

COVID-19 Vaccine Documentation

Tips for eClinicalWorks

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 [eClinicalWorks \(eCW\) EHR](#).

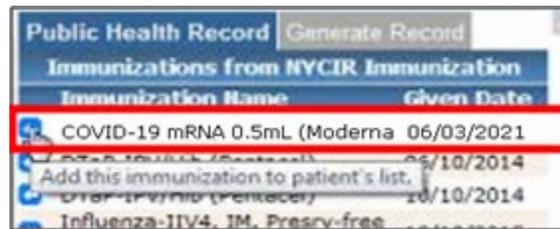
1. Ask all patients if they have received a COVID-19 vaccine

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.

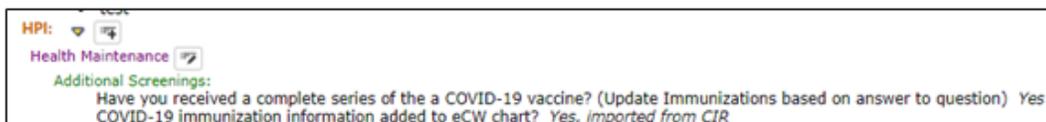
- Create an EMR Immunizations Alert (like CDSS alert, [see setup below](#)). eCW will show this alert under *Practice-Created Alerts* for all eligible patients who do not have a COVID-19 vaccination series documented in eCW *Immunizations*. A medical assistant can view this alert about vaccination status on the CDSS, along with other preventive and chronic guidelines, during pre-visit planning.



- During pre-visit planning, a medical assistant can use the eCW 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 eCW Progress Note, open the Immunization tool **Imm** and on the righthand side you will see the *Public Health Record* tab, which shows records for this patient from CIR. Clicking the blue arrow to the left of each vaccine (if patient has had two doses, you will need to click both blue arrows) will quickly incorporate these into the eCW record as structured external immunizations. Incorporating these records into the chart will satisfy the Immunization EMR Alert (mentioned above) for COVID-19 vaccine as well.



- 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. Build a question into your most commonly used progress note templates, or into your intake template, that will remind the care team to ask this question and to document structured information about COVID-19 vaccinations in the Immunizations section of the chart ([see setup below](#)).

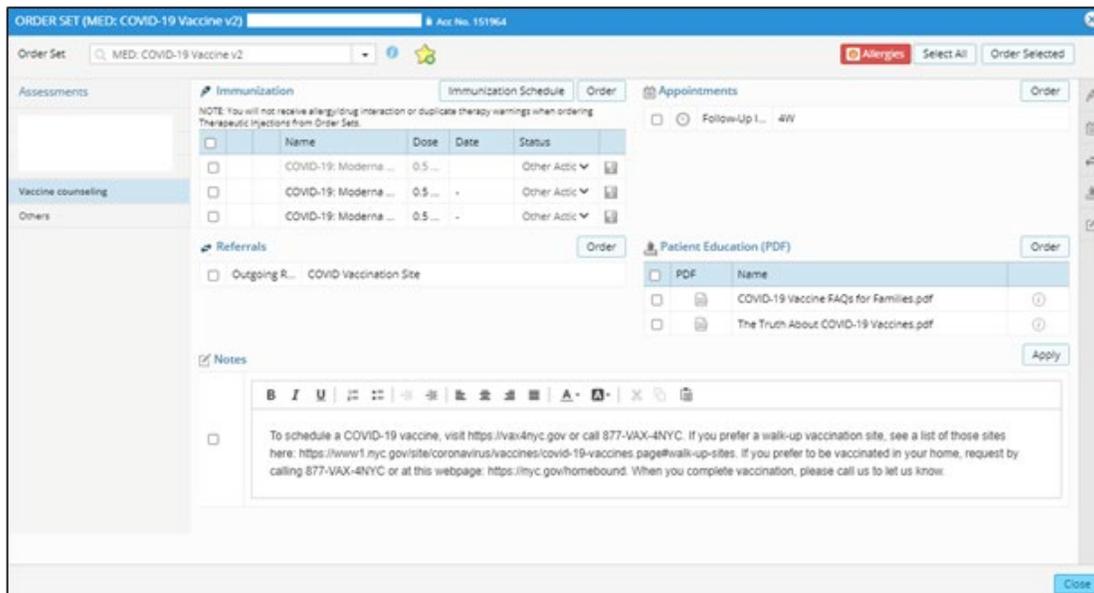


2. Document all COVID-19 vaccines administered both in your practice and elsewhere

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:

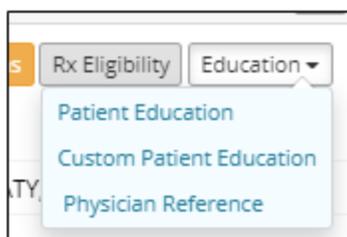
Use the *Immunizations* activity **Imm** from the Progress Note to record immunizations administered by your practice. Click Add, select the appropriate COVID-19 vaccine manufacturer/lot administered, complete all required fields, and ensure the status is *Administered*.



