

COVID-19 Vaccine Documentation

Tips for MDLand

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 [MDLand EHR](#).

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.

- During pre-visit planning, assign a care team member (e.g., Medical Assistant, nurse, etc.) to review each patient's Immunization Schedule in the chart (*Medical History > Vaccine*). This will show a list of all vaccines and clicking *Edit* will show a schedule. COVID-19 vaccines are at the bottom of the schedule and will show a box with date for each dose received:

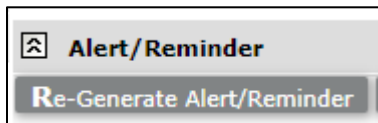
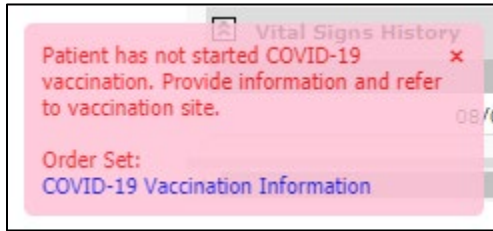
 **Vaccine** [Edit](#)

Group: MMR/Measles/Rubella
(1) 08/04/2021 MMR 03 Age: 19y VFC: Provider: DOH, Doctor Location: My Location Lot#: Manufacturer: Exp Date: Vis Date: Dose: 1 Site: Funding Source: Infor Source: 00

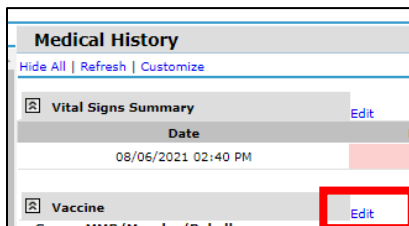
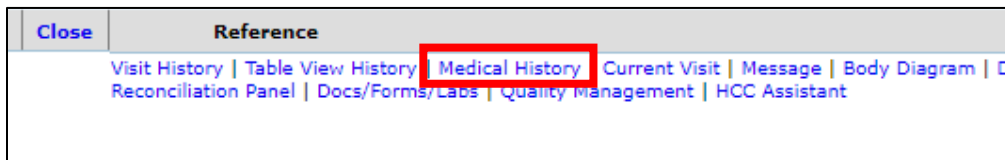
Group: COVID-19
(1) 03/01/2021 COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 mL dose 207 Age: 19y VFC: Provider: DOH, Doctor Location: My Location Lot#: Manufacturer: Exp Date: Vis Date: Dose: Site: Funding Source: Infor Source: 01
(2) 02/08/2021 COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 mL dose 207 Age: 19y VFC: Provider: DOH, Doctor Location: My Location Lot#: Manufacturer: Exp Date: Vis Date: Dose: Site: Funding Source: Infor Source: 01

COVID-19	02/08/2021 COVID-19, m... (207)	03/01/2021 COVID-19, m... (207)
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- To make this pre-visit planning step easier, create a Health Registry Alert so MDLand can automatically pop up a pink window for patients who do not have a COVID-19 vaccine recorded in the chart ([see setup steps](#)). When this alert appears, the care team will know that the COVID-19 vaccine status must be assessed further. If an alert does not appear, the user may need to click *Re-Generate Alert/Reminder* to make sure.

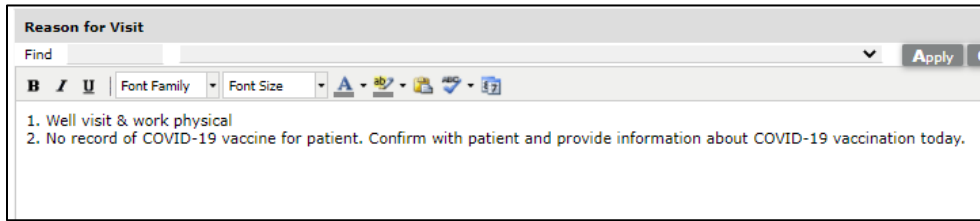


- During pre-visit planning, a medical assistant can use the MDLand bi-directional connection to NYC’s Citywide Immunization Registry (CIR) to check a patient’s COVID-19 vaccination status. This will show vaccination records for vaccines administered in NYC. From the office visit, open the *Medical History* link in the upper right corner the chart, go to the *Vaccine* section and click *Edit*. The Immunization Schedule will open. Click *Record Up/Download* and then *Download All Vaccines* and vaccination information will be automatically pulled from CIR. If a COVID-19 vaccine is shown, make sure it is added correctly to the chart.



