COVID-19 Vaccine Documentation
Tips for Epic

A trusted health care provider's recommendation is one of the strongest predictors 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.

The NYC Health Commissioner issued an advisory on September 8, 2021, 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 for the Epic EHR.

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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.

- Add a COVID-19 vaccine topic or rule to the *Health Maintenance* activity and associate it with the COVID-19 vaccine orders and immunization records. A medical assistant can review vaccination status here, along with other preventive and chronic guidelines, during pre-visit planning.
- During pre-visit planning, query the Citywide Immunization Registry (CIR) using the *Imm. Registry* button in the *Immunizations* activity. This will use a bi-directional connection to show vaccines administered by other facilities in NYC, to enable you to update your records before the patient presents.
- Implement a *Best Practice Advisory* (BPA) that will pop up to remind you to ask patients who do not already have a documented COVID-19 vaccine series this question.

- When checking in or rooming patients, access Care Everywhere records to identify if patient received COVID-19 vaccine at another Epic facility.
- Build a question about the COVID-19 vaccine into your EpicCare Ambulatory Rooming navigator to remind the medical assistant to ask during triage.

2. Document all COVID-19 vaccines administered both in 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.

- **When your practice administers a COVID-19 vaccine:** The vaccinator should use the *Immunizations* tab/activity in the visit navigator to record immunizations administered by your practice. If your practice is administering, once an order has been placed for a COVID-19 vaccine (consider building this order into a SmartSet), the vaccine will be available for administration in the Incomplete Administrations section of the Immunizations activity.
- **To document a COVID-19 vaccine administered elsewhere***:* When a care team member (e.g., medical assistant or nurse) identifies a patient has received a COVID-19 vaccine from another provider, they should document this in Epic as well. From *Chart Review* or from the *Visit Navigator*, open the *Immunizations Activity*, and open *Historical Administrations*. Here you can record all pertinent info (e.g., manufacturer, dates, sites.) for all COVID-19 vaccinations the patient has received.

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

As the provider's recommendation is so important use every opportunity to offer information on the efficacy, availability, and administration of COVID-19 vaccination, 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 SmartText with the key elements of vaccine information commonly provided to each patient to save time.
- Create or update a SmartSet that includes COVID-19 vaccine orders to facilitate efficient order entry for COVID-19 vaccines.
- Train clinical staff to document refused vaccines in the Immunizations tool of the Epic chart, with a status of *Refused.*
- To streamline providing educational materials, identify if your third-party patient education vendor makes COVID-19 vaccine educational resources available. If not, or in addition, create *SmartPhrases* to integrate custom messaging for your patients to take home. Both third-party and custom *SmartPhrase* education are avilable in *Patient Instructions* and can be included in the

printed and *MyChart After Visit Summary*.

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 a variety of options. For example, patients can receive a vaccine in their home; patients with accessibility needs or accommodation needs can request support from any NYC-run vaccination site. Provide information to each patient so they feel confident to arrange their vaccination or help them arrange one; document these efforts in the chart.

- If referring to an external vaccination site, build an External COVID-19 Vaccine order in Order Composer (and consider incorporating into favorites or SmartSets) that includes pertinent information patients will need to access an external referral.

- Build custom *Patient Instructions* (e.g., using SmartPhrases) to quickly populate important information (nearby vaccination sites, websites, and phone numbers to call, reminders about second doses, etc.). Alternatively, build a *Letter* in Epic that includes key information of this kind, and share with patients by printing from the Visit Navigator.

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 using the EHR. These lists can be used to reach out to eligible patients to remind them about the importance of vaccination.

- Use a *Reporting Workbench* report (e.g., *Find Patients*) to identify patients who are eligible for a COVID-19 vaccine but who have not yet confirmed to receive a complete COVID-19 vaccine series. One option is to download/export/print this list so patients may be contacted by phone.

- If configured appropriately, the Reporting Workbench report makes available a *Mass Communication* button, which can be used to generate (dependent upon active functionality) MyChart messages, letters, texts, etc. to large groups of patients who appear in the Reporting Workbench report results. Consider using *Mass Communication* to reach a broad number of patients to invite them to discuss vaccination, request that they update you with their vaccination status, and/or advise with instructions to access vaccinations on their own.

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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)