

# Recording and Reporting Vaccinations Within Your Clinic's EMR

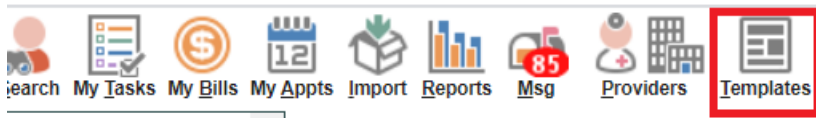
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## Med Access

### Creating Vaccination Templates

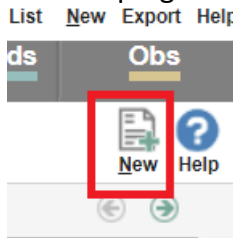
1. Click on Templates in the upper right corner of the main page



2. In the window that appears, select the tab named Imm



3. In the top right-hand corner of the Immunization tab, select the New icon



4. Fill in the Template Name and Type - if the type of vaccine that you want does not appear, follow instructions 5-6 to create a new Immunization Type.

If you want to report on multiple COVID-19 vaccinations in the future (E.g. List off all patients with no COVID-19 Vaccination), you should add COVID-19 to the Description field. Change the template assignee to Assign to User and click Save.

### Task

#### Task Template

Template Name

Pfizer-BioNTech COVID-19

Category\*

Immunization

Type

Pfizer-BioNTech COVID-19

Description

COVID-19

Reason

Note / Instructions

Assignee\*

Assign to user

Start

when due

Due\*

Today

Last Update: PMA Practice

☒ Apply as Active

☐ Apply as Completed

☐ Apply as Cancelled

Recurrence

None

Save

- If the Type of vaccine you desire does not appear, scroll over the Type icon until the New Template icon appears and click it

- In the window that appears, type the name of the Immunization in the Description field and click the Add New icon. You can now close the New Type window and return to step 4 to finish creating this Immunization template.

- After saving the template, it will return you to the Immunization template tab, here you can add this vaccination to either Your User favorites and/or Clinic favorites. Click the icon heart that applies, as shown below.

Days	Description	Reason	Observation	Template	Usage
0	Immunization(Pfizer-BionTech COVID-19), Pfizer-BioNTech COVID-19, Test			General	

## Recording Vaccinations

- Within the patient's chart, select the Imm tab and right click on the Result icon

- Select the vaccination template you want (See [Creating Vaccination Templates](#) if you do not see the template you need)

- Fill in any applicable notes in the Note/Instructions field. If this vaccination was done at the clinic, the ordering provider can be added. The date under the observation field should be changed to reflect the actual date the patient had the vaccination administered. When everything has been recorded, select the radio dial Complete this task and click save.

**Bri Mac-test** 31 years   

Task

Category\*

Immunization

Type

Pfizer-BioNTech COVID-19

Description

COVID-19

Reason

Note / Instructions

Administered by AHS.

Workflow Actions

Compl. & create Follow Up

Save & create Follow Up

Compl & Open Next task

Save & Open Next Task

Assignee\*

Practice, PMA

Due\*

18-Jan-2021

Update or Forward

Complete this task

Save

Preview

← Observations

Ordering Provider

Date

01-Jan-2021

Step

Final

## Reporting Vaccinations

- Select the Reports icon on the main page of Med Access



2. Select the demographics information you would like to report on. If you are wanting to report on a Primary Care Provider's entire panel, select their name in the Primary Provider field and select the Status of Active. You may also want this report to only capture certain age groups for this use the Age Range fields.

Practice Mgmt Reporting

Criteria Unmasl

Template: Select Template...

**Demographics**

Identifier Starts w

Gender

Status Active

Last Name Starts w

First Name Starts w

Middle Name

Primary Provider Unassigned

Sec. Provider

Referring Provider

Family Provider

Provider Group

Care Team

Address Group

Address Starts w

City Starts w

Postal Code Starts w

Phone Number ( ) Starts w

Rostered

Age Range to

3. To report on patients with or without a specific COVID-19 vaccination, in the Task section of the reporting page, select Immunization in the Category drop down. Select the specific vaccination in the Type drop down. Change the Task date, "Back" drop down to All. Change the observation date to reflect the dates of vaccinations you are reporting on. If you are looking for patients WITHOUT this vaccination select the Not checkbox at the top of the Task section, if you are looking for patient's WITH this vaccination then leave this unchecked.

Task not

Category Immunization

Type Pfizer-BioNTech CC

Description Starts

Reason Starts

Abnormal All

Order Type All

Observation

Observation Value Conta

Observation Template

Urgency All

Observation Status All

Group All

Owner All

Owner Role All

Ordering Provider All

Ordering Provider Role All

Ordering Provider Id All

Step All

Service Provider

Patient Class All

Patient Location All

Task Date Back All Ahead None

Not Updated Within

Obs. Date 15-Jan-2019 to 18-Jan-2021

- To report on patients with or without any COVID-19 vaccination, in the Task section of the reporting page, select Immunization in the Category drop down. Type COVID-19 in the Description field. Change the Task date, “Back” drop down to All. Change the observation date to reflect the dates of vaccinations you are reporting on. If you are looking for patients WITHOUT this vaccination select the Not checkbox at the top of the Task section, if you are looking for patient’s WITH this vaccination then leave this unchecked.

