Instructions for the Epic®
Electronic Health Record (EHR) System

Adding Educational Material

to an After Visit Summary for Patients Who Express Vaccine Hesitation

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01. Background and Limitations

This document is intended to provide health systems with instructions for how to add patient educational information to a patient's After Visit Summary (AVS) following a consultation with their healthcare provider (HCP) in which they discussed reasons for their vaccination hesitance.

An additional resource entitled "Configuring Documentation of Vaccine Hesitancy Reasons" is available through your GSK representative. **Please note:** this separate resource should be implemented by a health system alongside this one. Without first configuring the vaccine hesitation reason capture tool, AVS content will not be triggered.

These instructions are specific to the Epic EHR system. These instructions are not appropriate for other conditions, treatments, therapeutic areas, or for other EHR systems. This document is not intended to provide any clinical advice or clinical recommendations, which are solely the responsibility of the HCP.

The processes outlined in this piece are variable, and not all steps will apply to every customer. Any steps or settings that are not part of a customer's standard process should be excluded or modified accordingly. Any questions should be directed to the appropriate service provider. The practice is solely responsible for implementing, testing, monitoring, and ongoing operation of any EHR tools.

This guide is designed for organizations using the Epic 2025 version or later. Setting up patient educational content in an AVS requires minimal time. Some configuration may be required by a clinical analyst.

02. Key Considerations

Vaccine hesitancy is an increasing concern due to its association with rising rates of vaccine-preventable diseases in children and adolescents. Multiple studies have explored reasons for vaccine hesitancy and a number have found that they tend to be associated with the following key areas of concern: safety concerns, a desire for additional education, religious reasons, and personal or philosophical reasons.[1]

This guide provides technical instructions to help a health system configure and deliver educational content in AVS messages for all patients who have documented vaccination hesitation reasons. Specifically, the instructions help the health system to:

1. Configure a SmartText Object for inclusion in After Visit Summaries.
2. Embed the SmartText Object in an AVS for patients who have a vaccination hesitation reason documented during an encounter.

Educational content for patients can be added to an AVS document in the Epic EHR system in 2 ways:

1. By creating a SmartText or SmartPhrase, which can be added to a patient education library and manually added to the AVS during the wrap-up activity.
2. By automatically adding educational content to the AVS based on patient characteristics.

SmartText and SmartPhrases provide documentation efficiencies while working in the Epic EHR system. Instead of manually entering repetitive information, adding a SmartText or SmartPhrase element consolidates all relevant content in an easy-to-access location. SmartPhrases can be created by end users or by the system, and they can easily be shared across the organization. SmartTexts are generated by the health system.

Steps for both options are included in this guide (in Sections 4 and 5 respectively).

NOTE: Instructions for setting up learning assessments, educational titles, topics, and points are not included in this guide.

03. How to Create Vaccination Hesitation Patient Education SmartPhrase or SmartText and Add It Manually to the AVS

An individual HCP end user can create a SmartPhrase without requiring assistance from the organization's Health IT (HIT) team. However, an HIT clinical analyst is required to create a SmartText object. To create a SmartPhrase or SmartText object based on the vaccine hesitation patient educational resource and manually add it to the AVS during the wrap-up activity, follow the steps below:

> **NOTE:** Health systems do not need to generate both SmartPhrases and SmartText objects. Health systems should follow the set of instructions below that best aligns with their standard EHR practices pertaining to health educational content.

3.1 Configuring a SmartPhrase

1. **Open the SmartTool Editor** and **select the SmartPhrase option** by clicking the Epic logo at the top left and selecting MySmartPhrases or using the search feature.
2. **Create a new SmartPhrase** with a unique mnemonic according to the organization's naming convention (eg, ".VaccineHesitation").
3. **Select the General button** and **insert desired text**. Suggested content can be found on **pages 10-16**.
4. **Click Accept** after uploading and formatting as desired.

   NOTE: Some manipulation may be required. Consider adjusting the SmartLinks as desired.
5. **Open** a patient chart and **confirm the SmartPhrase renders** the form as expected.
6. To use the newly created SmartPhrase from Step 2, **enter** the SmartPhrase name during wrap-up activity.

