



# New York City Citywide Immunization Registry (CIR):

Coverage Reports  
Reminder / Recall

New: Text Messaging

Patient Status: Active/Inactive  
(a.k.a. Moved or Gone Elsewhere – MOGE)

NYC Department of Health & Mental Hygiene  
Bureau of Immunization  
July 2015

# CIR Information Website homepage:

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

NYC THE NEW YORK CITY DEPARTMENT OF HEALTH AND MENTAL HYGIENE Health

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TURN SUB-MENUS OFF

HOME

HEALTH TOPICS A-Z

HEALTHY LIVING

MENTAL & BEHAVIORAL HEALTH

HEALTHY ENVIRONMENT

EMERGENCY PREPAREDNESS

DATA & STATISTICS

HEALTH CARE PROVIDERS

NYC Med

Primary Care Information Project

Public Health Action Kits for Providers

Public Health Laboratory

Notifiable Diseases & Conditions

Communications & Publications

Important Health Topics

## Citywide Immunization Registry

### Information for Providers

Home > Health Care Providers > Important Health Topics > Immunizations > Citywide Immunization Registry

CIR Information for Providers | Parents, Guardians, & Individuals | Schools, Child Care Facilities, & Camps

Welcome to the New York Citywide Immunization Registry (CIR)! The CIR keeps immunization records for New York City's children.

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

Register your practice online.

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

Public and private schools interested in accessing the Online Registry to view immunization records, please download, fill out and fax back these [forms](#) to the CIR.

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

- ▶ See who is on the Provider Honor Roll
- ▶ See who is on the Provider Special Mention List

**For Providers**  
Information for Providers

**For Parents & Guardians**  
Information for Parents, Guardians, and Individuals

**For Schools, Child Care Facilities & Camps**  
Information for Schools/Child Care Centers & Camps

Look up records & report immunizations  
**Online Registry**  
GO

- Contact CIR at (347) 396-2400 for Online Registry access, or
- Visit <http://www.nyc.gov/html/doh/html/hcp/cir-security-admin-info.shtml>

After account set up is completed this is the **Log in** screen you will see going forward:

1. Enter User ID & Password;

2. Click **I Consent** →

1

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**Online Registry** **Welcome!** Please enter your User ID and Password

**User ID**  **Password**

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

**In proceeding beyond this point, the user:**

- acknowledges the possibility that the information contained herein may be incorrect or incomplete.
- acknowledges that the medical decision to immunize or test a child for lead rests with the health care provider, based on the child's current health status and past medical history.
- agrees to look up information only on his/her current patients, and to comply with the restrictions on the disclosure of information from the Online Registry in accordance with NYC Health Code [Section 11.07\(d\)](#) and [Section 11.06\(b\)](#).

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

**Cancel X** **I Consent →**

**Online Registry Resources**

- **New features!**
  - Pre-completed forms:
    - Refer children with asthma living with pests for a home inspection *New!*
    - Create, Save and Re-Use Online CH205 Forms
      - [Online CH205 Form Online Tutorial](#) *New!*
      - [Online CH205 Form Guide](#)
  - Visit "Tools" inside: Run flu coverage reports and recall lists
- **Guides:**
  - Coverage, Reminder/Recall
    - [Influenza Coverage Reports Brief Guide](#)
  - QuickGuide
  - QuickGuide for Users with Read-Only Access
  - Full Guide
  - VFC Online Registry Ordering Tool - Guide, FAQs
- Please visit [www.nyc.gov/health/cir](http://www.nyc.gov/health/cir) for more resources.

**News and Highlights**

- VFC Requirements for 2015
- See who is on the Provider Honor Roll.
- Use your EHR system to report immunizations to the CIR. For more information, send us an email at [cir@health.nyc.gov](mailto:cir@health.nyc.gov), including your facility address, contact information and current EHR, or phone 347-396-2400.
- **Frequently requested documents:**
  - [CPT-CIR Vaccine Code list](#)
  - [UPIF Guide for Electronic Reporters](#)
- Please visit the [Immunization Information for Providers](#) for more resources.

2

Check notice boxes for updates.

CIR at (347)396-2400 or [cir-reset@health.nyc.gov](mailto:cir-reset@health.nyc.gov) for Online Registry account issues.

# Overview of Reminder/Recall: preparing the data



1. **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**.
2. View and edit a patient's last valid contact information: address, **home phone, cell/mobile phone, and email address** and phone number.
3. Update patient's status – active/inactive (a.k.a. **Moved or Gone Elsewhere –**MOGE**).**

# Overview of Reminder/Recall features: report options



## 1. Coverage (located in the Tools screen):

- a) **Up-to-Date** (UTD) percentages for 7-11 mo. olds, 19-35 mo. olds, 24-35 mo. olds, or 11-18 yr. olds;
- b) **Influenza** UTD percentages for 6-59 mo. olds, 5-10 yr. olds, or 11-18 yr. olds.

## 2. Outreach Type: Recall/Reminder

### a) Recall (located in the Recall screen):

#### 1) Custom Recall –see who has vaccine Due Now or Overdue:

- i. enter age ranges of your choice;
- ii. **select gender (male, female, or both);**
- iii. choose to recall patients who are missing any age-appropriate immunization, any specified vaccine series, or # of specified valid doses

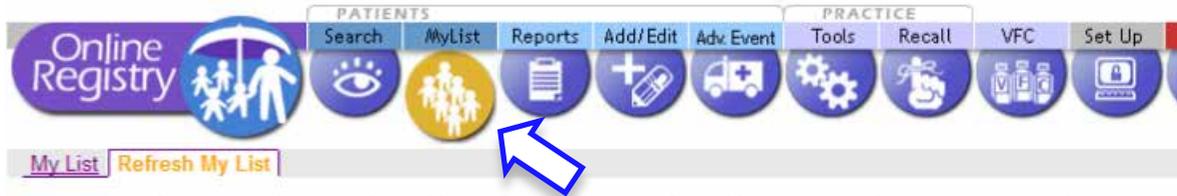
#### 2) Standard Recall –see who in MyList is Due Now.

- ### b) Reminder (located in Recall screen): same as Recall, but used to see who is due immunizations within 28 days, or **Due Soon**.

## 3. Contact Method: produce a recall list with phone numbers for contact by phone or compose letters with address labels to print and mail.

**New feature:** Send text messages to mobile phones of parents/guardians of patients due vaccination(s) using the custom recall option. See Slide 51.

# About Refresh MyList (practice\* list):



- **MyList**- Historically the user built **MyList** as patients were looked up or added, confidentially, one-by-one, to the Online Registry.
- **Refresh MyList** supplements **MyList**.
  - practices reporting immunizations by electronic methods will need to regularly refresh **MyList** to keep it current.
- **Refresh MyList** modifies and creates a new **MyList**. You may choose a combination of retrieving (or removing) patients who:
  - have been looked up in the Online Registry but may not have been immunized yet at your practice, and/or,
  - have been immunized at your practice who are in the CIR, but may not already be on **MyList**, or,
  - have received their last immunization at your practice who are in the CIR, but may not already be on **MyList**, and
  - have been designated as “Moved and Gone Elsewhere” (**MOGE**) via the OR.
  - For each of the above, the times ranges choices can be within 3 months to anytime.
  - After refreshing **MyList**, it will contain **only** the patients who meet the criteria you selected.

# Refresh MyList (practice list): tips



- Please remember that **MyList** is shared by all of the Online Registry users at your **practice**. **Any changes you make will affect all your users and affect the patients to be contacted if your practice has scheduled recall jobs using text messaging.**
- You may want to consider designating one person at your practice to update MyList and run reports.
- Please contact the CIR at [\(347\) 396-2400](tel:347-396-2400) if you have duplicate/fragmented CIR records that need to be merged.
- Please review your records and let us know if you do not see records you reported in the CIR.
- Agencies and organizations that use the Online Registry for looking up patient records only and do not report immunizations may not need to use this feature.



Use this feature to recreate the MyList that is shared by all of the Online Registry users at your practice. When you click the "Continue" button at the bottom of the screen, the MyList for your Practice will be recreated and will contain **only** the patients who meet the criteria that you select below.

**Refresh My List**

**Include Patients who:**

Have been looked up at this practice: [dropdown menu]

Have received an immunization at this practice: [dropdown menu]

Please note after refreshing MyList:

- Any patients who are looked up by users at this practice will be added to the MyList.
- Any patients who are manually removed by users will be removed from the MyList.

Cancel Continue

# Refresh MyList (practice list): examples

Example: Choose

patients in CIR who:

- q have received an immunization at your practice in the last 3 years, and
- q have been looked up by your practice in the past year,
- q Do not include patients who have moved or gone elsewhere.

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

**Include Patients who:**

- Have been looked up at this practice: within 1 year
- Have received an immunization at this practice: within 3 years
- Have received their last immunization at this practice: .....

Do not include patients who have been designated as MOGE (Moved or Gone Elsewhere).

Please note after refreshing MyList:

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

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

Example Results:

Results will appear above MyList

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

# MyList: Who's in MyList?

Click on the link to see [Who's in MyList?](#)

**Online Registry**

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

PRACTICE: Search, MyList, Reports, Add/Edit, Adv. Event, Tools, Recall, VFC, Set Up

**My List** Refresh My List

- Each time someone at Citywide Immunization Registry finds a patient using Search, they are added to MyList. To help your list, use the [Refresh MyList](#) feature.
- To view a patient record, click on the patient's name.
- To Remove from List, check one or more boxes and click the "Remove" button at the bottom of the page. (The selected will no longer appear on this page. They will not be deleted from the Registry.)

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

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

View MyList: Show patients accessed... Show per page... and Jump to...  
 ever 10

Who's in MyList? - Microsoft Internet Explorer provided by HEALTH

## Who's in MyList?

On 02/02/2010 at 06:02PM, SHIRLEY HUIE refreshed this practice's MyList with patients who met the following criteria as of that date:

- Include all patients who received an immunization at this practice in the last 1 year.

In addition, since the time of that refresh:

- Any patients who were looked up by users at this practice, would have been added to the MyList.
- Any patients who were manually removed by users at this practice, would have been removed from the MyList.

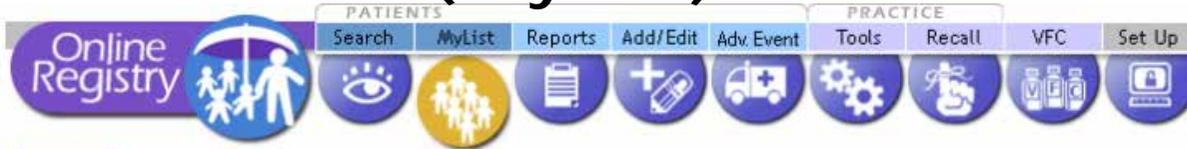
Close this Window

**New!** Mobile or cell phone (M)  
Home phone (H)

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

1-10 of 71 records 1 2 3 4 5 6 7 8

# Patient List (MyList): Active Status, Remove



My List Refresh My List

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

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

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

1-10 of 71 records 1 2 3 4 5 6 7 8

# Update Patient Info: address, phone, MOGE status

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

Welcome User Name (Facility Name)

View Record Newborn Hearing Screening Print Reports Request Fax Pre-completed Forms and Referrals **Update Patient Info**

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

**Patient Information**

First Name: MONICA **Alternate First**† Middle Name: CAROLINE Last Name: RECALL-SULL **Alternate Last**†

DOB: 09 / 21 / 2000 (mm/dd/yyyy) Gender:  M  F

House No. / Street / Apt. No.: 42-09 28TH ST City / State / ZIP: LONG ISLAND CITY NY 11101

Medical Rec. No. Medicaid No. (AA####A)†

Mom DOB† Mom First Name† Mom Maiden Name†

Home Phone: (222) 222-2222  Cell/Mobile & Home Phone are the same. Selecting checkbox will copy the Cell/Mobile Phone number and the Home Phone number to both fields.

