Online Registry QuickGuide
Coverage Reports, Recall and Reminder Jobs
List, Letters and Labels

1. Prior to producing coverage reports and recall or reminder jobs, keep your MyList current by clicking on the Refresh MyList tab in the MyList screen. Choose to retrieve your patients from CIR or remove patients from your MyList, who:
   a. have been looked up in the Online Registry (OR) but may not be immunized yet at your practice, and/or,
   b. have received an immunization at your practice who are in the CIR, but not yet added to MyList, or,
   c. have received their last immunization at your practice who are in the CIR, but not yet added to MyList, and
   d. exclude patients who have been designated as “Moved and Gone Elsewhere” (MOGE) via the Update Patient Info screen in the Online Registry.
   e. For each of the above, choose time ranges from 3 months to anytime.
   f. After refreshing MyList, it will contain only the patients who meet the criteria you selected.

   - MyList is shared by all Online Registry users at the practice. Any changes will affect all users! Consider assigning one person at your practice to regularly update MyList and run reports and jobs.
   - Contact the CIR at 347-396-2400 if there are records that need to be merged.
   - At any time, users can view the criteria of the current MyList by clicking on the link Who's in MyList?, found on MyList and the coverage and recall/reminder screens
   - Patients individually looked up will continue to be added to MyList until the next refresh, and patients individually removed from MyList will be removed.
   - Note: Practices that report to CIR using EMRs or billing systems must use Refresh MyList.

2. Before running a coverage, recall or reminder report, review and update patient contact information, such as address, cell phone number and email address, in the Update Patient Info screen; and update the status of patients to let CIR know of patients no longer seen [a.k.a. Moved or Gone Elsewhere – (MOGE) status] at your practice. While in MyList, under the Active column, click the Yes/No link to the left of the patient’s name to bring up the Update Patient Info screen to change the status.

   - Note: Two things must be done to remove a record from MyList and its association with the practice:
     i. Update the Active status to “No” in the Update Patient Info screen;
     ii. From MyList, under the Remove column check the box next to the patient’s name. Click the blue Remove icon at the top of the column. The record is removed from MyList, but remains in CIR.

3. Report Options
      i. Influenza Coverage Report: current season; for 6-59 month-olds, 5-10 year-olds, 11-18 year-olds.
      ii. COVID-19 Coverage Report: shows any patient who received at least 1 dose at your facility.
      iii. A recall list of patients who are not up-to-date may be generated from a coverage report.
   b. Recall/Reminders (located in Recall screen):
      i. Custom Recall: choose or enter age ranges, then choose options to recall patients who are missing either any age-appropriate immunization(s), any specified vaccine series, or any specified number of valid doses.
      ii. Standard Recall – “Due Now” (red status icon next to patient name in MyList): see who in your entire MyList is Due Now.
      iii. Standard Reminder – “Due Soon” (orange status icon next to patient name in MyList): see who is due for immunizations within 28 days.
   c. Use coverage and recall/reminder reports to produce lists, or letters and address labels. Details on page 2.
4. **Coverage Report** (located in Tools screen) highlights:
   a. View [Who's in MyList?](#) and use the [Refresh Mylist](#) feature to keep your list current.
   b. **Review date**: The default date is today’s date, modifiable. Up-to-date calculations will be based on the age of patient as of the date entered.
   c. **Influenza Coverage Report** is available for the current flu season, based on a cohort of [Mylist](#) patients.
   d. **COVID-19 Coverage Report** displays all patients who have received at least 1 dose at your facility.
   e. A Report Name is automatically generated and is editable.
   f. Report that processing or done are found in the [Recent Coverage Reports](#) screen. The Report Status will change from “Processing…” to [Done](#).
   g. To view the output, click on [Done](#) in the Report Status column.
   h. The processing of the report takes time. You may return to the screen at a later time.
   i. You have the option to send the results of the coverage report to produce a recall job of a list or letters and labels by clicking on the gray [Create Recall List](#) button to the left of the coverage summary.

5. **Creating a Recall Job**: While in the [Recall](#) screen, you have an additional opportunity to review and update each record. Click the links in the Update column on the right side for patient immunization history, address, phone numbers and MOGE status. Individual records may be removed from the recall job by unchecking the recall box to the left of the patient’s name.
   a. The recall list results, downloadable to Excel, will be found in the [Recall](#) screen. The list includes: name of patient, date of birth, CIR ID, address, phone numbers and immunizations that are past due.
   b. The recall letter options are either a default or customizable letter. Individual letters for each patient, labels formatted for printing, and a list of the individual’s past due immunization are the job results.
   c. Please be patient, processing the report takes time. You may return to the screen at a later time.
   d. The Recall jobs are found in the [Recall](#) screen. Click on [Done](#) to view the results.
   e. **Printing letters**: Office letterhead may be used to print the letters.
   f. **Printing labels**: Use standard address labels, 30 per page, 1 inch x 2-5/8 inches. In your printer properties, choose paper option type as: Labels.

6. **Custom Recall, list and letters highlights**:
   a. View [Who’s in MyList?](#) and use the [Refresh Mylist](#) feature to keep your list current.
   b. In the [Recall](#) screen, choose from the yellow options box: 1. Outreach Type: Recall, 2. Parameter Type: Custom, and 3. Contact Method: List or Letters.
   c. The Custom Recall Job options appear next. Select the patient and immunization criteria for the recall job (sections A, B, and C). To use custom recall with text messaging: refer to [Brief Text Messaging Guide](#).
   d. A report name is automatically generated and is editable.
   e. After running a Custom Recall, the next step is to review the recall list by clicking on the [Pending Review](#) link in the Status column.
   f. Follow highlights outlined from 4j to 4o, above.

7. **Standard Recall highlights**:
   a. View [Who’s in MyList?](#) and use the [Refresh Mylist](#) feature to keep your list current.
   b. In the [Recall](#) screen, choose from the yellow options box: 1. Outreach Type: Recall, 2. Parameter Type: Standard, and 3. Contact Method: List or Letters.
   c. Next, review the recall list as outlined in step 5 above. You may choose individual records by checking the recall box to the left of the patient name, or checking the recall box at the top of the column.
   d. Follow highlights outlined under step 5, above.

8. **Standard Reminder highlights**:
   a. View [Who’s in MyList?](#) and use the [Refresh Mylist](#) feature to keep your list current.
   b. In the [Recall](#) screen, choose from the yellow options box: 1. Outreach Type: Reminder, 2. Parameter Type: Standard, and 3. Contact Method: List or Letters.
   c. Next, review the reminder list as outlined in step 5. Here, you may choose individual records by checking the reminder box to the left of the patient name, or check the reminder box at the top of the column.
   d. Follow highlights outlined under step 5, above.
   e. For this group of patients, the results will show both vaccines that are Due Soon and Due Now.