COVID-19 Vaccine Documentation
Tips for Practice Fusion

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 Practice Fusion 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. Consider the following Practice Fusion recommendations as you update your process:

- 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 (*Patient Chart > Summary Tab > Go To > Immunizations*). This will show a list of all vaccines recorded in your system for this patient.
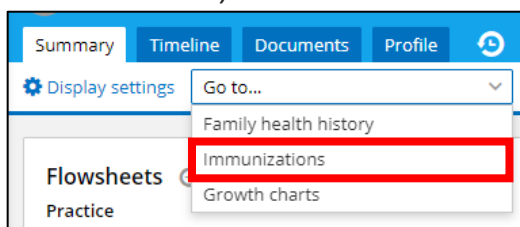
- Also during pre-visit planning, a medical assistant can use the Practice Fusion bi-directional connection to NYC's Citywide Immunization Registry (CIR) to check a patient's COVID-19 vaccination status. This will show vaccination records for vaccines administered in NYC. From the *Immunizations* activity, click the *Search in Registry* button, confirm the patient's demographics, and click *Search.* If a COVID-19 vaccine is shown, make sure it is added correctly to the chart.

- If a COVID-19 vaccine record is found from this search or by any other means prior to, or during, the visit – add the vaccine to the patient's record using the *Add Vaccine* button in the *Immunizations* activity, to ensure your records are up to date.
- If it is unclear whether the patient has received a COVID-19 vaccine, add a note to the visit's *Chief Complaint* to remind the care team to ask the patient during the visit. An helpful or additional option is also to use a *Pinned Note* added to the patient's *Profile* – this will pop up the next time the patient and his/her visit is opened. Ensure *Auto-open note* is set to 'ON' to ensure this will pop up when the patient is seen.
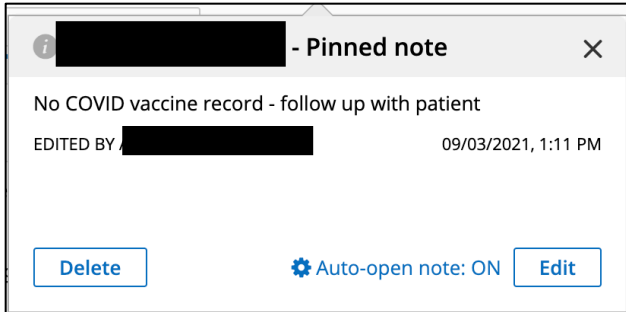
- If you use online check-in/intake in *Practice Fusion*, consider building a custom intake question that will prompt patients to answer about their COVID-19 vaccination status when they check in for their visit
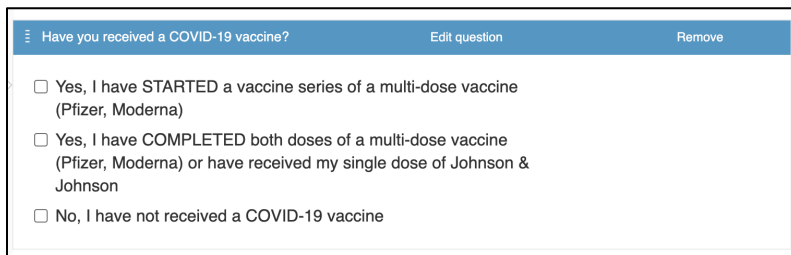
2. Document all COVID-19 vaccines administered both in your practice and elsewhere

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

- From the *Immunizations* activity, click *Add Vaccine*
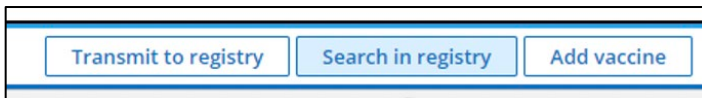
- If your practice is administering the patient's COVID-19 vaccine in your facility, use the *Administered* option. If you are updating the record to reflect a vaccine administration at another facility, use the *Historical* option. Search for the specific vaccine a patient received using the *Vaccine* lookup search box. Please note: if the patient has received two or three doses of a vaccine like Pfizer or Moderna, you will need to add this vaccine twice.

- Complete required fields to save the immunization. You may use the *Comments* field to note which facility administered an external vaccination.

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 a template to more efficiently document the most common points a provider will cover when providing vaccine information. To create a template, navigate to *Settings > Charting Templates > Create Template*.

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. Consider preparing and documenting this information in your EHR with the following recommendations:

- Create vaccine sites that are located conveniently to your patients as *Connections* so the information (address, phone number, etc.) will pre-populate when you print referral orders for patients.
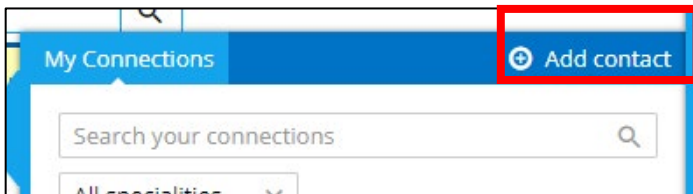

- Create a new *Referral Letter Template* that provides your patients with key information about getting vaccinated, including links to educational materials, etc.
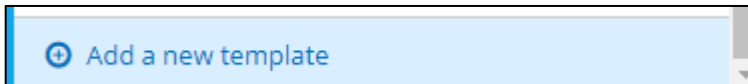
5. Conduct outreach to unvaccinated patients to encourage them to get vaccinated

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.

- The Practice Fusion system is able to generate lists of patients by age, clinical condition, date of recent visit, and more; however, at this time, is not able to generate a list based on immunization status. Instead, generate a *Patient List Report (NEW)* with criteria that help you identify active patients (suggestion: seen since 2020) who are eligible for vaccination at this time (for example: age 12+). This list can be exported to Excel, with patient contact info, to help reach out to patients who are eligible by phone or email.
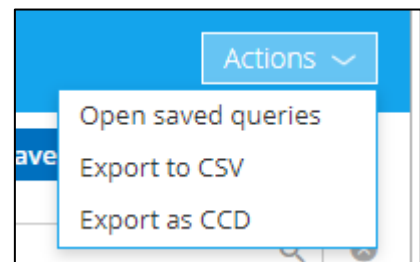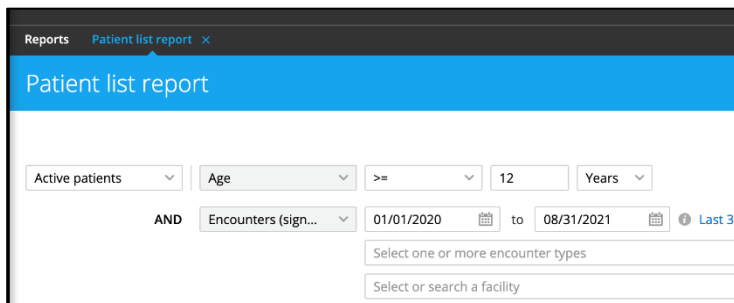
Additional Resources

- [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)