

COVID-19

Vaccination Workflow

Epic Ambulatory
Epic Cadence

v 2020



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Workflow Overview

Scheduling of COVID-19 vaccinations will largely take place over MyChart by means of patient self-scheduling. Some patients will be manually scheduled by a staff from a workqueue. Patients will be scheduled to receive COVID-19 vaccinations in two separate doses with very specific time in between the first and second dose, depending on which vaccine is being given. Upon completion of the vaccine administration by a staff member, patients will be required to schedule a second dose. If patients who are our internal healthcare workers experience adverse side effects, these can be assessed and documented by occupational health.

[Click here to access COVID-19 vaccination workflow video](#) (password is epic2020)

*Please Note, the Sidebar report (preview checkbox) will be available beginning the week of 12/21/20

Schedule an Appointment from a Workqueue

Some patients will not have MyChart accounts and will need to have their vaccination scheduled by staff. A workqueue will be used to identify those individuals who have had an order placed, but have yet to complete self-scheduling via MyChart.

1. Staff working the scheduling workqueues should navigate to their **workqueue list** and the **Appt Requests** tab.
2. Locate workqueue **#63066 COVID19 VACCINATION ORDERS TO SCHEDULE** or **#62123 YHC COVID VACCINATION ORDERS TO SCHEDULE**, depending on which you've been directed to use. **Double-click** to open the workqueue.

F	ID	Name	Service Area	Active Count	Active	WQ Status
☆	62662	DENTAL SURGERY TREATMENT VISITS TO...	YALE NEW HAVEN DE...	11	Yes	
☆	62663	DENTAL TREATMENT VISITS TO BE AUTHO...	YALE NEW HAVEN DE...	5	Yes	
☆	62664	DENTAL TREATMENT VISITS TO BE AUTHO...	YALE NEW HAVEN DE...	1	Yes	
☆	62665	DENTAL TREATMENT VISITS TO BE AUTHO...	YALE NEW HAVEN DE...	0	Yes	
☆	62759	YM/YNH 24 HOUR BP MONITOR ORDERS T...	YALE NEW HAVEN HE...	1	Yes	
☆	62764	LMH RAD/CARD IMAGING (LMH) - US MFM	YALE NEW HAVEN HE...	0	Yes	
☆	63011	Y RIS YNH US CHANGE ORDERS	YALE NEW HAVEN HE...	0	Yes	
☆	63034	LMH RAD/CARD IMAGING (LMH) - CT	YALE NEW HAVEN HE...	0	Yes	
☆	63035	Y RIS BREAST SURGERY RADIOLOGY ORD...	YALE NEW HAVEN HE...	0	Yes	
☆	63066	COVID19 VACCINATION ORDERS TO SCHE...	YALE NEW HAVEN HE...	12	Yes	
☆	63078	LMH RAD/CARD IMAGING (LMH) - MRI	YALE NEW HAVEN HE...	0	Yes	
☆	63079	LMH RAD/CARD IMAGING (LMH) - NUC	YALE NEW HAVEN HE...	0	Yes	
☆	63123	YHC COVID VACCINATION ORDERS TO SC...	YALE NEW HAVEN HE...	0	Yes	

