New York City  
Citywide Immunization Registry (CIR),  
Online Registry:  
Coverage Reports,  
Reminder/Recall and  
Text Messaging

NYC Department of Health & Mental Hygiene  
Bureau of Immunization  
August 2019

CIR homepage: nyc.gov/health/cir

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

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

Check Notice boxes for updates.

- Contact CIR at (347) 396-2400 for Online Registry access, or  
- Visit: https://www1.nyc.gov/site/doh/providers/reporting-and-services/cir-security-admin-info.page
Assess Practice Readiness for using OR Recall Text Messaging

- Do your patients (parents/guardians) accept communication for follow-up or appointments per your organization’s patient care protocol and practices, including receiving text messages for immunization recall purposes; and is it supported by staff to help collect and update contact information?

- Is cell phone information routinely and accurately updated in your EMR by training staff to enter data accurately?

- Are cell phone numbers and all data correctly sent and captured in the Online Registry and periodically verified with your IT staff, EMR vendor and CIR for accuracy?

- Is there coordinated effort and decision making on prioritizing groups for recall?

- Is the MyList regularly refreshed and patient information regularly updated (monthly)--patient’s Active/Inactive status (MOGE); text messaging acceptance?

- Are staff available and trained?

- Is there an available appointment phone line?

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

Overview

I. MyList, Refresh MyList, MOGE (slides 6-11)

II. Coverage located in the Tools screen (slides 12-21):
   - Generate a recall list or letters from a coverage report.
     A. Up-to-Date (UTD) percentages for 7-11 mo. olds, 19-35 mo. olds, 24-35 mo. olds, or 11–18 yr. olds, 13-17 yr. olds, 13 yr. olds
     B. IQIP Assessments: 24-35 month olds, 13 year olds
     C. Influenza UTD for 6-59 mo. olds, 5-10 yr. olds, or 11–18 yr. olds

III. Outreach Type: Recall or Reminder located in the Recall screen:
   A. Recall
      1. Custom Recall –used to see who has vaccine Due Now (slides 22-33):
         a. choose or specify age ranges
         b. choose to recall patients who are missing any age-appropriate immunization, any specified vaccine series, or # of specified valid doses
      2. Standard Recall –used see who in MyList is Due Now (slides 40-42)
   B. Reminder – see who in MyList is Due Soon, within 28 days (slide 51)

IV. Contact Method:
   1. List with phone numbers, downloadable (slides 20-24, 33-36)
   2. Letters with address labels (slides 20-24, 33-36), or
   3. Text messages to mobile phones of parents/guardians of patients (slides 38-52).
Prepare **MyList** before running recall jobs: (slides 6-12)

- Check the last time **MyList** was updated and “**Who’s in MyList**”
- **Refresh MyList** (located in the **MyList** screen).
  
  This feature retrieves patients you immunized in the past who are in the CIR, but may not already be on **MyList**.
- Choose to limit or expand your patient list based on patients:
  - Seen within $n$ number of years
  - Looked up in CIR (have not had vaccination at the practice yet)
  - MOGEs
- Review and edit patient’s last valid contact information
  - **MyList** is sortable, downloadable to enable review of missing or outdated contact information
- Update patient’s active/inactive status (a.k.a. Moved or Gone Elsewhere –MOGE)
- The recall list is based on the **MyList** and the parameters you chose in Refreshing **MyList**, not what’s in your entire EMR or CIR.

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**MyList: Who’s in MyList?** (patient list of the practice)

Click on the link to see “**Who’s in MyList**?”

MyList is your list of patients who have been looked up or added by your staff within the Online Registry, either manually one-by-one, or retrieved as a group by using **Refresh MyList**. Practices using EMRs need to regularly Refresh MyList.
Refresh MyList: tips

- MyList is shared by all of the Online Registry users at your practice. Any changes you make will affect all users at your site!
- Consider designating one staff person to update MyList monthly, maintain and run reports
- Customize your population (denominator) for recall
- After refreshing MyList, review your records for: duplicates/fragments to be merged (contact the CIR at (347) 396-2400), missing records reported to CIR. (contact your EMR vendor).
- Agencies and organizations that use the Online Registry to look up patient records only and do not report immunizations may not need to use these options.
- Results will appear at the top of the screen above MyList, for example:
  - Patient list refresh complete. Patients added: 190. Patients removed: 14