NEW Cell/Mobile: (222) 222-2222 NEW Email:

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

Patient has opted out of text messages:†  
 Yes  No   
 If you change the opted in or out status of a patient for receiving text messages, all other patients with the same cell/mobile number will automatically be set to the same status.

Clear  Continue →

† Data previously reported are saved in the CIR but may not be displayed.

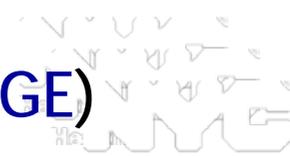
‡ The NYC Health Department is expanding its reminder/recall functionality in the Online Registry for providers who choose to use it to send text messages to parents and/or guardians regarding immunizations due or soon to be due for their children.

The functionality does not provide parents and/or guardians an opportunity to "opt in" to receive these text messages. However, those who receive text messages are provided an opportunity to "opt out" after receiving the initial and any subsequent messages. You may manually change a patient's status to "opt out" if you would like to ask for consent before sending these text message immunization reminders.

If you choose to use this Online Registry tool to communicate with parents and/or guardians of the children in your practice, please consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.

- Update patient information, address, home phone, parent/guardian cell/mobile phone, and parent/guardian email address.
- 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.

# Criteria of Moved or Gone Elsewhere (MOGE)



The following describes the criteria which should be used to consider a child 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 child 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 child 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 child 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 child’s last visit to the practice, this may mean that the child 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 child 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 child, then the child should be kept in the practice’s MyList.



- The coverage or recall/reminder reports are only as good as the information (immunizations and addresses) your practice reported to the CIR.
- Use the new features to help you update your records in CIR.

# Tools: Coverage Report: reports list



Before running coverage or recall /reminder lists, consider using **Refresh MyList (slide 6)**.

To start a **Coverage Report**, click on Create New Coverage Report [Standard](#).

**Online Registry**

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

**PRACTICE**

[Immunization Schedule](#) | [Lead Guidelines](#) | **Coverage Report**

● This page shows Coverage Reports you have created in the last year. Click on a Coverage Report to view it or use it to create a Recall List for patients who need immunizations.

Create New Coverage Report: [Standard](#) [Refresh](#)

**Recent Coverage Reports (1 Report)**

	Type	Name	Patients	UTD%	Coverage Status as of:	Date Created	Report Status
<input type="checkbox"/>	Standard Coverage Report	"HUIE_20100108_01"	240	35.8%	01/08/2010	01/08/2010 5:10 PM	<a href="#">Done</a>

[Delete](#)

# Coverage Report: choose a report to use

The screenshot shows the 'Standard Coverage Report' section of the Online Registry. At the top, there are navigation tabs for 'PATIENTS' (Search, MyList, Reports, Add/Edit, Adv. Event) and 'PRACTICE' (Tools, Recall). A blue arrow points to the 'Tools' tab. Below the navigation is a breadcrumb trail: 'Coverage Report | Immunization Schedule | Lead Guidelines'. A yellow callout box contains instructions: 'Use this page to find out which patients are up to date and optionally create a Recall List for patients who need immunizations. For Coverage Report instructions, click here. Consider using Refresh MyList before running a coverage report.' Below this is a link: 'The patients that will be included are all the patients in "My List" | Who's in MyList? | Refresh MyList'. The 'Standard Coverage Report' section has a 'Report' dropdown menu with four options: '7-11 month olds with...', '19-35 months olds with...', '24-35 month olds with...', and '11-18 year olds with...'. A yellow arrow labeled 'a' points to the first option. Below the report options is a 'Review date' field with a calendar icon and the date '10/14/2014'. A yellow arrow labeled 'b' points to the date field. Below the date field is the 'Influenza Coverage Report' section, which is highlighted in yellow. It contains a warning: 'The flu season runs from August 1st through June 30th. You may not run an Influenza coverage report outside the flu season time frame. The influenza coverage reports are not based on your MyList population, but on the population parameters shown below each report option.' Below the warning are three checkboxes for age groups: '6-59 month-olds', '5-10 year-olds', and '11-18 year-olds'. A yellow arrow labeled 'a' points to the first checkbox. Below the checkboxes is a 'Report Name for identification later:' field with the text 'USERNAME\_20141014\_01'. A yellow arrow labeled 'c' points to this field. At the bottom right are three buttons: 'Cancel', 'Clear', and 'Continue'. A yellow arrow labeled 'd' points to the 'Continue' button.

## 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** →

## New! Influenza Coverage Report:

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

# Standard Up-To-Date Measures

7- 11 months

19-35 months

24-35 months

13 - 17 years

11 - 18 years

○ 7-11 month olds with...

- 3 DTP,
- 2 Polio,
- 2 Hib,
- 2 HepB,
- 3 Pneumococcal

- DOHMH

● 19-35 month olds with...

- 4 DTP,
- 3 Polio,
- 1 MMR,
- 3 HepB,
- 3 Hib,
- 1 Varicella,
- 4 Pneumococcal

- DOHMH
- CDC; NIS

○ 24-35 month olds with...

- 4 DTP,
- 3 Polio,
- 1 MMR,
- 3 HepB,
- 3 Hib,
- 1 Varicella,
- 4 Pneumococcal

- DOHMH

○ 13-17 year olds with...

- 1 MCV,
- 1 Tdap,
- 3 HPV

- DOHMH
- CDC

○ 11-18 year olds with...

- 1 MCV,
- 1 Tdap,
- 3 HPV

**Figure 1. Recommended immunization schedule for persons aged 0 through 18 years - 2013.**  
 (FOR THOSE WHO FALL BEHIND OR START LATE, SEE THE CATCH-UP SCHEDULE [FIGURE 2]).

These recommendations must be read with the footnotes that follow. For those who fall behind or start late, provide catch-up vaccination at the earliest opportunity as indicated by the green bars in Figure 1. To determine minimum intervals between doses, see the catch-up schedule (Figure 2). School entry and adolescent vaccine age groups are in bold.

Vaccines	Birth	1 mo	2 mos	4 mos	6 mos	9 mos	12 mos	15 mos	18 mos	19-23 mos	2-3 yrs	4-6 yrs	7-10 yrs	11-12 yrs	13-15 yrs	16-18 yrs
Hepatitis B <sup>1</sup> (HepB)	1 <sup>st</sup> dose	← 2 <sup>nd</sup> dose →					← 3 <sup>rd</sup> dose →									
Rotavirus <sup>2</sup> (RV) RV-1 (2-dose series); RV-5 (3-dose series)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	See footnote 2											
Diphtheria, tetanus, & acellular pertussis <sup>3</sup> (DTaP: <7 yrs)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	3 <sup>rd</sup> dose			← 4 <sup>th</sup> dose →				5 <sup>th</sup> dose				
Tetanus, diphtheria, & acellular pertussis <sup>3</sup> (Tdap: ≥7 yrs)														(Tdap)		
<i>Haemophilus influenzae</i> type b <sup>4</sup> (Hib)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	See footnote 5		← 3 <sup>rd</sup> or 4 <sup>th</sup> dose, see footnote 5 →									
Pneumococcal conjugate <sup>6a,c</sup> (PCV13)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose	3 <sup>rd</sup> dose		← 4 <sup>th</sup> dose →									
Pneumococcal polysaccharide <sup>6b,c</sup> (PPSV23)																
Inactivated Poliovirus <sup>7</sup> (IPV) (<18 years)			1 <sup>st</sup> dose	2 <sup>nd</sup> dose			← 3 <sup>rd</sup> dose →					4 <sup>th</sup> dose				
Influenza <sup>8</sup> (IIV; LAIV) 2 doses for some: see footnote 8								Annual vaccination (IIV only)					Annual vaccination (IIV or LAIV)			
Measles, mumps, rubella <sup>9</sup> (MMR)							← 1 <sup>st</sup> dose →					2 <sup>nd</sup> dose				
Varicella <sup>10</sup> (VAR)							← 1 <sup>st</sup> dose →					2 <sup>nd</sup> dose				
Hepatitis A <sup>11</sup> (HepA)								← 2 dose series, see footnote 11 →								
Human papillomavirus <sup>12</sup> (HPV2: females only; HPV4: males and females)														(3-dose series)		
Meningococcal <sup>13</sup> (Hib-MenCY ≥ 6 weeks; MCV4-D ≥ 9 mos; MCV4-CRM ≥ 2 yrs.)								see footnote 13						1 <sup>st</sup> dose		boost

12 months

35 months

18 years

Range of recommended ages for all children
Range of recommended ages for catch-up immunization
Range of recommended ages for certain high-risk groups
Range of recommended ages during which catch-up is encouraged and for certain high-risk groups
Not routinely recommended

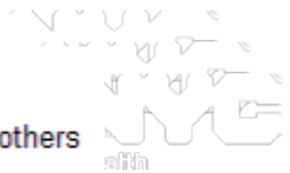
# BOI Quarterly Reports compared to Online Registry reports

CIR-Generated Quarterly Report	Online Registry equivalent	Difference
Standard Reports		
<p><b>19 to 35 months old UTD%</b></p> <p>4 DTaP, 3 Polio, 1 MMR, 4 Hib*, 3 HepB, 1 Varicella, 4 PCV*</p> <p>*requirements vary, based on age at 1<sup>st</sup> dose, # doses already received, current age, and product used</p>	<p><b>Standard Coverage:</b></p> <p>Go to "Report to Use" and choose "19 to 35 month olds."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the patient's last series immunization after the patient turned 12 months-old.</p> <p>Online report uses MyList.</p>
<p><b>13 to 17 years old UTD%</b></p> <p>1 Tdap, 1 MCV, 3 HPV</p>	<p><b>Standard Coverage:</b></p> <p>Go to "Report to Use" and choose "13-17 year olds."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the last immunization after the patient turned 9 years-old.</p> <p>Online report uses MyList.</p>
<p><b>11 to 18 years old UTD%</b></p> <p>1 Tdap, 1 MCV, 3 HPV</p>	<p><b>Custom Recall:</b></p> <p>Go to "Specific Age" and choose "11-18 year olds." Also select "Any age-appropriate immunization from the series below only" and choose "Influenza."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the last immunization after the patient turned 10 years-old.</p> <p>Online report uses MyList.</p>