- If you would like to report on whether the patients with specific comorbidities have had or not had a vaccine, follow this step, if not skip to step 6. There are two ways to pull the comorbidities into a report, but this will be specific to your clinic team’s process. If your clinic team is adding accurate information within the Patient’s profile and cleaning these up on an ongoing basis, this may be easier to use then billing information. Billing information will capture all the bills created by a Primary Care Provider so this will ensure no patient is being missed. Below are the two options detailed.

#### **Option #1 – Patient’s Profile Information**

Select the green plus button on the Profile bar, this will expand the options as seen below. Select the appropriate Category in the drop down the select the Status as Current. Next, add the diagnosis you would like to report on. If you would like to add more than one diagnostic code, click the green plus button besides Diagnosis, add as many as needed. Now move to step 6.

### Option #2 – Billing Information

Select the green plus button on the Billing bar, this will expand the options as seen below. Add the diagnostic code that represents the comorbidity you require the patients to have to be included in the report. If you would like to add more than one diagnostic code, click the green plus button besides Diagnosis, add as many as needed. Next, select the Bill date to the date you desire. Now move to step 6.

The screenshot shows the 'Billing' section of a software interface. At the top right, there is a green plus button in a red box, a red X button, and a 'not' checkbox. Below this, the 'Billing Item' field has a green plus button. The 'Diagnosis' field has a green plus button in a red box and contains two entries: 'diabetes mellitus\*' with code '250' and 'essential hypertension\*' with code '401'. Both entries have a red box around the code and a 'Starts' dropdown menu. The 'Bill Date' dropdown is set to '3 years' with a red box around it. Other fields include Status, Insurer, Group, Attending Provider, Location, Third Party, Payee Num, Seq/Claim #, Remittance Date, Batch #, Claim Type, Facility, Has Warnings?, Written Off?, Explanatory Code, and Count.

- To get the total number of patients that fit the reporting criteria, select Patient Count (pdf) in the Type drop down to the right of the reporting criteria. If you would like a list of patients that fit the reporting criteria, click the arrow besides Searching, then click the Search icon below that.

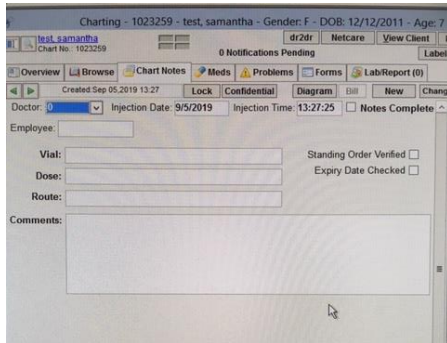
The screenshot shows the 'Reports' section with a 'Type:' dropdown set to 'Patient Count (pdf)'. Below this is the 'Searching' section with a dropdown arrow in a red box. The 'Type:' dropdown is set to 'New Search' and there is a 'Search' button with a magnifying glass icon in a red box. Below the Search button, there is a 'Patient Name' field and a 'WARNING: LIST TRUNCATED. Use adv...' message. There are also several checkboxes on the left side of the page.

# HealthQuest

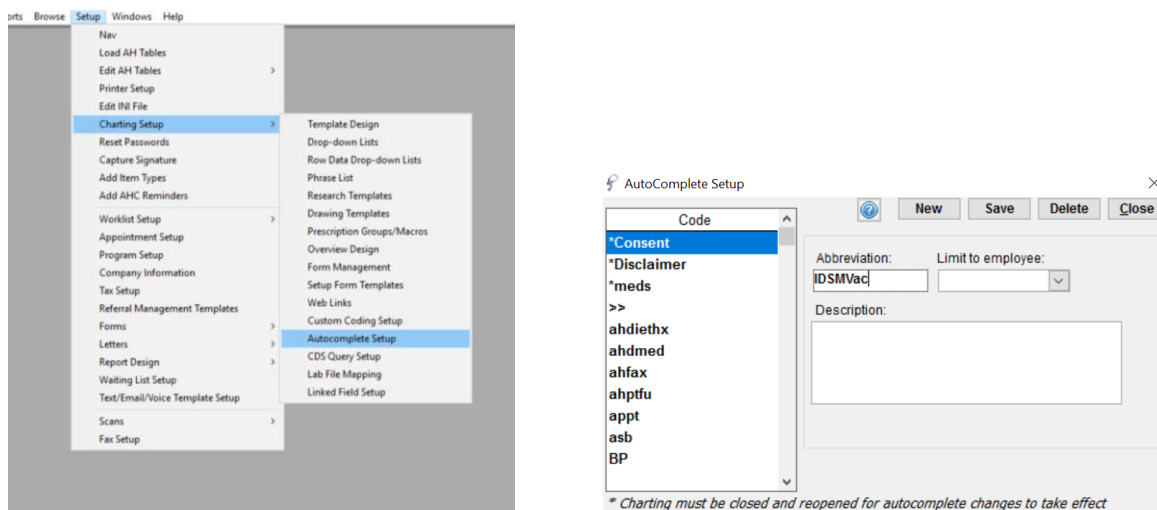
## Recording Vaccinations

There are a number of different options here for recording an immunization a clinic can use for administration, or documentation from another source (netcare, or the patient).

