



## JOB BREAKDOWN SHEET

<b>Job/Role: Clinic Staff involved in administration of COVID Vaccines</b>		<b>Process Name: COVID Vaccine Administration in Primary Care Clinics</b>
<b>Department: Primary Care</b>		<b>Owner:</b>
<b>Job Aids:</b>		<b>Equipment/Supplies:</b>
<b>Notes:</b>		
<b>Date Last Revised: 6/4/21</b>		
Major Step – “What”	Key Points – “How”	Reasons – “Why”
<b>1. Vaccine ordering, transportation &amp; handling (BO Supervisor/Lead)</b>	<b>1.1. Ordering (quantities, process):</b> 1.1.1. Minimum 5 days prior to dosing, submit vaccine order to Pharmacy 1.1.2. Specify quantity and type of vaccine (inclusive of 1 <sup>st</sup> and 2 <sup>nd</sup> doses) 1.1.3. Ordering process for vaccines will be coordinated across Primary Care 1.1.4. Clinics will submit individual orders for “kits” via email. Kits come in packs of 100 doses. 1.1.5. Transport method is via courier (for VFC clinics) or pick up at 4C (for non-VFC clinics)  <b>1.2. Documenting receipt of vaccine in ALERT:</b> 1.2.1. After receiving vaccine, login into <a href="http://www.alertiis.org">www.alertiis.org</a> using the clinic ORG Code, User Name, & Password 1.2.2. Click on your clinic name 1.2.3. Select “manage transfers” under “inventory” section on left banner 1.2.4. Click on the date next to the vaccine you want to receive 1.2.5. Check that the doses (not vials) and lot number match what you received from pharmacy 1.2.5.1. <i>If the doses or lot number do not match call pharmacy 4-7995</i> 1.2.6. Click “accept transfer” 1.2.7. Click “yes” on pop up 1.2.8. Vaccine will then show up in your inventory	<ul style="list-style-type: none"> <li>•</li> </ul>

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<p><b>2. Medication room – Moderna (COVID Vaccine Lead)</b></p>	<p><b>2.1. A “COVID Vaccine Lead” will be identified to oversee process.</b> The Lead will be responsible for drawing up the vaccine, preparing accompanying vaccine cards and labels, monitoring time to ensure vaccine is viable, discarding of old vaccine, and reporting any unused doses in ALERT at the end of each day.</p> <p><b>2.2. Vaccine preparation (multidose vials):</b></p> <p>2.2.1. Vaccine will be drawn up when the first patient consents to receive the vaccine.</p> <p>2.2.2. Puncture one vial at a time, draw up all vaccines and store in refrigerator.</p> <p><b>2.3. Managing daily supply:</b></p> <p>2.3.1. Vaccine Lead will monitor quantities remaining and time drawn throughout the day.</p> <p>2.3.2. Each vaccine brand has a different number of doses per vial and a different amount of time that vaccines remain viable drawn up. Following CDC guidelines for each brand, Vaccine Lead will ensure that any doses that are no longer viable are discarded and reported as unused doses in ALERT. Links to the CDC guidelines for each vaccine type can be found in Appendix A.</p> <p>2.3.3. Prior to clinic closing, Vaccine Lead will ensure (or delegate responsibility for ensuring) that all unused doses are discarded at the end of the day and reported in the ALERT system.</p> <p>2.3.4. All clinics will develop a clinic-specific contingency plan to help reduce unused vaccines. This may include offering to specialty care patients or anyone presenting to the clinic for any reason.</p> <p><b>2.4. Documenting waste in ALERT:</b></p> <p>2.4.1. Login into <a href="http://www.alertiis.org">www.alertiis.org</a> using the clinic ORG Code, User Name, &amp; Password</p> <p>2.4.2. Click on your clinic name</p> <p>2.4.3. Select “manage inventory” under “inventory” section on left banner</p> <p>2.4.4. Click on “show inventory”</p> <p>2.4.5. Click on the “active” button to sort for current vaccines</p> <p>2.4.6. Find the vaccine by name (list is alphabetical)</p> <p>2.4.7. Click the name of the vaccine</p>	<ul style="list-style-type: none"> <li>•</li> </ul>
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**Commented [MO1]:** to be completed by @Carrie Medina and @David Froelich