Patient List (MyList): Active Status, Remove

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

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

- Update patient information, address, home phone, parent/guardian cell/mobile phone, and parent/guardian email address, text message status
- Please note: Information reported by Vital Records may not be edited online.
- You may send a copy of the revised birth certificate by fax to (347) 396-2559, or call us at (347) 396-2400.
- Mark if MOGE (Moved or Gone Elsewhere).
  MOGE choices:
  - Not in my practice
  - Not in NYC (moved)
  - Patient deceased.
- See slide 39: notes relevant to text messaging

Criteria of Moved or Gone Elsewhere (MOGE)

The following describes the criteria which should be used to consider a patient a MOGE:

- There is documentation in the chart that the child moved to another city/state and/or transferred to another health care provider. or
- The patient has not returned to the practice in over one year and there are 3 documented contact attempts (by letter or by phone) with no response. If there are phone call attempts with no direct contact, there should be at least one letter sent. or
- There is a “returned to sender” follow-up letter in chart, and it was sent after the last visit. Keep in mind that a letter may be returned because the facility failed to update the patient’s information. Therefore, a patient with a returned letter may be considered a MOGE if the returned letter was sent and received 6 months after the last visit. If the last visit to the practice was just recently made (< 6 months) and the provider received a “returned to sender” follow-up letter and there is no other type of follow-up attempt, the patient should be kept in the practice’s MyList. or
- If the provider has obtained records from the CIR, and the CIR record indicates additional vaccination dates after the patient’s last visit to the practice, this may mean that the patient transferred care to another provider in New York City. If the additional dates in the CIR record are at least 6 months after the last visit, then the patient can be considered a MOGE. If the CIR record indicates additional vaccination dates < 6 months after the last visit and the provider never attempted to contact the patient, then the patient should be kept in the practice’s MyList.
• The coverage or recall/reminder reports are only as good as the immunizations and contact information your practice reported to the CIR.

Tools: Coverage Report:

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

To start a Coverage Report, click on “Create Standard, IQIP, Flu Coverage Reports”
Coverage Report: choose a report to use

Standard Coverage Report:
- Choose a report to use.
- Enter the review date. The most commonly used review date is the default date, which is today’s date.
- Rename file if desired.
- Click Continue.

Influenza Coverage Report:
- Choose one or more reports.
- Rename file if desired.
- Click Continue.

IQIP Assessments:
- Choose one or more reports.
- Rename file if desired.
- Click Continue.

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

Coverage Report: view completed reports

Your Coverage Report is being processed. Most Coverage Reports can be processed in a few seconds, but others may take longer. You can find your Coverage Report in Recent Coverage Reports.

Create New Coverage Report: Standard or Flu Coverage

This page shows Coverage Reports you have created in the last year. For Coverage Report instructions, click here. For a brief guide on influenza Coverage Reports, click here. Click on the link “Done” in the Report Status column on the right to view a Coverage Report. You may use it to create a Recall List for patients who need immunizations.

Report Name for identification later:

- Rename file if desired.
- Click Continue.

- Click Done.

- Click Close.

- Click Print.

- Click Close.
Coverage Report: create a recall job

- The results include a summary and a list of the patients who are not UTD. From here, one may create a recall list and letters.
- Currently, text messaging is not available from this process but can be created using the Custom Recall functions (slides 38-52).

You may take the results to produce a Recall List or Labels and Letters.
Click on Create Recall List

Review and Update Records

(a) Review each record
The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

(b) Update immunization record

(c) Update patient information
Recall from Coverage Report: select List or Labels & Letters

- 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: compose letter

- Choose an option:
  - Default letter
    - Optional: add today’s date;
    - Salutation: “Dear Parent/Guardian
  - Custom message
    - Enter extra line spaces for your letterhead
    - or
  - List of names includes: address, phone and doses that are due now.
Recall from Coverage Report: name the job

Accept or rename your List or Labels & Letters file. Click Continue →

Please be patient. Processing the records takes time.

Recall from Coverage Report: access finished jobs

h. A confirmation message appears
i. The processed Recall file will be found in the Recall tab under the Reminder/Recall Job List.

The Report Status will change from “Processing...” to the type of job you chose.

