

COVID-19 Community Vaccine Scheduling Workflows

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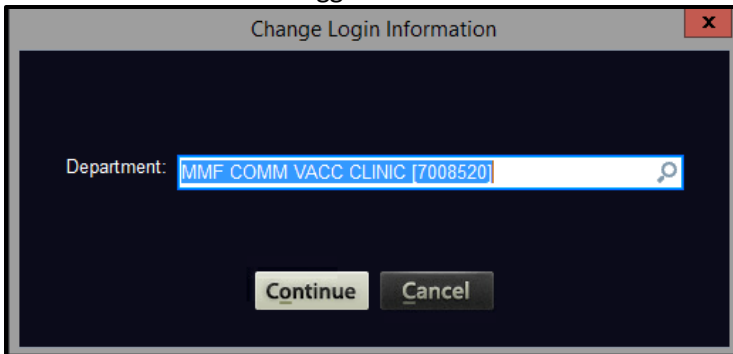
Overview

Patients that qualify for the COVID-19 Vaccine will be administered by either the MMF Community Vaccine Clinic or MMF department. Users will schedule and arrive the patient in Epic using the Appointment Desk functionality. This tipsheet will review the Scheduling and Check In workflows needed to administer the vaccine.

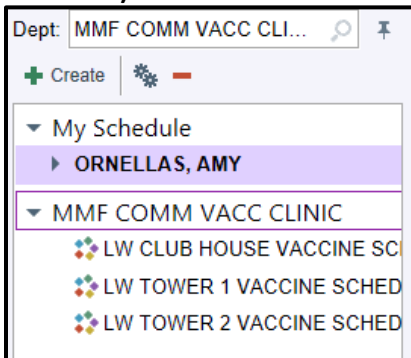
Epic Log In Department and Resource Schedule

It is important that the user is logged into the correct department and resource schedule.

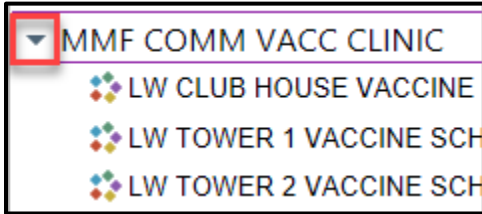
- 1. Validate that the user is logged into the MMF Comm Vacc Clinic department.



- 2. On the MPS (Multi Provider Schedule), navigate to the MMF Comm Vacc Clinic Department (All Providers) field and click the arrow to expand.



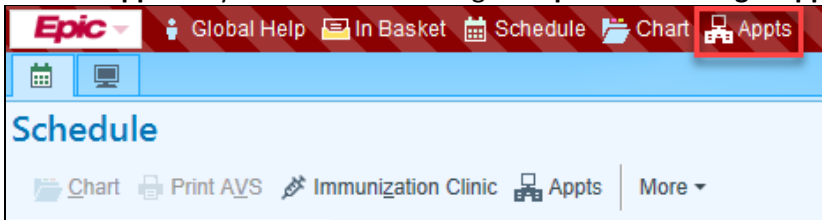
- 3. Expand again by clicking the arrow in front of the **MMF Comm Vacc Clinic** schedule.
- 4. Click to highlight the appropriate resource schedule based on the generic resource the user will be administering the COVID-19 vaccine to patients.



The user must select the appropriate scheduling resource to see the patients scheduled for that generic provider resource.

**Scheduling an Existing Patient in Epic**

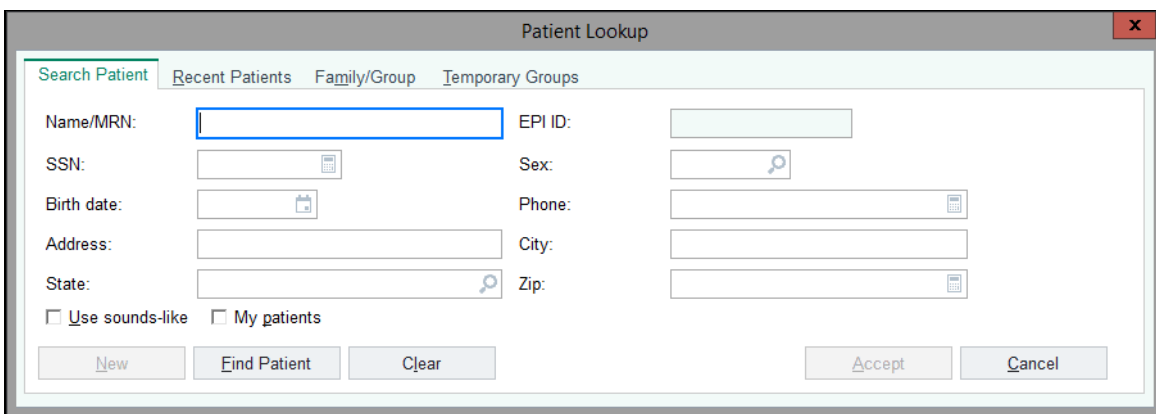
- 1. Click on **Appts** on your main toolbar or go to **Epic > Scheduling > Appts** to open the Appointment Desk.