- *Refusals*: Train staff to document refused vaccines in the Immunizations tool of the eClinicalWorks chart, with a status of *Refused*. Do not suppress the immunization or any alert, so you can be reminded to ask again at the next visit.

| | | |
|--------|------------------|---------|
| Status | Not Administered | ▼ |
| Reason | Refused | ... Clr |

- To streamline providing educational materials, find out if your third-party patient education vendor makes COVID-19 vaccine educational resources available. Each can be printed and sent to the eCW patient portal for patients to take home (see setup below)



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.

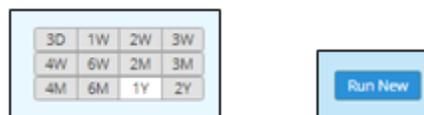
- If referring to an external vaccination site, build the vaccination sites most convenient to your patients as *Referring Providers* including information like address and phone number. This way, you can easily select from these when creating a referral order. Once the Referring Provider and Specialty are configured ([see setup below](#)) you can select from an Order Set, from a Quick Order, or from the Treatment screen.

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 a *Letter* in eClinicalWorks that includes key information and share with patients by printing from the Progress Note.

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 *Registry* report 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. The quickest way to search is to:
 - Use the *Encounters* tab to find all active patients (e.g., patients with a visit in the last 1 year or 2 years)



- Use the *Demographics* tab to restrict to a SUBSET of patient 12+

- Use the *Imm/T.Inj* tab to SUBSET(NOT) on CVX 207, 208, 211, from the period 12/01/2020 – present

- From the Registry, export this list of patients if you prefer to reach out by phone by clicking *Copy* and then *CSV*, which will export an Excel file

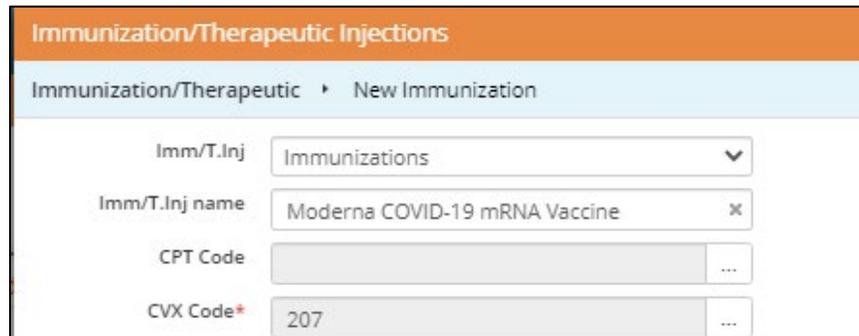
- From the Registry, send a mass message using the Messenger tool, through which you can send voice, text, portal, or email messages to all patients (or some patients) who appear in the Registry search results. Check off the patients who should receive the message(s) and click *Messenger* to send.

eClinicalWorks Setup

A. Complete pre-work setup in eCW

1. If you have not done so, update the CVX codes in eCW to include all COVID-19 vaccine CVX codes
 - a. A provider who has Admin privileges must be logged in to import this information
 - b. Navigate to Admin Band > Content Distribution
 - c. Click the green download icon in two rows: **MVXCODES (Manufactures of Vaccines MVX 2020)** and **CVXCODES (Immunization Vaccines Administered CVX 2021)**

 - d. Once both downloads are complete, log out of eCW and log back in.
2. Create Immunizations for Pfizer, Moderna, and Janssen
 - a. Navigate to Menu > EMR > Immunizations/Therapeutic Injections and click *New*
 - b. Add all required options to create each immunization record. If you are only recording outside immunizations, you will only need an Immunization Name and CVX code. If you will be administering these vaccines at your practice, also add CPT code, administration code, billing units, dose, and diagnosis

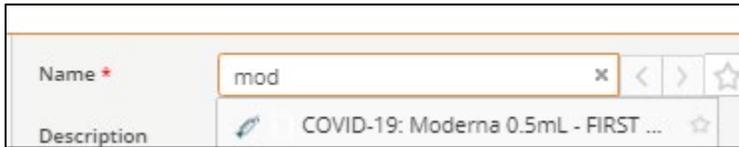


| Immunization/Therapeutic Injections | |
|---|-------------------------------|
| Immunization/Therapeutic ▸ New Immunization | |
| Imm/T.Inj | Immunizations |
| Imm/T.Inj name | Moderna COVID-19 mRNA Vaccine |
| CPT Code | |
| CVX Code* | 207 |