3. Single-click to select a patient, then click **Schedule**.

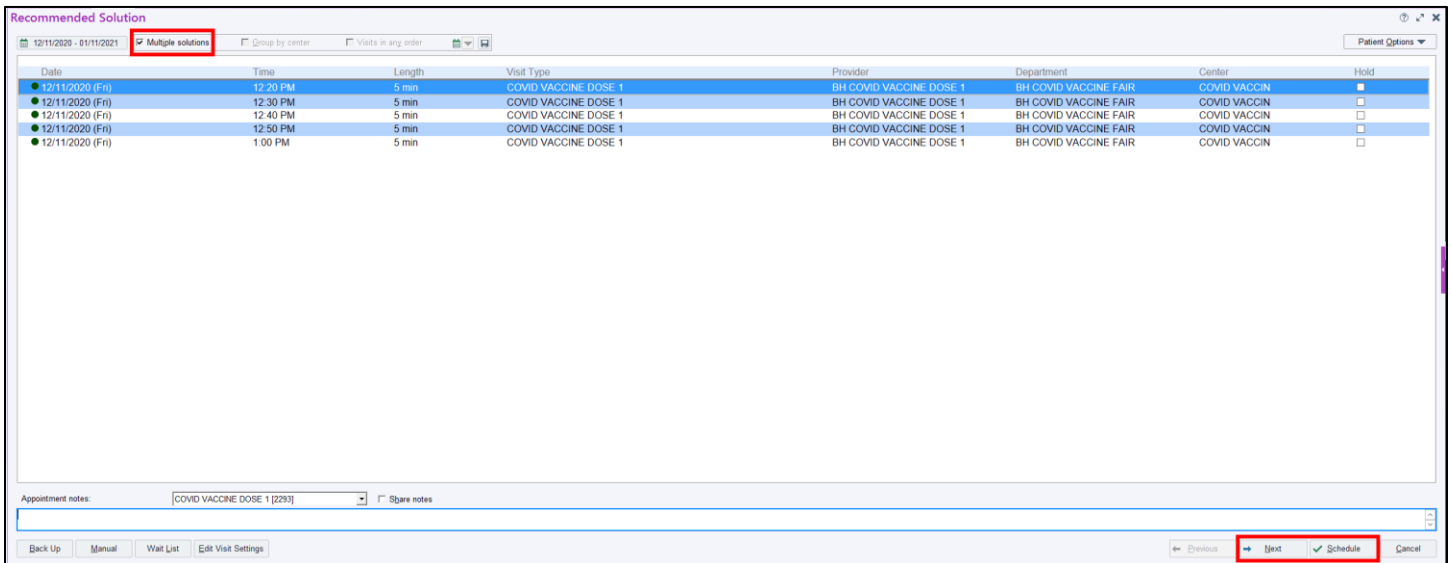
Creation ...	MRN	Name	Procedure Name	Cat
12/09/2020	MR9019369	AARTM,FOUR	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/08/2020	MR2470	QUINN,HARLEY	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR1420	WIDOW,BLACK	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR9017448	ZZZAMB, ANNE	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR2546	ZZZAMB, ANNEMARIE	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/11/2020	MR9018769	ZZZAMB, ANNEMARIE	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR2538	ZZZASAP, ASTHMA	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR2533	ZZZASAP, ORTHO	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/10/2020	MR9017387	ZZZCADENCE, KRIST...	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/11/2020	MR9018474	ZZZCADENCE, SAMA...	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/07/2020	MR9020338	ZZZCSHH, FEMALE	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN
12/09/2020	MR2616	ZZZTEST, JAMES	COVID-19 GENERIC VACCINE ORDER FOR SCHEDULING	IMN

- You are presented with a decision tree. Ask the patient each question and document the patient's responses using the various dropdowns.

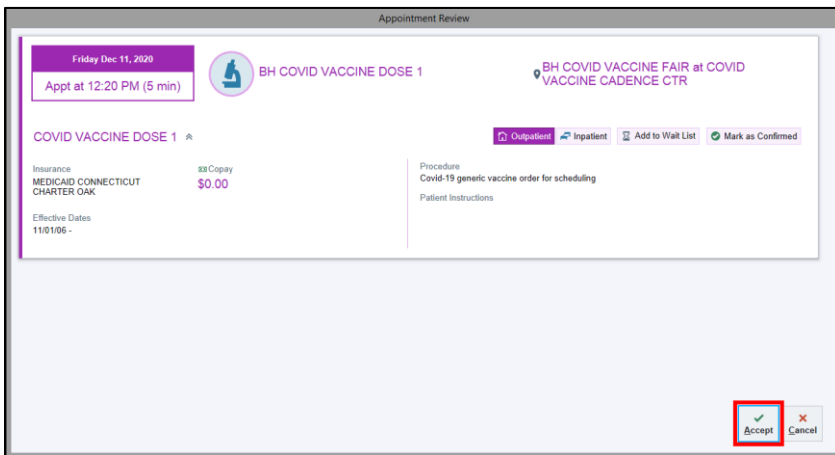
- Read the **results**. These results will dictate whether or not the patient should be scheduled for a COVID Vaccine.
- View both results above. Click **Apply** or **Deny** as appropriate.
- If able to proceed with scheduling, you are brought to a **Make Appointment** form with the **Visit Type** and a pool of **resources** populated automatically.
- The **auto-search** box is checked automatically. Uncheck this box if you prefer not to use this method.
- Click **Search** to locate an appointment time.