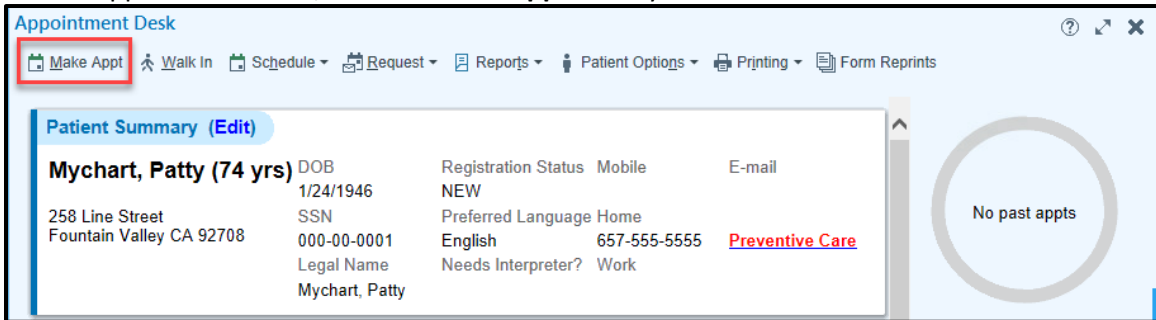
- 2. Find the patient in the **Patient Look Up** window.



The scheduler should enter the patients last name, first name in the name field as the initial search option. This will help ensure that the patient employee is selected. If other search options are utilized, make sure to use at least 2 patient identifiers to select the correct patient.

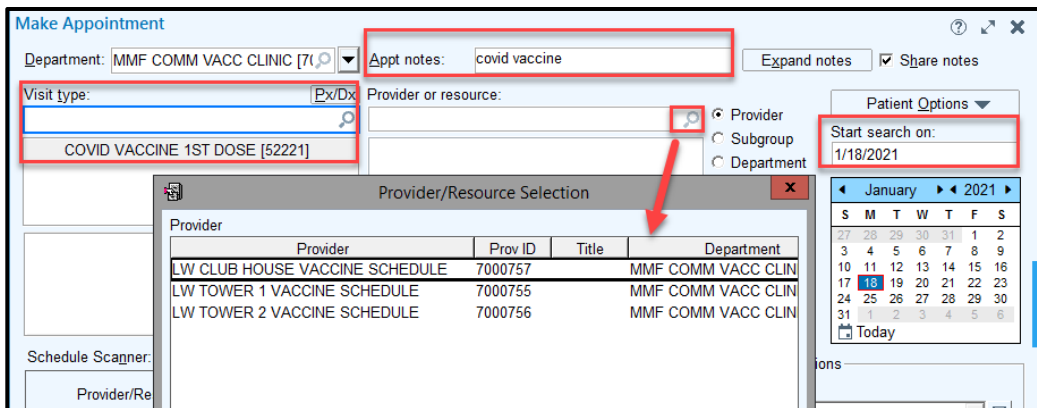


3. On the Appointment Desk, click the **Make Appt** activity button.



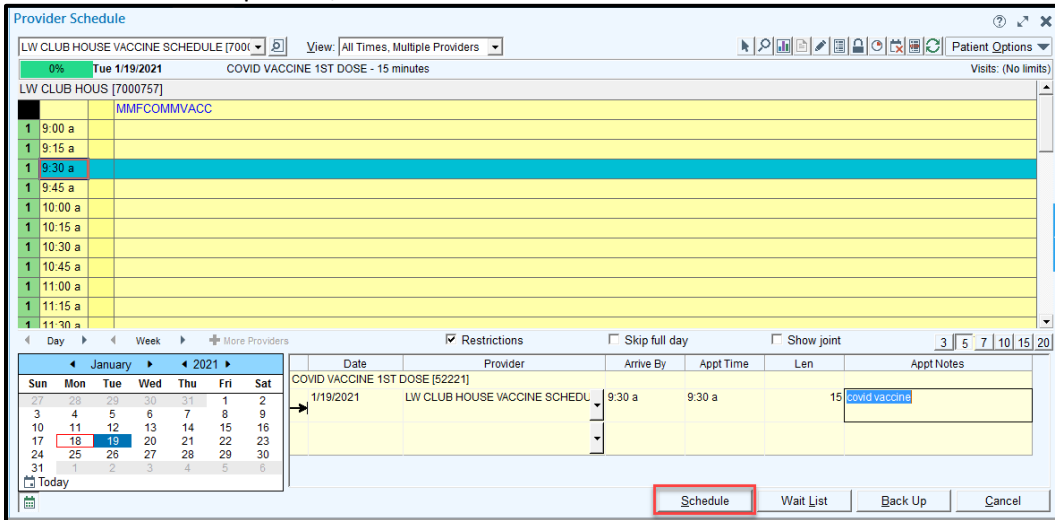
4. On the Make Appointment form, enter the following fields:

- **Department:** **MMF Comm Vacc Clinic [7850020]**(default based on login)
- **Appt notes:** Free Text (covid vaccine)
- **Visit Type:** For the first dose select 52221 Covid Vaccine 1<sup>st</sup> Dose
- **Provider/Resource:** Select the appropriate Resource schedule for this department.
- **Start Search on date:** Select the date being scheduled for the appointment

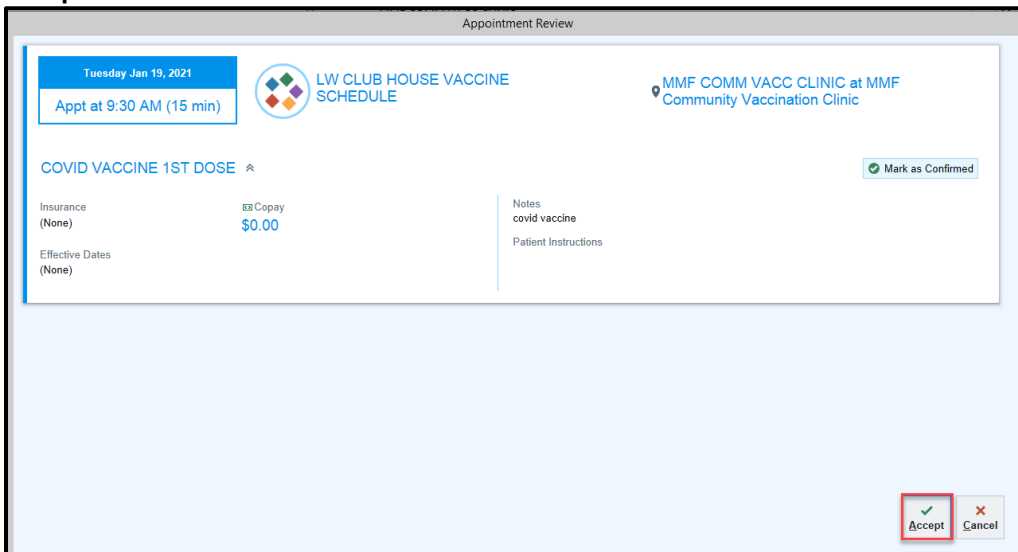


5. Click **Search**

- 6. On the Provider Schedule, user may see multiple open slots. Double click on the desired appointment time on the date requested, then click **Schedule**.



- 7. The Appointment Review window allows the user to review the scheduled appointment details. Click **Accept**.



8. The Appointment Information screen opens. Click Accept.

The screenshot shows the 'Appt Desk' window with the 'Appt Information' tab selected. The patient information is as follows:

- Name: Patty Mychart
- SSN: 000-00-0001
- Sex: Female
- Birth date: 1/24/1946
- Aliases: 1
- Address: 258 Line Street, Fountain Valley, CA 92708
- City (or ZIP): FOUNTAIN VALLEY
- State: CA, ZIP: 92708
- County: ORANGE
- Country: United States of America
- Home Phone: 657-555-5555
- Work Phone: (empty)
- Mobile: (empty)
- Referring: 1
- How you heard about us: (empty)
- PCP: (empty)
- Appt phone: (empty)
- Block calls for appointment:
- On Demand Print: Appt letter: 0, Enc form: 0, Face sheet: 0, Visit label: 0
- Perm comm: (empty)

Buttons at the bottom: Cancel, Back, Next, **Accept** (highlighted).

9. On the Interactive Face Sheet (IFS) confirm demographic and guarantor account information is correct, click **Finish**.

The screenshot shows the 'Registration' window with the 'Mychart, Patty' patient selected. The 'GUARANTORS & COVERAGES' section is expanded, showing:

- Guarantor: P/F Mychart, Patty [100080]
- Address linked to patient: 258 Line Street, Fountain Valley, CA 92708
- Home: 657-555-5555
- Rel to patient: Self
- Employment: (empty)
- Prof acct balance: 0.00
- Hosp acct balance: 0.00
- FPL Info: No FPL info on file