- I. Use a chart template like shown below. (Call Healthquest and ask for Justik Injection chart note template, or build template with support of your local EMR Expert).

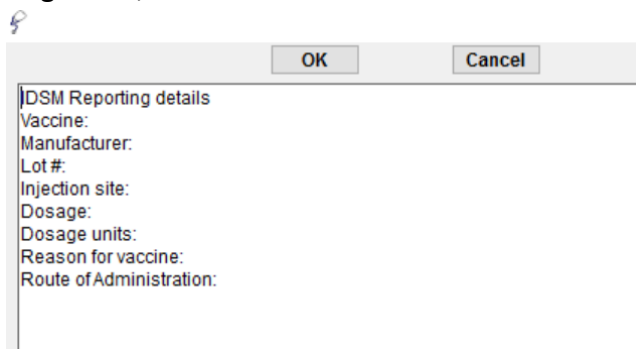


- II. Use an autocomplete with all relevant information required for reporting.



\* Charting must be closed and reopened for autocomplete changes to take effect

- i. Click New, enter clinic wide Abbreviation of choice, here in the example is "IDSMVac"
- ii. In the Description, include all the information required for reporting. Double click to open a larger box, add all this information shown below. Hit ok, and save in the box above.

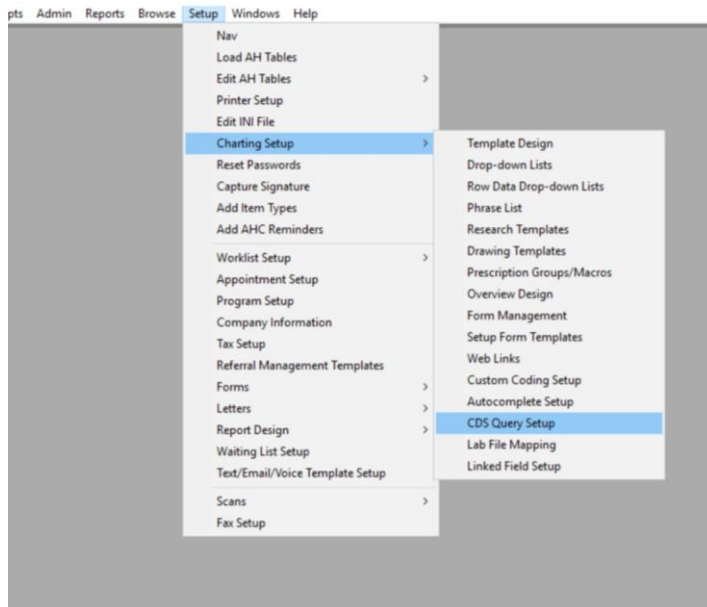




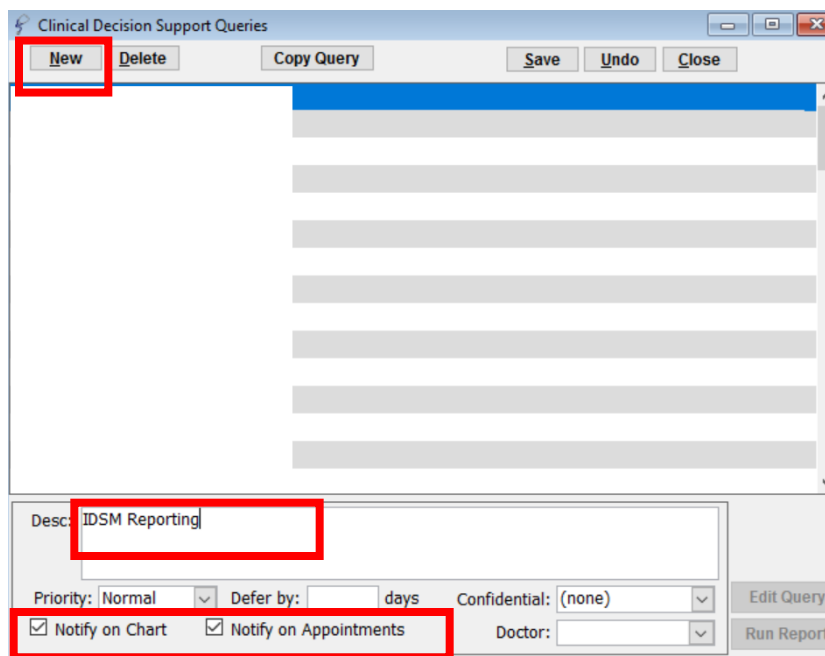
- iii. To execute this Auto-complete in a patient chart note, place cursor where the text is needed, type 'IDSMVac' hit space bar and the above should appear ready to be filled out.

## Reporting Vaccinations

Setup > Charting Setup > CDS Query Setup



Click on New, in the Desc box at the bottom, call the report IDSM Reporting. Uncheck the checkboxes at the bottom, Save at the top.



Click on edit Query at the bottom right.

Click New Line and select Clients.

Fill out as shown below, check off default Doctor, and Client type, select appropriate options from the dropdowns and save line.