- Quick Tip:** you can click to select one or more of the resources and **right-click** to use only these to search or remove these from your search.

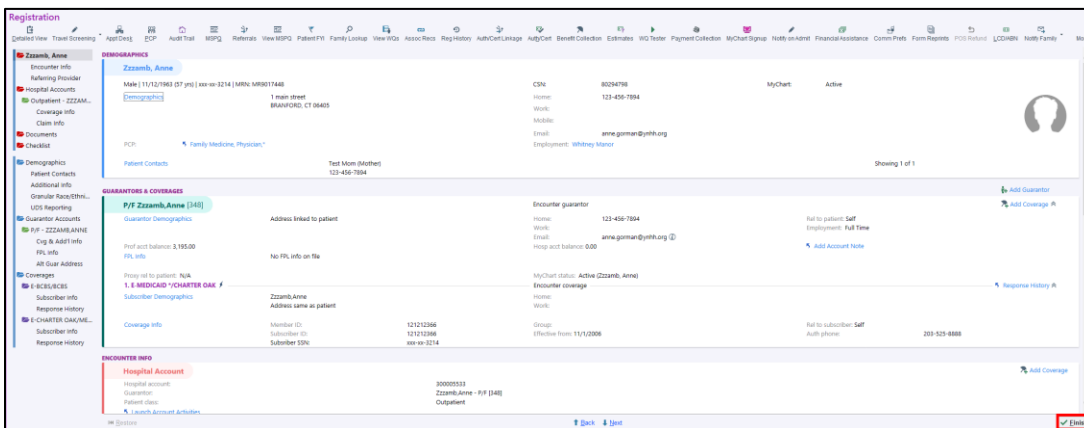
- After clicking search you are presented with a Recommended Solution form. Based on the resources selected in the make appointment form, this will bring you the next available appointments meeting the criteria of the order.
- Use the **multiple solutions check box** to view more appointment options.
- Click **Next** to show additional dates/times.
- When an appropriate appointment date/time is identified, single-click to highlight it then click **Schedule**.



- Review details with the patient and click **Accept** on the **Appointment Review** screen.



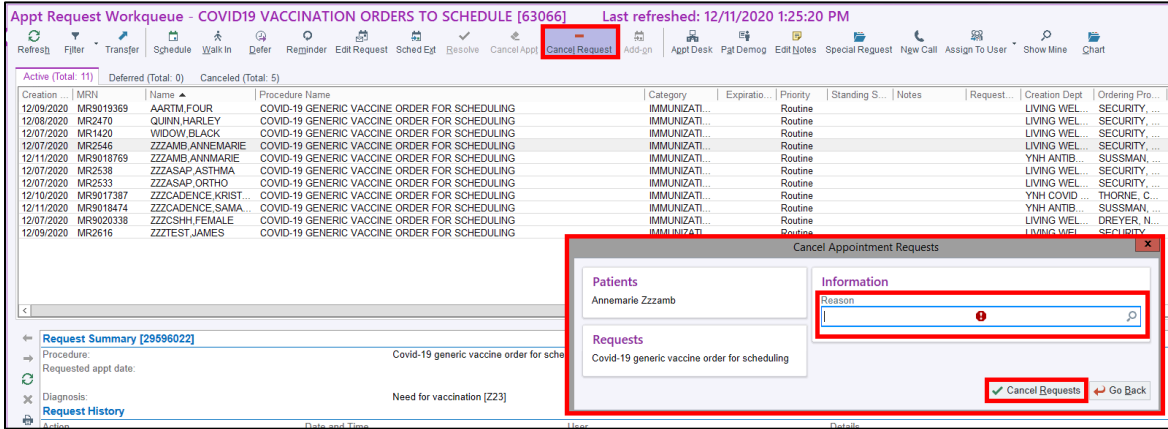
- Click **Finish** to proceed through any registration screens.