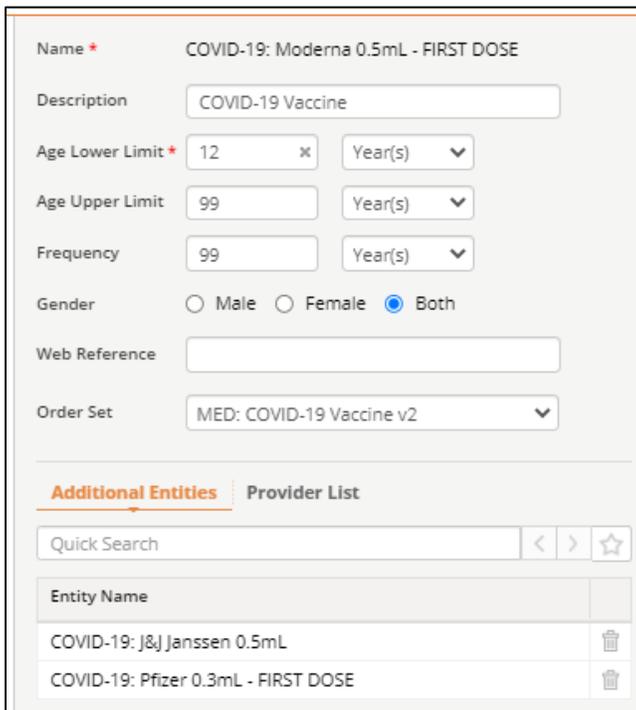
- c. Click *OK* to save.
 - d. If you will be administering COVID-19 vaccines, you will also need to add lot numbers as you receive new inventory. Do this from *Menu > EMR > Vaccine Lot Numbers*
- ### B. Create COVID-19 Vaccine Order Set
1. Once you have completed the pre-work (above), navigate to *Menu > EMR > Order Set Administration*.
 2. Click *New*, add the order set's name to the *Description* field, and click *OK*
 3. Add orders to your order set as appropriate. For example, if you will be administering vaccines in your practice, add the immunizations you will administer to the *Immunization* section. Consider also adding the appropriate follow-up interval (e.g. four weeks for Moderna) to the *Appointments* section. If you will be referring patients to another site, consider adding a referral to the vaccination site to the *Referrals* section.

C. Build COVID-19 Vaccine Immunization EMR Alert

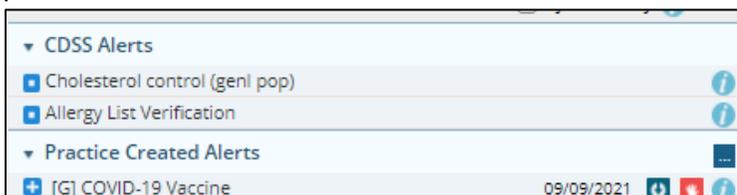
- Once you have completed the pre-work and order set (above), navigate to *Menu > EMR > Alerts > Immunization Alerts* and click *New*
- Select one of your COVID-19 vaccines from the *Name* field. Any of the three is okay to select.



- Complete the remaining fields according to how you want the alert to be setup: based on age, etc. Link the order set you created in the *Order Set* field. Add the other vaccine names to the bottom field *Entity Name*. This will ensure that the alert will be completed by any of the three current COVID-19 vaccines.

A screenshot of the full alert configuration form. The 'Name' field is set to 'COVID-19: Moderna 0.5mL - FIRST DOSE'. The 'Description' is 'COVID-19 Vaccine'. 'Age Lower Limit' is 12, 'Age Upper Limit' is 99, and 'Frequency' is 99, all with 'Year(s)' dropdowns. 'Gender' has radio buttons for 'Male', 'Female', and 'Both', with 'Both' selected. 'Web Reference' is empty. 'Order Set' is 'MED: COVID-19 Vaccine v2'. Below is a section for 'Additional Entities' with a 'Provider List' tab. A 'Quick Search' field is present. The 'Entity Name' table lists 'COVID-19: J&J Janssen 0.5mL' and 'COVID-19: Pfizer 0.3mL - FIRST DOSE', each with a trash icon.

- Click *OK*
- Open a patient to confirm your setup is complete. For example, in the example alert above, any patient 12+ who does not have a COVID-19 vaccine recorded in the *Immunizations* activity in the chart should have this alert appear in their CDSS tab of the righthand chart panel.



D. Set up template(s) with COVID-19 vaccination status question and/or Vaccine Information template to document education and information provided to patient

1. Navigate to *Menu > File > Templates*
2. If you are adding vaccine items to an existing template (e.g. an intake template or well visit template), select that template and click *View*. Otherwise, click *Add New Template*.
3. Add any items to the appropriate section of the template (e.g. *Preventive Medicine* for education and information provided; *HPI* for screening)
4. You do not need to save the template; it will be automatically saved with any changes you make.

E. Create a Referring Provider and Specialty for “COVID Vaccination Site”

1. To create a custom specialty, navigate to *Menu > EMR > Miscellaneous Configuration > Configure Specialty*.
 2. Click *Add* and name the new specialty “COVID Vaccination Site” or similar.
 3. To create a Referring Provider, navigate to *Admin Band > Referring Physicians* and click *Add New*
 4. Select an Entity Type of *Non-Person Entity*
 5. If the site you refer to has an NPI known to you, enter the NPI. Otherwise, use the placeholder NPI of 1999999992.
 6. Add the vaccine site’s name, address, and contact information that will be helpful to your patients to have on hand when they review their referral order.
 7. Enter the CAPTCHA validation code and click *OK* to save.
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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)