
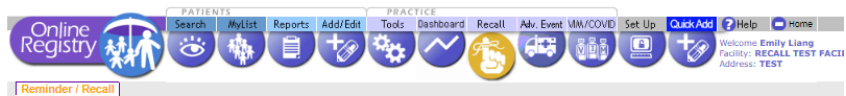


## Remind Patients Due Soon Immunizations Through Text Message via the Online Registry

Your practice may now be able to use text messaging via the Online Registry at no cost to your practice to remind patients due soon immunizations. Reminder text message jobs directed at patients who will be due for selected immunizations in the next 28 days. This brief guide illustrates some of the new features. See the [recall guide](#) online.

1. Log into 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:

- (1) Reminder
- (2) Custom
- (3) Text Message, and One-time or Recurrent.

Use this page to set up Reminder/Recall lists, letters, or text message jobs.

**New!** Set up REMINDER text message jobs directed at patients who will be due for selected immunizations in the next 28 days. RECALL messages are directed at patients who are due now or past due. Each Outreach Type, REMINDER or RECALL, must be set up as separate jobs. If you wish to direct messages to patients for both REMINDER and RECALL jobs, return to this initial Reminder/Recall screen to set up each of the Outreach Type jobs using the same parameters/criteria - age range, vaccine series - you have selected.

If you have not already done so, before selecting your custom Reminder/Recall criteria, please:

- Please review patients in MyList. Refresh MyList before creating a new Reminder/Recall.
- Update addresses, cell phone numbers, emails, and immunizations of your patients. Hint: from MyList, select each patient to view their record, select the Update Patient Info tab, then enter the updated information.

Patients without cell phone numbers will not receive Reminder/Recall notices via text message. Note: Collecting cell phone number data in the CIR is relatively new. Please check that your EMR is set up to report cell phone numbers and/or use the Online Registry's Update Patient Information screen to update cell phone numbers at the time of the patient's visit.

To create a new Reminder/Recall job, follow the steps below.

- 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.
- Next, choose a Parameter Type. If you want to run a job using your MyList, choose "Standard". Choose "Custom" to specify age range, sex, and vaccine type/dose numbers.
- Then, choose a Contact Method. If you are sending text messages, choose the frequency of contact. Recurrent texts for recall jobs will be sent every 28 days, and recurrent texts for reminder jobs will be sent every 14 days, within the start and end date indicated. One-time texts will send only once on the date indicated.

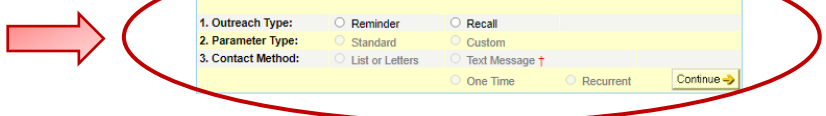
If you are sending text messages, it is recommended to run a List (List or Letters) the first time to view the list of recipients. You will not be able to view the list of recipients during the text message set up.

**Important:** Please read the [reminder/recall instruction guide](#), [brief text messaging guide](#) and [reminder text messaging guide](#) carefully before attempting to set up or send text messages.

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

If you are sending text messages, it is recommended to run a List (List or Letters) the first time to view the list of recipients. You will not be able to view the list of recipients during the text message.

Click "Continue."



2. The Custom Reminder screen will appear next. Select the patient and immunization criteria or the reminder job (Sections A, B and C).

Create Custom Reminder Job

**A**  All patients in MyList

Specific Age

7-11 month olds  11-18 year olds  
 19-35 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** Sex

Male  
 Female  
 All Others

**C** For immunization series: Include patients who will be due for:

Any age-appropriate immunization

Any age-appropriate immunization from the series below only:

Influenza  Hib  Varicella  
 HepB  Pneumococcal  HepA  
 Rotavirus  Polio  Meningococcal  
 DTaP  MMR  Human Papillomavirus  
 Tdap  COVID-19

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:  
 /  /

If you choose to run a recurrent job, you will be prompted to enter a date range (Section D):

*Note: Recurrent jobs are set to run every 14 days within the custom date range.*

**D** Enter the date range this message will run.  
 NOTE: All recurrent reminder jobs will run every 14 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:  /  /

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**. Click [here](#) to have your facility name and contact number set up for your custom text messages.

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

Select message (default recommended.) **This message will be sent to each patient on your recall list.**

Use default message  
 Use custom message

Fill in the fields for the sample message provided.

Type in your custom message. Your facility name and contact number will precede the message. Set up and save your facility name and number [here](#).

Please do not use any non-English language characters or symbols, which are not supported at this time.