- The appointment has now been scheduled and will fall off of the workqueue.

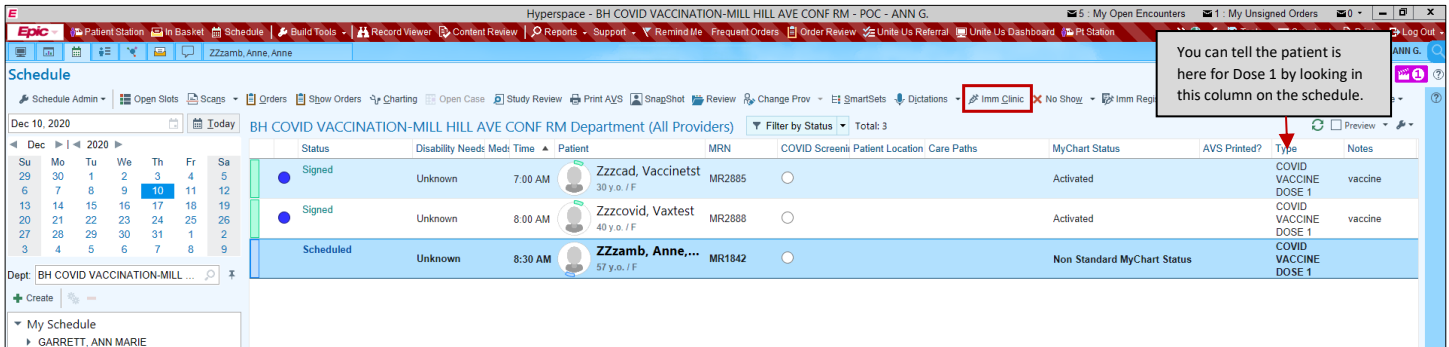
Remove Requests from a Workqueue

1. It is possible that the patient will decline to schedule or not meet clinical criteria.
2. From the workqueue, click to highlight the patient and click **Cancel Request**.
3. Enter a **reason** as to why the patient does not wish to pursue scheduling or indicate that the patient did not qualify based on answers to the decision tree. To find an appropriate reason, **type** in **“COVID”** in the reason field and click through the various options. Click **Cancel Requests**.

