


## 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."



**Reminder / Recall**

- Refresh **MyList** before creating a new Reminder/Recall job.
- To create a new Reminder/Recall job, follow the steps below.
  1. First, choose an **Outreach Type**. Reminders will be sent to patients due immunizations in the next 28 days. Recalls will be sent to patients due immunizations now.
  2. Next, choose a **Parameter Type**. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, gender, and vaccine type/dose numbers.
  3. Then, choose a **Contact Method**. If you are sending text messages, choose the frequency of contact. Recurrent texts will be sent every 28 days within the start and end date indicated. One time texts will send only once on the date indicated.

For additional Recall/Reminder instructions, click [here](#).

To recall patients based on up-to-date rates using list or letters, use the [Coverage Report Tool](#).

*Not all combinations are possible.*

1. **Outreach Type:**  Reminder  Recall

2. **Parameter Type:**  Standard  Custom

3. **Contact Method:**  List or Letters  Text Message ↑

One Time  Recurrent

**Continue** →

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

**Create Custom Recall Job**

**A**  All patients in MyList

**Specific Age**

7-11 month olds  11-13 year olds  
 12-35 month olds  13-17 year olds  
 24-35 month olds  19+ year olds

**Age Range**

From ≥ [ ] years [ ] months  
 To < [ ] years [ ] months

**DOB Range**

Include patients born between [ ]/ [ ]/ [ ] and [ ]/ [ ]/ [ ]

**B** **Gender**

Male  
 Female

**C** **For immunization series: Include patients who are missing:**

Any age-appropriate immunization

Any age-appropriate immunization from the series below only:

Influenza  Pneumo. Conjugate  MMR  
 HepB  Pneumo. Polysaccharide  Varicella  
 Rotavirus  Polio  HepA  
 DTaP  Meningococcal  
 Hib  Tdap  Human Papillomavirus

Include patients who do not have the # of specified valid doses from the series chosen below:

[ ] Influenza [ ] Pneumo. Conjugate [ ] MMR  
 [ ] HepB [ ] Pneumo. Polysaccharide [ ] Varicella  
 [ ] Rotavirus [ ] Polio [ ] HepA  
 [ ] DTaP [ ] Meningococcal  
 [ ] Hib [ ] Tdap [ ] Human Papillomavirus

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

**D** Send out job on this date:  
 [ ]/ [ ]/ [ ]

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

**D** Enter the date range this message will run.  
 NOTE: All recurrent jobs will run every 28 days from your start date. Once this job is created, you may stop future recurrent messages by turning off the job on the Reminder/Recall Job List.

From [ ]/ [ ]/ [ ]  
 To [ ]/ [ ]/ [ ]

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

- 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.**

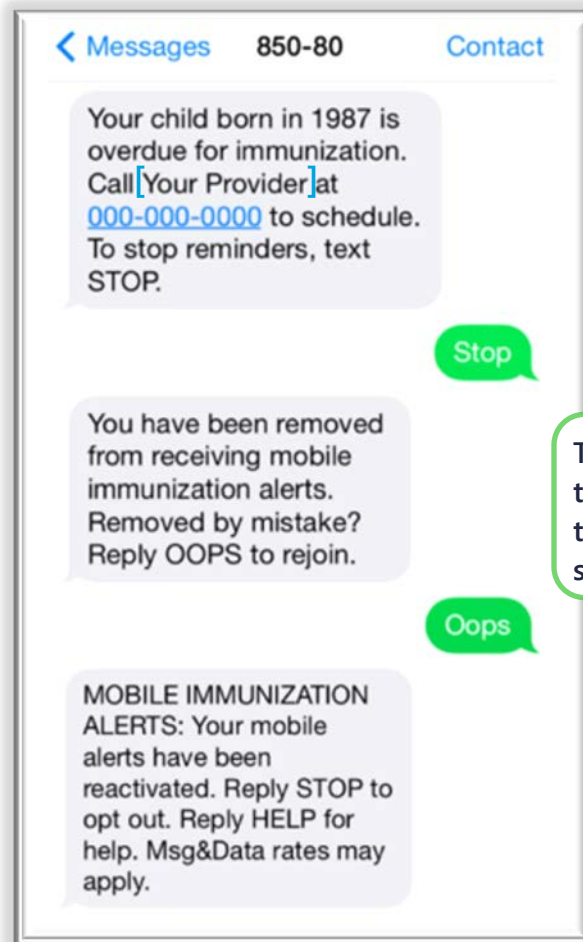
*Please note that it is your responsibility to compose appropriate messages, and to adhere to the laws, rules, and regulations that apply to the disclosure of confidential and sensitive information in the content of your custom text message.*

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



- 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

For complete instructions, visit: <http://www.nyc.gov/html/doh/downloads/pdf/cir/cir-recall-guide.pdf>

- 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

- 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.

- In the Update Patient Info screen:
  - update patient's "active" status;
  - update the Cell/Mobile number;
  - 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:

- 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.
- 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.
- 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.