COVID-19 Vaccine Documentation: EHR Tips

A trusted health care provider's recommendation is a <u>one of the strongest predictors</u> that a patient will get vaccinated against COVID-19. This document will help providers incorporate steps from the [Use Every Opportunity](#) framework into their daily workflows to identify patients who have not received a COVID-19 vaccine and empower them to get vaccinated.

<u>The NYC Health Commissioner issued an [advisory](#) on September 8, 2021</u>, to further activate NYC health care providers to offer unvaccinated patients information on the efficacy, availability, and administration of COVID-19 vaccination during each patient visit. If a patient agrees to have a COVID-19 vaccination, their health care provider shall either offer to administer the vaccine to the patient if authorized or refer the patient to another health care provider who can lawfully administer the vaccine to the patient. See these [Frequently Asked Questions](#) for more information.

All health care providers should assess and document every patient's COVID-19 vaccination status. For patients who are unvaccinated, providers should document conversations about vaccines at every visit until the patient is vaccinated. For patients who have not completed a full vaccination series, providers should provide and document education. Providers who do not administer COVID-19 vaccines should refer patients to a vaccination site. Providers should document all COVID-19 vaccines administered, regardless of location.

Below are five best practice processes to implement in your practice. Each best practice is accompanied by recommendations applicable to **any electronic health record (EHR) system**.

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1. Ask all patients if they have received a COVID-19 vaccine

For all visit types (sick, well, chronic care, follow-up), incorporate a step into your pre-visit planning and intake or rooming or triage processes where a care team member (e.g., medical assistant) reviews and updates each patient's COVID-19 vaccination status. Patients who confirm they are unvaccinated should be asked this question at all subsequent visits. Consider the following EHR recommendations as you update your process:

- Use a Clinical Decision Support (CDS) alert or EHR flag that will remind you to ask patients this question. Some EHRs have a built-in COVID-19 vaccine CDS or allow for rules-based customization to CDS alerts to show unvaccinated patients only. Assign a care team member (e.g., medical assistant), to review these alerts during pre-visit planning.

- Use your EHR's bi-directional connection (see this [list of bi-directional EHRs](#)) to NYC's [Citywide Immunization Registry](#) (CIR) to check a patient's status during pre-visit planning. This will show COVID-19 vaccination records for vaccines already administered in NYC.
- Any patient whose chart or CIR does not show COVID-19 vaccination information should be asked by a member of the care team whether they have received a COVID-19 vaccine. Add a question about COVID-19 vaccination status to a Medical History checklist or EHR template to make sure it is requested.

2. Document all COVID-19 vaccines administered at your practice and elsewhere

For patients who have received a COVID-19 vaccine, document pertinent information in the chart (e.g., vaccine manufacturer, date(s) of administration, provider or facility where administered). Information should be documented both when your practice administers the vaccine and when a vaccine has been obtained elsewhere. Consider the following recommendations as you update your process:

- Most EHRs have a built-in Immunizations activity that will allow for documentation of vaccines administered both at your practice and elsewhere. Use this tool to document COVID-19 vaccinations, both administered by your practice and those administered elsewhere
- If your EHR does not provide this feature, document COVID-19 vaccination in a Medical History, Preventive Medicine, or Health Maintenance section of the chart. Ideally, this is kept as structured data (as opposed to free text), which will enable you to search more easily for or generate a list of patients with or without vaccines in the future.

3. For eligible patients who have not yet received the vaccine, provide vaccine information at every visit

The provider's recommendation is critical, so use every opportunity to offer information on the efficacy, availability, and administration of COVID-19 vaccines and document this counseling – as well as patients' readiness to receive the vaccine – at each visit. Consider incorporating patient education and answers to patient questions into your EHR to facilitate this discussion.

- Create a template or macro to efficiently document relevant points covered in counseling provided to each patient - every time - including information about a patient's hesitancy or refusal. Documentation of counseling is typically recorded in the Plan or Treatment Plan section of the EHR.
- Most EHRs have a workflow to document vaccine refusals. Contact with your EHR vendor to identify the process in your system.
- Upload patient education about the COVID-19 vaccines (links to education materials are in the Additional Resources section below), to easily access these materials during an encounter, and print or send the materials to the patient portal.

4. Refer patients to a vaccine administration site

If a patient agrees to get vaccinated and you do not administer the vaccine at your practice, refer them to a vaccinating site. Patients who agree to get a COVID-19 vaccine have multiple options. Patients can receive a vaccine in their home and patients with accessibility needs or accommodation needs can request support from any NYC-run vaccination site. Inform each patient about their options so they feel confident to arrange their vaccination, or help them arrange one. Document these efforts in the chart. Consider the following recommendations to prepare and document this information in your EHR:

- Use your EHR's Referrals tool, or a Referral order type, to create a referral for your patient to a COVID vaccination site. Many EHRs can use this referral order to generate a referral letter pre-populated with important information for patients (e.g., addresses, websites, phone numbers).
- Alternatively, consider using an order in the Plan section of your electronic chart's progress note to record efforts to counsel and connect patients to vaccinations.

5. Conduct outreach to unvaccinated patients to encourage them to get vaccinated

As providers follow the steps above to ensure up-to-date information on each patient's vaccination status, care teams will be able to easily generate lists of patients who are unvaccinated. These lists can be used to contact eligible patients to remind them about the importance of vaccination.

- Use your EHR's Registry, Patient List, or other reporting tool that can make lists of patients based on certain criteria. For example, it is usually possible to generate a list of patients who are age 12+ who have not completed a COVID-19 vaccination series and export this list with patient contact information so the care team to contact patients by phone.
- Most EHRs can facilitate mass communication via a message through the patient portal, a mass text, email, or robocall campaign, or mass letters to mail. Consider using these tools to efficiently send information and reminders to patients who are not vaccinated. There is sample messaging in [link to FAQ] to support you with this mass outreach.

Additional Resources

- [NYC REACH EHR Tips on COVID-19](#) (includes guides on workflow and documentation in different EHR systems)
- [Building Confidence in COVID-19 Vaccines](#)
- [Addressing Patients' COVID-19 Vaccine Questions](#)
- [COVID-19 Vaccines: FAQ for Providers](#)
- Some recommended educational materials are linked here, and many are available in other languages on [NYC Health's COVID-19 Vaccine page](#)
  - [What New Yorkers Need to Know about the COVID-19 Vaccine](#)
  - [FAQs for Families and Educators](#)
  - Receiving the COVID-19 vaccine will have no cost to the patient, regardless of insurance status or immigration status
  - [Incentives](#) are available to those who receive the COVID-19 vaccine
- Use these links to support connecting patients with vaccination appointments:
  - [COVID-19 Vaccine Finder](#)
  - Book Appointment at [NYC-run vaccination site](#) (supports accommodation requests; patients can also call 877-VAX-4NYC to arrange accommodations)
  - [Walk-up, mobile, and pop-up sites](#)
  - [Provider Referral form](#) (provider/care team fills out form and call center will call patient back)

EHRs with Bi-Directional CIR Integration

The following EHRs have established bi-directional integration with NYC's CIR. If you do not see your EHR on this list, reach out to your vendor and/or to CIR.

Adaptamed, ADS, Allscripts, Amazing Charts, Athenahealth, Cerner, Criterions, CureMD, Cybermed, DigiDMS, eClinicalWorks, Empower MD, Epic, GE Centricity, Glenwood/Glace, IBM Websphere, iPatientCare, Ironbridge, Kareo, MDLand, Medent, MedGen, Medicat, MTX, NextGen, Office Practicum, PioneerRx-Stc, Point N Click, Practice Fusion, PrescribeWellness.