The screenshot shows the 'CDS Query Setup' window for 'IDSM Reporting'. The main area displays a list of queries with the first entry, 'Patients Patient of TEST Type:Valid Alberta Patient', selected. To the right, the details for this query are shown, including a description, level (1), and data description. Below the list, the 'New Line' button is highlighted with a red rectangle. The bottom section of the window contains various filters and checkboxes, including 'Age Over', 'Age Under', 'Gender', 'City', 'Province', 'Postal Code', 'Referral Doc', 'Bill Type', 'PDI Program', 'Verified', 'Date', and 'Default Doctor' (checked) and 'Client Type' (checked).

Click New Line, and select Chart Data.

Fill out as shown below, check off visit dates (Under/In the last) 7 days, and any field contains IDSM Report. Save line, and save at the top, and close.

The screenshot shows the 'CDS Query Setup' window for 'IDSM Reporting' after clicking 'New Line'. The main area displays a list of queries with the first entry, 'Patients Patient of TEST Type:Valid Alberta Patient', selected. The second entry, 'AND Chart Data: Under 7 Days ago any field contains IDSM Report', is highlighted in blue. To the right, the details for this query are shown, including a description, level (1), and data description. Below the list, the 'New Line' button is highlighted with a red rectangle. The bottom section of the window contains various filters and checkboxes, including 'Visit Dates' (checked), 'Doctor' (checked), 'Chart Data', 'Any field' (checked), 'Numbers', and 'Other Date'.

New Line, Click Chart Data again. Fill out as shown below.

CDS Query Setup  
IDSM Reporting

Save Undo Close

Patients Patient of TEST Type: Valid Alberta Patient  
AND Chart Data: Under 7 Days ago any field contains IDSM Report  
AND Chart Data: Under 7 Days ago any field contains COVID

AND OR NOT

Description: Chart Data: Under 7 Days ago any field contains COVID

Level: 1

Data Desc:

New Line Copy Line Save Line Delete

Chart Data

☒ Visit Dates Under 7 Days ago

☐ Doctor

☐ Chart Data

☒ Any field contains COVID

☐ Numbers

Each week for reporting, go to Setup > Charting Setup > CDS Query Setup. Scroll to find the report name (IDSM Reporting), hit run report in the bottom right of the window.

Clinical Decision Support Queries

New Delete Copy Query Save Undo Close

ESPCN-RN Paps results reviewed - Unsatisfactory

**IDSM Reporting**

LLAC referrals

LLAC-No. of Appt Type: Assessment Appts

LLAC-No. of Appt Type: Preventative Screening

LLAC-No. of Appt Type: Treatment Appts

LLAC-No. of Completed Pts

LLAC-No. of Follow Up Pts

LLAC-No. of Follow ups for High Risk Foot

LLAC-No. of Follow ups for Lower Leg Edema

LLAC-No. of Follow ups for Preventative Screening

LLAC-No. of Follow ups for Wound

LLAC-No. of Initial Pts

LLAC-No. of Pts seen LLAC and OT

Desc: IDSM Reporting

Priority: Normal Defer by: days Confidential: (none)

☐ Notify on Chart ☐ Notify on Appointments Doctor:

Edit Query Run Report

CDS Query Report

Export Send Email List Manager Print Center Create Tasks Retrieve Print Filter Sort Close

Page 1 of 1

IDSM Reporting		1 Patients Listed	
Chart No	Name	Gender	Ref Name
51054	Test, Samantha	F	34TEST

4/15/2021

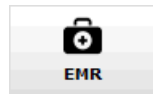
If wanting to know how many COVID Vaccines total, without the week time interval for IDSM reporting, change the time line to 6 months, or 1 year, for both chart data lines.

## Accuro

\*[http://services.optimedsoftware.com/Manual/2017/index.htm#t=2338\\_1.htm&rhsearch=vaccine&rhhlterm=vaccine](http://services.optimedsoftware.com/Manual/2017/index.htm#t=2338_1.htm&rhsearch=vaccine&rhhlterm=vaccine)

