New Text Messaging via the Online Registry to Recall Patients Due/Overdue Immunizations

Your practice may now be able to use text messaging via the Online Registry at no cost to your practice to recall patients Due or Overdue immunizations. This brief guide illustrates some of the new features. See the full guide online.

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

To set up text messaging choose the combination:
- Recall,
- Custom,
- Text Message, and
- One-Time or Recurrent.

Click “Continue.”

2. The Custom Recall screen will appear next. Select the patient and immunization criteria for the recall job (sections A, B and C).

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

Or, if you chose to run a recurrent job, you will be able to enter a date range (section D):

Recurrent jobs are set to run every 28 days within the custom date range.
4. 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.

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.

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

6. 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”.

Short Code: 850-80. 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.
7. View your scheduled and completed recall jobs in the **Reminder/Recall Job List** in the "Reminder/Recall" section.

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

9. After clicking on a job name, the next 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.

10. Click on **View Job Run Details**, which can be downloaded and saved. See Excel example below:
11. 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 the 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 patient’s “active” status;
   (2) update the Cell/Mobile number;
   (3) 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. You can choose to opt-out patients while in this screen.

**Important notes:**

1. 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.

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, you may refresh your MyList anytime; however, subsequent recall jobs will be based on the new refreshed criteria.

3. 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.