# BOI Quarterly Reports compared to Online Registry reports

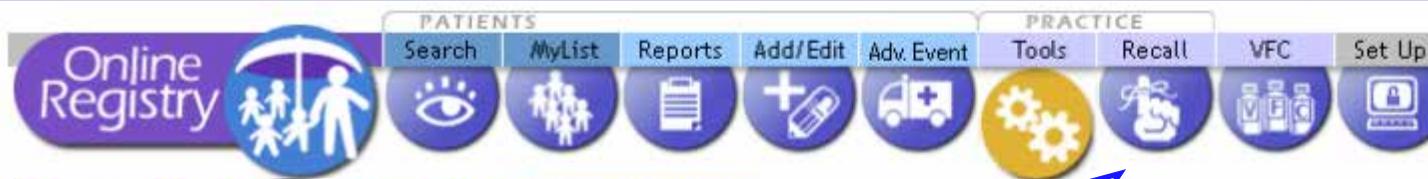
CIR-Generated Quarterly Report	Online Registry equivalent	Difference
January, May Seasonal Flu Report		
<b>Influenza UTD% 6 to 59 months old</b>	<p><b>Custom Recall:</b>            Select "Age range" and indicate "From <math>\geq</math> 6 mo To <math>&lt;</math> 60 mo." Also select "Any age-appropriate immunization from the series below only" and choose "Influenza."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the last immunization after the patient turned 14 days old.            Online report uses MyList.</p>
<b>Influenza UTD% 5 to 10 years old</b>	<p><b>Custom Recall:</b>            Select "Age range" and indicate "From <math>\geq</math> 5 years To <math>&lt;</math> 10 years." Also select "Any age-appropriate immunization from the series below only" and choose "Influenza."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the last immunization at 4 years of age.            Online report uses MyList.</p>
<b>Influenza UTD% 11 to 18 years old</b>	<p><b>Custom Recall:</b>            Go to "Specific Age" and choose "11-18 year olds." Also select "Any age-appropriate immunization from the series below only" and choose "Influenza."</p>	<p>BOI Quarterly report identifies the patient as belonging to a facility if that facility administered and reported the last immunization after the patient turned 10 years-old.            Online report uses MyList.</p>

# Coverage Report: view completed reports



✓ Your Coverage Report is being processed. Most Coverage Reports can be processed in a few seconds, but others take longer. You can find your Coverage Report in [Recent Coverage Reports](#)

- e. A confirmation message appears.
- f. The processed Recall file will be found in the [Recent Coverage Reports](#) list.
- g. The **Report Status** (right column) will change from "Processing..." to "Done." *Please be patient. Some reports take more time. You may return to this page later. If you see the record processing counter is not changing, click "Refresh."*
- h. To view output, click on [Done](#) in the **Report Status** column.



[Coverage Report](#) [Immunization Schedule](#) [Lead Guidelines](#)

f This page shows Coverage Reports you have created in the last year. Click on a Coverage Report to view it or use it to create a Recall List for patients who need immunizations.

Create New Coverage Report: [Standard](#)

[Refresh](#)

Recent Coverage Reports (2 Reports)							
	Type	Name	Patients	UTD%	Coverage Status as of:	Date Created	Report Status
<input type="checkbox"/>	Standard Coverage Report	"UTD_20100127_01"	6	0.0%	01/27/2010	01/27/2010 3:28 PM	<a href="#">Done</a>
<input type="checkbox"/>	Standard Coverage Report	"HUIE_20100108_01"	240	35.8%	01/08/2010	01/08/2010 5:10 PM	<a href="#">Done</a>

[Delete](#)

# Coverage Report: create recall job



**Online Registry**

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

Coverage Report Immunization Schedule Lead Guidelines

This page lists the results of your Coverage report.

**Standard Coverage Report: UTD\_20100127\_01**

**0 of 6 patients are up to date (0.0%).**

Based on MyList with an age range of: 19mo - 35mo

Doses: As Of: 01/27/2010

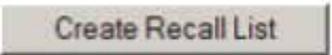
- DTP 4
- Polio 3
- MMR 1
- HepB 3
- Hib 3
- Var. 1
- Pneum.4

Create Recall List

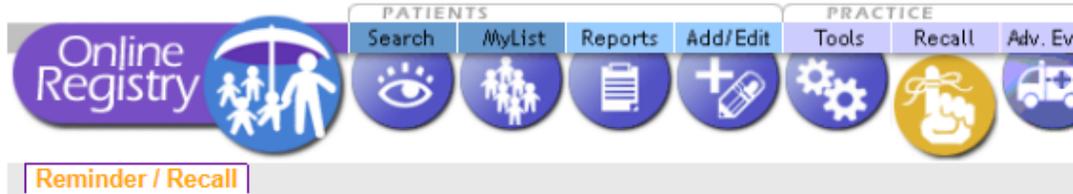
**6 of 6 patients are not up to date (100.0%)**

Last/First	Gender	DOB
Mouse, Minnie	F	05/26/2008
Huie, Sherl	F	03/01/2008
Duck, Daffy	M	07/07/2007
Duck, Daffy	F	03/02/2008
Papadouka, Vikki	F	09/20/2007
Poppins, Mary	F	10/01/2007

i. You may take the results to produce a **Recall List** or **Labels and Letters**.

Click on 

# Recall from Coverage Report: review each record



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"
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.

- a. Review each record Due Now . 
  - b. Update immunization records by clicking on the [Add Imms](#) link in the *Update* column on the right.
  - c. Update address and phone by clicking on the [Edit Addr/Ph](#) link in the *Update* column on the right.
- Mark the patients you wish to recall in the left column.
- Click 

Who's in Recall List? Currently showing patients who meet the selected custom recall criteria.

	Status	Last/First	Gender	DOB	Last Accessed	Last Recall	Missing	Address	Phone	Update?
<input type="checkbox"/>										
<b>Recall</b>	These patients have immunizations that are DUE NOW									
<input checked="" type="checkbox"/>		<a href="#">Recall-Barone, Nick</a>	M	12/31/2001	04/17/2015	<a href="#">04/17/2015</a>	Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-1		908-917-1111 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input checked="" type="checkbox"/>		<a href="#">Recall-Sull, June</a>	M	01/01/2010	03/31/2015	<a href="#">04/14/2015</a>	Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1		908-555-5555 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input checked="" type="checkbox"/>		<a href="#">Recall-Sull, Monica</a>	F	09/21/2000	04/20/2015	<a href="#">04/17/2015</a>	Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-2	42-09 28th St Long Island City, NY 11101	908-555-5555 (H) 908-555-5555 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input checked="" type="checkbox"/>		<a href="#">Reynolds, C...</a>	F				Influenza-1, DTP-5, MMR-2, Varicella-2		347-396-2537 (H) 917-555-5555 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>

1-4 of 4 records

Click on the patient name to view the record in CIR

# Update Patient Immunizations (from Recall screen)



- 1. Add immunization history information below, then click "Continue" button at the bottom of the page. Note: If entering a combination vaccine, add it to only one of the appropriate series.
- 2. Check the new entries (highlighted) for accuracy, then click the "Confirm" button at the bottom of the page.

Clear  Continue

## Immunization History

Event	1	2	
<b>Influenza</b> 0 event(s)	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>
<b>HepB</b> 0 event(s)	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>
<b>Rotavirus</b> 0 event(s)	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>	Date: <input type="text"/> / <input type="text"/> / <input type="text"/> (mm/dd/yyyy) Choose Vaccine <input type="text"/> <input type="radio"/> Given by this practice? <input type="radio"/> Another? Lot: <input type="text"/> My Lot List... <input type="text"/>

# Update Patient Info: address, phones, MOGE status

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

View Record Newborn Hearing Screening Print Reports Request Fax Pre-completed Forms and Referrals Update Patient Info

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

**Patient Information**

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

Middle Name

Last Name  **Alternate Last**

DOB     
mm/dd/yyyy

Gender  M  F

House No. / Street / Apt. No.

City / State / ZIP

Medical Rec. No.  Medicaid No. (AA#####A)

Mom DOB    mm/dd/yyyy

Mom First Name  Mom Maiden Name

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

NEW Cell/Mobile

NEW Email

Patient has opted out of text messages: **†**  
 Yes  No   
If you change the opted in or out status of a patient for receiving text messages, all other patients with the same cell/mobile number will automatically be set to the same status.

Clear  Continue

- Update patient information, address, **home phone**, **parent/guardian cell/mobile phone**, **parent/guardian's email address**.
- 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.

† Data previously reported are saved in the CIR but may not be displayed.

‡ The NYC Health Department is expanding its reminder/recall functionality in the Online Registry for providers who choose to use it to send text messages to parents and/or guardians regarding immunizations due or soon to be due for their children.

The functionality does not provide parents and/or guardians an opportunity to "opt in" to receive these text messages. However, those who receive text messages are provided an opportunity to "opt out" after receiving the initial and any subsequent messages. You may manually change a patient's status to "opt out" if you would like to ask for consent before sending these text message immunization reminders.

If you choose to use this Online Registry tool to communicate with parents and/or guardians of the children in your practice, please consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.

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

**Online Registry**

**PATIENTS** Search MyList Reports Add/Edit **PRACTICE** Tools Recall Ad

**Reminder / Recall**

1. Select criteria for the Custom Recall List.
2. Confirm criteria for the Custom Recall List, and accept or change List Name.
3. Please wait while your list is being generated. Once the Status of the list changes to "Per"
4. Review patients, update addresses, and immunizations.
- **5. Select to make Labels & Letters or make a List.**
6. Select or compose a Message.
7. Confirm and retrieve your Recall job.

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

**Select your preferred method:**

- Create a **List** of names, addresses, phone numbers, and immunizations  
➤ Your Excel document will contain a list of names, dates of birth, genders, medical record numbers from your practice, CIR IDs, addresses, phone numbers, and the immunizations that are past due for selected patients.
- Create **Labels and Letters** to print and mail. An Excel summary report containing names, addresses, phone numbers, and the immunizations that are past due for selected patients is included in the output.  
➤ Your PDF document will contain (1) address labels and (2) a Recall message of your choice with the immunizations that are past due for each patient.

← Change Cancel X Continue →

d. After marking the patients to recall and clicking

**Continue** → ,

select to create:

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

# Recall from Coverage Report: letters -compose message

**Reminder / Recall**

1. Mark the patients who need Recall Letters, then click Continue.
2. Select to make Labels & Letters or make a List.
- 3. Select or compose a Message.**
4. Confirm and retrieve your Recall job.

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

**Select Message:**

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

**Today's Date (optional)**

**Dear Parent/Guardian (optional)**

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

[Note: Immunizations due will be displayed here.]

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

Thank you,

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

Enter the message of your choice in the field below:

[Note: Immunizations due will be displayed here.]

**No message, just a list.**  
If selected, only a list of names in your Recall list will be printed.

- e. Choose an option:
- Default letter
- Optional:
- q add today's date;
  - q Salutation: "Dear Parent/Guardian"
- Custom message
- or
- List of names includes: address, phone and doses that are due now.
- Click
- Review, click
- if a confirmation screen appears next.

# Recall from Coverage Report: review and name job



## Reminder / Recall

1. Mark the patients who need Reminder / 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 PDF.

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

You have selected Labels & Letters for 5 patients using a Default message..

Note: The addresses you see below will be used. Please update now if necessary.