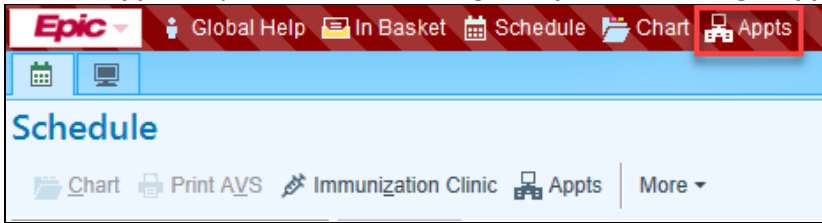
The 'ENCOUNTER INFO' section shows:

- Payment Information: Copay due: 0.00, Copay paid: 0.00, Prepay due: 0.00, Prepay paid: 0.00

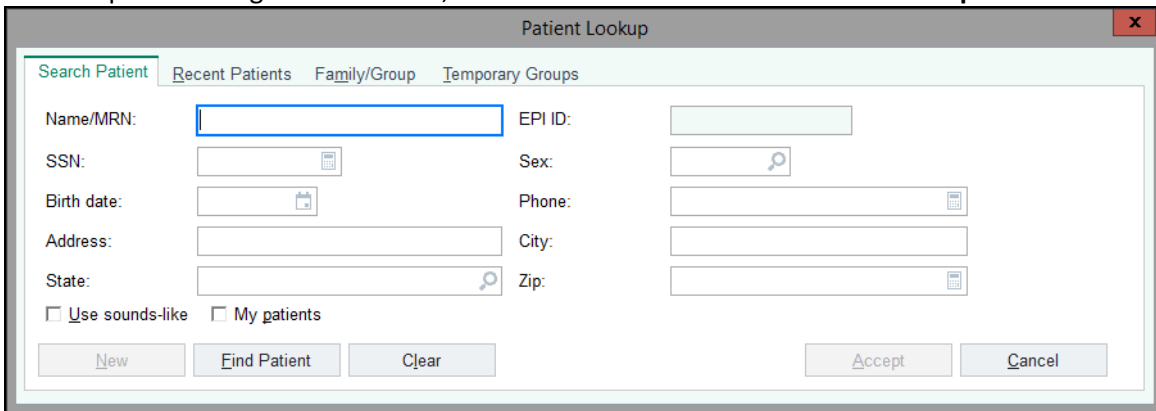
Buttons at the bottom: Restore, Back, Next, **Finish** (highlighted).

## Scheduling a New Patient not in Epic

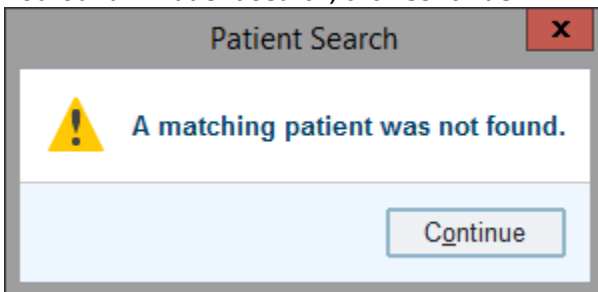
1. Click on **Appts** on your main toolbar or go to **Epic > Scheduling > Appts** to open the Appointment Desk.



2. Find the patient using the Last Name, First Name and DOB of the **Patient Look Up** window.



3. If the patient is New and has not been uploaded in the MHS system and has never been seen at any MemorialCare facility, then the user will need to create a new record in Epic. If a matching patient was not found in Patient Search, click **Continue**.



- 4. On the Patient Lookup window, enter:
  - a. **Name/MRN:** Last name, Frist Name
  - b. **SSN:** 000000001
  - c. **Sex:**
  - d. **Birth date:** mmddyyyy
- 5. Click **New**.

Patient Lookup

Search Patient | Recent Patients | Family/Group | Temporary Groups

Name/MRN: Patient, Lucy EPI ID:

SSN: 000-00-0001 Sex: Female [1]

Birth date: 3.24.1944 Phone:

Address:  City:

State:  Zip:

Use sounds-like

New Find Patient Clear Accept Cancel

- 6. The **New Patient** form will open. Enter the patients address, phone number, email (optional), and preferred language.
- 7. Click **Accept**.

New Patient

Undo ECP Registration

Name: Lucy Patient SSN: 000-00-0001

Sex: Female Birth date: 3/24/1944 Aliases: 1

1-Permanent | 2-Temporary | 3-Confidential

Address: 1478 Via Mariposa E Unit X Contact information: 

Number Type	Number
1 Home Phone	657-555-5555
2 Work Phone	
3 Mobile	

City (or ZIP): LAGUNA WOODS

State: CA ZIP: 92637 Email:

County: ORANGE Comments:

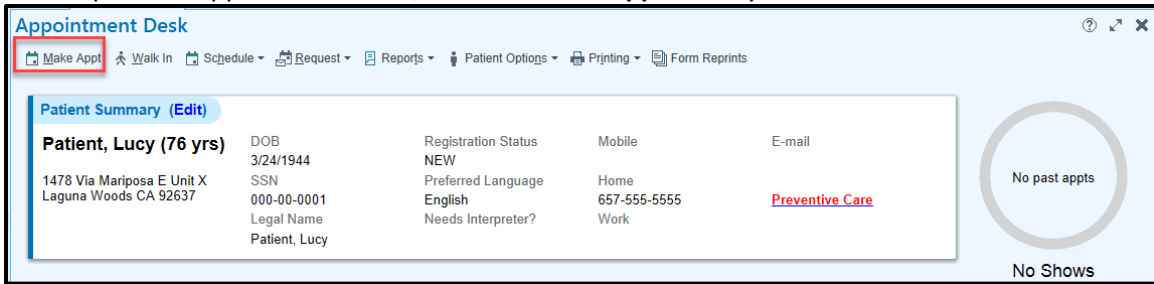
Country: United States of America

Needs interpreter?  Pref language: English

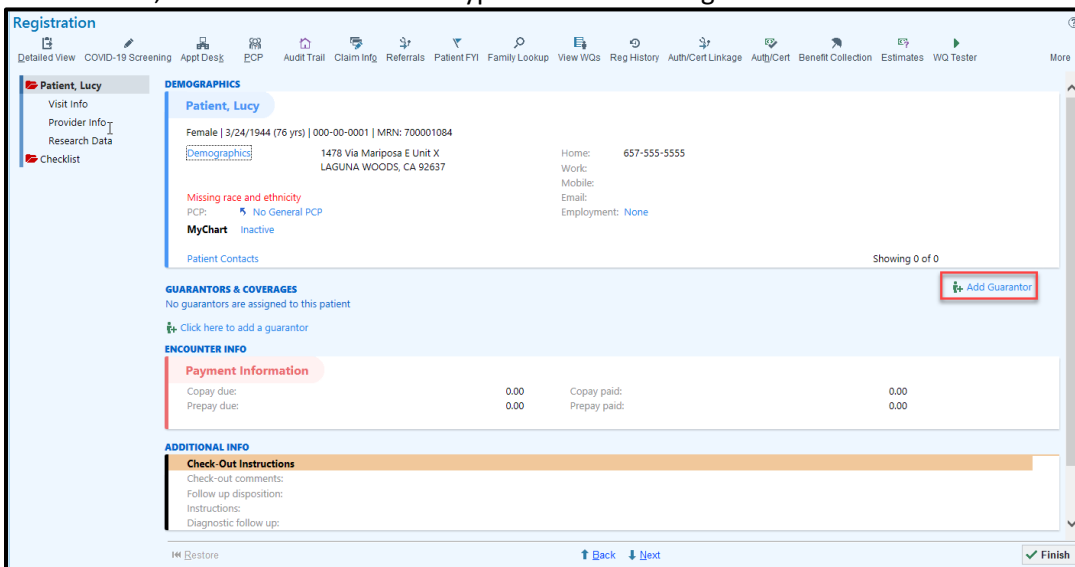
Perm comm:

Accept Cancel

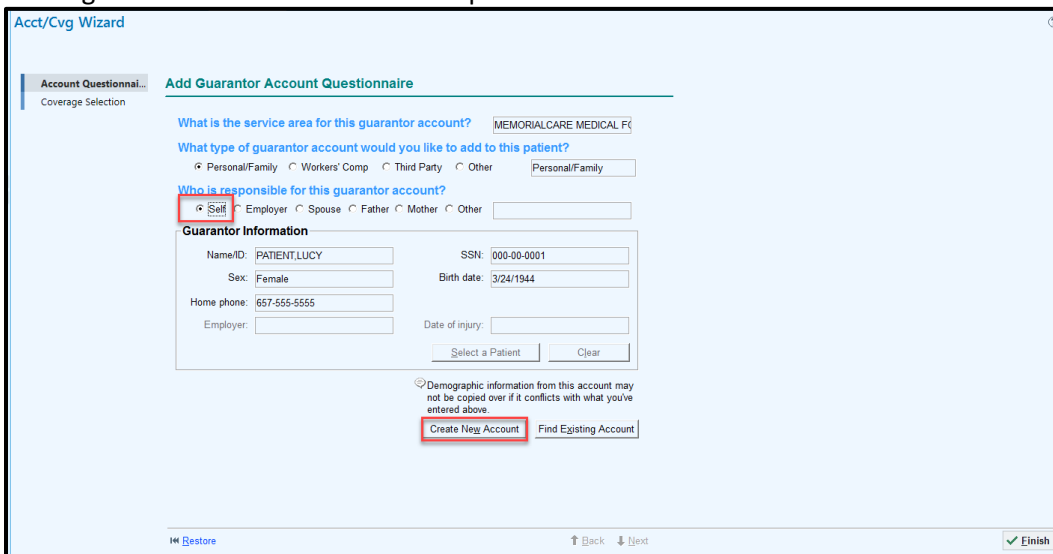
8. On the patient's appointment desk, click the **Make Appt** activity button.