### Recording Vaccinations

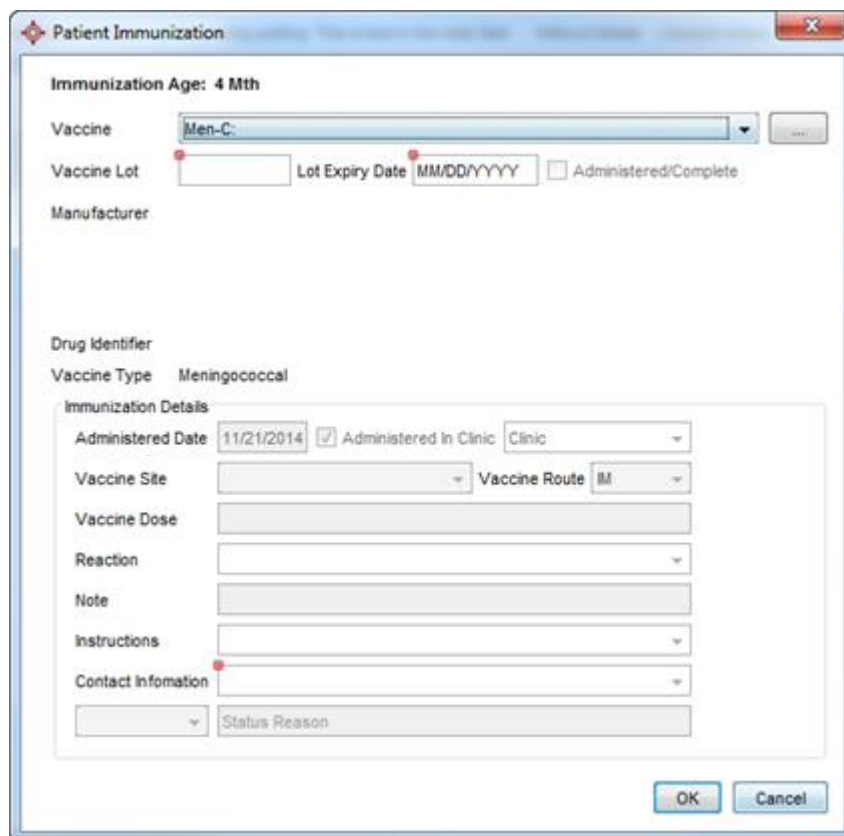
**Note:** Fields with  in the corner are mandatory and must be completed.



1. Click the **EMR** button on the Navigation bar and click the **Encounter Notes** tab.
2. Click the next **vaccine** due on the patient's **Immunization Schedule**. The Select **Vaccine** window is displayed, click **OK**.

**Note:** More than one **vaccine** can appear in an immunization age. If you click on a **vaccine** that has an immunization age higher than the patient's age, a warning message is displayed.

The Patient Immunization window is displayed:



3. Click  and select the appropriate **vaccine** from the list displayed.







If the COVID vaccine is not an option in the dropdown:

The two approved COVID-19 vaccination DINs are now available in Accuro. Their Drug Information Numbers are below.

## 02509210 PFIZER-BIONTECH COVID-19 VACC PFIZER-BIONTECH COVID-19 VACC


### 02510014 MODERNA COVID-19 VACCINE MODERNA COVID-19 100 MCG/0.5ML

If First Data Bank has not yet been updated in Accuro:

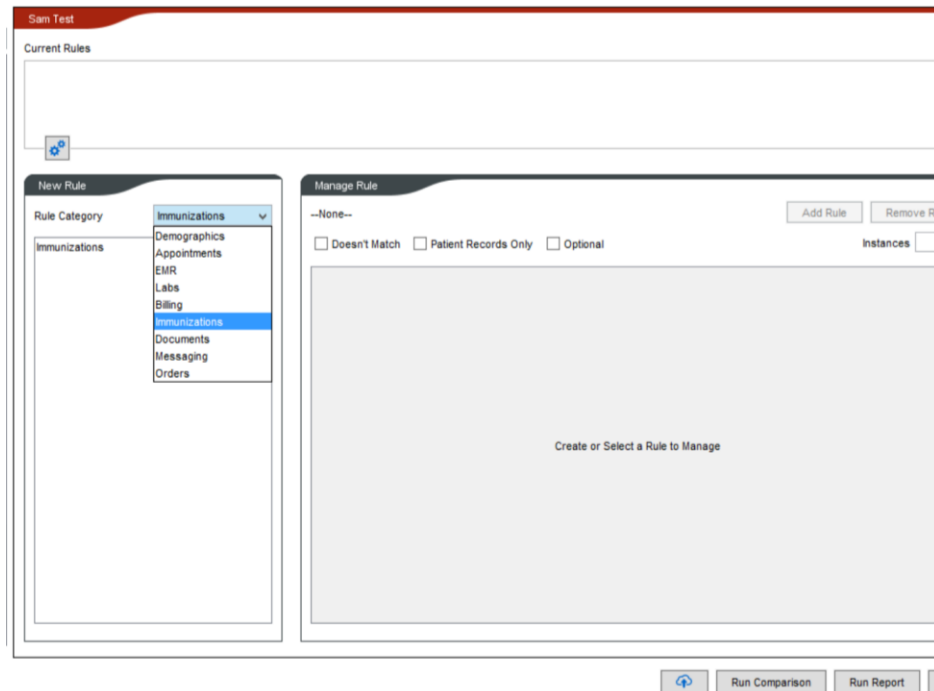
1. Log into Accuro.
2. The 'Update Lists' window is displayed immediately after logging in.
3. Click the check-boxes to select the appropriate update lists.
4. Click 'Update Selected'. You can now click 'Hide Window' and carry on using Accuro while the update list is being updated.
4. To select a **vaccine** not displayed in the drop-down list, click the **Ellipses** button  and search on the drug name.
5. Select the desired drug and click **OK**.
6. Type in the **Vaccine Lot** number.
7. Choose an **Expiry Date**.
8. Click the checkbox beside **Administered/Complete**.
9. Double-click the **Administered Date** field and select the date from the calendar displayed.
10. If the **vaccine** was not administered in the clinic, deselect the **Administered in Clinic** checkbox, click  and select a location from the list displayed.
11. Click  and select a **Vaccine Site** from the list displayed.
12. Click  and select a **Vaccine Route** from the list displayed.
13. Click  and select a **Reaction** from the list displayed, if any.
14. Type any additional information in the **Note** field, if required.
15. Click  and select **Contact Information** from the list displayed.
16. Click **OK**.