- During patient intake or rooming or triage, any patient whose vaccination status is still unknown should be asked by a member of the care team (e.g., medical assistant or nurse) whether they have received a COVID-19 vaccination. To ensure this step happens, after pre-visit planning

shows there is no COVID-19 vaccine record, the medical assistant should add an item to the *Reason for Visit* section of the chart to ensure vaccination is prioritized for assessment and discussion during the visit.



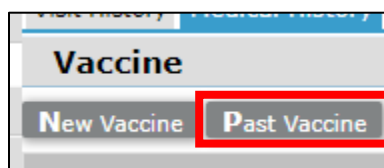
2. Document all COVID-19 vaccines administered both in your practice and elsewhere

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:** From the *Vaccine Edit* activity (Medical History > Vaccine > Edit), click *New Vaccine* and complete all required fields with the information about the vaccine administered. Then click *Save*.



- **To document a COVID-19 vaccine administered elsewhere:** From the *Vaccine Edit* activity (Medical History > Vaccine > Edit), click *Past Vaccine* and complete all required fields with the information about the vaccine administered. Then click *Save*.



- Note – if you are uncertain which vaccine from the list to select, refer to the number on the righthand side – this is the vaccine’s CVX code. 207 is Moderna, 208 is Pfizer, and 212 is Janssen. You can click *Code Reference* within MDland to double check these CVX codes.

COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 mL dose (207) COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose (208)	Code Reference
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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 an Order Set and Decision Support to more efficiently document the most common points a provider will cover when providing vaccine information ([see setup below](#)). This can be accessed either by clicking the hyperlink in the pink or by clicking *Decision Support* in the upper right corner of the Office Visit window. Clicking *Apply* will add all selected elements to the progress note.

- *Refusals:* If a patient refuses or is not yet willing to be vaccinated, document this information in the *Treatment Plan* section of the note.

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.

- If you find there is a large amount of information to share with patients about vaccination options, or if you have patients who prefer a variety of options listed out in one place, you can build an *Other Letter* ([setup steps here](#)) in MDLand that includes key information and share with patients by printing from *Patient Home*.

The screenshot shows an email template editor. At the top, there is a 'Template:' dropdown menu with 'COVID-19 Vacc Information NYC' selected and a 'Customize' button. Below the template name, the address for 'DOH Test Clinic' is listed: 185 Great Neck Road, Suite 4J, New York NY 11021, Tel: 212-363-8000, Fax: [blank]. The recipient information is: Test, Patient 01, TianHe Bei 890, New York NY 10010.

The main body of the email contains the following text:

Dear Patient 01 Test,

Today we discussed the importance of the COVID-19 vaccine. Below is information and reminders that will help you to schedule and receive your COVID-19 vaccination.

Find a vaccine near you with Vaccine Finder: <https://vaccinefinder.nyc.gov>

Book an appointment at a NYC-run vaccination site: <https://vax4nyc.nyc.gov>. You can also call 87-VAX-4NYC for help in scheduling your appointment, including finding a site that can accommodate any special needs you have (translation, accessibility, etc.). [Incentives](#) are available to those who receive the COVID-19 vaccine from an NYC site.

Cost: Receiving the COVID-19 vaccine will have no cost to the patient, regardless of insurance status or immigration status

Educational Materials

[What New Yorkers Need to Know about the COVID-19 Vaccine](#)

[FAQs for Youth and Families](#)

Thank you for taking this important step to get vaccinated and protect the health of you and your family.

Sincerely,
DOH, Doctor, MD

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 *Health Registry* report to identify patients who are eligible for a COVID-19 vaccine but who do not have a recorded COVID-19 vaccine in the chart ([setup steps here](#))

Report

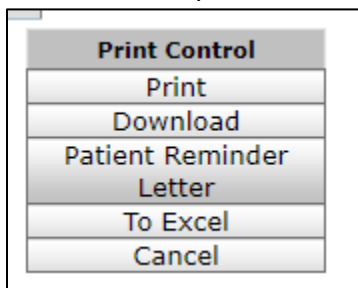
Close

Name: COVID-19 Vaccine Report
 Criteria:
 Gender: Both
 Age: 12 years to 120 years

<input type="checkbox"/>	Patient	Gender	Date of Birth	Age	Last Office Visit	Preferred Contact Method
<input checked="" type="checkbox"/>	bpm, test	Female	02/01/1980	41	08/10/2021	SMS
<input checked="" type="checkbox"/>	Test, HTN	Female	02/01/1980	41	08/10/2021	SMS
<input checked="" type="checkbox"/>	test, olivia	Female	06/06/1991	30	08/05/2021	SMS
<input checked="" type="checkbox"/>	Test, Patient 01	Male	01/01/2002	19	08/18/2021	Phone
<input checked="" type="checkbox"/>	WAYNE, BRUCE	Male	02/06/1946	75		Phone
<input checked="" type="checkbox"/>	Whiteside, Kara	Female	10/11/1952	68	08/11/2021	Phone

Total 6 record(s).