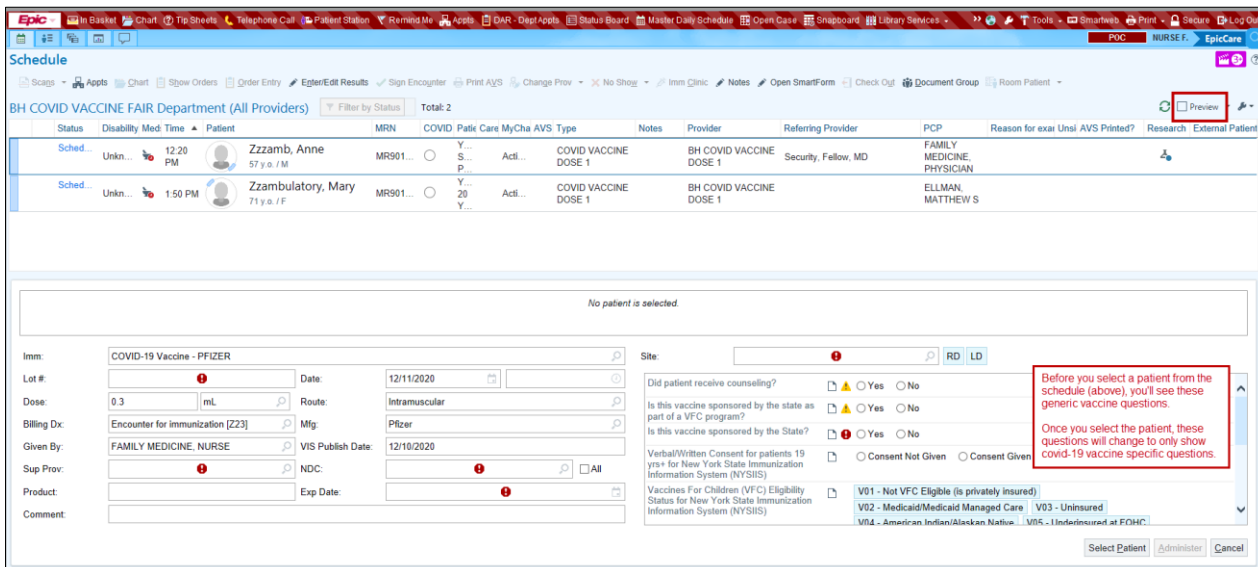


Document the Administration of Dose 1

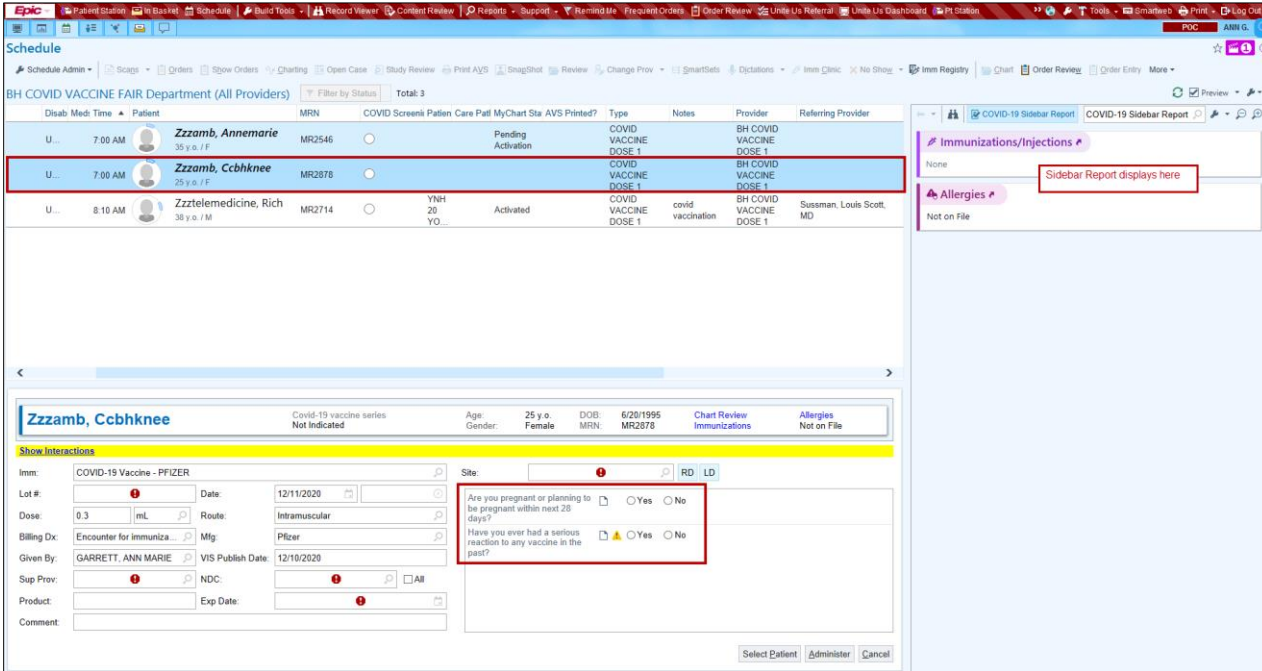
1. From the **Multi-Provider Schedule (MPS)** screen, click the **Imm Clinic** button.