## Reporting Vaccinations

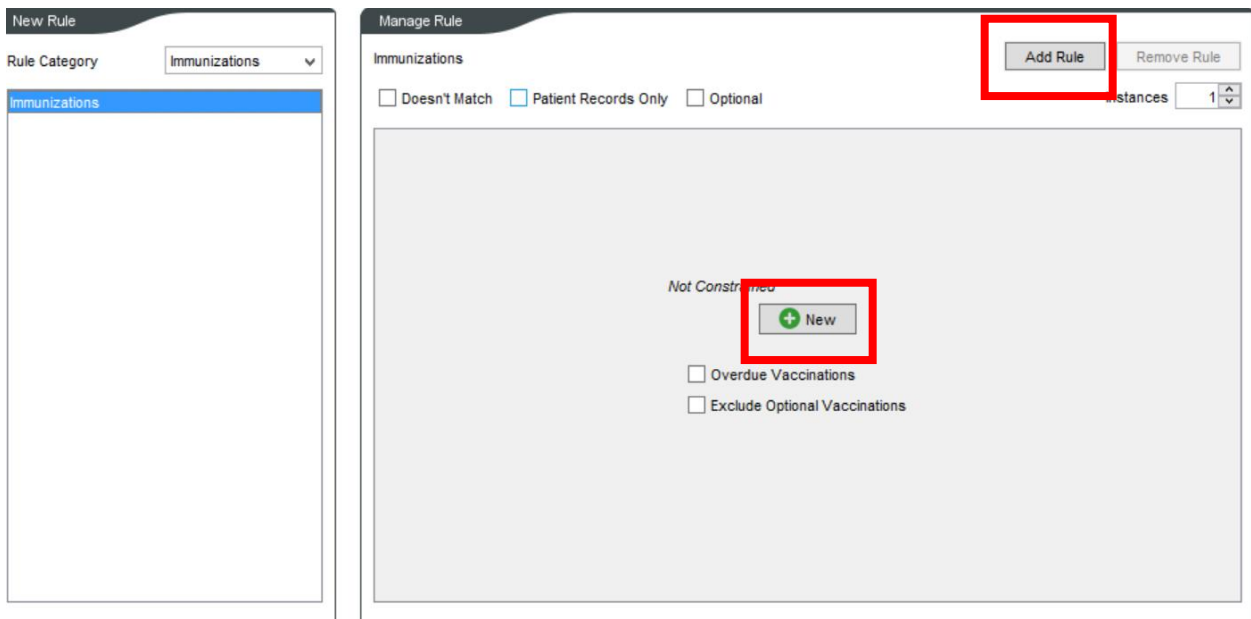
Click the Accuro Target in the bottom left corner, hover over reports, and select Query builder.

Select  and give the search a name, such as "IDSM reporting", hit ok.

In the drop down shown on the next page, under new rule, select immunizations, then select immunizations again.



See the below window, click new, and select date administered and fill out, "in the last week"



If wanting a list of patients with or without a specific vaccine, instead of clicking date administered, select Vaccine/Immunization.

Select add rule.

Hit Run report in the bottom right corner of that window.

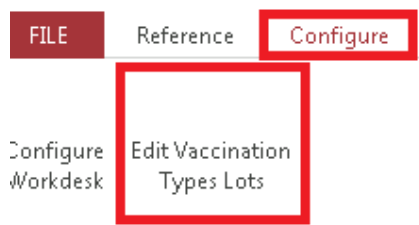


Select one provider at a time, or run the whole clinic, and run. The list will appear, with all the columns with the above information, shown on the right-hand side of that above window.

## Wolf

### Creating Vaccination Templates

1. In the Work Desk, select the Configure tab and click Edit Vaccination Types Lots



2. In the window that appears, enter a Vaccine Type, Brand Name, and Manufacturer. Once the template is correct, click the "plus sign" icon then click the exit icon.

Vaccination Types and Lots

Vaccine Type  Search Vaccine Type

☒ ☐

\*Vaccine Type Brand Name Manufacturer

**Moderna COVID-19** **mRNA-1273** **Moderna Therapeutics**

Notes

Vaccine Lots  \*Lot Number \*Expiry Lot Finished

☒ Available ☐ Finished

## Recording Vaccinations

1. In the patient's chart - Medical Summary, select Add Vaccination in the Vaccinations section.

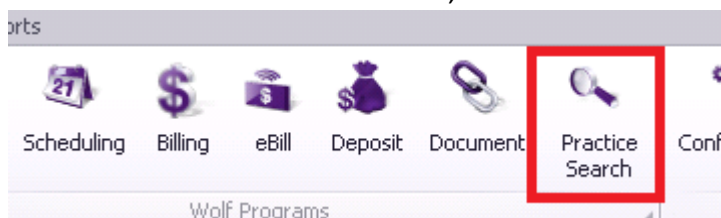


2. In the window that appears, add the correct Vaccination Date, Vaccination Name, Lot # (this is a mandatory field, if Lot# is unknown then type in 00000), and Vaccination Injection Site, then click the exit icon in the top right corner. (See [Creating Vaccination Templates](#) if the Vaccination Name that you need does not appear)