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	<ul style="list-style-type: none"><li>2.4.8. Click the action drop down list under “Modify Quantity On Hand”</li><li>2.4.9. Select “Subtract”</li><li>2.4.10. Add in the number of doses not used at the end of the day</li><li>2.4.11. Click on the reason drop down list</li><li>2.4.12. Scroll down and select “Other - Not Usable, reported by Provider”</li><li>2.4.13. Click “Save”</li></ul>	

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<p><b>3. Offering Vaccine to Patients</b></p>	<p><b>3.1. Clinics may opt to offer vaccine to patients and visitors at any point during their visit.</b></p> <p><b>3.2. Offering vaccine to patients AT CHECK IN:</b></p> <p>3.2.1. Patients and visitors presenting for a visit will be offered the opportunity to get a vaccine by the PAS at check in.</p> <p>3.2.2. The DAR can be configured to indicate whether Epic has record of the patient being vaccinated.</p> <p>3.2.3. If patients accept the vaccine, in accordance with clinic protocol, PAS will add a note to the appointment notes or place the patient and/or visitor on the appropriate resource schedule using the COVID Vaccine visit type.</p> <p>3.2.4. If a visitor accepts the vaccine and does not have a chart, PAS must follow the standard registration process.</p> <p>3.2.5. Clinics may use a laminated Pre-Vaccination Checklist if offering at check in. The checklist contains a set of questions to related to vaccine reaction and other factors. These questions are the same as the questions in the .COVIDVACCINESCREEN smart phrase. Patients will be given the checklist along with an erase marker and instructed to present the checklist to the MA when they are roomed.</p> <p>3.2.6. <b>Vaccine refusal/declination:</b></p> <p>3.2.6.1. Decline – received at another location: PAS make note in appointment notes and MA checks records; if possible update chart to reconcile outside records</p> <p>3.2.6.2. Decline – has not been vaccinated: PAS make note in appointment notes to alert MA and PCP of opportunity to discuss vaccine hesitancy with patient</p> <p><b>3.3. Offering vaccine to patients DURING ROOMING</b></p> <p>3.3.1. Patients may also be offered a COVID vaccine during the MA rooming process.</p> <p>3.3.2. MAs review Health Maintenance. Upon identifying patients without a documented vaccine, patients will be offered vaccine.</p> <p>3.3.3. For patients who accept, MA will use the .COVIDVACCINESCREEN smart phrase to document response to questions.</p>	<ul style="list-style-type: none"> <li>•</li> </ul>
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	<p>3.3.4. <b>Vaccine refusal/declination:</b></p> <p>3.3.4.1. Decline – received at another location: MA checks records; if possible update chart to reconcile outside records.</p> <p>3.3.4.2. Decline – has not been vaccinated: MA alerts PCP of opportunity to discuss vaccine hesitancy with patient</p>	

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<p><b>4. Vaccine Administration (MA)</b></p>	<p><b>4.1 The Delegation Protocol</b> “COVID-19 Vaccinations for Ambulatory and ED” provides direction for initiation of care by authorized non-physicians and non-APPs for patients who request vaccination against the SARS-CoV-2 virus based on specific criteria. Protocol can be accessed here: <a href="https://ohsu.ellucid.com/documents/view/20371">https://ohsu.ellucid.com/documents/view/20371</a></p> <p>4.1.1 The DP indicates that licensed Registered Nurses (RN), Licensed Practical Nurses (LPN), Medical Assistants (MA), or Pharmacists will enter orders using “Per Delegation Protocol” order mode using a Smartset or orderset and sign the order. When not using a Smartset, a standard Smartphrase must be used to document the use of the protocol.</p> <p>4.1.2 Reference the DP for all protocol requirements, including reviewing the screening tool “.COVIDVACCINESCREEN”, providing all vaccine recipients with a copy of the current federal Emergency Use Authorization (EUA) Fact Sheet for Recipients and Caregivers for the specific vaccine to be given.</p> <p><b>4.2 Pre-administration process/safety questions/identification of wait times</b></p> <p>4.2.1 If vaccine offered by PAS, MA retrieves patient and Pre-Vaccination Checklist, reviews for eligibility and prepares to administer. If any concerns are identified on the checklist, MA consults with provider.</p> <p>4.2.2 If vaccine offered during rooming process, MA uses the .COVIDVACCINESCREEN smart phrased for documentation and consults with provider as needed.</p> <p><b>4.3 Documentation in Epic</b> (See Immunization Tip Sheet for screenshots)</p> <p>4.3.1 Select Order COVID (aka MODERNA SARS-COV-2 (COVID-19) VACCINE)</p> <p>4.3.2 After selecting Order, MA will sign order and select “Delegation Protocol” from the “Order Mode” screen</p>	<ul style="list-style-type: none"> <li>•</li> </ul>
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	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p><b>Ordering Information</b> Order mode </p> <div style="background-color: yellow; height: 15px; border: 1px solid black; margin-bottom: 5px;"></div> <p>Title</p> <p>Delegation Protocol</p> <p>Per Existing Signed Order</p> <p>Per Transcription - Electronic Communication</p> <p>Per Independent Scope</p> <p>Verbal with readback</p> <p>Telephone with readback</p> <p>Per IRB Approved Research w/ cosign</p> <p>OR Scheduling Request</p> <p>Per Transcription - Paper Communication</p> </div> <p>4.3.3 Once order is signed, MA will navigate to “Immunization Activity”</p> <p>4.3.4 From there, MA will see that the vaccine order is prepared to be administered</p> <p>4.3.5 Enter Vaccine information (Brand, Lot #)</p> <p>4.4 <b>Administer vaccine</b> and note time given for 15/30 wait</p> <p>4.5 <b>If applicable, schedule 2<sup>nd</sup> dose appointment</b> during the appropriate timeframe for vaccine type. See section 7 “Scheduling” for instructions.</p> <p>4.6 <b>Rooming:</b> Continue with normal rooming process.</p> <p>4.7 <b>Monitoring:</b> Upon leaving exam room let patient know a monitor will be checking in in case of adverse reaction (and that patients will wait with the door open).</p>	