2. You'll see a schedule of all employees who self-scheduled to receive the Covid-19 vaccine. Click the **Preview** checkbox to view the Covid-19 Sidebar report. This report will display any prior Covid-19 vaccinations which will be helpful information when you're documenting the administration of the Dose 2.

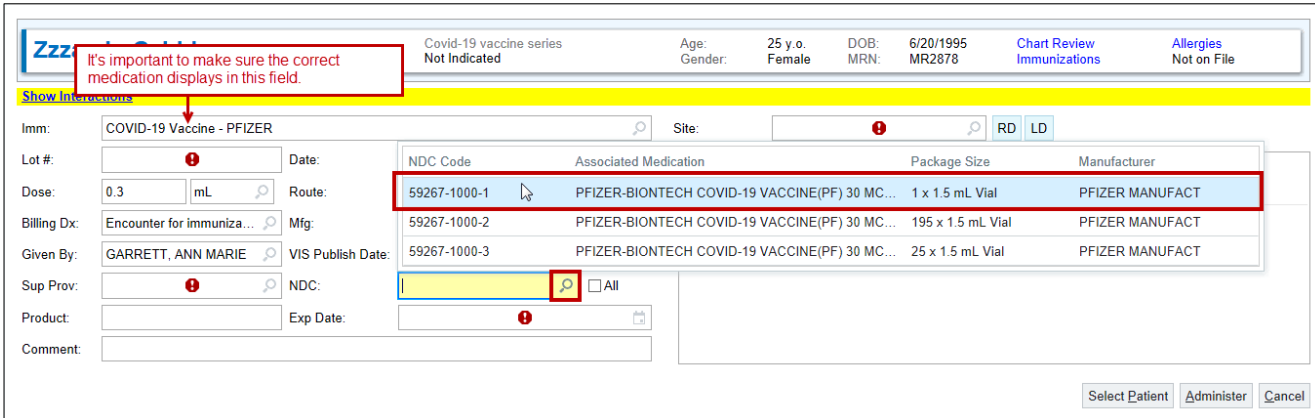


3. Click the patient's name from the schedule.
4. Answer the vaccine related questions that display (lower right hand side).

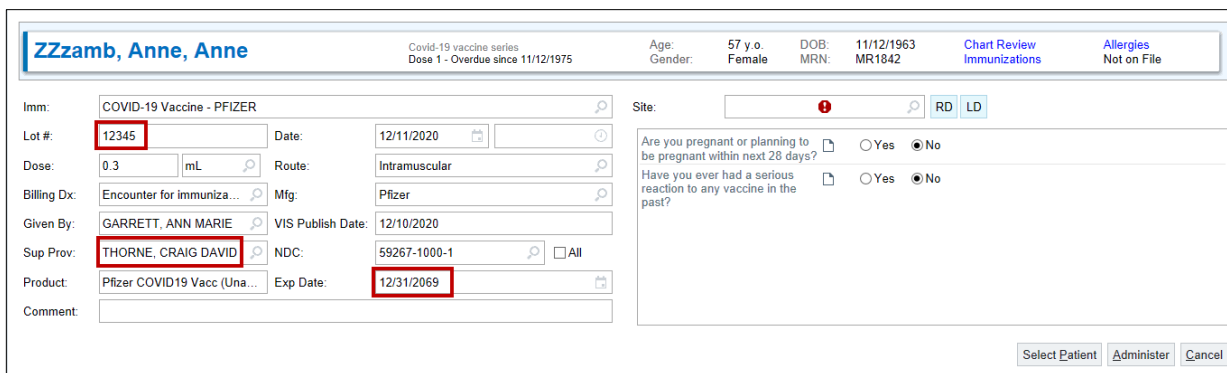


The very first time you administer the vaccine, the Pfizer medication will automatically display in the **Imm** field. Pfizer is first because we received that vaccine first. Just note, when Moderna vaccine is available, be careful to select the correct vaccine (manufacturer) in the **Imm** field.

5. Verify **COVID-19 Vaccine – PFIZER** displays in the **Imm** field. If needed, click the to select.
6. Click the in the **NDC** field and select **PFIZER-BIONTECH (59267-1000-1)**. Notice, the **Product** field populates.