Please be patient. Processing the records takes time.

j. To view results, click on each of the links in the Status column.
Output: List, Letter and Labels

Letter: default or customized

Address labels: Standard 1” x 2-5/8”

Reminder/Recall:

STOP. Before running recall jobs, see how to Prepare MyList (slides 7-12)
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 to continue.

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

**Important:** Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
Example 1:
To recall patients who are missing MMR, you may:
A. Select “Specific Age: 1-18 years,”
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 “MMR.”

Results: Patients missing the correct number of age-appropriate doses of MMR.
Results will also list additional vaccines missing.

Example 2:
To recall patients who don’t have the third HPV vaccine dose, you may:
A. Select “Age Range: “11-18 year olds,”
B. Keep the gender default options “Male” and “Female,” 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 1st, 2nd, or 3rd dose of HPV, and additional vaccines missing.
Custom Recall: confirm and name job (List Name)

2. Confirm criteria for the Custom Reminder/Recall List, and accept or change List Name. We recommend you give your list a brief and clearly descriptive name.

The status changes from "Selecting patients..." to "Pending Review" (Done)

It may take some time but Click on the list of patients that are "Pending Review."
Review and Update Records

(a) Review each record
The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

(b) Update immunization record

(c) Update patient information

Custom Recall: select contact List or Labels & Letters

5. Select to make Labels & Letters or make a List.

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.
Custom Recall: compose letter

e. Choose an option:
• Default letter
  Optional:
  ❑ add today’s date;
  ❑ Salutation: “Dear Parent/Guardian
• Custom message
  – Enter extra line spaces for your letterhead
  or
• List of names includes: address, phone and doses that are due now.

Custom Recall: view List, Labels, Letters

f. A confirmation message appears.

Please be patient. Processing the records takes time.

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

g. To view output, click on a

[Excel List] | [Excel Labels] | [Excel Letters]
Output: List, Letter and Labels

Recall: Standard recall based on MyList

Important: Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.
Recall: Custom Text Message –

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

It is important to list your facility name, shown here as “Your Provider,” so your patient knows who is sending the message.

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

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

Include an appointment phone number.

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

Recall: Custom Text Message – prepare and update patient information

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

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

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

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

**Important**: First, run your criteria as a Custom List job to review the patients who will receive the text messages. You will not be able to see a list of patients until after the messages are sent out. Please see slides 6 to 9 to see how to refresh your MyList to show the current information reported to CIR by your facility, if reporting by EMR or billing.

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.
Recall: Custom One-Time Text Message – send date, compose message

c. Enter the date, but avoid entering today’s date.

d. Next, choose a default message or choose custom message.

If you choose to send a default message, fill in your facility name and contact number to schedule an appointment. Each patient’s year of birth will be populated by the CIR.

If you choose to send a custom message, please note that it is your responsibility to adhere to the laws, rules, and regulations that apply to the disclosure of confidential and sensitive information in the content of your custom text message.

Note to practices with adult patients:
Please do not use the default message, which says, “Your child born…” Instead create a recall for 0 to 19 year olds. Then create a group of ≥ 19 year olds. And use the custom message for adults.

Recall: Custom Text Message – view jobs

e. 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.

f. Accept or change the Job Name.

g. Click Continue to schedule the job.
Recall: Custom Recurrent Text Message – set up job

a. To set up text message to run recurrently, select the following:
   - **Outreach Type**: Recall
   - **Parameter Type**: Custom
   - **Contact Type**: Text Message
   Click **Continue**

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

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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. 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.
c. Enter the date range, but avoid entering today’s date. Messages will be sent every 28 days. Patients in Mylist will automatically age in and out, and be added or removed depending on UTD status.

d. Next, choose a default message or choose custom message.

If you choose to send a default message, fill in your facility name and contact number to schedule an appointment. Each patient’s year of birth will be populated by the CIR. Use the default message only for patients under 19 years old.

If you choose to send a custom message, please note that it is your responsibility to adhere to the laws, rules, and regulations that apply to the disclosure of confidential and sensitive information in the content of your custom text message, and include your facility name and contact number.

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

Recall: Custom Text Message – confirm and name job

Accept or change the Job Name. Click \textit{Continue} \textit{ } to schedule the job.
Recall: Custom Text Message – view jobs

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

Click the Excel View Job Runs Details link to view your job run details.
Recall: Custom Text Message – job run details (Excel output)

The downloadable list of patients contains:

- Summary of the criteria for the recall job
- Number of patients UTD and not UTD
- Text message sent status
- Patient status for accepting text messages
- Medical record number, CIR ID, contact information, and immunizations past due.