A screenshot of the 'Vaccinations' form for a patient named 'Mac-Test, Mrs. Bri'. The form contains several fields for entering vaccination data. The following fields are highlighted with red boxes: the 'Date' field with the value '12-Jan-2021', the 'Vaccine' field with the value 'Pfizer-BioNTech COVID-19', the 'Lot #' field with the value '000000', and the 'Injection Site' dropdown menu showing 'L Deltoid'. Other visible fields include 'Location' (Wolf Demo2 Clinic), 'Administration Facility' (Clinic), 'Administered By' (Staff), 'Brand Name' (BNT162b2), 'Route', 'Dosage', and 'Reaction' (None). A note at the bottom indicates 'AEFI Report (Public Health Canada)'. In the top right corner, there are buttons for 'Log', 'Multum', and an exit icon (a red square with a white arrow) which is also highlighted with a red box.

## Reporting Vaccinations

1. Within the main Wolf EMR screen, select Practice Search at the top





2. In the window that appears, on the left-hand side, select Status, Patient MD, and Vaccinations. After those have been selected fill in the Patient status drop-down to reflect the active panel and select the Primary Care Provider the report is for within the drop down. Below both options, the vaccination field will be available, type the vaccination(s) you are reporting on and click Add or the “plus sign” icon to add them to the reporting criteria. When all the vaccinations have been added, select the patient report icon at the top right corner of the window.

## PS Suites

### Recording Vaccinations

1. Within the patient’s chart, select the Imm title

2. Within the name field, type part of the vaccination name and then click Tab.

New treatment for Brianna Test

3. In the window that appears, select the correct vaccination name and click Choose.

Choose a Medication X

Search Medication Name covid-19 Search

Suggestions for: covid-19

**COVID-19 vaccine (Pfizer) tozinameran**  
Treatment Type: Immunization  
HICL: 46945 Route: Intramuscular

Previous Medications

- ◆ Pfizer-BioNTech COVID-19 (Discontinue on Jan 18, 2021, Failure of Treatment)

Contains: covid-19

- ◆ COVID-19 vaccine
- ◆ COVID-19 vaccine (AstraZeneca)
- ◆ COVID-19 vaccine (Moderna)
- ◆ **COVID-19 vaccine (Pfizer) tozinameran**

☒ Brand and Trade Names ☐ Discontinued Medications ☒ Generic Names

Keep Original Text

Cancel **Choose**

4. The full vaccination name should appear now within the first window. If this vaccination is being administered at your clinic, enter the Administration Details. If this vaccination was done by another healthcare site, check off the option for Started/Performed by External Provider and then add the Provider Name. Select the date the vaccination was administered in the Start/Perform Date field at the bottom of the window. Then click Perform Immunization once all the information on this window is correct.

New treatment for Brianna Test X

Treatment

Name: **COVID-19 vaccine (Pfizer) tozinameran**

Label Instructions:

Administration Details

Site: Lot: Expiry Date: Manufacturer:

Actions & Comments

☐ Refused Treatment

☒ Started/Performed by External Provider

Provider Name: Leduc Shoppers Drug Mart

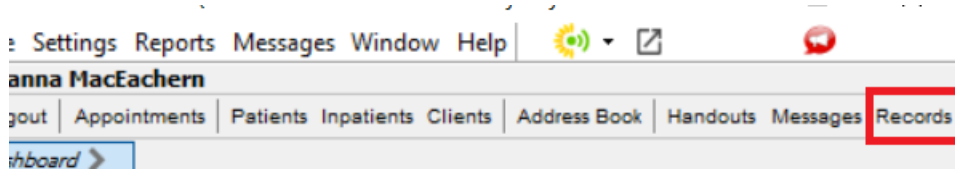
Comments:

Start/Perform Date: Thu, Jan 28, 2021

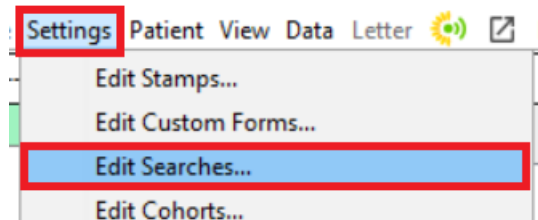
Cancel **Perform Immunization**

## Reporting Vaccinations

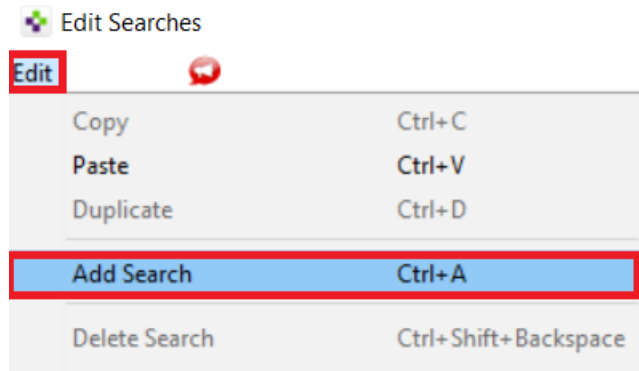
1. In the main PS Suites window, select Records