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<b>5. Monitoring (Provider)</b>	5.1. Patient will stay in exam room for duration of monitoring period.  5.2. Clinician at time of visit (or designee) is responsible for monitoring.  5.3. If a member of the care team is not present, patient will wait with the door open.  5.4. In case of an adverse reaction, follow clinic policy for medical emergencies  5.5. If the visit ends and the patient wait time has not passed, patient will continue to wait in exam room or be escorted to the waiting area until time is over	<ul style="list-style-type: none"> <li>•</li> </ul>
<b>6. Safety (RN)</b>	6.1. In case of adverse reaction, follow clinic policy for medical emergency  6.2. Ensure that EpiPens and Benadryl (oral) are readily available and sufficiently stocked 6.2.1. Minimum # EpiPens: 3  6.3. Consult with clinician on whether a 2 <sup>nd</sup> dose is appropriate 6.3.1. If not appropriate, and if 2 <sup>nd</sup> dose appointment was scheduled, cancel appointment  6.4. Documentation (See Appendix B for Tip Sheet) 6.4.1. Document response in Epic 6.4.2. Add allergic reaction to Epic	<ul style="list-style-type: none"> <li>•</li> </ul>

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<b>7. 2<sup>nd</sup> Dose</b>	<p><b>7.1. Scheduling</b></p> <p>7.1.1. 2<sup>nd</sup> doses must be scheduled during the appropriate timeframe as advised by CDC.</p> <p>7.1.2. 2<sup>nd</sup> dose appointments will be scheduled at the time the 1<sup>st</sup> dose is administered by the person administering the vaccine.</p> <p>7.1.3. 2<sup>nd</sup> doses will either be scheduled on the appropriate resource schedule (e.g. Clinic Support or MA Visit Schedule) using the visit type is “COVID19 Booster” (Appt # 7506) and “t+ X days” on autosearch (X = 21 days for Pfizer or 28 days for Moderna).</p> <p>7.1.4. Blocks will be matched with the COVID19 Booster visit type. Template builders need to build the template to allow for 12 blocks for this visit type at the preferred time (clinics will be responsible for determining when they want to template these blocks).</p> <p><b>7.2. Documentation</b></p> <p>7.2.1. <i>Chief complaint</i></p> <p>7.2.2. <i>Note template</i></p> <p>7.2.3. <i>Ordering department</i></p> <p>7.2.4. <i>Order mode</i></p> <p><b>7.3. Space (administration &amp; monitoring)</b></p> <p>7.3.1. Clinics to identify the appropriate space for administering vaccine (exam room or other clinical area).</p> <p>7.3.2. If administered in exam room, the exam room can also serve as the patient waiting space. A monitor would need to be assigned. Following administration of vaccine, vaccinator will provide instructions to patients on how long and where to wait.</p> <p>7.3.3. If administered in a location that would not accommodate wait time, patient will be directed to wait in the waiting areas for the appropriate amount of time. Front desk staff will be responsible for alerting clinical staff in case of a vaccine reaction.</p> <p><b>7.4. Follow up (missed 2<sup>nd</sup> doses)</b></p> <p>7.4.1. Use Standard Scheduling Worklist Follow Report to identify patient who missed appointments for their 2<sup>nd</sup> dose (can sort by visit type if needed)</p> <p>7.4.2. Outreach to patient and reschedule visit.</p>	<ul style="list-style-type: none"> <li>•</li> </ul>
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**Commented [MO2]:** Megan Davenport to provide additional info on ordering process for clinic support / MA visit – this is in process to be completed before 2<sup>nd</sup> doses (using express lanes)