### Reminder / Recall List

Status	Last/First	Gender	DOB	Last Accessed	Last Recall	Missing	Address	Phone	Update?
<b>These patients have immunizations that are DUE NOW</b>									
	<a href="#">Papadouka, Vikki</a>	F	09/20/2007	12/11/2009	<a href="#">02/05/2010</a>	H1N1-1, Influenza-3, Hib-3			<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
	<a href="#">Poppins, Mary</a>	F	10/01/2007	12/10/2009	<a href="#">02/05/2010</a>	H1N1-2, Influenza-1, HepB-1, DTP-1, Hib-1, Pneumo Conj-1, Polio-1, MMR-1, Varicella-1	2 Laf New York, NY 10013	222-222-2222	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
		M	07/07/2007	12/10/2009	<a href="#">02/05/2010</a>	H1N1-2, Influenza-1, HepB-1, DTP-1, Hib-1, Pneumo Conj-1, Polio-1, MMR-1, Varicella-1	123 Wall St, 2 New York, NY 10022		<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
		F	05/26/2008	06/08/2009	<a href="#">02/05/2010</a>	H1N1-1, Influenza-1, DTP-4, Hib-4, Pneumo Conj-4, Polio-3, HepA-1			<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
	<a href="#">Katsouris, Mary</a>	F	03/02/2008	06/08/2009	<a href="#">02/05/2010</a>	H1N1-1, Influenza-1, DTP-4, Polio-3, HepA-1			<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>



f. Confirm list.

g. Accept or rename your **List** or **Labels & Letters** file.

Click

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

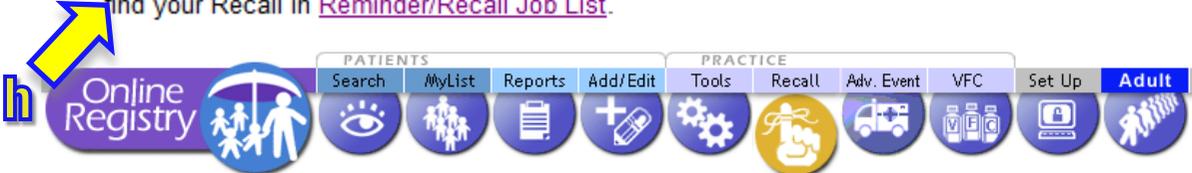
List Name for identification later:



# Recall from Coverage Report: access finished jobs



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



**Reminder / Recall**

- Refresh **MyList** before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.
  1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days. Recalls will be sent to patients due immunizations now.
  2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
  3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

Not all combinations are possible.

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

[Continue](#) ➔

- 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.

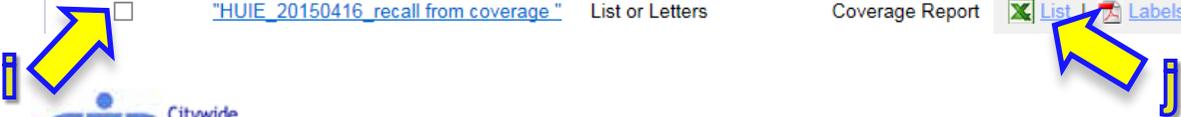
## Reminder/Recall Job List

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

[Refresh Job List](#)

Show  entries

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



# Output: List – Excel formatted for downloading

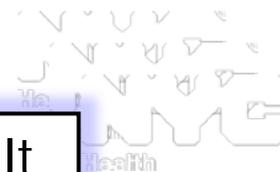


	A	B	C	D	E	F	G	H	I	J	K	L
1	Recall Name: Coverage Report_recall list											
2	Date Created: 6/1/2015 1:32:39 PM											
3	Created By: msull1											
4	Based On: Coverage Report											
5	Standard Recall: Selected 'Due Now' patients											
6	Total Patients: 4, Patients not UTD: 4 (100%) Patients UTD: 0 (0%)											
7												
8	Last Name	First Name	DOB	Gender	CIR Id	Medrec Num	Address	City	State	Zip	Phone	Due Now
9	INFO	MINIMAL	12/31/2000	M	788188833							Influenza-1*
10	RECALL-BARNICK		12/31/2001	M	788184665							HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-1
11	RECALL-SULL	MONICA	09/21/2000	F	788184504		42-09 28th St	LONG ISLAND CIT NY		11101	908-	Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-2

\* For influenza, ignore the dose number shown. This should be interpreted as simply missing this season's dose.

Large patient lists containing more than 65,000 rows of data will require version Excel 2007 or later.

# Output: Labels and Letters



Letter: default or customized

You may use paper preprinted with your office letterhead to print the letters.

To print labels, use standard address labels, 1" x 2-5/8"

Address labels

May 18, 2015

Dear Parent/Guardian:

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

Patient Name: DAFFY DUCK

Immunizations Due Now: Influenza-1, HepB-2, Varicella-2, HPV-2

Please call our office at 212-222-2222 to schedule an appointment at your earliest convenience.

Thank you,

Doctor's office

To the Parent/Guardian of:  
JANE DOE  
2 Laf  
New York, NY 10013

To the Parent/Guardian of:  
DORA EXPLORA  
2 Lafayette St, 3A  
New York, NY 10009

To the Parent/Guardian of:  
JACK HORNER  
2 Laf  
New York, NY 10002

To the Parent/Guardian of:  
RONALD MCDONALD  
2 Lafayette St, 19  
Ny, NY 10007

To the Parent/Guardian of:  
MICKEY MOUSE  
789 Park Ave, 32C  
New York, NY 10013

# Output: Printing Labels



The image shows a screenshot of a Windows operating system interface. In the foreground, the "Print" dialog box is open, showing the printer selection as "HP LaserJet 9050 PCL 6". A yellow arrow points to the "Pages" field, which is set to "6". Below the "Print" dialog, the "HP LaserJet 9050 PCL 6 Document Properties" dialog box is open, with the "Paper/Quality" tab selected. A yellow arrow points to the "Type is:" dropdown menu, which is set to "Labels". The "Paper Options" section shows "Letter" selected for "Paper Options Size is:". The "Print Quality" section shows "600 dpi" selected. The "EconoMode" checkbox is unchecked. The "HP" logo is visible in the bottom left corner of the properties dialog.

Printer Name: HP LaserJet 9050 PCL 6  
Status: Toner low; 0 documents waiting  
Type: HP LaserJet 9050 PCL 6

Print Range:  
 All  
 Current view  
 Current page  
 Pages: 6  
Subset: All pages in range

Page Handling:  
Copies: 1  
Page Scaling: None

Document: 8.5 x 11.0in  
Paper: 8.5 x 11.0in  
1/1 (6)

HP LaserJet 9050 PCL 6 Document Properties  
Advanced Paper/Quality Effects Finishing Output

Print Task Quick Sets  
Type new Quick Set name here

Paper Options  
Size is: 8.5 x 11 inches  
Letter  
Custom...

Use Different Paper/Covers  
Source is: Automatically Select

Type is: Labels

Print Quality  
600 dpi  
EconoMode (May Save Print Cartridges)

To print labels, in Printer Properties/Preferences, under "Paper type" or "Type is:" choose "Labels."

# Reminder/Recall: creating a new job

*New added features!* Choose an Outreach Type: **Recall** or **Reminder**.

Create a **Recall** job for patients **due now** for immunization(s), or create a **Reminder** job for patients **soon to be due** (within 28 days) for immunization(s).

**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 next 28 days. Recalls will be sent to patients due immunizations now.
- Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
- Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

*Not all combinations are possible.*

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

Continue →

Available combinations for a **Recall** job:

- **Parameter type:** Standard (MyList) or Custom list, *with Contact Methods* of a List (address and phone) or Letters;
- or*
- **Parameter type:** Custom list, *with Contact method* using Text Message.

**Reminder** job combinations include:

- **Parameter type:** Standard (MyList) or Custom list, *with Contact Methods* of a List (address and phone) or Letters.

The next slides will walk through the combinations.

# Recall: Custom List or Letters: set up job

**Important preparation: A. (1)** Refresh your MyList to retrieve the current information reported to CIR by your facility, if reporting by EMR or billing, and **(2)** review and confirm the inclusion criteria of MyList. Please refer to [slides 6 to 13](#).

**Online Registry**

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

**Reminder / Recall**

● Refresh [MyList](#) before creating a new Reminder/Recall job.

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

1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days. Recalls will be sent to patients due immunizations now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent text will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

*Not all combinations are possible.*

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

[Continue](#) →

**Reminder/Recall Job List**

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

Show 20 entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
--------	----------	----------------	----------	--------	----------	--------------	------------

[Refresh Job List](#)

- 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**.

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



## Reminder / Recall

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

1. Select criteria for the Custom Recall Job.
2. Confirm criteria for the Custom Recall Job, and accept or change Job Name.
3. Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
4. Review patients, update addresses and immunizations.
5. Select to make Labels & Letters or make a List.
6. Select or compose a Message.
7. Confirm and retrieve your Recall job.

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

Create Custom Recall Job

**A**  All patients in MyList

**Specific Age**

7-11 month olds       11-18 year olds

19-35 month olds       13-17 year olds

24-35 month olds       19+ year olds

**Age Range**

From ≥        years       months

To <        years       months

**DOB Range**

Include patients born between

/  /

and

/  /

**B** **Gender**

Male

Female

**C** **For immunization series**

Include patients who are missing:

Any age-appropriate immunization

Any age-appropriate immunization from the series below

Influenza       Pneumo. Conjug

HepB       Pneumo. Polysa

Rotavirus       Polio

DTaP       Tdap

Hib

Include patients who do not have the # of specified valid d

--0-- Influenza      --0-- Pneumo. C

--0-- HepB      --0-- Pneumo. P

--0-- Rotavirus      --0-- Polio

--0-- DTaP      --0-- Tdap

--0-- Hib

Cancel X    Clear    Continue →

b. Select patient and immunization criteria:

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

# Custom List or Letters – Example 1



## Reminder / Recall

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

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

Create Custom Recall Job

**A**

All patients in MyList

**Specific Age**

7-11 month olds       11-18 year olds

19-35 month olds       13-17 year olds

24-35 month olds       19+ year olds

**Age Range**

From ≥  years     months

To <  years     months

**DOB Range**

Include patients born between

/  /

and

/  /

**B**

**Gender**

Male

Female

**C**

**For immunization series:**

Include patients who are missing:

Any age-appropriate immunization

Any age-appropriate immunization from the series below only:

<input type="checkbox"/> Influenza	<input type="checkbox"/> Pneumo. Conjugate
<input type="checkbox"/> HepB	<input type="checkbox"/> Pneumo. Polysaccharide
<input type="checkbox"/> Rotavirus	<input type="checkbox"/> Polio
<input type="checkbox"/> DTaP	<input type="checkbox"/> Tdap
<input checked="" type="checkbox"/> Hib	

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

<input type="text"/> Influenza	<input type="text"/> Pneumo. Conjugate
<input type="text"/> HepB	<input type="text"/> Pneumo. Polysaccharide
<input type="text"/> Rotavirus	<input type="text"/> Polio
<input type="text"/> DTaP	<input type="text"/> Tdap
<input type="text"/> Hib	

Example 1:

To recall patients who are missing a Hib, you may:

- A** Select "Specific Age: 24-35 month age olds,"
- B** Keep the gender default options "Male" and "Female," and
- C** Select "For immunization series: Include patients who are missing...[a]ny age-appropriate immunization from the series only," and choose "Hib."

**Results:** Patients missing the correct number of age-appropriate doses of Hib.

Results will also list other vaccines missing for this group of patients.