Important notes:

SmartPhrases: Creation, Storage and Sharing

- SmartPhrases can be created at either the end-user level or the health-system level
- When SmartPhrases are created by an individual provider, they are stored in the MyPhrases folder
- SmartPhrases can be shared with other users by adding them in the Sharing section

Copying Shared SmartPhrases

- Navigate to the SmartPhrase tool to copy SmartPhrases created by other users
- In the Sharing section, use Copy User to find other users' SmartPhrases
- Select one or more SmartPhrases of interest. Copy the selected SmartPhrases to save them to your personal MyPhrases in the Sharing section

→ *See next page for additional steps.*

03. How to Create Vaccination Hesitation Patient Education SmartPhrase or SmartText and Add It Manually to the AVS (continued)

3.2 Configuring SmartText

1. **Open the SmartTool Editor** and **select the SmartText option**.
2. Click **Accept**.
3. On the Restrictions tab, **enter the desired Functional Types. Enter** and **select** MR Clinical References, MR Patient Instructions, MR Letter Encounter, and MR Charting.
4. **Complete the Synonyms information** and consider key search terms (eg, hesitation, vaccine hesitation).
5. **Select the General tab** and **enter the desired SmartText**. Example content can be found on **pages 10-16**.
6. Once completed, **release the record(s)** by selecting the radio button.

NOTE: If third-party content is used for the Patient Education library (eg, Healthwise or other), consider the Import Patient Instructions utility. Additional instructions can be found below:

1. **Save the records** on a network drive.
2. **Open** the Import Patient Instructions utility.
3. **Select** the desired format (HTML or RTF).
4. **Select** the desired content directory.
5. **Complete the SmartText Settings** as desired. **Enter** and **select** MR Clinical References, MR Letter Encounter, and MR Charting for the Functional Types.
6. **Release the record(s)** once complete.
7. After successful integration of the vaccination hesitation patient educational content, confirm and validate the content in the wrap-up activity when selecting Clinical References/Patient Instructions.

04. How to Automatically Add Vaccination Hesitation Patient Education to the AVS Based on Patient Characteristics

Setting up the vaccination hesitation patient educational content to conditionally appear in an AVS requires a few steps to be completed by a clinical analyst.

1. Follow the steps on page 6 of this guide (Configuring SmartText) to add the patient educational content as a SmartText in the system.
2. Define the cohort of patients to receive the conditional AVS by using a rule of set of rules. After the rules have been established, a conditional print group that includes both the rule(s) and the SmartText record can be created.
3. Add the new print group to the AVS report.

The below are optional steps to automate the addition of vaccination hesitation educational material in appropriate patients' AVS.

4.1 Create Rules to Define the Cohort

1. **Open the Rule Editor** and **create a new rule**. **Select the SmartPhrase option** by clicking the Epic logo in the top left and selecting Tools > Rule Editor Tools and Rule Editor or by using the search feature.
2. **Create rules** for the scenarios below:
    a. Scenario 1: Safety concerns and fear of side effects
    b. Scenario 2: Misinformation and media influence
    c. Scenario 3: Low perceived risk of disease
    d. Scenario 4: Preference for natural immunity or alternative approaches
    e. Scenario 5: Religious, moral, or personal beliefs
    f. Scenario 6: Distrust in institutions and the healthcare system
    g. Scenario 7: Desire for more information or time
3. **Enter a unique name** for each of the rules and **set the context** to Patient.
4. **Click** Accept.
5. **Enter the description for the rule** (eg, "This rule finds all patients with a vaccination hesitation reason of "Safety concerns and fear of side effects").

→ *See next page for additional steps.*

04. How to Automatically Add Vaccination Hesitation Patient Education to the AVS Based on Patient Characteristics (continued)

4.1 Create Rules to Define the Cohort (continued)

6. In the Properties tab folder, **find the first value** (eg, Category list item of "Safety concerns and fear of side effects" from the EPT database and 16105 which contains the HM Edited Topic Reasons).

   Double-click the property to add it to the criteria form.

7. **Set the vaccine or immunization series parameter** as desired (this is optional but may be considered if the user wants to associate the vaccination hesitancy reason to a specific immunization series).

8. **Set the number of completed immunizations as desired** (optional if suspected vaccination hesitancy occurs during the immunization series).

9. **Complete the Evaluation logic** for all rules.

10. **Click Save**. **Review proper operation** of the rules and **click Accept**.

4.2 Create Conditional Print Groups

1. In Clinical Administration, **go to Reports, Print Groups** and **select** Dup Print Groups.

2. **Duplicate the desired print group** for the AVS SmartText with the optional Rule filter.