You or your child born in   
 CIR will insert patient birth YEAR here  
 is overdue for immunization. Call

**FACILITY NAME (up to 30 characters):**  
  
 Characters remaining: 5

at **CONTACT NUMBER:**   
 to schedule.

**HAPPY DAY PEDIATRICS TEST (212) 400-1234:**  
 88 character limit  
  
 Characters remaining: 88

NOTE: To allow patients to opt out of receiving text message reminders, the line "To stop reminders, text STOP" will be added to the end of your message.

Patients who text "STOP" will not receive any future text messages via the CIR.

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.

Cancel  Clear  Continue

Enter your facility name and contact number here to have your facility name and phone number appear to the patient for reminder/recall purposes. Click Confirm to save. This can also be edited by going to Set Up on your navigation bar.

**Reminder/Recall Facility Name and Contact Settings**

Enter your facility name and phone number as you would like it to appear to the patient for reminder/recall purposes. Entries may be edited for specific jobs.

Facility Name (up to 30 characters):

Facility Contact #:   -

Confirm

**Sample Custom Message:**

Note: Please do not use any non-English language characters or symbols, which are not supported at this time.

**Use custom message**

Type in your custom message. Your facility name and contact number will precede the message. Set up and save your facility name and number [here](#).

Please do not use any non-English language characters or symbols, which are not supported at this time

HAPPY DAY PEDIATRICS TEST (212) 400-1234:  
 88 character limit

Please contact our office to schedule an appointment for your upcoming due vaccination|

Characters remaining: 1

**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.**

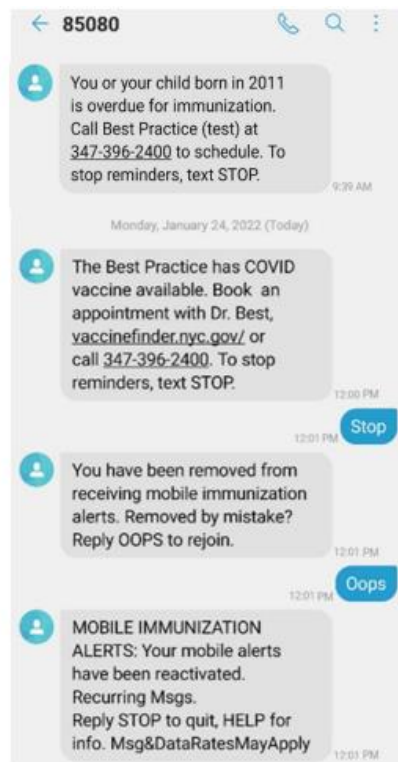
5. A sample of how the messages sent will look on the screen of a mobile phone. For vaccinations past due, the default message for past due vaccinations will be indicated as "overdue". Vaccinations due soon will be indicated as "due" (not shown).

It is important to list the practice phone number and practice name, shown here as "The Best Practice," so your patient knows who is sending the message.

Shown are examples of a (1) default message and (2) custom 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.

6. In the next screen, you will name your Reminder job. Click continue to run your job.

**Confirm criteria for Custom Reminder Job**

<p><b>All patients in MyList</b></p> <p>Sex: All</p> <p>Text Message Type: One Time</p> <p>Date of Run: 08/20/2024</p> <p>Custom Message: Please contact our office to schedule a follow up appointment.</p>	<p><b>For immunization series: Include patients who will be due for :</b></p> <p>Patients missing any age appropriate immunization</p>
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Job Name for identification later:

We recommended you give your list a brief and clearly descriptive name.

7. After clicking continue, you will receive a confirmation message of your Reminder job.



✔ You have just created a REMINDER job and will contact all patients in your selected criteria who will be due for selected immunizations in the next 28 days. If you wish to direct messages to patients who are due now for immunizations, you may set up a new RECALL job below.

8. To view your scheduled and completed recall jobs in the Reminder/Recall Job List in the Reminder/Recall Section.

9. Click on a job name to view details of the reminder job.

**Reminder/Recall Job List**

This table shows Reminder/Recall jobs you have created in the last year. This page will refresh every 2 minutes. You can manually refresh the Job List page using the 'Refresh Page' link. Please wait while this page loads completely.

[Refresh Page](#)

Show **20** entries

<a href="#">Delete</a>	Job Name	Contact Method	Based On	Status	Patients	Date Created	Cancel Job
<input type="checkbox"/>	<a href="#">"test2_2024081901"</a>	One-time Text Message	Reminder	Complete (Last Run: 08/19/24)	7	08/19/2024 12:48pm	
<input type="checkbox"/>	<a href="#">"TEST_2024081901"</a>	One-time Text Message	Reminder	Active (Next Run: 08/20/24)		08/19/2024 12:43pm	<a href="#">Cancel Job</a>

10. After clicking on the job name, the next screen you can view:

(a) the details for the Job: parameters that were chosen for the reminder, date of the job, date range for recurrent jobs and text message

(b) a list of completed runs by date, status of jobs, and number of patients in the reminder job

(c) patients who were included in the reminder job, by clicking on the date of run

**Reminder / Recall**

This page shows the details for your Reminder job. You may use this page to (1) view the details, or (2) cancel your job. If you cancel a job in error, you will be given an opportunity to "Keep" the job.