# Custom List or Letters – Example 2



## Reminder / Recall

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

1. Select criteria for the Custom Recall Job.
2. Confirm criteria for the Custom Recall Job, and accept or change Job Name.
3. Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
4. Review patients, update addresses and immunizations.
5. Select to make Labels & Letters or make a List.
6. Select or compose a Message.
7. Confirm and retrieve your Recall job.

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

## Create Custom Recall Job

**A**  All patients in MyList

**Specific Age**

7-11 months  11-18 year olds

19-35 month olds  13-17 year olds

24-35 month olds  19+ year olds

**Age Range**

From ≥  years  months

To <  years  months

**DOB Range**

Include patients born between  /  /

and  /  /

**B** **Gender**

Male  Female

**C** **For immunization series**

Include patients who are missing:

Any age-appropriate immunization

Any age-appropriate immunization from the series below only:

<input type="checkbox"/> Influenza	<input type="checkbox"/> Pneumo. Conjugate	<input type="checkbox"/> MMR
<input type="checkbox"/> HepB	<input type="checkbox"/> Pneumo. Polysaccharide	<input type="checkbox"/> Varicella
<input type="checkbox"/> Rotavirus	<input type="checkbox"/> Polio	<input type="checkbox"/> HepA
<input type="checkbox"/> DTaP	<input type="checkbox"/> Tdap	<input type="checkbox"/> Meningococcal
<input type="checkbox"/> Hib		<input type="checkbox"/> Human Papillomavirus

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

<input type="text"/> Influenza	<input type="text"/> Pneumo. Conjugate	<input type="text"/> MMR
<input type="text"/> HepB	<input type="text"/> Pneumo. Polysaccharide	<input type="text"/> Varicella
<input type="text"/> Rotavirus	<input type="text"/> Polio	<input type="text"/> HepA
<input type="text"/> DTaP	<input type="text"/> Tdap	<input type="text"/> Meningococcal
<input type="text"/> Hib		<input type="text"/> 3 Human Papilloma virus

Buttons: Cancel X, Clear, Continue

## Example 2:

To recall male patients who need the third HPV vaccine dose, you may:

- A** Select "Specific Age: "11-18 year olds,"
- B** Select gender "Male," and
- C** Select "For immunization series:...Include patients who do not have the # of specified valid doses from the series chosen below: 3 Human Papillomavirus";

**Results:** Patients due their 1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup> dose of HPV **and** any additional vaccines these same patients may be due at this time.

For example, Minnie Mouse is due her next HPV dose **and** she needs her next Tdap and MCV.

# Custom List or Letters – Example 3



**Online Registry**

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

Reminder / Recall

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

1. Select criteria for the Custom Recall Job.
2. Confirm criteria for the Custom Recall Job, and accept or change Job Name.
3. Please wait while your job is being generated. Once the Status of the job changes to "Pending Review" click to review the job.
4. Review patients, update addresses and immunizations.
5. Select to make Labels & Letters or make a List.
6. Select or compose a Message.
7. Confirm and retrieve your Recall job.

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

**Create Custom Recall Job**

**A**  All patients in MyList

**Specific Age**

7-11 month olds     11-18 year olds  
 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  
 [01] / [01] / 1995  
 and  
 [01] / [19] / 2014

**B** **Gender**

Male  
 Female

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

Any age-appropriate immunization

Any age-appropriate immunization from the series

Influenza  
 HepB  
 Rotavirus  
 DTaP  
 Hib

Include patients who do not have the # of specific

[--] Influenza    [--] P  
 [--] HepB    [--] P  
 [--] Rotavirus    [--] P  
 [--] DTaP    [--] Td  
 [--] Hib

## Example 3:

To recall patients who are due flu vaccine, you may:

- A** Enter "DOB Range: "01/01/1995" and "01/19/2014" (or today's date),
- B** Keep the gender default options "Male" and "Female," and
- C** Select "For immunization series: Include patients who are missing...any age-appropriate immunization from the series below only" and check "Influenza;"

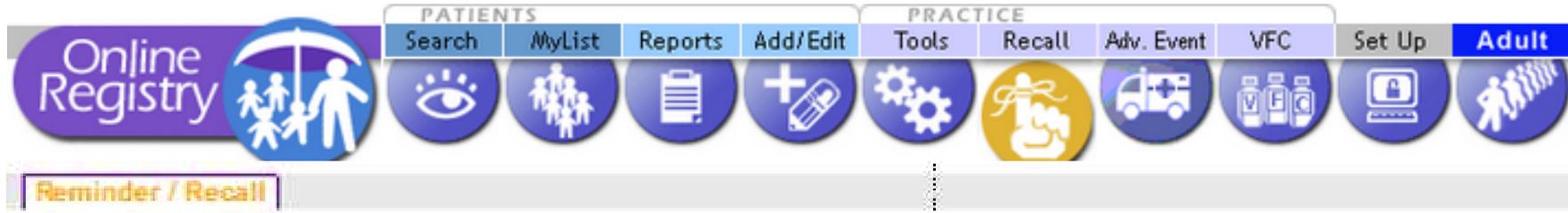
**Results:** Patients due an influenza vaccine, *and* any additional vaccines these same patients may be due at this time.

For example, Mickey Mouse is missing his next flu dose **and** he needs his next Tdap.

# Custom Recall: confirm and name job (List Name)



- 1) Confirm criteria for the Custom Recall List.
- 2) Accept or change the List Name.



1. Select criteria for the Custom Reminder/Recall List.
- 2. Confirm criteria for the Custom Reminder/Recall List, and accept or change List Name. We recommended you give your list a brief and clearly descriptive name.
3. Please wait while your list is being generated. Once the Status of the list changes to "Pending Review" click to review the list.
4. Review patients, update addresses and immunizations.
5. Select to make Labels & Letters or make a List.
6. Select or compose a Message.
7. Confirm and retrieve your Recall list/job.

## Confirm criteria for Custom Reminder/Recall List

### Age Range:

At least 11 yr, not yet 19 yr

**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:**

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



# 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 28 days. Recalls will be sent to patients due immunizations now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

*Not all combinations are possible.*

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

[Continue](#) ➔

Click on the list of patients that are [Pending Review](#).

## Reminder/Recall Job List

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

[Refresh Job List](#)

Show  entries

<a href="#">Delete</a>	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	"Sull_20150420_01"	List or Letters (C)	Recall	<a href="#">Pending Review</a>	0	04/20/2015 4:50pm	
<input type="checkbox"/>	<a href="#">"MS coverage recall 4.17.15"</a>	List or Letters	Coverage Report	<a href="#">List</a>	2	04/17/2015 4:37pm	



# Update Patient Immunizations (from Recall screen)



626921987 2 Lar (Page 01 of 07) New York, NY 10002

1. Add immunization history information below, then click "Continue" button at the bottom of the page. Note: If entering a combination vaccine, add it to only one of the appropriate series.  
 2. Check the new entries (highlighted) for accuracy; then click the "Confirm" button at the bottom of the page.

Clear  Continue

Event	1	2	3
H1N1 Influenza 2 event(s)	H1N1-09, Preservative Free Date: 9/8/2009 5w 3d	H1N1-09, Injectable Date: 1/1/2010 21w 6d	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...
Influenza 1 event(s)	Influenza-injectable Date: 1/1/2010 21w 6d	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...
HepB 0 event(s)	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...	Date: [ ]/[ ]/[ ] (mm/dd/yyyy) Choose Vaccine This Practice? <input type="radio"/> Another? <input type="radio"/> Lot: My Lot List...

Local intranet 100%

# Update Patient Info: address, phone, MOGE status (from Recall screen)



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

**Patient Information**

First Name: MONICA *Alternate First†*

Middle Name: CAROLINE

Last Name: RECALL-SULL *Alternate Last†*

DOB: 09 21 2000  
mm/dd/yyyy

Gender:  M  F

---

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

City / State / ZIP: LONG ISLAND CITY NY 11101

Medical Rec. No.  Medicaid No. (A#####)†

Mom DOB†    mm/dd/yyyy

Mom First Name†  Mom Maiden Name†

---

Home Phone: (908) 917-5555

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

NEW Cell/Mobile: (908) 917-5555

NEW Email:

Patient has opted out of text messages: ‡  
Yes  No

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

Clear  Continue



- Update patient information, address, home phone, parent/guardian cell/mobile phone, and parent/guardian email address.
- 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.

† Data previously reported are saved in the CIR but may not be displayed.

‡ The NYC Health Department is expanding its reminder/recall functionality in the Online Registry for providers who choose to use it to send text messages to parents and/or guardians regarding immunizations due or soon to be due for their children.

The functionality does not provide parents and/or guardians an opportunity to "opt in" to receive these text messages. However, those who receive text messages are provided an opportunity to "opt out" after receiving the initial and any subsequent messages. You may manually change a patient's status to "opt out" if you would like to ask for consent before sending these text message immunization reminders.

If you choose to use this Online Registry tool to communicate with parents and/or guardians of the children in your practice, please consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.

# Custom Recall: select contact List or Labels & Letters



d. After marking the patients to recall and clicking

**Continue** →

select to create:

- a **List** (downloadable in Excel), or
- **Labels & Letters**, which includes a list
- Click **Continue** →

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 'Ready', you can proceed.
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 creating a Recall job.

## 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 →

# Custom Recall: compose letter

**Online Registry**

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

**Reminder / Recall**

1. Select criteria for the Custom Recall List.
2. Confirm criteria for the Custom Recall List, and accept or change List Name.
3. Please wait while your list is being generated. Once the Status of the list changes to "Pending Review" click to review the list.
4. Review patients, update addresses, and immunizations.
5. Select to make Labels & Letters or make a List.
6. **Select or compose a Message.**
7. Confirm and retrieve your Recall job.

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

**Select Message:**

**Use default message.**  
If selected, this message will be printed for each patient on your Recall list:

**Today's Date (optional)**

**Dear Parent/Guardian (optional)**

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

[Note: Immunizations due will be displayed here.]

Please call our office at [ ] to schedule an appointment at your earliest convenience.

Thank you,  
Recall Test Facility

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

Enter the message of your choice in the field below:

[ ]

[Note: Immunizations due will be displayed here.]

**No message, just a list.**  
If selected, only a list of names in your Recall list will be printed.

- e. Choose an option:
- Default letter
  - Custom message
- or
- List of names includes: address, phone and doses that are due now.

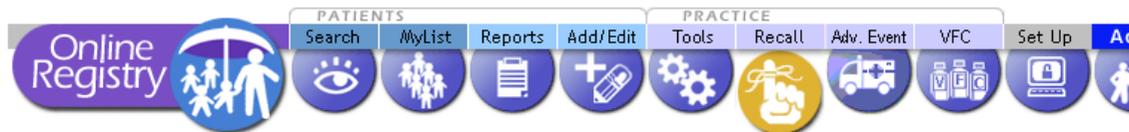
Click

Confirm, click

# Custom Recall: view List, Labels, Letters



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



Reminder / Recall

- Refresh [MyList](#) before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.

1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days. Recalls will be sent to patients due immunizations now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

*Not all combinations are possible.*

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

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 each:



## Reminder/Recall Job List

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

[Refresh Job List](#)

Show 20 entries

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





# Output: Labels & Letters



Letter: default or customized

You may use paper preprinted with your office letterhead to print the letters.