Recall: Custom Text Message – Cancel Job (a)

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

a. Click **"Cancel Job"** link to review your job before canceling.

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

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

a. Review your job details.

b. Click Cancel Job button

c. Read pop-up and click the 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.

Recall: Replies to Text Message –

- The current text messaging functionalities do not allow direct two-way communication to providers; BOI is able to view replies
- The majority of recipients do not reply to the messages.
- <5% of the recipients have opted out.
- The relatively few replies received have been of this nature:
  - Thank you
  - Have an appointment already
  - Can you make me an appointment?
  - We were just there. Why wasn’t this mentioned?
  - We moved and no longer going that practice
  - I’m not a child
  - Wrong number/I don’t have a child
  - We had all the shots. Check your records
  - I don’t believe in a particular vaccination/ vaccinations
  - Who is this?
Reminder: “Due Soon”

To create a list, or labels & letters for patients Due Soon, select the following:
- Outreach Type: Reminder
- Parameter Type: Standard
- Contact Type: List or Letter

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

This list is based on patients in the MyList.
Follow the instructions.
For this group of patients the output will show both vaccines that are Due Soon and Due Now.

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

Review and Update Records

(a) Review each record
The recall process allows multiple chances to update records. Step through these screens record maintenance has been done.

Select all patients in the current list

(b) Update immunization record

(c) Update patient information

Click on the patient icon to view the record in CIIR.
Best Practice Tips for using OR Reminder/Recall and Text Messaging (1)

- 1. Routinely update cell phone information in your EMR. Train all staff to enter data accurately in the appropriate screen(s) and field(s).
- 2. Verify with your IT staff, EMR vendor and CIR that immunizations (see VIM guide, slide 27) and cell phone numbers are correctly captured in the Online Registry.
- 3. Support patient buy-in to text messaging for follow-up.
- 4. Review and update your facility's **MyList:**
  - Status: Active/Inactive (**MOGE**). Develop easy process for patients to notify your practice if they've gone elsewhere.
  - Accepts text messages Y/N?
- 5. Actively coordinate efforts and decisions on prioritizing groups for recall.
- 6. Run a recall list to preview the group that will receive the message before setting up and sending text messages.

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Best Practice Tips for using OR Reminder/Recall and Text Messaging (2)

- 6. Inform patients the text messages are one-way and are general (cannot reply or set up appointments, but must call).
- 7. Inform patients that opting-out means opting out of all messages and any family members associated with that number.
- 8. Avoid excessive text messages that will lead to opting-out.
- 9. Compose professional, grammatically correct messages.
- 10. Include the practice name and phone number for appointments.
- 11. Do not copy and paste text into the message box.
- 12. Do not use foreign languages since the system is unable to translate other languages.
- 13. Avoid scheduling text messages the same day you create them to allow time to cancel job.
- 14. Have dedicated or available appointment phone line(s).
- 15. Cancel recurrent jobs set up when staff exit.
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
E-mail: cir@health.nyc.gov
(Subject line: Recall; Facility Name)

Further reading

In general, studies are showing that reminder/recall efforts can improve immunization coverage.

### Standard Up-To-Date Measures

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>7-11 months</td>
<td>MMR, OPV, Hib, HepB, PCV13, RotaVax, Varicella</td>
</tr>
<tr>
<td>19-35 months</td>
<td>DTP, Polio, MR, HepB, Hib, Varicella, PCV13</td>
</tr>
<tr>
<td>24-35 months</td>
<td>DTP, Polio, MR, HepB, Hib, Varicella, PCV13</td>
</tr>
<tr>
<td>13-17 years</td>
<td>13-17 year olds with...</td>
</tr>
<tr>
<td>11-18 years</td>
<td>13-17 year olds with...</td>
</tr>
</tbody>
</table>

**Additional Measures**
- MMR
- OPV
- Hib
- HepB
- PCV13
- RotaVax
- Varicella

**Notable Events**
- 12 months: MMR, OPV, Hib, HepB, Varicella
- 35 months: MMR, OPV, Hib, HepB, Varicella
- 11 years: MMR, OPV, Hib, HepB, Varicella