9. Follow steps 4-6 of existing patient scheduling. See scheduling a patient in Epic section above.  
 10. From the IFS, click on Add Guarantor hyperlink to create a guarantor account.

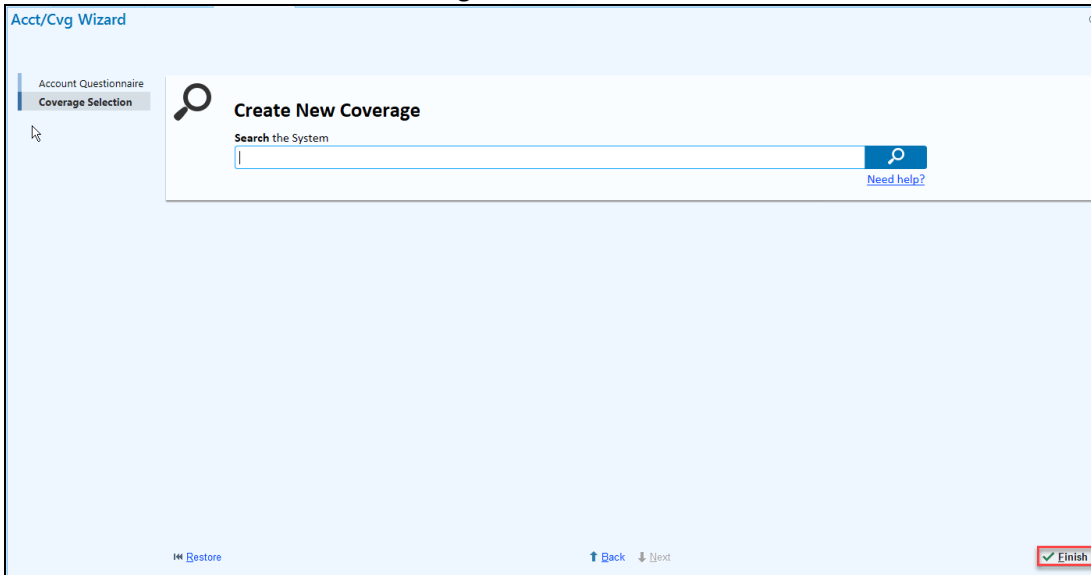


11. On Acct/Cvg Wizard, the Personal/Family type account will default in if the patient does not have an existing account. Select 'Self' under responsible section and click Create New Account.

