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

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

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

2. To set up text messaging choose:
   - Recall
   - Custom
   - Text Message
   - One-Time or Recurrent

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

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

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

   Recurrent jobs are set to run every 28 days within the custom date range.
5. On the bottom right of the same screen select either the default message or customize your own message. For both message types, be sure to include your facility name and contact information.

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

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

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

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

Shown are examples of a (1) default message and (2) custom message.

Auto-reply confirming patient has opted out of receiving text messages after replying, “STOP”.

Auto-reply confirming patient has opted back in to receiving text messages after replying, “OOPS”.

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.

Short Code: 85080. This is the number that recipients will see when you text them.

The recipient always has the option of continuing to receive messages or stopping them.
8. View your scheduled and completed recall jobs in the **Reminder/Recall Job List** in the “Reminder/Recall” section.

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

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

   (a) the Details for the Job: parameters that were chosen for the recall, date of the job, and text message;

   (b) a list of completed runs by date, status of jobs, and number of patients in the recall.

   (c) patients who were included in the recall, by clicking on the Date of Run.

11. Click on **View Job Run Details**, which can be downloaded and saved. See Excel example below:

   - Jobs may be canceled in the Reminder/Recall Job List screen under the Cancel Job column, or while in the Details for Job screen. Canceling jobs scheduled the same day may not stop the process in time. Some messages may still get sent.
Important Steps for Managing and Preparing your Patient Lists for Recall


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

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

C. In the Update Patient Info screen: (1) update the Cell/Mobile number; (2) select patient’s status for receiving text messages. By default, all patients with a cell/mobile number will be opted in to receive text messages.

Important notes:

1. If the mobile number is shared by family members, opting out of receiving a message means opting out all members from receiving future messages.

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

3. Mobile Phone Data: Determine the workflow for updating cell phone information in the Online Registry. Facilities using HL7 messaging to report to CIR should consider sending mobile phone numbers. Please contact your EMR vendor.

4. If you choose to use this text messaging tool to communicate with parents and/or guardians of the children in your practice, please check your current protocols for contacting patients for follow-up and consult with your own legal advisors regarding text messaging parents/guardians/patients without express consent.

5. The Bureau of Immunization is sending recall messages to individuals seven days past due dose 2 for COVID-19 vaccination, however, messages are more effective when sent by the patient’s provider. BOI will not send a message if you already sent a message for missed vaccinations.