To print labels, use standard address labels, 1" x 2-5/8"

Address labels

May 18, 2015

Dear Parent/Guardian:

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

Patient Name: DAFFY DUCK

Immunizations Due Now: Influenza-1, HepB-2, Varicella-2, HPV-2

Please call our office at 212-222-2222 to schedule an appointment at your earliest convenience.

Thank you,

Doctor's office

To the Parent/Guardian of:  
JANE DOE  
2 Laf  
New York, NY 10013

To the Parent/Guardian of:  
DORA EXPLORA  
2 Lafayette St, 3A  
New York, NY 10009

To the Parent/Guardian of:  
JACK HORNER  
2 Laf  
New York, NY 10002

To the Parent/Guardian of:  
RONALD MCDONALD  
2 Lafayette St, 19  
Ny, NY 10007

To the Parent/Guardian of:  
MICKEY MOUSE  
789 Park Ave, 32C  
New York, NY 10013

# Output: Labels & Letters



A screenshot of a Windows operating system showing the HP LaserJet 9050 PCL 6 printer settings. The main window is titled 'Print' and shows the printer name, status, and print range. A yellow arrow points to the 'Pages' field, which is set to 6. Below this, the 'Page Handling' section shows 'Copies' set to 1 and 'Page Scaling' set to 'None'. A second window, 'HP LaserJet 9050 PCL 6 Document Properties', is open, showing the 'Paper/Quality' tab. In this window, the 'Paper Options' section shows 'Size is' set to 8.5 x 11 inches and 'Type is' set to 'Labels'. A yellow arrow points to the 'Type is' dropdown menu. The 'Print Quality' section shows '600 dpi' selected. The 'EconoMode' checkbox is unchecked. The 'HP' logo is visible in the bottom left corner of the properties window.

To print labels, in Printer Properties/Preferences, under "Paper type" or "Type is:" choose "Labels."

# Recall: Standard recall based on MyList – set up job



**Reminder / Recall**

- Refresh **MyList** before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.
  1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days 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 "C" 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. Recall 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](#).

a. To set up a recall list, or labels & letters for patients Due Now, based on the **MyList**, select the following:

- **Outreach Type:** Recall
- **Parameter Type:** Standard
- **Contact Type:** List or Letter

Click 

*Not all combinations are possible.*

<b>1. Outreach Type:</b>	<input type="radio"/> Reminder	<input checked="" type="radio"/> Recall
<b>2. Parameter Type:</b>	<input checked="" type="radio"/> Standard	<input type="radio"/> Custom
<b>3. Contact Method:</b>	<input checked="" 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.

[Refresh Job List](#)

Show  entries

<input type="button" value="Delete"/>	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel
<input type="checkbox"/>	<a href="#">"DOB no MMR VAR_20150511_01"</a>	List or Letters (C)	Recall	<input checked="" type="checkbox"/> List   <input checked="" type="checkbox"/> Labels   <input checked="" type="checkbox"/> Letters	78	05/11/2015 6:05pm 908-555-5555	
<input type="checkbox"/>	<a href="#">"standard_20150511_01"</a>	List or Letters (S)	Recall	<input checked="" type="checkbox"/> List   <input checked="" type="checkbox"/> Labels   <input checked="" type="checkbox"/> Letters	193	908-555-5555 :53pm 908-555-5555	

**Important:** Please see [slides 6 to 13](#) to see (1) how to refresh your **MyList** to retrieve the current information reported to CIR by your facility, if reporting by EMR or billing, and (2) to review and verify the inclusion criteria of **MyList**.

# Recall: Standard recall based on MyList – review records



**Reminder / Recall**

- Our records show that these patients may need the vaccines as shown. To recall patients, first review the records and add any immunizations that were given but not recorded.
- 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.

- b. Review each record Due Now
  - c. Update immunization records by clicking on the [Add Imms](#) link in the *Update* column on the right.
  - d. Update address and phone by clicking on the [Edit Addr/Ph](#) link in the *Update* column on the right. Update Patient Status (MOGE).
    - Mark the patients you wish to recall in the left column.
- Click

Currently showing patients in MyList who are DUE NOW for any vaccine

Status	Last/First	Gender	DOB	Last Accessed	Last Recall	Missing	Address	Phone	Update?
<input type="checkbox"/>	Recall-Bernie, Nick						Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-1	908-917-3370 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input type="checkbox"/>	Recall-Sull, Julia						Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1	908-917-3370 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input type="checkbox"/>	Recall-Sull, Monica						Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1, Mening.-1, HPV-2	42-09 28th St Long Island City, NY 11101 908-917-3370 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>
<input type="checkbox"/>	Recall-Sills, Chloe						Influenza-1, DTP-5, MMR-2, Varicella-2	484 W 43rd Street New York, NY 10036 917-310-2501 (M)	<a href="#">Edit Addr/Ph*</a> <a href="#">Add Imms*</a>

1-4 of 4 records

Click on the patient name to view the record in CIR

Immunization History

Event	1	2	3	4	5	Need Due
MMR1 Influenza	11/18/2009	11/18/2009	11/18/2009			DUE NOW MMR1-2
Influenza	11/18/2009	11/18/2009	11/18/2009			DUE NOW INFLUENZA
DTaP	11/18/2009	11/18/2009	11/18/2009			Completed Vaccine Series
MMR2	11/18/2009	11/18/2009	11/18/2009			Not recommended after 23 weeks
DTaP	11/18/2009	11/18/2009	11/18/2009			DTaP (DTP)
MMR	11/18/2009	11/18/2009	11/18/2009			DUE NOW MMR (MMR2)
MMR2	11/18/2009	11/18/2009	11/18/2009			Completed Vaccine Series
MMR2	11/18/2009	11/18/2009	11/18/2009			Completed Vaccine Series

Schools and other agencies that mainly only look up records may consider looking up a roster of individuals to add them to MyList, and then run Recall/Reminder or Coverage Reports.

# Recall: Standard recall based on MyList – select to make a List or Labels & Letters



**Online Registry**

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

**Reminder / Recall**

1. Mark the patients who need Recall Letters, then click Continue.
2. **Select to make Labels & Letters or make a List.**
3. Select or compose a Message.
4. Confirm and retrieve your Recall job.

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

**Select your preferred method:**

- Create a **List** of names, addresses, phone numbers, and immunizations
  - Your Excel document will contain a list of names, dates of birth, genders, medical record numbers from your practice, CIR IDs, addresses, phone numbers, and the immunizations that are past due for selected patients.
- Create **Labels and Letters** to print and mail. An Excel summary report containing names, addresses, phone numbers, and the immunizations that are past due for selected patients is included in the output.
  - Your PDF document will contain (1) address labels and (2) a Recall message of your choice with the immunizations that are past due for each patient.

← Change Cancel X Continue →

- d. After marking the patients to recall and clicking **Continue** → , select to create:
- a **List** (downloadable in Excel), or
  - **Labels & Letters**, which includes a list.
  - Click **Continue** →

# Recall: Custom One-Time or Recurrent Text Messaging

## Important steps and user tips to review before sending text messages:

1. (a) Understand, review and confirm the inclusion criteria of MyList. See [slides 6 to 13](#).  
(b) Refresh your MyList to retrieve current information reported to the CIR by your facility, particularly if reporting by EMR or billing.
2. 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 and update immunization history and contact information in the CIR by using the [Update Patient Info screen](#) before setting up a text message job.
3. Recurrent recall jobs are set to run every 28 days, within the custom date range you entered. You may cancel future scheduled jobs.
4. You may schedule a text message to be sent the same day (today), but be advised that canceling the same day may not stop the process in time. Some messages may still get sent.
5. If you would like to create your own custom text message to send to patients, make sure you include your facility name so patients know who is texting them. We also suggest you include a phone number for them to call and schedule an appointment.

# Recall: Custom One-Time or Recurrent Text Messaging



## Incorporating text messaging into your workflow:

- 1. Staffing:** Large sites may want to designate a staff person to manage refreshing MyList and manage recall jobs. If a recurrent recall text message job is set up, you may *refresh* your MyList anytime; however, subsequent recall jobs will be based on the new refreshed criteria.

For example, if you began running a recall each month for any patients given immunizations at your practice in the last three years, and then you re-refresh your MyList so it contains the patients given their last immunization at your practice for the past year only, your next recurrent recall job will be based on the new criteria.

- 2. Mobile Phone Entry:** Determine the workflow for updating cell phone information in the Online Registry.

Facilities using HL7 messaging to report to CIR should also consider sending mobile phone numbers. Please contact your EMR vendor.

# Recall: Custom One-Time or Recurrent Text Messaging

## Notes from the New York City Health Department



1. The text messaging service is free for providers through the CIR.
2. All patients in the CIR are defaulted to receive text messages if a mobile phone number is entered into the system and job parameters include these patients. You may manually change a patient's "opt-in" status in the [Update Patient Info](#) screen at anytime if they do not want to receive text messages or if you would like to ask for consent before sending messages.
3. Patients who receive text messages may text "**STOP**" to opt out after receiving the initial message, i.e., stop receiving messages. Patients may later reply "**OOPS**" to change the status to opt back in, i.e., receive messages. To see what the message will look like to the recipient, [see slide 66](#).
4. If you choose to use this text messaging tool to communicate with parents and/or guardians of the children in your practice, please check your current protocols for contacting patients for follow-up and consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.
5. 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.

# Recall: Custom Text Message – use a custom recall list to manage and prepare patient contact information

**Important preparation: A. (1)** Review and confirm the inclusion criteria of your MyList. ([slides 6 to 13](#)), and **(2)** refresh your MyList to retrieve current information reported to CIR by your facility, particularly if reporting by EMR or billing

**B.** Run a custom recall list prior to generating a text message job to view the patients who fit the custom criteria and who will be sent a text message. ([slides 31-38](#)). You may use the list to help you manage contact information and update immunization histories.



## Reminder / Recall

- Refresh [MyList](#) before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.
  1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days. Recall 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 will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

Not all combinations are possible.

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

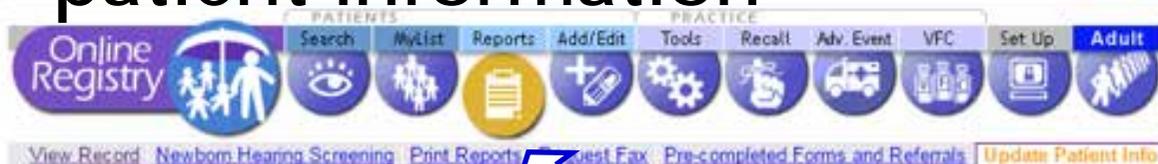
To set up a **custom recall list** for patients Due Now, select the following:

- **Outreach Type:** Recall
- **Parameter Type:** Custom
- **Contact Type:** List

Click

Follow steps to generate a list and then use the list to update patient contact information. See [slides 32-41](#).

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



1. Update patient information to include a **Cell/Mobile** number
2. Choose patients' opted in or out status for receiving text messages.

