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:
• Contact CIR at (347) 396-2400 for Online Registry access, or

nyc.gov/health/cir
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**;

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CIR at (347)396-2400 or 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.

*Practice is used here to mean practice, agency, clinic, school, or pharmacy, etc.*
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 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.
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.

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?**

New! Mobile or cell phone (M)
Home phone (H)
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 . 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.
- 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.
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.
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**.
Coverage Report: choose a report to use

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

New! Influenza Coverage Report:
- a. Choose one or more reports.
- c. Rename file if desired.
- d. Click Continue
### Standard Up-To-Date Measures

#### 7-11 months
- DOHMH

#### 19-35 months
- DOHMH
- CDC; NIS

#### 24-35 months
- DOHMH

#### 13-17 years
- DOHMH
- CDC

#### 11-18 years
- DOHMH

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**Figure 1. Recommended Immunization schedule for persons aged 0 through 18 years**

(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 groupate in bold.

<table>
<thead>
<tr>
<th>Vaccines</th>
<th>Birth</th>
<th>1 mo</th>
<th>2 mos</th>
<th>4 mos</th>
<th>6 mos</th>
<th>9 mos</th>
<th>12 mos</th>
<th>15 mos</th>
<th>18 mos</th>
<th>19-23 mos</th>
<th>2-3 yrs</th>
<th>4-6 yrs</th>
<th>7-10 yrs</th>
<th>11-12 yrs</th>
<th>13-15 yrs</th>
<th>16-18 yrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatitis A (HepA)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1st dose</td>
<td>2nd dose</td>
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<td>1st dose</td>
<td>2nd dose</td>
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<tr>
<td>Rotavirus (RV-1) (2-dose series); RV-5 (3-dose series)</td>
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<td>1st dose</td>
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<tr>
<td>Diphtheria, tetanus, &amp; cellular pertussis (DTP; &lt;7 yrs)</td>
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<td>1st dose</td>
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<tr>
<td>Tetanus, diphtheria, &amp; cellular pertussis (Tdap; ≥7 yrs)</td>
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<td>1st dose</td>
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<tr>
<td>Hepatitis B (HB)</td>
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<td>1st dose</td>
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<tr>
<td>Pneumococcal conjugate (PCV13)</td>
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<tr>
<td>Pneumococcal polysaccharide (PPSV23)</td>
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<tr>
<td>Inactivated Poliovirus (IPV) &lt;18 yrs</td>
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<td>1st dose</td>
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<tr>
<td>Influenza (IV/IAV) 2 doses for some see footnote 8</td>
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<td>1st dose</td>
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<tr>
<td>Measles, mumps, rubella (MMR)</td>
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<td>1st dose</td>
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<tr>
<td>Varicella (VAR)</td>
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<td>1st dose</td>
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<tr>
<td>Hepatitis A (HepA)</td>
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<td>1st dose</td>
<td>2nd dose</td>
<td>3rd dose</td>
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<tr>
<td>Human papillomavirus (HPV2; females only; HPV4; males and females)</td>
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<td></td>
<td></td>
<td></td>
<td>1st dose</td>
<td>2nd dose</td>
<td>3rd dose</td>
<td>4th dose</td>
<td>5th dose</td>
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<td></td>
</tr>
<tr>
<td>Meningococcal (Hib-MenCY ≥ 6 weeks; MCV4 D&lt;9 mos; MCV4-CRM ≥ 2 yrs)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>1st dose</td>
<td>2nd dose</td>
<td>3rd dose</td>
<td>4th dose</td>
<td>5th dose</td>
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</tr>
</tbody>
</table>

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**Range of recommended ages for all children**