- This report can be printed, downloaded to Excel, or used to generate reminder letters which can be sent to patients



- Opening the full report by clicking the hyperlink under *Action History* will also allow to mass send a text (SMS) message to patients ([setup steps here](#))

Create Report

Action History

Total 1 actions have been taken base on this disease management guid

Report Date	Create By	Total Results
08/20/2021	DOH, Doctor	6

Health Registry Report - COVID-19 Vaccine Report(08/20/2021)

Refresh Print List To Excel Show ID **Batch Send SMS** Close Show

Criteria:
 AND DEMOGRAPHICS (Both, Age from 12-120)
 AND VACCINE (In 730 Day(s) before current date, Vaccine: COVID-19 vaccine, vec

Patient	DOB	Age	Sex	Address	C
bpm, test	02/01/1980	41	F	123	se

MDLand Setup

A. Set up Health Registry Alert for COVID vaccine

1. Click the Health Registry icon on the left side of the MDLand window
2. Click New to create a new alert
3. Give the alert a name and select the *Alert/Reminder*



The "New Guideline" dialog box is shown. It has a title bar "New Guideline". Below the title bar, there are three fields: "Guideline Name" with the text "COVID-19 Vaccine Alert", "Guideline Type" with a dropdown menu showing "Alert/Reminder", and "Enable" with a checked checkbox. At the bottom, there are two buttons: "Save" and "Cancel".

4. Click *Add Operator* and select *Demographic*. This will tell MDLand which patients to look for. First, select *Both* genders, then input the ages this alert should look for (e.g., 12 years to 120 years), and check *Active* to set this alert for active patients

The "Action Guideline Editor" dialog box is shown. It has a title bar "Action Guideline Editor". Below the title bar, there are four buttons: "Save", "Refresh", "Delete", and "Close". Below the buttons, there is a section titled "Demographics". In this section, there are three radio buttons for "Patient Gender": "Male", "Female", and "Both", with "Both" selected. To the right of these radio buttons is a checked checkbox labeled "Active". Below the gender options, there are two sets of input fields for "Patient Age": "From: 12" and "To: 120". Each set has radio buttons for "Years", "Months", and "Days", with "Years" selected for both. Below the age options, there are two sets of input fields for "Patient DOB: From:" and "To:", each with a date picker icon.

5. Click *Save*
6. Click *Add Operator* again and this time, select *Vaccination*. Tell the system how far to look back (for example 730 days/2 years), add the COVID-19 vaccinations by clicking them in the lefthand box and moving them to the righthand box with the right-arrow ►

7. Check *Exclude* so the system looks for patients who do NOT have one of these vaccines

Action Guideline Editor

Save Refresh Delete Close

Vaccination

In 730 Day(s) before current date Date From: To:

Unselected items:

- Adenovirus types 4 and 7
- adenovirus, type 4
- adenovirus, type 7
- adenovirus, unspecified formulation
- anthrax
- anthrax immune globulin
- AS03 Adjuvant
- BCG
- botulinum antitoxin
- cholera, BivWC
- cholera, live attenuated
- cholera, unspecified formulation
- cholera, WC-rBS
- CMVIG
- COVID-19 IV Non-US Vaccine (BIBP, Sinophar
- COVID-19 IV Non-US Vaccine (CoronaVac, Sir
- COVID-19 IV Non-US Vaccine (COVAXIN)
- COVID-19 IV Non-US Vaccine (QAZCOVID-IN

Selected Items:

- COVID-19 vaccine, vector-nr, rS-Ad26, PF, 0.5
- COVID-19, mRNA, LNP-S, PF, 100 mcg/0.5 ml
- COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL

Exclude

8. Click *Save*
9. Add the alert message that you would like to pop up in the patients' charts in the *Action (Alert/Reminder)* section of this window, check *Every Time*, and click *Save Action*.