To view the list of patients included in a previously completed job run, click on the date of run of interest in the "Completed Run(s)" section below.

**Details for Job Name "test2\_2024081901"**

<b>Criteria</b>	<b>Based On:</b>	<b>All patients in MyList</b>	<b>Doses:</b>
Created On: 08/19/2024 12:48 pm	Patients in 'My List'	Sex: All	Patients missing any age appropriate immunization

[Rename this Job](#)


**Text Message Type:** One Time  
**Date of Run:** 08/19/2024  
**Default Message:** You or your child born in <BIRTH YEAR> is due soon for immunization. Call HAPPY DAY PEDIATRICS TEST at 212-400-1234 to schedule.

**Job State:** Complete

[Previous](#)

Completed Run(s)			Number of Patients
Date of Run	Status		
<a href="#">08/19/2024 12:50 pm</a>	COMPLETED		7

11. After clicking on **(c)** date of run, it will show a list of patients who were included in the reminder job.

Run Date: 08/19/2024 12:50 pm					
Job Status: COMPLETED					
Patient Count: 7					
Last Name	First Name	Sex	Date of Birth	Mobile Phone	
1 Blanchet-Test	Cate-Test	F	04/01/2000		
2 Recall-Kiru	Girl	F	08/30/2015		
3 Smith-Test	Ashley-Test	F	01/11/1995		
4 Testduesoon	Testduesoon	M	03/13/2024		
5 Testfour	Testfour	F	07/01/2024		
6 Testthree	Testthree	F	06/23/2024		
7 Tieml...	Waf	F	09/09/2015		
* includes reported vaccinations compared against the Immunization Schedule as of the date the list was prepared.					

12. Click on  [View Job Run Details](#) which can be downloaded and saved for a full summary of the job run details. See excel example below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Job Name:	test2_2024081901														
2	Facility Code:	5555R56	Facility Name:	RECALL TEST FACILITY												
3	Created By:	eljang2														
4	Created On:	08/19/2024 12:48 PM	Date of Run:	08/19/2024												
5	Date of Run:	08/19/2024 12:50 PM														
6																
7	Outreach Type:	Reminder														
8	Contact Method:	Text message														
9	Based On:	All patients in MyList														
10		Sex: All														
11		Doses: Patients missing any age appropriate immunization														
12																
13	Total Patients who met Age/Sex criteria:	199	Patients UTD:	191 (96.0%)	Patients not UTD:	8 (4.0%)										
14	Total Patients not UTD who have a cell #:	158														
15	Total Patients sent text msg (did not opt-out):	7														
16																
17	Sent Text Msg	Opted Out Text Ms	Last Name	First Name	DOB	Sex	MRN	CIR Id	Address	City	State	ZIP	Home Phone	Cell Phone	Email Address	Due Now
14	N	Y	RECALL	REGINA	05/23/1973	F	RECR		€ 408 BIG APF NEW	NY	NY					Influenza-1, HepB-1, DTP-1, Zoster-1, COVID-19-1
15	N	Y	RECALL	RICHARD	05/05/2005	M		7								Influenza-1, HepB-1, DTP-1, MMR-1, Varicella-1, HPV-1, COVID-19-1

## Important Steps for Managing and Preparing your Patient Lists for Reminder/Recall

For complete instructions, visit: <https://www.nyc.gov/assets/doh/downloads/pdf/cir/txt-messaging-guide.pdf>

A. (1) Review and confirm the inclusion criteria of your MyList (slides 6-13), 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 call/mobile number will be opted in to receive text messages. You can choose to opt-out patients while in this screen.

### **Office logistics and notes:**

1. If the mobile number is shared by family members, opting out of receiving a message means opting out all members from receiving future messages.
2. **Staff preparation:** 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, refresh the MyList regularly. Recalls can increase call volumes. Provide staff with scripts, answers to FAQs. Check vaccine supply.
3. **Mobile Phone Numbers Accuracy:** Determine the workflow for updating mobile phone information in the Online Registry. Facilities using HL7 messaging to report to CIR should send mobile phone numbers. Contact your EMR vendor.
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. Do not use private health information in text messages.
5. While the Bureau of Immunization may send vaccination recall messages to individuals, messages when sent by the patient's provider are received better and are more effective.