- 7-11 months
- 19-35 months
- 24-35 months
- 13-17 years
- 11-18 years

**Range of recommended ages for certain high-risk groups**

- 12 months
- 35 months
- 18 years
<table>
<thead>
<tr>
<th>CIR-Generated Quarterly Report</th>
<th>Online Registry equivalent</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 to 35 months old UTD%</td>
<td><strong>Standard Coverage:</strong></td>
<td>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. Online report uses MyList.</td>
</tr>
<tr>
<td>13 to 17 years old UTD%</td>
<td><strong>Standard Coverage:</strong></td>
<td>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. Online report uses MyList.</td>
</tr>
<tr>
<td>11 to 18 years old UTD%</td>
<td><strong>Custom Recall:</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

*requirements vary, based on age at 1st dose, # doses already received, current age, and product used
## BOI Quarterly Reports compared to Online Registry reports

<table>
<thead>
<tr>
<th>CIR-Generated Quarterly Report</th>
<th>Online Registry equivalent</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>January, May Seasonal Flu Report</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Influenza UTD% 6 to 59 months old</strong></td>
<td><strong>Custom Recall:</strong> Select “Age range” and indicate “From ≥ 6 mo To &lt; 60 mo.” Also select “Any age-appropriate immunization from the series below only” and choose “Influenza.”</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Influenza UTD% 5 to 10 years old</strong></td>
<td><strong>Custom Recall:</strong> Select “Age range” and indicate “From ≥ 5 years To &lt; 10 years.” Also select “Any age-appropriate immunization from the series below only” and choose “Influenza.”</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Influenza UTD% 11 to 18 years old</strong></td>
<td><strong>Custom Recall:</strong> Go to “Specific Age” and choose “11-18 year olds.” Also select “Any age-appropriate immunization from the series below only” and choose “Influenza.”</td>
<td>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.</td>
</tr>
</tbody>
</table>
Coverage Report: view completed 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: create recall job

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:
DTP 4 01/27/2010
Polio 3
MMR 1
HepB 3
Hib 3
Var. 1
Pneum.4

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

<table>
<thead>
<tr>
<th>Last/First</th>
<th>Gender</th>
<th>DOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mouse, Minnie</td>
<td>F</td>
<td>05/26/2008</td>
</tr>
<tr>
<td>Huie, Sherl</td>
<td>F</td>
<td>03/01/2008</td>
</tr>
<tr>
<td>Duck, Daffy</td>
<td>M</td>
<td>07/07/2007</td>
</tr>
<tr>
<td>Duck, Daffy</td>
<td>F</td>
<td>03/02/2008</td>
</tr>
<tr>
<td>Papadouka, Vikki</td>
<td>F</td>
<td>09/20/2007</td>
</tr>
<tr>
<td>Poppins, Mary</td>
<td>F</td>
<td>10/01/2007</td>
</tr>
</tbody>
</table>

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

Click on
Recall from Coverage Report: review each record

- Review each record Due Now.
- Update immunization records by clicking on the Add Imms link in the Update column on the right.
- 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 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.

### Immunization History

<table>
<thead>
<tr>
<th>Event</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenza</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
</tr>
<tr>
<td></td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
</tr>
<tr>
<td></td>
<td>Given by this practice?</td>
<td>Given by this practice?</td>
<td>Given by this practice?</td>
</tr>
<tr>
<td></td>
<td>Another?</td>
<td>Another?</td>
<td>Another?</td>
</tr>
<tr>
<td></td>
<td>Lot: My Lot List...</td>
<td>Lot: My Lot List...</td>
<td>Lot: My Lot List...</td>
</tr>
<tr>
<td>HepB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
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<tr>
<td></td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
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<td></td>
<td>Given by this practice?</td>
<td>Given by this practice?</td>
<td>Given by this practice?</td>
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<tr>
<td></td>
<td>Another?</td>
<td>Another?</td>
<td>Another?</td>
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<tr>
<td></td>
<td>Lot: My Lot List...</td>
<td>Lot: My Lot List...</td>
<td>Lot: My Lot List...</td>
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<tr>
<td>Rotavirus</td>
<td></td>
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<td></td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
<td>Date: / / (mm/dd/yyyy)</td>
</tr>
<tr>
<td></td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
<td>Choose Vaccine</td>
</tr>
</tbody>
</table>
Update Patient Info: address, phones, MOGE status

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

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

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 Continue if a confirmation screen appears next.
Recall from Coverage Report: review and name job

f. Confirm list.
g. 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

- 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.