3. **Complete the Parameters:**

   a. Parameter 1: Enter the header (eg, Additional Information)

   b. Parameter 2:

      i. Piece 1: Enter the ID of your vaccination hesitation patient education SmartText

      ii. Piece 2: Enter the ID of the newly created rule

      iii. Piece 3: Enter "="

      iv. Piece 4: Enter "1"

   c. Parameters 3 and 4: Optional; set as desired

4. **Save** the new Print Group.

04. How to Automatically Add Vaccination Hesitation Patient Education to the AVS Based on Patient Characteristics (continued)

4.3 Add the Conditional Print Groups to the AVS Report Record

1. In Clinical Administration, **go to Reports, Print Groups** and **select** Reports (LRP).
2. **Open the AVS report** and **navigate to the Report Definition screen**.
3. **Add the newly created conditional print group** in the Report Print Group columns.
4. **Set the prioritization** as desired.
5. **Save** the record.

05. Example Vaccine Hesitation Education SmartText Object

Concerns About Safety and Possible Side Effects of Vaccination:

Many people have questions about vaccine safety and possible side effects. It's normal to want to understand what to expect before making a healthcare decision. Vaccines, like most medical treatments, typically cause mild side effects over the course of a few days, such as soreness at the injection site or muscle aches, headache, or fatigue. These effects are usually temporary and go away on their own. Serious side effects are uncommon, but can occur. Vaccines are carefully studied and monitored to help ensure they are as safe as possible.

You may have concerns about long-term health effects, ingredients, or stories you've heard from others. It's important to know that vaccines are tested in large clinical studies and continue to be monitored after FDA approval. Most people tolerate vaccines well, and the protection they provide against disease is considered to outweigh the risk of side effects. If you have specific concerns, your healthcare provider (HCP) can review what is known about safety and help you understand what applies to you.

If you would like to learn more, explore these trusted resources:

- **VaccineInformation.org Vaccine Information for Patients**: Easy-to-understand information about vaccine safety, side effects, and how vaccines work
- **Immunize.org: Vaccine Basics and Safety**: Educational materials and answers to common questions about vaccine safety and ingredients
- **CDC Vaccine Resources for Patients**: Official information on vaccine safety, monitoring, and recommended vaccines

You may also find it helpful to speak with your HCP as you consider your decision. Your care team is here to provide clear, accurate information and support you in making the choice that feels right for you.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Information About Vaccines in Social Media, News Sources, and Personal Networks:

Many people come across different information about vaccines from social media, news sources, or personal networks. It's normal to feel unsure when messages conflict or when stories are presented in emotional or compelling ways. Not all information about vaccines is accurate or complete, and it can sometimes be difficult to tell which sources are reliable.

Vaccines are studied in large clinical trials and continue to be monitored after FDA approval. Healthcare and public health organizations review scientific evidence from many studies to provide recommendations based on the best available data. If you have seen or heard something that raises questions, your healthcare provider (HCP) can help review that information with you and explain what is known.

If you would like to learn more, explore these trusted resources:

- **VaccineInformation.org Vaccine Information for Patients**: Explains vaccine safety and common concerns in clear, easy-to-understand language
- **Immunize.org Vaccine Confidence Resources**: Addresses common questions and concerns about vaccines
- **Let's Get Real About Childhood Vaccines**: Provides straightforward explanations to help distinguish between facts and misinformation

You may also find it helpful to speak with your HCP about any information you've seen. Your care team is here to provide clear, accurate information and help you understand what applies to you.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Perceptions About the Risk of Disease Related to Vaccines:

Some vaccine-preventable diseases are less common today, which can make them feel less of a concern. It's understandable to wonder whether vaccination is still necessary if you have not seen these illnesses in your community.

Many of these diseases are now rare because vaccination has helped reduce their spread over time. When vaccination rates decrease, some diseases can return and lead to serious complications, especially for young children, older adults, or individuals with certain health conditions. Vaccination helps protect you by reducing the risk of illness before exposure occurs.

If you would like to learn more, explore these trusted resources:

- **CDC Vaccine Resources**: Information about vaccine-preventable diseases and why vaccines are recommended
- **Vaccines and the Diseases They Prevent**: Provides an overview of recommended vaccines by disease, including vaccines recommended prior to travel and for specific groups
- **History of Vaccines**: Educational resources on how vaccines have reduced disease over time

Your healthcare provider can also help you understand your personal risk and how vaccines may help protect your health and those around you.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Preference for Natural Immunity or Alternative Approaches to Vaccines:

Some people prefer natural approaches to health or believe that experiencing an illness may provide stronger or longer-lasting immunity. It's common to want to support the body's natural defenses and make informed choices about medical care.