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

The 'Patient Information' form displays the following data for patient MONICA CAROLINE RECALL-SULL (DOB: 09/21/2000):  
- Home Phone: (908) 917-3370  
- NEW Cell/Mobile: (908) 917-3370  
- NEW Email: [Empty field]  
- Address: 42-09 28TH ST, LONG ISLAND CITY, NY 11101  
- A checkbox is checked: 'Cell/Mobile & Home Phone are the same'.  
- A field for 'Patient has opted out of text messages:' is set to 'No'.  
- A note states: '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.'

- By default, all patients with a cell/mobile number will be opted in to receive text messages.
- If you would like your patients to consent before receiving text messages, you can set their status to opt out.
- If patients ever want to opt out or opt back in to receive text messages, you can select their status here.

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

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

The screenshot shows the 'Reminder / Recall' section of the Online Registry. The navigation bar includes 'Search', 'MyList', 'Reports', 'Add/Edit', 'Tools', 'Recall', 'Adv. Event', 'VFC', 'Set Up', 'Adult', 'Help', and 'LogOut'. The user is logged in as Shirley Huie (SSA) at the Citywide Immunization Registry (CIR), 4209 28 STREET.

**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 week, while 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". Checkboxes allow you 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. Text messages will be sent every 28 days within the start and end date indicated. One time texts will send only once, while recurrent texts will send every 28 days within the start and end date indicated.

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

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

*Not all combinations are possible.*

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

[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.

Show 20 entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Create
<input type="checkbox"/>	"DOB no MMR VAR_20150511_01"	List or Letters (C)	Recall	<input checked="" type="checkbox"/> List   <input type="checkbox"/> Labels   <input type="checkbox"/> Letters	78	05/11/2015 6:00

a. To set up text message to run one time, select the following:

- **Outreach Type:** Recall
- **Parameter Type:** Custom
- **Contact Type:** Text Message
- Select One Time

Click [Continue](#)

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

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

b. Select patient and immunization criteria:

- A** Choose one of the three age range choices in the left column.
- B** Specify gender (optional).
- C** Choose one of the three choices in the right column to include patients to recall who are:
  1. missing any age-appropriate immunizations, or
  2. missing any age-appropriate immunizations from a specified vaccine series, or
  3. missing a specified # of valid doses from specified series.
- D** Enter the date you want the job to run.

Click 

# Recall: Custom One-Time Text Message – select default message or compose a custom message

c. Next, choose either the **default message** or compose a **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 into the message.

If you choose to send a **custom message**, you will need to type in your contact name and number. *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.*

Click 

**D** Send out job on this date:  /  /

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

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

Use custom message  
Type in your message.

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

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

at CONTACT NUMBER:   
to schedule.

132 character limit  
  
Characters remaining: 132

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

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

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

Cancel  Clear  Continue 

See recipient's view of message on [slide 66](#).

# Recall: Custom One-Time Text Message – confirm job criteria



Reminder / Recall

1. Select age, gender, and immunization criteria.
2. Schedule your job by entering the start and end dates.
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.

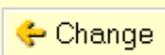
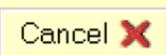
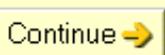
**Note:** This is your last chance to update your MyList before creating this Recall job. [Who's in MyList?](#) [Refresh MyList](#)  
If you schedule a recurrent job, we encourage you to regularly refresh your MyList and review your patient's information in the CIR. Scheduled text messages will be based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

- d. Confirm criteria for the **custom one-time text message**. This is your last chance to update your MyList before creating the recall job. Click on the link to see [Who's in MyList?](#) or click the [Refresh MyList](#) link.
- e. Accept or change the Job Name.
- f. Click  to schedule the job. See [slide 67](#) to view jobs.

**Confirm criteria for Custom Recall Job**

<b>All patients in MyList</b>	<b>For immunization series: Include patients who are missing:</b> Patients missing any age appropriate immunization
<b>Gender:</b> Males and Females	
<b>Text Message Type:</b> One Time	
<b>Date of Run:</b> 04/23/2015	
<b>Custom Message:</b> rest	

**e**  **Job Name for identification later:**   
We recommended you give your list a brief and clearly descriptive name.

# Recall: Custom Recurrent Text Message – use a custom recall list to manage patient contact information

**Important preparation:** **A. (1)** Review and confirm the inclusion criteria of your MyList ([slides 6 to 13](#)), and **(2)** Refresh your MyList to retrieve the current information reported to CIR by your facility, particularly if reporting by EMR or billing.

**B.** Run a custom recall list prior to generating a text message job to view the patients who fit the custom criteria and who will be sent a text message. ([slides 31-38](#)). You may use the list to help you manage contact information and update immunization histories.

The screenshot shows the 'Reminder / Recall' section of the Online Registry. It includes a navigation bar with 'PATIENTS' (Search, MyList, Reports, Add/Edit) and 'PRACTICE' (Tools, Recall, Adv. Event, VFC) tabs. Below the navigation bar, there are instructions for creating a new Reminder/Recall job. A yellow box highlights the configuration options for Outreach Type, Parameter Type, and Contact Method. A yellow arrow points to the 'Continue' button in the configuration box.

**Reminder / Recall**

- Refresh **MyList** before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.
  1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days; recalls will be sent to patients due immunizations now.
  2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose 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. Recalls will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

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

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

*Not all combinations are possible.*

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

To set up a **custom recall list** for patients Due Now, select the following:

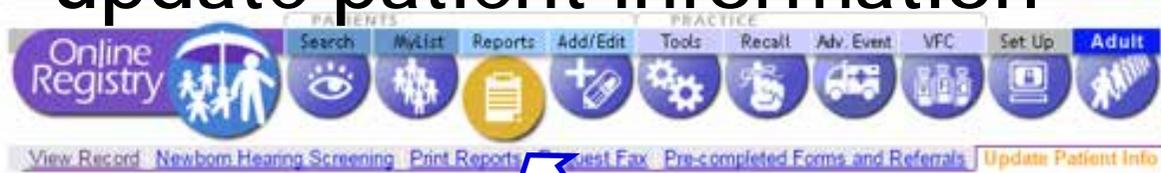
- **Outreach Type:** Recall
- **Parameter Type:** Custom
- **Contact Type:** List

Click

Follow steps to generate a list and then use the list to update patient contact information. See [slides 32-41](#).



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



1. Update patient information to include a **Cell/Mobile** number
2. Choose patients' opted in or out status for receiving text messages.

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

**Patient Information**

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

Middle Name: CAROLINE

Last Name: RECALL-SULL *Alternate Last*

DOB: 09 / 21 / 2000

Gender:  M  F

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

City / State / ZIP: LONG ISLAND CITY NY 11101

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

Mom DOB:    Mom First Name:  Mom Maiden Name:

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

**NEW** Cell/Mobile: (908) 917-3370

**NEW** Email:

Patient has opted out of text messages: Yes  No

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

Clear  Continue

- By default, all patients with a cell/mobile number will be opted in to receive text messages.
- If you would like your patients to consent before receiving text messages, you can set their status to opt out.
- If patients ever want to opt out or opt back in to receive text messages, you can select their status here.

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

# Recall: Custom Recurrent Text Message – set up job



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

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

## Reminder / Recall

- Refresh [MyList](#) before creating a new Reminder/Recall job.
- 🌀 To create a new Reminder/Recall job, follow the steps below.

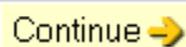
1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days will be sent to patients due immunizations now.
2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose specify age range, gender, and vaccine type/dose numbers.
3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Re will be sent every 28 days within the start and end date indicated. One time texts will send only once on t 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](#).

a. To set up text message to run one time, select the following:

- **Outreach Type:** Recall
- **Parameter Type:** Custom
- **Contact Type:** Text Message
- Select Recurrent

Click 

Not all combinations are possible.

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

[Refresh](#)

Show 20 entries

Delete	Job Name	Contact Method	Based On	Status	Patients	Date Created
	"DOB: MMR VAD: 20150511 01"	List or Letters	Labels	Letters	70	05/11/2015 09:05

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

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

b. Select patient and immunization criteria:

**A** Choose one of the three age range choices in the left column.

**B** Specify gender (optional).

**C** Choose one of the three choices in the right column to include patients to recall who are:

1. missing any age-appropriate immunizations, or
2. missing any age-appropriate immunizations from a specified vaccine series, or
3. missing a specified # of valid doses from specified series.

**D** Enter the date range to run the recurrent job.

Click Continue

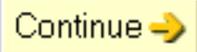
# Recall: Custom Recurrent Text Message – select and compose message

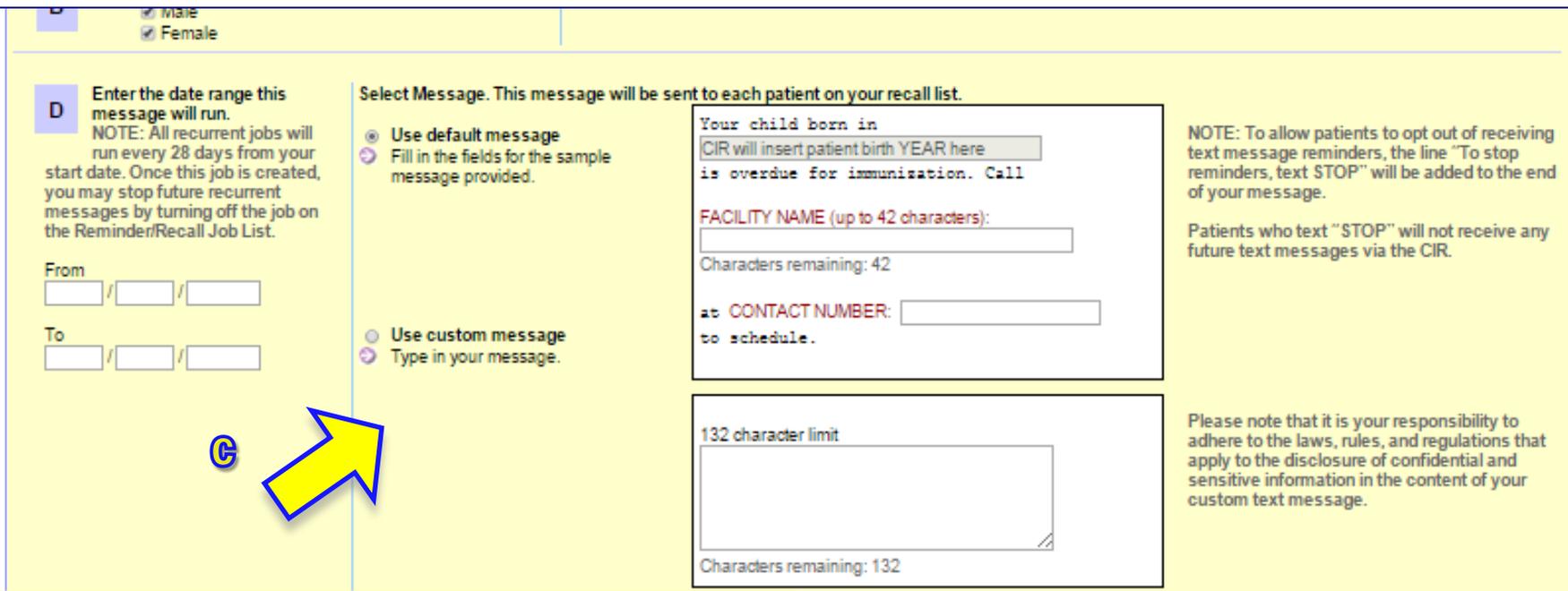


c. Next, choose either the **default message** or compose a **custom message**.