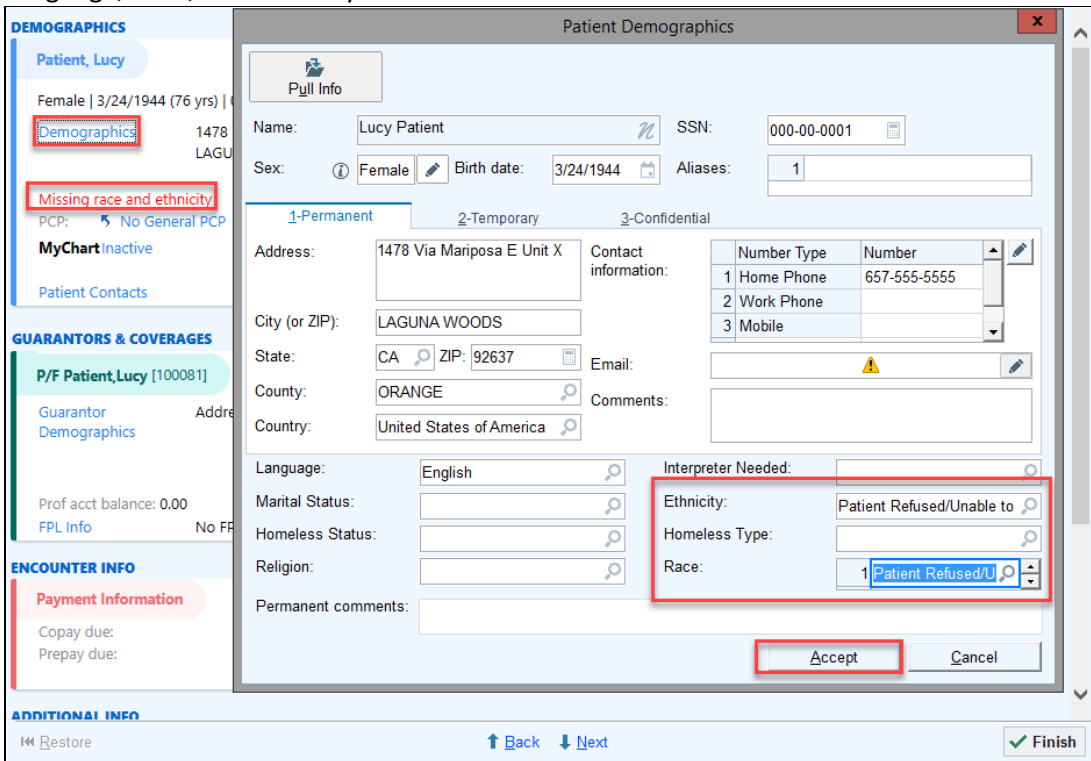




12. Click **Finish** on the Create New Coverage form.



13. Before leaving the Interactive Face Sheet (IFS), click on the Demographics hyperlink and complete the Language, Race, and Ethnicity fields.



## Schedule the 2<sup>nd</sup> Dose Vaccine Appointment

The administration of the initial vaccine has been completed, and the patient needs to return for the 2<sup>nd</sup> dose in 28 days.



This scheduling workflow *must only* occur the **same day** as the Initial Vaccine appointment. If this is happening on a different day see the [Manual Appointment Entry](#) section of this tipsheet.

1. Locate the patient on the MPS and single-click to highlight the patient.
2. Click the **Appts** activity button from within the Schedule.

COVID-19/Lab I	Time	Status	Video	Patient	Provider	Notes	Primary Plan
	9:00 AM	Signed Checked in: 8:31 AM			EMP VACCINE RESOURCE-LBM		None
	9:15 AM	Scheduled			EMP VACCINE RESOURCE-LBM		HC LA BC CHDP HMO
	9:30 AM	Signed Checked in: 9:25 AM			EMP VACCINE RESOURCE-LBM		None
	9:45 AM	Scheduled			EMP VACCINE RESOURCE-LBM		None
	10:15 AM	Signed Checked in: 10:25 AM		Training, Patient 48 year old / F	EMP VACCINE RESOURCE-LBM		None
Ordered-N...	1:00 PM	Arrived Checked in: 12:59 PM			EMP VACCINE RESOURCE-LBM		None

3. The patient's Appointment Desk will open. Click the Make Appt activity button.
4. Based on the initial administration and the 28 Day 2<sup>nd</sup> Dose selection, the workflow will display the appointment times for the appropriate date +/-2 days. Select the desired time.
5. Continue the steps for [Scheduling an Employee Existing in Epic](#).

## Check In a Scheduled Appointment

1. Locate the Scheduled appointment for the employee on the MPS and single-click to highlight the patient.
2. Click the Appts activity button on the MPS.

COVID-19/Lab I	Status	Video	Gray Risk	Time	Patient	Sex	ID (both)	Provider / Department	Visit Type	Confir
	Scheduled		No Assessment	10:00 AM	Training, Two 24-year old	F	79500048	EMP VACCINE RES... EMPIIM	Covid-19 Vaccine First Dose	

3. Highlight the appointment on the Future tab, and click **Check In**.

**Appointment Desk**

Make Appt Walk In Schedule Request Reports Patient Options Printing Form Reprints

**Patient Summary (Edit)**

**Mychart, Patty (74 yrs)** DOB: 1/24/1946 Registration Status: NEW Mobile: E-mail: [Preventive Care](#)

258 Line Street Fountain Valley CA 92708 SSN: 000-00-0001 Preferred Language: English Home: 657-555-5555

Legal Name: Mychart, Patty Needs Interpreter?: Work:

**Guarantor Accounts**

Account Name	Acct Ver Status	Acct #	Serv Area	Type	Fin Class	Balance	Acct Status
Mychart,Patty	New	100080	MMF	PIF	SELF	0.00	

Payor/Plan Cvg Ver Status Subscriber

**Future** Past

Encounter Date	Time	Visit Type	Provider	Dept	Notes	Rfl
1/19/2021 Tue	9:30 A	COVID VACCINE 1ST DOSE [52221]	LW CLUB HOUSE VACCINE SCHEDULE [7000757]	MMFCOMM...	covid vaccine	

**Check In** Check Out Cancel/Reschedule Change Appointment Edit Appointment Notes Edit Appointment Info Copy into Make Appointment Recur Message More

4. From the IFS, confirm information is correct. Click Continue Check In

**Registration**

Detailed View COVID-19 Screening Appt Desk PCP Audit Trail Claim Info Referrals Patient FYI Family Lookup View WGs Reg History Auth/Cert Linkage More

**Mychart, Patty**

Visit Info Provider Info Research Data Checklist

**DEMOGRAPHICS**

Mychart, Patty

Female | 1/24/1946 (74 yrs) | 000-00-0001 | MRN: 700001083

258 Line Street Fountain Valley, CA 92708 Home: 657-555-5555 Work: Mobile: Email: Employment: None

PCP: No General PCP MyChart: Active

Patient Contacts Showing 0 of 0

**GUARANTORS & COVERAGES**

P/F Mychart,Patty [100080]