7. In the **Exp Date** field, type '12/31/2069'. Be sure to enter the date in this format: **MM/DD/YYYY**.
8. Type the correct Lot number in the **Lot #** field.
9. In the **Sup Prov** field, type 'craig thorne' and press **Enter**. Dr. Thorne will be the supervising provider for all YNHHS employees.



10. Select the correct injection site in the **Site** field. Use the **RD** speed button to indicate Right Deltoid. Use the **LD** speed button to select Left Deltoid. You can hover over the speed buttons to see the meaning.
11. Click **Administer**. The vaccine order for the second dose will be generated for the patient automatically so they can schedule their second dose vaccine appointment.

Zzzamb, Anne, Anne Covid-19 vaccine series Dose 1 - Overdue since 11/12/1975 Age: 57 y.o. Gender: Female DOB: 11/12/1963 MRN: MR1942

Imm: COVID-19 Vaccine - PFIZER Lot #: 12345 Date: 12/11/2020 Dose: 0.3 mL Route: Intramuscular Billing Dx: Encounter for immunization Mfg: Pfizer Given By: GARRETT, ANN MARIE VIS Publish Date: 12/10/2020 Sup Prov: THORNE, CRAIG DAVID NDC: 59267-1000-1 Product: Pfizer COVID19 Vacc (Una... Exp Date: 12/31/2069

Site: Right deltoid **RD** **LD**

Are you pregnant or planning to be pregnant within next 28 days? Yes No

Have you ever had a serious reaction to any vaccine in the past? Yes No

Select Patient **Administer** Cancel

As soon as you select the next employee off the schedule, you'll notice the information from the last administration stays, saving you lots of time! All you'll need to do is:

- Confirm the medication is correct in the **Imm** field (manufacturer)
- Answer the questions
- Confirm the **Site**
- Click **Administer**

Schedule Second Dose

1. Note that appointment check in/out is automated for this workflow and no additional steps are needed for users.
2. Upon completion of first dose vaccine administration, an order will automatically be placed for a second dose.
3. Patients should be encouraged to access **MyChart** while still present at their appointment and schedule the next dose within the appropriate time period (21 days for Pfizer vaccine) using the self-scheduling method.
4. If a patient does not have MyChart or does not wish to self-schedule, staff should schedule the patient's second dose from the workqueue using the above steps used for the first dose scheduling.

Document the Administration of Dose 2

There are a few visual cues to let you know you are documenting the administration of Dose 2:

- The **Visit Type** column in the schedule will show **DOSE 2**.
- The Sidebar report will show that Dose 1 was administered.
- The banner will show the Next due date.

1. Click the in the **Imm** field and select the correct vaccine (manufacturer).
2. Document the NDC field first (then the product name will display automatically).
3. Enter the **expiration date** as 12/31/2069 (MM/DD/YYYY).
4. Enter the **Lot #**.
5. Enter 'craig thorne' as the **supervising provider**.
6. Use the **RD** or **LD** speed buttons to document the injection **site**.
7. Click **Administer**.

Zzzcad, Vaccinetst Covid-19 vaccine series Next due on 12/29/2020 Age: 30 y.o. Gender: Female DOB: 12/9/1990 MRN: MR2885

Imm: COVID-19 Vaccine - PFIZER Lot #: [redacted] Date: 12/29/19... Dose: 0.3 mL Route: Intramuscular Billing Dx: Encounter for... Mfg: Pfizer Given By: FAMILY ME... VIS Publish Date: 12/10/2020 Sup Prov: [redacted] NDC: [redacted] Product: [redacted] Exp Date: [redacted]