- A confirmation message appears.

- 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.

- To view results, click on each of the links in the Status column.
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
Output: Printing Labels

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).

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.

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.
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.
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**

**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\textsuperscript{st}, 2\textsuperscript{nd}, or 3\textsuperscript{rd} dose of HPV \textbf{and} any additional vaccines these same patients may be due at this time.

For example, Minnie Mouse is due her next HPV dose \textbf{and} she needs her next Tdap and MCV.
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.
Custom Recall: view patients retrieved for this job

Click on the list of patients that are **Pending Review**.
Custom Recall: review each record

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 Add/Ph link in the Update column on the right.

Mark the patients you wish to recall in the left column.

Click Continue ➔
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.

**Immunization History**

<table>
<thead>
<tr>
<th>Event</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>H1N1 Influenza</strong></td>
<td><strong>H1N1.09, Preservative Free</strong>&lt;br&gt;2 events&lt;br&gt;Date: 9/8/2009&lt;br&gt;5w 3d</td>
<td><strong>H1N1.09, Injectable</strong>&lt;br&gt;Date: 1/1/2010&lt;br&gt;21w 6d</td>
<td></td>
</tr>
</tbody>
</table>
Update Patient Info: address, phone, MOGE status (from Recall screen)

- 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.

Patient Information

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

House No. / Street / Apt. No.: 420-09 20TH ST
City / State / ZIP: LONG ISLAND CITY, NY 11101
Medical Rec. No.: [blank]
Mom DOB: [blank]
Mom First Name: [blank]
Mom Maiden Name: [blank]

Home Phone: (908) 917-5555
NEW Cell/Mobile: (908) 917-5555
NEW Email: [blank]

© Data previously recorded are saved in the CR 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.

NYC Health

Citywide Immunization Registry

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Custom Recall: select contact List or Labels & Letters

d. After marking the patients to recall and clicking select to create:

- a **List** (downloadable in Excel), or
- **Labels & Letters**, which includes a list
- **Click**
e. Choose an option:
   - Default letter
   - Custom message
   - List of names includes: address, phone and doses that are due now.

Click [Continue] Confirm, click [Continue]


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.

- A confirmation message appears.
  
- Please be patient. Processing the records takes time.

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

- To view output, click on each:
  - List
  - Labels
  - Letters
Output: List: Excel formatted for downloading

- The output list contain summary information, UTD statistics, list of patients, and contact information which can be useful to your practice for managing patients.

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

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

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.
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
To print labels, in Printer Properties/Preferences, under “Paper type” or “Type is:” choose “Labels.”
Recall: Standard recall based on MyList - set up job

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.

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 Continue ➔
Recall: Standard recall based on MyList - review records

- Review each record Due Now.
- Update immunization records by clicking on the Add Imms link in the Update column on the right.
- Update address and phone by clicking on the Edit Add/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 Continue.

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

- 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.
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.

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

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

Click Continue

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.

- 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.
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 **Continue**
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 [Continue](#).

See recipient’s view of message on [slide 66](#).
Recall: Custom One-Time Text Message - confirm job criteria

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 [Continue](#) to schedule the job. See [slide 67](#) to view jobs.
To set up a custom recall list for patients Due Now, select the following:

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

Click [Continue ➤](#).

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.

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

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

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

See recipient’s view of message on slide 66.
Recall: Custom Recurrent Text Message - confirm job criteria

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 Continue to schedule the job.
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.

**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.

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

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

Return to slide 58, 64.
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.
j. In the completed runs table, click on the date of your completed job run to view details about the patients included.

k. Click the Excel View Job Runs Details link to view your job run details.
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

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

a. Click the **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.
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: Custom Text Message – Cancel Job**
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

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 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.
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
E-mail: nycimmunize@health.nyc.gov