Guarantor Address linked to patient Home: 657-555-5555 Rel to patient: Self Employment: Prof acct balance: 0.00 FPL info: No FPL info on file Hosp acct balance: 0.00

**ENCOUNTER INFO**

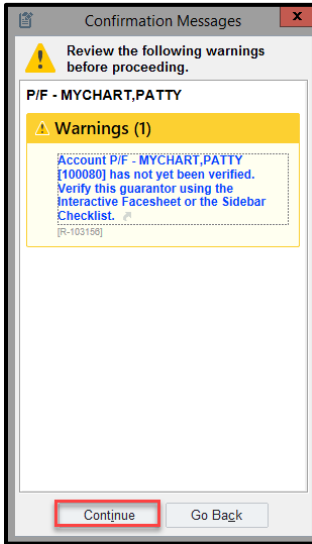
Payment Information

Copay due:	0.00	Copay paid:	0.00
Prepay due:	0.00	Prepay paid:	0.00

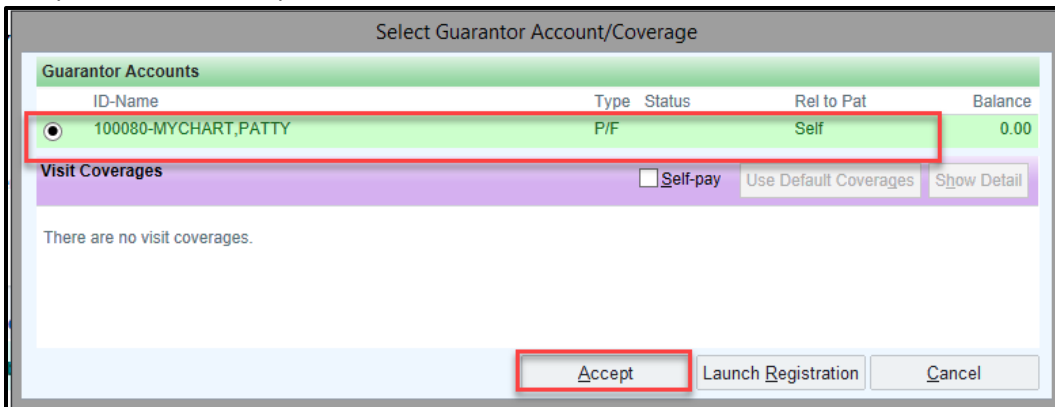
**ADDITIONAL INFO**

Restore Back Next **Continue Check In**

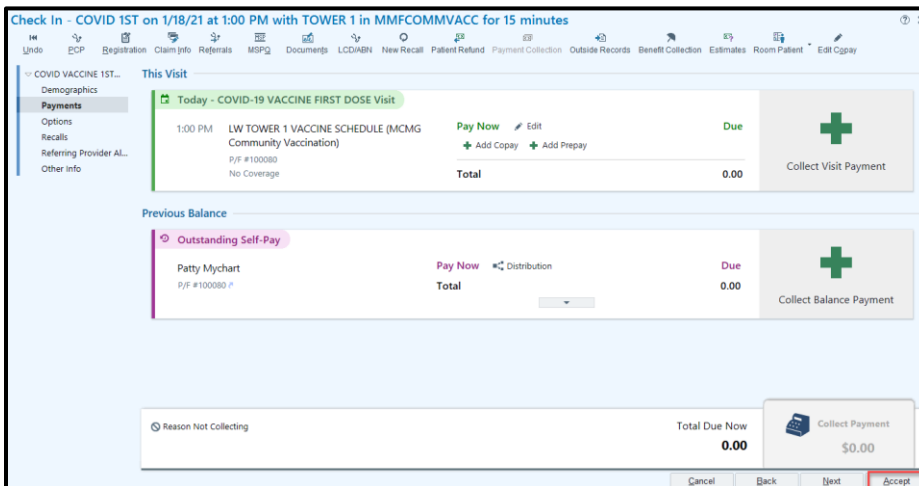
- Click **Continue** on the Confirmation Messages window.



- Select the P/F guarantor account and click Accept. A guarantor account must be linked to the visit to complete the Check In process.



- On the Payment screen, click Accept.



8. On the Appointment Desk, the status of **Arrived** is on the appointment and the employee is ready to receive their vaccine.

Future		Past					
Encounter Date	Time	Visit Type	Provider	Dept	Notes	Rfl	
1/18/2021 Mon	1:00 P(Arr)	COVID VACCINE 1ST DOSE [52221]	LW TOWER 1 VACCINE SCHEDULE [7000755]	MMFCOMM...	covid vaccine [7008520]		