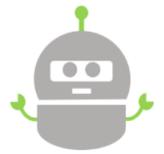




# COVID-19 Immunization Reconciliation Tool



## Overview & FAQs

The eHealth Centre of Excellence (eCE) has launched a new process to help primary care efficiently document their patients' COVID-19 vaccinations within their electronic medical records (EMRs).

The bot runs a search to produce a list of patients, and then opens the record for each patient on the list. The bot then locates the patient's HRM COVaxON vaccination report in the patient's chart, confirms COVID-19 vaccine details and automatically updates the CCP immunization section of the patient's chart. This process is offered at **NO COST** to you or your clinic.

## How does our process work?

Step	Description
1	Bot securely connects to the VPN and logs into the EMR
2	Once logged into EMR, bot runs a search to identify <b>active</b> patients with <b>less than two COVID vaccines</b> and <b>at least one HRM report</b>
3	Opens each patient chart from the results list & performs the following actions for <b>each patient</b> :
3a	Extracts HRM COVaxON Vaccination report(s) information using a custom form developed by the eCE
3b	Extracts COVID-19 vaccine information from CPP IMMU section and compares to information found in the previous step
3c	For each HRM report found, it will add vaccine information to the CPP IMMU section for vaccines <b>not already entered</b>
3d	If bot is unable to add vaccine information <b>OR</b> encounters date discrepancies within a 21-day threshold <b>OR</b> HRM report(s) is missing given date information, it will flag patient for <b>manual review</b>
4	Summary report generated and/or EMR message generated for interested participant(s)
5	Logs out of the EMR & disconnects from the VPN

# Interested in implementing this bot at your practice?

## 1. What is Robotic Process Automation (RPA) (a.k.a bot)?

RPA (Robotics Process Automation), also referred to as a 'bot' or 'robots' is a technology software programed to automate business processes by interacting with digital systems. Bots access healthcare applications to capture, interpret, and trigger action on manual, repetitive tasks at high speed and with great accuracy.

## 2. Is the process available for all EMRs systems?

The current process is compatible with Telus' Practice Solutions Suite EMR. We may look to expand the process to other EMRs in the future depending on the level of interest.

## 3. What is required to participate?

In order to participate in this initiative, organizations will be required to sign an agreement with the eCE and meet the technical requirements to ensure eligibility to implemented the automated solution. Please fill out the ["Expression of Interest"](#) form to sign up your clinic and share the required information so our team can assess technical feasibility.

## 4. What are the technical requirements to implement these tools in practice?

At a high-level, technical requirements include but not limited to:

- TELUS Health, Practice Solutions EMR (Local or ASP)
- EMR account, unique username and password to the EMR as any other human user
- VPN account. Following VPN types are supported for this process:
  - FortiClient (Local)
  - FortiClient (ASP)
  - Windows VPN (SSTP or L2TP/IPsec)
  - Shrewsoft VPN
  - Open VPN

**Note:** If the VPN your clinic uses is not supported, please get in touch with us at [automates@ehealthce.ca](mailto:automates@ehealthce.ca). Our team will need to connect with your technical team to gather additional information for the new VPN type.

## 5. How is the tool implemented?

Our bots are housed at the eCE within a secure, encrypted environment. No program or software installation is required at the organization. Each organization is required to grant 'bot' access to their VPN and EMR. The eCE will then coordinate a schedule time when the bot will run.

## 6. Will implementing this tool in my practice affect EMR performance?

Running this process will not impact your server or any other user using the EMR. The bot has been tested with a few clinics already and the runs have gone smoothly without impacting the system. If there are still concerns about system performance, bots can also be scheduled to run at your practice after hours to minimize any interruptions that are anticipated by the clinic.

## 7. Does the bot have access to the COVaxON database?

There is no direct link to the COVaxON database. The bot is solely reliant on the categorized HRM reports that are posted to the patient's chart to extract COVID-19 vaccination information for patients.

## 8. Once agreements are signed and technical requirements are met, how quickly will be the bot be implemented in my practice?

Once we have the necessary paperwork and all technical requirements (EMR account / VPN connection information) gathered from your team (locally hosted server) or the vendor (ASP model), our team will be able to start the setup and add participant physician(s) to the queue for bot runs. Timeline for the runs is dependent on the # of participant clinician(s) per site & # of patients that the bot must process for each physician.

## 9. How does the bot handle HRM report(s) when the vaccine name and lot number fields are empty?

The bot is currently programmed to populate the name of the Pfizer vaccine when it finds that the vaccine name is missing from the report for any “given date” that falls between May 18<sup>th</sup> – June 16<sup>th</sup>. OntarioMD has confirmed that if the vaccination name is missing from the HRM report(s) between that time period, then it was a Pfizer vaccine. If the lot # is empty in the report, then the bot will not populate that lot # when it is updating vaccine information for that patient. However, when a given (administration) date field is empty in the HRM report, it will not process that patient and include in the summary report for manual validation.

## 10. Is there a workaround for the EMR limitation when adding the first dose after the second dose of the vaccine has been added?

An error prevents end-users from entering the first dose of the vaccine after the second dose has already been entered. The EMR will not allow a user to record a change for the same treatment for a date that is earlier than the one entered. To handle this scenario, the bot will temporarily add a date that is far in the future (e.g., Jan 1, 2035) to bypass the error. Bot will then change the future date with the original date specified in the HRM report using a special custom form to ensure the given date for that dose was correctly updated in the patient’s chart.

## 11. What information is included in the summary report generated at the end of the run?

A summary reports includes a list of all patients along with actions and/or errors that the bot encountered when processing those patient charts. More specifically, this report includes a summary, next actions a user at your site may need to perform, the number of COVID-19 vaccination HRM reports found, the number of COVID-19 vaccines that were already in the CPP IMM section, and how many vaccines were added in by the bot. Patient IDs and Physician Name information is included in these reports and no personal health information (PHI) is included. These encrypted reports are securely saved in our environment for auditing purposes and can be shared with sites on request.

## 12. What if I don’t want to receive the reports? How will I get notified of the results?

**EMR message notification functionality** is available that allows the bot to send a n EMR message for each patient to either the participant physician OR another designated individual at your site. There are two options related to the messaging piece: **Receive a message for all patients even if there is no further manual validation OR only receive a PSS message if manual validation is required for the patient.**

Opting in to receive an EMR message is optional – a summary report generated by the bot can be shared with sites that do not want to receive EMR messages. Sites can opt-in to receive both messages and the report.

[Click here to sign-up!](#)