Action (Alert/Reminder)

Effective Period: From: To:

Alerts Display: Once Only Every Time

Reminder/Alert: Patient has not started COVID-19 vaccination. Provide information and refer to vaccination site.

B. Set up COVID Vaccine Order Set

1. Open MDLand Settings and navigate to the *Order Set* menu

- Body Diagram
- Photo Comparison
- PQRS
- Decision Support
- Order Set**

2. Add the order set name (e.g. *COVID-19 Vaccine Information*) to the Name field, and add the templated note you wish to pull into your Assessment/Plan in the *Assessment/Plan* box.

Order Set Customization

Save Refresh New Delete Close

Order Set: Find: COVID-19 Vaccination Information Apply

Name*: COVID-19 Vaccination Information

Tag: Add Tag

Assessment/Plan: Find: Apply Customize

B / **I** **U** Font Family Font Size A ABC

Provided information benefits of the COVID-19 vaccine. Patient confirmed understanding. Answered questions about benefits, potential side effects, and risks of remaining unvaccinated. Patient indicated is ready to consider vaccination. Provided information and options to schedule vaccination as well as take home educational materials.

3. Add any other pieces (e.g., do you want to have a *Follow-up* task to remember to follow up with this patient regarding COVID-19 vaccine after the visit?) and click *Save*

Referral Letter: Need Referral Letter

New Appointment: Create New Appointment in Day(s)

Reminder: Need FollowUp in 21 Day(s), Subject: Follow up on COVID Vaccin Assign To: DOH, Doctor(DOH)-MD

C. Set up Health Registry [Decision Support](#) for COVID Vaccine

1. Because the setup is almost identical to the Health Registry Alert set up, you can open the Health Registry Alert for COVID-19 Vaccine and *Save As a Decision Support* type of alert.
2. Return to the Health Registry activity and click *Refresh*. You will now see the Decision Support. Use the hyperlink to open the Decision Support. Here you will add the *Order Set* created earlier and click *Save Action*

Action (Decision Support)

Order Set : Add Customize

COVID-19 Vaccination Information [Delete]

Save Action Action History

3. Now, for all eligible patients, providers can quickly access the order set from the office visit by clicking the *Decision Support* hyperlink.

D. Set up Health Registry Report for COVID vaccine

Guideline	
Guideline Name:	COVID-19 Vaccine Report Update Name Refresh Save As Close
Guideline Type:	Report
Operators	
Add Operator	
AND Demographics(Both, Age from 12-120)	
AND Vaccination(In 730 Day(s) before current date, Vaccine: COVID-19 vaccine, vector-nr, rS-Ad26, PF, 0.5 mL, COVID-19, mRN	

E. Set up COVID-19 Information Letter

<input type="checkbox"/> EMR
EMR Options
General
Medical History
Office Visit
Printing

Other Letter	
Save Refresh New Delete Close	
Template List:	COVID-19 Vacc Information NYC
Name:	COVID-19 Vacc Information NYC
Description:	<div style="border: 1px solid gray; padding: 5px;"> <p>Dear [#KW:PatientNameFML#],</p> <p>Today we discussed the importance of the COVID-19 vaccine. Below is information and reminders that will help you to schedule and receive your COVID-19 vaccination.</p> <p>Find a vaccine near you with Vaccine Finder: https://vaccinefinder.nyc.gov</p> <p>Book an appointment at a NYC-run vaccination site: https://vax4nyc.nyc.gov. You can also call 87-VAX-4NYC for help in scheduling your appointment, including finding a site that can accommodate any special needs you have (translation, accessibility, etc.). Incentives are available to those who receive the COVID-19 vaccine from an NYC site.</p> <p>Cost: Receiving the COVID-19 vaccine will have no cost to the patient, regardless of insurance status or immigration status</p> </div>

F. Set up COVID-19 SMS Template

The screenshot shows a software interface for setting up an SMS template. At the top, a settings menu is open, listing various system options. The 'SMS' option is highlighted. Below the menu, the 'SMS Settings' section is active, displaying a form with the following fields:

- Message Type:** Health Maintenance (dropdown menu)
- Template:** (dropdown menu)
- Template Name:** COVID-19 Vaccination Reminder (text input field)
- Language:** English (dropdown menu)
- Message:** (large empty text area)

Buttons for 'Save', 'Refresh', 'New', 'Delete', and 'Close' are located above the form. A 'Settings' gear icon is visible to the left of the settings menu, and an 'Other Letter' button is to the right.

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)