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

Population Health Insights Guide

TO HELP IDENTIFY APPROPRIATE OLDER ADULT PATIENTS FOR RSV VACCINATION AND EVALUATE RSV IMMUNIZATION RATES IN YOUR HEALTH SYSTEM

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01. Guide Overview

This Population Health Insights Guide is intended to help health systems make configuration updates in the Epic EHR Population Health Suite (Healthy Planet) to generate reports that may identify useful insights to support improving RSV immunization rates. This guide provides suggestions and instructions to monitor and manage RSV immunization rates and associated population health metrics across the health system.

This guide will not work for other conditions, treatments, therapeutic areas, or on other EHR systems.

This guide provides specific considerations for:

- Identifying older adult patients with RSV immunization care gaps
- Using Epic-released registries to provide visibility into immunization care gaps
- Using clinical decision support tools to create care gap awareness in the EHR for clinicians

Additionally, this guide will provide an overview of the Healthy Planet module, commonly used features of Healthy Planet, and technical instructions to configure these features across the registries, reporting tools, and health maintenance features within the Healthy Planet solution suite.

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 operating of any EHR tools.

This guide is designed for organizations using the Epic 2022 version or later. Some configurations may be required by a clinical analyst.

Key Terms Used in This Guide

AIS = Adult Immunization Status

CDC = Centers for Disease Control and Prevention

CER = rules solution in Epic

DRG = Diagnosis Related Group

HCP = healthcare provider

IDB = Radar (dashboard) component

IDM = Radar (dashboard) record

OPA = OurPractice Advisory

Radar = dashboard solution in Epic

RSV = respiratory syncytial virus

YOA = years of age

02. Background

Importance of Managing Adult Immunization to Support Population Health at the Health System Level

The Epic EHR system offers functionality for health systems to manage immunizations at the system or population level by supporting a health system's existing population health strategy. After a health system sets a strategy, which can include improving immunization rates amongst vulnerable populations and standardizing immunization processes, tactics can be set at both the health system and local levels to reach these goals. Healthy Planet provides critical tools to support both the strategy and tactics.

Individual tactics—for example, creating a list of patients with immunization care gaps—can help provide valuable care and insights into what is working well at both the health system and individual provider levels. A system-wide approach is suggested to create economies of scale and reduce any outliers that may negatively affect the health system's RSV immunization efforts.

This guide provides instructions on how to help identify older adult patients who may be appropriate for RSV vaccination per CDC vaccination recommendations found **here**. These patients are individuals 75 years of age and older and individuals 50 through 74 years of age who are at increased risk for severe RSV.[1]

03. Epic EHR Healthy Planet Population Health Suite High-Level Overview

Healthy Planet, Epic's population health management solution, includes:

- Comprehensive care management tools
- Advanced reporting capabilities for actionable insights
- Engagement solutions for both providers and patients
- Tools to empower patient activation
- Support for value-based care initiatives

Health systems can utilize Healthy Planet to help improve RSV immunization rates

04. Overview of Population Health Registries & Registry Metrics Within the Healthy Planet Module

A critical component of Healthy Planet is **registries**. Registries are commonly used to drive clinical outcomes at the health system level, provide data insights, and expose clinical variation to help guide the health system to meet strategic imperatives for achieving RSV vaccination for appropriate patients.

Registries allow health organizations to identify subsets of their patient population. Registries are organized around a common health element(s) known as **registry inclusion rules**. Common inclusion rules include age, chronic conditions, diagnoses, health measures, immunization status, or other clinical factors. Patients who meet the selected inclusion rule for a particular registry are automatically included in the registry.

Since registries are dynamic, patients who no longer meet the inclusion metric are excluded from the registry, and new patients may be introduced. This is handled by a back-end program and does not require providers to actively enroll patients in a registry.

Epic provides many commonly used health registries to health systems; the most relevant registry for immunizations in the Epic EHR system is the Wellness Registry. The **Wellness Registry** drives health maintenance alerts for all preventative measures and immunization series. However, organizations can modify registries and their inclusion rules to meet their desired specific population health programs.

It is important to note that registries can consume data feeds from outside organizations if desired. For immunizations, consider identifying if a state immunization registry is available to feed historic administered immunizations. Adding this data feed provides a complete immunization history to providers, and the immunization rules acted upon by the registry can forecast any immunization(s) due.