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 into the message.

If you choose to send a **custom message**, you will need to type in your contact name and number. *Please note that it is your responsibility to compose appropriate messages, and 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.*

Click 



See recipient's view of message on [slide 66](#).

Cancel  Clear  Continue 

# Recall: Custom Recurrent Text Message – confirm job criteria



## Reminder / Recall

1. Select age, gender, and immunization criteria.
2. Schedule your job by entering the start and end dates.
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.

- d. Confirm criteria for the custom one-time text message. This is your last chance to update your **MyList** before creating the recall job. Click on the link to see [Who's in MyList?](#) or click the [Refresh MyList](#) link.
- e. Accept or change the Job Name.
- f. Click  to schedule the job.

**Confirm criteria for Custom Recall Job**

All patients in MyList

Gender: Males and Females

Text Message Type: Recurrent

Date of Run: 04/23/2015

Custom Message: rest

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

Job Name for identification later:  

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

# Recall: Custom One-Time or Recurrent Text Message

Here is a sample of how the messages you send will look.

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

< Messages 850-80

Your child born in 1987 is overdue for immunization. Call [Your Provider] at [000-000-0000](tel:000-000-0000) to schedule. To stop reminders, text STOP.

**Short Code:** This is the number that your patients will see when you text them. It is important to list your facility name, shown here as "Your Provider," so your patient knows who is sending the message.

Stop

You have been removed from receiving mobile immunization alerts. Removed by mistake? Reply OOPS to rejoin.

Auto-reply confirming patient has **opted out** of receiving text messages.

Oops

MOBILE IMMUNIZATION ALERTS: Your mobile alerts have been reactivated. Reply STOP to opt out. Reply HELP for help. Msg&Data rates may apply.

Auto-reply confirming patient **has opted back in** to receive text messages.

Return to [slide 58](#), [64](#).

# Recall: Custom Text Messages – view jobs

g. View your scheduled and completed one-time text message job in the **Reminder/Recall Job List**.

h. Click on a job name to view the custom parameters selected for your job.

1. Outreach type:  Reminder  Recall

2. Parameter Type:  Standard  Custom

3. Contact Method:  List or Letters  Text Message

One time text  Recurrent

[Continue](#)

**Reminder / Recall**

- This page shows the details for your Recall job. You may use this page to (1) view the details, or (2) cancel your job. If you cancel a job in error, you will be given an opportunity to "Keep" the job.
- To view the list of patients included in a previously completed job run, click on the date of run of interest in the "Completed Run(s)" section below.

**Details for Job Name "Sull\_20150423\_03"**

**Criteria**

Created On: 04/23/2015 11:48 am	Based On: Patients in 'My List'	Age Range: 0 yr - 12 yr	Doses: Patients missing any age appropriate immunization
Text Message Type: Date of Run: Custom Message:		Gender: Males and Females	One Time 04/23/2015 test
Job State:		Complete	

[Rename this Job](#)

[Previous](#)

**Completed Run(s)**

Date of Run	Status	Number of Patients
<a href="#">04/23/2015 11:51 am</a>	COMPLETED	3

[Continue](#)

**Reminder/Recall Job List**

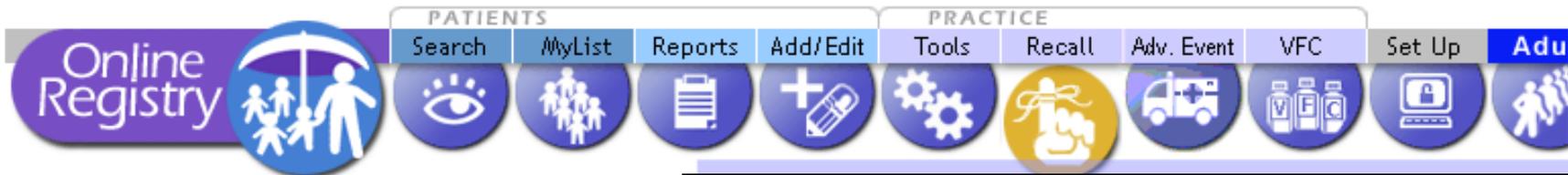
This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 2 minutes. You can manually refresh your Job List using the 'Refresh Job List' link. Please wait while the page loads completely.

[Refresh Job List](#)

Show 20 entries

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

# Recall: Custom Text Message – view job run details



## Reminder / Recall

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

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

Details for Job Name "Sull\_20150423\_03"

Criteria

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

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

Job State: Complete

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

[View Job Run Details](#)

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

Text Message Type:  
Date of Run:  
Custom Message:  
Job State:

Completed Run(s)	Date of Run	Status	Number of Patients
	<a href="#">04/23/2015 11:51 am</a>	COMPLETED	3

# Recall: Custom Text Message – job run details

## (Excel output)

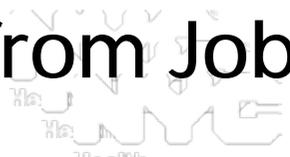
- The **Job Run Details** contain summary information, UTD statistics, list of patients, and contact information which can be useful for managing patients.
- If you set up a recurrent job from 1/1/2016 to 12/31/2016, the patients who were on the initial recall list who get vaccinated and become up-to-date during the date range of the job will be automatically removed from the recall list. Patients who become overdue during the date range of the job will be automatically added to the list.

	A	B	C	D	E	F	G									
1	Job Name:	Sull_20150423_03														
2	Facility Code:	5555R56	Facility Name:	Recall Test Facility												
3	Created By:	msull1														
4	Created On:	04/23/2015 11:48 am	Date of Run:	04/23/2015												
5	Date of Run:	04/23/2015 11:51 am														
6																
7	Outreach Type:	Recall														
8	Contact Method:	Text message														
9	Based On:	Patients in MyList with Age Range: 0 yr - 12 yr														
10		Gender: Males and Females														
11		Doses: Patients missing any age appropriate immunization														
12																
13	Total Patients who met Age/Gender criteria: 3, Patients UTD: 0 (0.0%), Patients not UTD: 3 (100.0%)															
14	Total Patients not UTD who have a cell #: 3															
15	Total Patients sent text msg (did not opt-out): 3															
16																
17	Sent Text Msg	Opted Out Text Msg	Last Name	First Name	DOB	Gender	MRN	CIR Id	Address	City	State	ZIP	Home Phone	Cell Phone	Email Address	Due Now
18	Y	N	RECALL	NALA	05/10/2004	F		788187049						908-5-1-1111		Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1
19	Y	N	REYNOLDS	CHLOE	10/03/2008	F	3395358	598991736	484 W 43RD STREET	NEW YORK	NY	10036	3473962537	917-2-1-1111	shuie@health.nyc.gov	Influenza-1, DTP-5, MMR-2, Varicella-2
20	Y	N	RECALL-SULL	JUNO	01/01/2010	M		788184526						908-5-1-1111		Influenza-1, HepB-1, DTP-1, Polio-1, MMR-1, Varicella-1, HepA-1

Please be patient. Some jobs take time. Large patient lists containing more than 65,000 rows of data will require version Excel 2007 or later.

**Contact information tip:** Use the job details lists to help you manage and update patient immunization history and contact information in the CIR using the **Update Patient Info** screen.

# Recall: Custom Text Message – Delete job from Job List



Online Registry

PATIENTS: Search, MyList, Reports, Add/Edit

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

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

Reminder / Recall

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

- Click the [Cancel Job](#) link to review your job before canceling.
- Click the **Delete** button to cancel a job without review. All jobs selected (☑) will be canceled and permanently removed from your Reminder/Recall Job List.

1. Outreach Type:  Reminder  Recall

2. Parameter Type:  Standard  Custom

3. Contact Method:  List or Letters  Text Message †

One Time  Recurrent

Continue →

## Reminder/Recall Job List

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

[Refresh Job List](#)

Show 20

**Delete**

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



# Recall: Custom Text Message – Cancel Job

**Online Registry**

PATIENTS: Search, MyList, Reports, Add/Edit, Tools, Re

PRACTICE: [Icons]

Reminder / Recall

- This page shows the details for your Recall job. You may use this page to (1) view the details of a job or (2) 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 "View Job Run(s)" section below.

Details for Job Name "HUIE\_20150410\_02"

**Criteria**

Created On: 04/10/2015 4:07 pm	Based On: Patients in 'My List'	Age Range: 6 yr - 7 yr	Doses: Patients age appropriate immunizations following
		Gender: Males and Females	

**Text Message Type:** Recurrent  
**Start Date:** 04/10/2015  
**End Date:** 06/15/2015  
**Custom Message:** Please ignore this message. Test.

**Job State:** Active (Next Run: 05/09/15)  
**Last Run:** 05/08/2015  
**Next Run:** 05/09/2015

Previous Cancel Job X

**Completed Run(s)**

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

If you click the [Cancel Job](#) link from the Reminder/Recall Job List, you are taken to the View Job screen.

- 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.



**Cancel Job?**

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

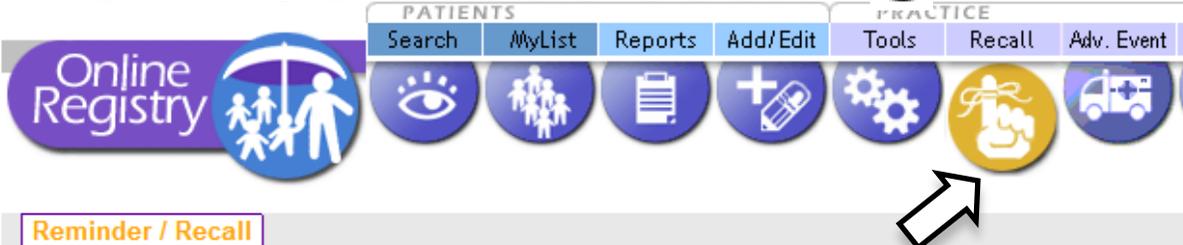
Note: We cannot ensure that a job run scheduled the same day as your cancellation request will be terminated in time.

- To cancel this job, click "Cancel Job."
- If you would like to continue running this recall job, select "Keep Job."

Cancel Job Keep Job



# 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

- 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](#).

● Orange status circle indicates there is a vaccine that is **Due Soon** (within a month).

This list is based on patients in the **MyList**.

Follow the instructions.

For this group of patients the output will show both vaccines that are **Due Soon** and **Due Now**.

Not all combinations are possible.

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

**Important:** Please see [slides 6 to 13](#) to (1) see how to refresh your MyList to show the current information reported to CIR by your facility, particularly if reporting by EMR or billing, and (2) review and verify the inclusion criteria of MyList. Please run a reminder list prior to generating a text message job to view the patients who fit the custom criteria who will be sent a text message ([Slides 31-38](#)).

Please go to [slides 39 to 47](#) for the remaining steps, including printing instructions.

# Future Enhancements

1. Send Reminder/Recall to patients via e-mail.
2. Set up reminders to patients via texting.
3. Other language options.



*Have a suggestion? Please let us know...*



# Contact Information

## Citywide Immunization Registry

### NYC Department of Health and Mental Hygiene

General CIR contact information:

Tel: (347) 396-2400

Fax: (347) 396-2559

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

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