Vaccines are designed to work with the body's immune system by helping it recognize and respond to certain diseases without experiencing the illness itself. Natural infection can sometimes lead to serious complications or long-term effects, depending on the disease. Vaccination offers a way to build protection while reducing those risks.

If you would like to learn more, explore these trusted resources:

- **About the Vaccine Education Center**: Explains how vaccines work with the immune system
- **VaccineInformation.org Vaccine Basics**: Covers how immunity develops and common questions about vaccines
- **CDC Vaccines & Immunizations: Vaccine Basics**: Provides an overview of how vaccines support immune protection

Your healthcare provider can help you compare options and understand how vaccination fits into your overall approach to health.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Religious, Moral, or Personal Beliefs Related to Vaccines:

Many people consider how their personal or religious beliefs apply to healthcare decisions, including vaccines. It's normal to have questions. Across many faith traditions, caring for one's health and protecting others are important values, and vaccination is often viewed as a way to help prevent serious illness and support the well-being of family and community.

Generally, major religious traditions do not prohibit vaccination, and many religious organizations support immunization. In fact, most faith communities encourage individuals to make informed healthcare decisions that protect both personal and community health. If you have specific concerns—such as ingredients, how vaccines are made, or ethical considerations—these can often be addressed through both medical information and guidance from faith-based perspectives.

If you would like to learn more, explore these trusted resources:

- **The Arizona Partnership for Immunization What does my religion say about vaccines?**: An overview of many major global religions' perspectives on vaccination, including links and additional resources
- **Immunize.org What the World's Religions Teach, Applied to Vaccines and Immune Globulins**: This article reviews teachings from many major religions—including Christianity, Islam, Judaism, Hinduism, and Buddhism—and explains how they relate to vaccines. It looks at common questions people may have about ingredients, ethics, and medical care, and compares those concerns with religious guidance

You may also find it helpful to speak with your healthcare provider and a trusted religious or community leader as you consider your decision. Your care team is here to provide clear information and support you in making the choice that feels right for you.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Level of Trust in Institutions and the Healthcare System Related to Vaccines:

Some people have concerns about healthcare systems, pharmaceutical companies, or public health recommendations. These feelings may be shaped by personal experiences, community perspectives, social media, or historical events. It's understandable to want transparency and to feel confident in the information you receive.

Vaccines are studied by many independent researchers and reviewed by multiple organizations before and after FDA approval. Safety monitoring continues over time through national and global systems designed to identify and evaluate potential concerns. Healthcare providers (HCPs) aim to share information openly so you can make informed decisions.

If you would like to learn more, explore these trusted resources:

- **CDC Vaccine Safety**: Explains how vaccine safety is monitored and evaluated
- **Immunize.org Vaccine Safety: Resources & Information**: Provides educational materials and answers to common safety questions
- **National Foundation for Infectious Diseases Immunization**: Offers information about disease prevention and vaccine research

You may also find it helpful to speak with your HCP about your concerns. Your care team is here to listen, provide transparent information, and support your decision-making.

→ *See next page for additional information.*

05. Example Vaccine Hesitation Education SmartText Object (continued)

Desire for More Information or Time Related to Vaccines:

It's common to want more information or time before making a decision about vaccination. Healthcare decisions can feel important, and taking time to understand your options is a normal part of the process.

Vaccines are recommended based on evidence about how they help protect against serious diseases. At the same time, your questions and preferences matter. Your healthcare provider can walk through the benefits and potential risks, answer your questions, and revisit the conversation at future visits if needed.

If you would like to learn more, explore these trusted resources:

- **CDC Vaccines & Immunizations: Vaccine Information Statements (VIS)**: Easy-to-read summaries about each vaccine
- **Trusted Sources of Vaccine Information**: Resources designed for patients and families
- **Immunize.org Clinical Resources A-Z**: Printable materials covering common vaccine questions

You can always return to this conversation when you're ready. Your care team is here to support you with clear information and help you make the decision that feels right for you.

06. Disclaimers

- The customer (ie, physician, medical group, integrated delivery network) shall be solely responsible for the implementation, testing, and monitoring of the instructions to ensure proper orientation in each customer's EHR system
- Capabilities, functionality, and setup (customization) for each individual EHR system vary. GSK shall not be responsible for revising the implementation instructions it provides to any customer if the customer modifies or changes its software or the configuration of its EHR system, after such time as the implementation instructions have been initially provided by GSK
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07. Notes

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