Site: **RD** **LD**

Are you pregnant or planning to be pregnant within next 28 days? Yes No

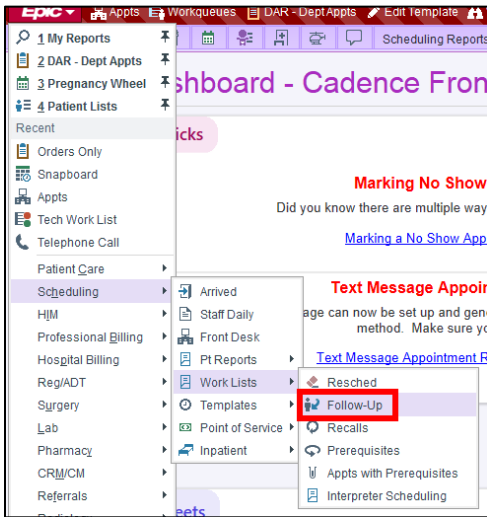
Have you ever had a serious reaction to any vaccine in the past? Yes No

Select Patient **Administer** Cancel

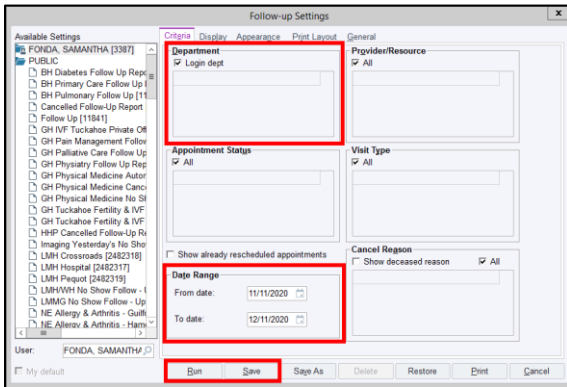
Follow Up Report for No Show

It is important that we are able to track those patients who no show or cancel vaccination appointments. To track these we utilize a follow-up report.

1. Navigate to the follow-up report by following the path **Epic**→**Scheduling**→**Work Lists**→**Follow-Up**



2. Note that Follow-Up report can be wrenched into the hyperspace toolbar or pinned to the Epic dropdown.
3. In the Follow-Up Settings, define the Department as your **Login dept** by clicking the **checkbox**.
4. Keep the Provider/Resource, Appointment Status and Visit Type sections as **"All"**.
5. In the **Date Range** field, define how far back you would like to pull information. *You can put in a date, i.e. 12/16/2020 or use t-logic, i.e. m-1.*
6. To save a copy click **Save** and provide a name for it. Click **Run** to view.



7. You are viewing all no shows and cancellations for the defined department during the defined date range.

Follow-Up: Temporary Report

Refresh Settings Layout Appt Desk Appt Info EOD Resched Expand Message Notes Edit Bsh Remove New Call Dial

Showing 5 of 5 entries

Date	Appt Time	Appt Message	MRN	Patient	Provider/Resource	Dept	Appt Status	Canc Rsn
12/09/2020	7:30 AM		MR9017387	Zzzcadence, Kristina "Wilma,	BH COVID VACCINE	BH COVID	No Show	
12/09/2020	12:00 PM		MR2885	Zzzcad, Vaccinetst	BH COVID VACCINE	BH COVID	No Show	
12/10/2020	7:00 AM		MR2885	Zzzcad, Vaccinetst	BH COVID VACCINE	BH COVID	No Show	
12/10/2020	8:00 AM		MR2888	Zzzcovid, Vaxtest	BH COVID VACCINE	BH COVID	No Show	
12/10/2020	8:30 AM		MR1842	ZZzamb, Anne, Anne	BH COVID VACCINE	BH COVID	No Show	

8. Click Remove and provide a reason why this patient is not to be rescheduled at this time.

9. Click Resched to reschedule the appointment. On the following screen click **Reschedule**.

Date	Time	Len	Providers	Departments	Visit Type
12/19/20	8:30 AM	5	GH COVID VACCINAT DOSE 1 (85857)	GH COVID VA [103070034]	COVID VACC DOSE 1 (2395)

11. You are brought to a Make Appointment form. Use the same steps as above to schedule this appointment.

Clinician Documentation of Side Effects

- cancellation of appt and order/documentation of adverse effects
- flowsheet in HM?
- Discontinue reasons
- Documentation to update allergies if needed