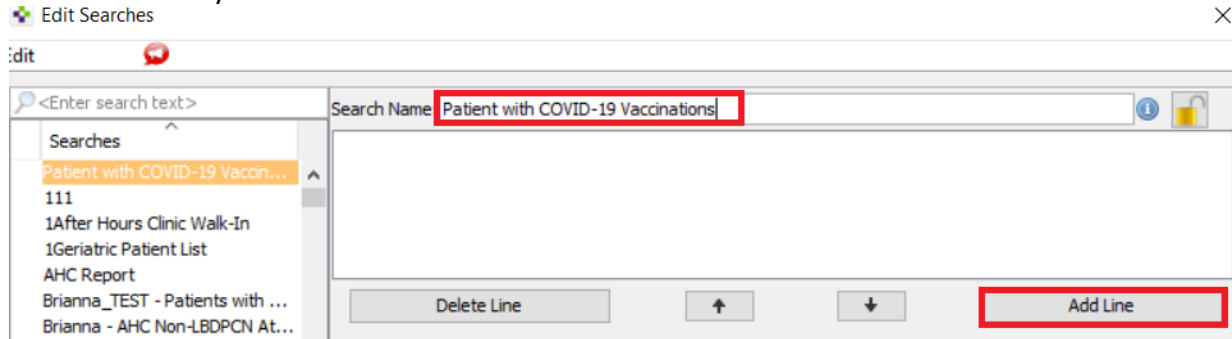
2. Within the window that appears, select the Setting dropdown and click Edit Searches...



3. Within the Searches window, select the Edit dropdown and click Add Search



4. Add the title of your search into the Search Name field and click Add Line



5. Select Demographics, Patient Status, select the equal sign and then select the status that reflects the clinic's active patients. After this is correct, select OK.

Add Search Criterion

Demographics	HN Expiry Date	=	Active
Patient Profile	HN Version Code		<input type="checkbox"/> Ask When Run
Visits	Home Phone		
Vitals	Language Code		
Immunizations	Last Seen Date		
Treatment	Maiden Name		
Allergies	Member Status		
CPP Problems	Middle Name		
CPP Past Medical History	Mobile Phone		
CPP Family History	Next Appointment Date		
CPP Risk Factors	Next Appointment Provider		
Lab Values	Next of Kin		
Lab Text	Other Provider Name		
Diagnostic Imaging	Patient Number		
Diagnostic Test Reports	Patient Status		
Consultation Report	Patient Status Date		

Cancel OK

6. Select Add Line again.

Delete Line   ↑   ↓   **Add Line**   Indent Line ->   Edit Line...   <- Outdent Line

Comments: \_\_\_\_\_

7. Select Patient Profile, then IMM/Immunization then Contains the Word then type either a partial name or the specific drug name within the available field. Once this is complete, click OK. *\*Note: if you are trying to find a list of patients that have not received the vaccination, select Patient Profile, IMM/Immunization then Does Not Contain The Word, instead and then follow the same reporting instructions following this step.*

Add Search Criterion

Demographics	ALLR/Allergies/Allergies	contains	COVID
Patient Profile	Case/Case Load/Case Load	contains the word	<input type="checkbox"/> Ask When Run
Visits	FH/Family Hx/Family History	does not contain the word	
Vitals	HPH/Past Hx/History of Past Health	does not contain	
Immunizations	IMM/Immunizations/Immunization	starts with	
Treatment	PERS/Personal Hx/Personal History	is empty	

Cancel OK

8. Select Perform Search within the Searches window.

Edit Searches

Search Name: Patient with COVID-19 Vaccinations

Patient Status = Active  
and  
IMMU/Immunizations/Immunization contains the word COVID

111  
1After Hours Clinic Walk-In  
1Geriatric Patient List  
AHC Report  
Brianna\_TEST - Patients with ...  
Brianna - AHC Non-LBDPCN At...  
Brianna - AHC Patient Attach...  
Brianna - AHC Unique Pts.  
Brianna - Test 1234  
Carla test

Hide searches related to Outcomes Dashboard

Perform Search... Test Search Cancel Add Done

9. Select Uncheck All Doctors and individually select the physicians you would like to run the report on. Then click Search.

Hide searches related to Outcomes Dashboard

Search for Patients of These Doctors:

Bob Test  
Doctor Test  
Test Doctor  
NP Test  
Other Doctor

Uncheck All Doctors  
Check All Doctors  
Show Inactive Doctors

Include Matched Data with Results  
Include Deleted Records in Evaluation

Report Format

Title: Patient with COVID-19 Vaccinations

Columns:

Patient #	First Name	Surname	Age	Home Phone	Business P...	Mobile Phor
<input checked="" type="checkbox"/> Include Privacy Column           Add Column... Remove Column						

Notes:

Cancel Edit Searches... Search

10. A list like shown below should appear in another window.

Patient with COVID-19 Vaccinations

Report

Patient #	First Name	Surname	Age	Home Phone	Business Phone	Mobile Phone	Privacy
20469	Brianna	Test	3 yr	780-986-6624			

Number found: 1