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### Appendix A – CDC Guidance for Vaccine Types

- Moderna: <https://www.cdc.gov/vaccines/covid-19/info-by-product/moderna/index.html>
- Pfizer: <https://www.cdc.gov/vaccines/covid-19/info-by-product/pfizer/index.html>
- Johnson&Johnson: <https://www.cdc.gov/vaccines/covid-19/info-by-product/janssen/index.html>

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### Appendix B – Useful links and screenshots

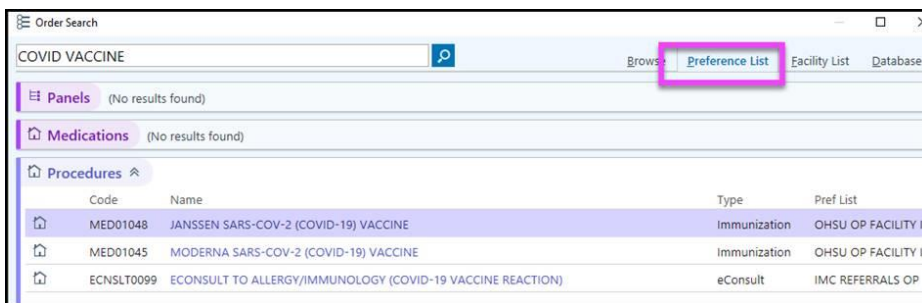
[COVID vaccine-specific Epic Downtime form](#)

COVID vaccine screening questions per [Delegation Protocol](#):

- Document the screening questions in the Progress Note using SmartPhrase .COVIDVACCINESCREEN (available now in Epic)

Ordering the COVID vaccine in clinic:

- **Internal Medicine**- search “COVID VACCINE” in the Visit Taskbar, vaccines should appear on **Preference List** tab.



Code	Name	Type	Pref List
MED01048	JANSSEN SARS-COV-2 (COVID-19) VACCINE	Immunization	OHSU OP FACILITY I..
MED01045	MODERNA SARS-COV-2 (COVID-19) VACCINE	Immunization	OHSU OP FACILITY I..
ECNSLT0099	ECONSULT TO ALLERGY/IMMUNOLOGY (COVID-19 VACCINE REACTION)	eConsult	IMC REFERRALS OP

- **Gabriel Park**- search “COVID VACCINE” in the Visit Taskbar, vaccines should appear on **Facility List** tab.

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COVID VACCINE			
Panels (No results found)		Facility List	
Medications (No results found)			
Procedures			
Code	Name	Type	Pref List
MED01048	JANSSEN SARS-COV-2 (COVID-19) VACCINE	Immunization	OHSU OP FACILITY L.
MED01045	MODERNA SARS-COV-2 (COVID-19) VACCINE	Immunization	OHSU OP FACILITY L.

[Documenting an Immunization tip sheet](#) – standard workflow (not COVID specific).

[Adverse reaction tip sheet](#) - The most important piece of this is documenting the COVID VACCINE in the **Allergies** activity(page 3).

The screenshot shows the 'Allergies/Contraindications' interface. At the top, there is a search bar with 'COVID vaccine' entered and an 'Add' button highlighted with a red box. Below this, there is a list of allergens. A search filter is applied, and the results show several COVID-19 vaccine entries. One entry, 'COVID-19 VACCINE, MRNA-1273, LNP-S (MODERNA)', is selected and highlighted in blue. Below the list, there is a 'Reactions' section with a '1' next to it. The 'Reaction type' field is empty. At the bottom right, there is an 'ACCEPT' button highlighted with a red circle. The interface also shows 'Fully Reviewed' and 'Mark as Encountered' options.

Once you've selected the appropriate COVID allergen, enter a reaction from the pick list and click the ACCEPT button. If additional documentation is needed, use the Comment field.

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