
 Fill in the fields for the sample message provided.
 Type in your custom message. Make sure to include your facility name.

This message will be sent to each patient on your recall list.
 You or your child born in [YEAR] is overdue for immunization. Call [FACILITY NAME] at [CONTACT NUMBER] to schedule.

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

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

Sample message: Please call, NY Practice-Dr. Vax, at 212-111-1111 to schedule your vaccination. To stop reminders, text STOP

Buttons: Cancel, Clear, Continue

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.

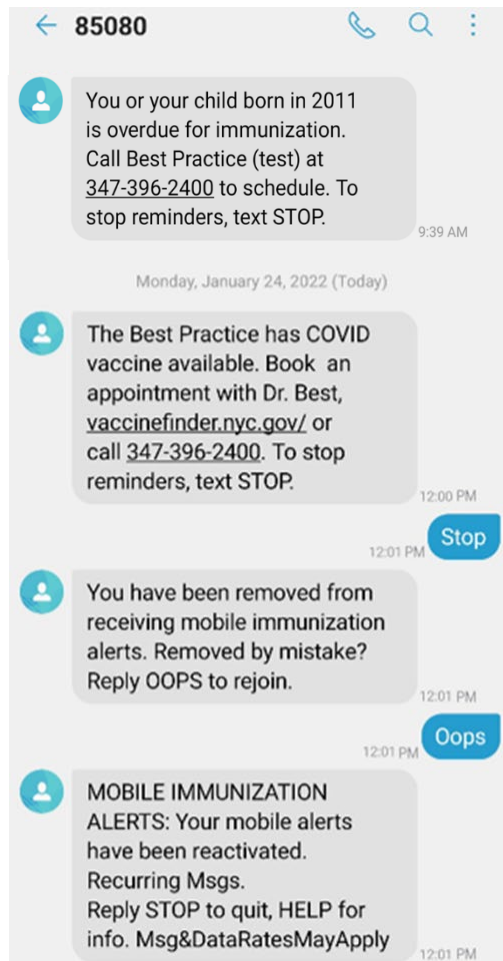
- In the next screen (not shown), you will name your Recall Job.
- A sample of how the messages you send will look on the screen of a mobile phone:

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: 850-80.
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.

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

Reminder/Recall section.

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

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. Please wait while this page loads completely.

Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
"Polio_Varicella_20220728_"	Recurrent Text Message	Recall	Canceled		07/28/2022 9:07pm	
"Pol Var_20220728_02"	Recurrent Text Message	Recall	Active (Next Run: 07/29/22)		07/28/2022 8:09pm	Cancel Job
"Missing Polio Var_20220728_02"	List or Letters (C)	Recall	List	53	07/28/2022 9:04am	
"Missing Pol Var_20220728_02"	One-time Text Message	Recall	Complete	1	07/28/2022 8:55am	

9. After clicking on a job name, the next screen you can view:

(a) the Details for the Job: parameters that were chosen for the recall, date of the job, date range for recurrent jobs 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

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 "Pol Var_20220728_02"

Criteria

Created On: 07/28/2022 8:09 pm	Based On: Patients in 'My List'	DOB Range: 08/30/2011 - 08/31/2011	Doses: Patients missing any age appropriate immunization from the following series: • Polio • Varicella
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Text Message Type: Recurrent
Start Date: 07/29/2022
End Date: 07/31/2023
Default Message: You or your child born in <BIRTH YEAR> is overdue for immunization. Call Best Practice at 347-396-2537 to schedule.

Job State: Active (Next Run: 08/02/22)
Last Run: 08/01/2022
Next Run: 08/02/2022

Completed Run(s)

Date of Run	Status	Number of Patients
07/29/2022 9:16 am	COMPLETED	1

10. Click on [View Job Run Details](#) which can be downloaded and saved for a full summary of the job run details. See Excel example below.

11. 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.

Reminder / Recall

- This page displays the list of patients included in the completed job run selected.
- Includes reported vaccinations compared against the Immunization Schedule as of the date the list was prepared.
- To view a full summary of details for this completed job run, click the "Job Run Details" Excel icon.

Details for Job Name "Pol Var_20220728_02"

Criteria

Created On: 07/28/2022 8:09 pm	Based On: Patients in 'My List'	DOB Range: 08/30/2011 - 08/31/2011	Doses: Patients missing any age appropriate immunization from the following series: • Polio • Varicella
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Text Message Type: Recurrent
Start Date: 07/29/2022
End Date: 07/31/2023
Default Message: You or your child born in <BIRTH YEAR> is overdue for immunization. Call Best Practice at 347-396-2537 to schedule.

Job State: Active
Last Run: 08/01/2022
Next Run: 08/02/2022

Run Date: 07/29/2022 09:18 am
Job Status: COMPLETED
Patient Count: 1

Last Name	First Name	Sex	Date of Birth	Mobile Phone
1 Donald	Duck	M	08/30/2011	917-319-0521

* Includes reported vaccinations compared against the Immunization Schedule as of the date the list was prepared.

Job Name	Facility Name	Created By	Created On	Start Date	End Date	Date of Run	Sex	DOB Range	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	Last Name	First Name	DOB	Sex	MRN	CIRID	Address	City	State	ZIP	Home Phone	Cell Phone	Email Address	Due Now
Pol Var_20220728_02	Recall Test Facility	shue10	07/28/2022 8:09 PM	07/29/2022	07/31/2023	07/29/2022 9:16 AM	Male	08/30/2011 - 08/31/2011	Polio, Varicella	1	0 (0.0%)	1 (100.0%)	1	DONALD	DUCK	08/30/2011	M	785451363	999	POND CIRCLE	SI	NY	10301	215554569	917-319-0521	HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, I	

Important Steps for Managing and Preparing your Patient Lists for Recall

For complete instructions, visit: <http://www.nyc.gov/html/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 the 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 patient's "active" status;
 (2) update the Cell/Mobile number;
 (3) 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. You can choose to opt-out patients while in this screen.

Office logistics and 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. Staff preparation: 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 regularly. Recalls can increase call volumes. Provide staff with scripts, answers to FAQs. Check vaccine supply.
3. Mobile Phone Numbers Accuracy: Determine the workflow for updating mobile phone information in the Online Registry. Facilities using HL7 messaging to report to CIR should send mobile phone numbers. 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. Do not use private health information in text messages.
5. While the Bureau of Immunization may send vaccination recall messages to individuals, messages when sent by the patient's provider are received better and are more effective.