Defining registries and registry inclusion factors, components, and outcomes are critical elements of a population health strategy.

Registry metrics are a component used to collect data that is pertinent to the patients in the defined population registry. Once a metric is associated with a registry, reports can be created from the population subset and these metrics can be used to show the captured data to gain insight on the patient's condition.

Proposed registry metrics for RSV immunization registries and technical instructions for configuring them can be found in later sections of this guide.

05. Using Registry to Track RSV Vaccinations at the System Level

Population health insights and registries at the health system level may offer:

- The opportunity to evaluate health system immunization rates
- The ability to help identify and monitor sites within the health system that are not achieving immunization goals
- RSV-specific clinical decision tools, such as Health Maintenance alerts and OurPractice Advisories (OPAs), which support a standards-based approach to addressing RSV
- The ability to utilize social determinants of health to help identify barriers and help develop impactful RSV immunization efforts

As health systems provide longitudinal health care to their members, setting up immunization tactics at the system level can potentially add supplementary touchpoints with patients (expanding from primary care-based encounters to acute and other care settings).

RSV immunization campaigns can be launched at the local level and expanded and scaled to the health system level if desired. Consider modifying the patient report and health maintenance alert scope from a local instance to the health system when scaling up.

06. Technical Instructions for Configuring Registries in Healthy Planet to Help Identify Older Adult Patients Potentially Eligible for RSV Immunization per CDC Recommendations

Registries are based on a general inclusion rule and may contain multiple metrics to define outcomes related to the common registry element. For immunizations, the inclusion rule is age, and multiple wellness age-based registries are available.

The Wellness Registry – All (82299) is the default Healthy Planet registry that includes all health system patients used for setting immunization expectations. Patients who meet CDC recommendations will automatically be assigned a Health Maintenance alert in Epic when they meet the immunization criteria. To confirm that the Wellness Registry – All (82299) is active:

1. **Navigate to the Registry Editor** and **open the Wellness Registry – All (82299)**.

2. **Confirm the Registry Status is set to Active**. A back-end program automatically scans all patients for all health maintenance rules. Patients will automatically be added or removed once criteria has been satisfied.

3. **Confirm the Health Maintenance Topic** for the RSV immunizations is configured. A standard setup is available with foundation grouper records for RSV vaccines. Rule 83595-IMM RSV Parent Rule can be entered in the Sequential Rule field during setup.

4. **Confirm the immunizations are listed** in the grouper records and mnemonic.

5. **Complete the process** by adding the Health Maintenance Topic table of the immunization records. Navigate to Clinical Administration > Meds, Allergens, Imm, etc > Immunizations to access the immunization records.

6. **Confirm that the Epic-released Health Maintenance Plans are connected to the Health Maintenance Topics** to complete the health maintenance setup.

Please note that when not electing to use Health Maintenance alerts, manual OPAs can be created and used. This option would require manual configuration and a maintenance burden on the health system to manage all immunization recommendations and preventive health maintenance recommendations from the US Preventive Services Task Force.

07. Technical Instructions for Modifying Registry Inclusion Rules for Registries

The registry inclusion rule determines who should be part of the registry. This is usually a condition or disease, whereas age is used for the Wellness Registry.

Registry changes can be made in the Registry Editor which requires administrative credentials. The Registry Editor includes the display name, registry type, activation status, and pub status of the registry. The **Epic-released Wellness Registries are appropriate choices for age-based immunization series**. Epic-released inclusion rules and metric rules have limited editing options. Consider copying the standard rule before changing or adding properties. Registry inclusion rules are created in the Rule Editor and contained in the CER master file. In Hyperspace, look for the Registry Editor and click Override Registry to create a copy of a released registry instead of creating a new registry.

For the RSV immunization efforts, consider the Epic-released Wellness Registry – All (82299) inclusion rule and registry metrics.

NOTE: The Wellness Registry may not capture all patient vaccinations outside the health system. Therefore, it's important for HCPs to review patient immunization history and update vaccination records as appropriate.

08. How to Configure Registry Metrics/Key Performance Indicators to Monitor Population Health Metrics in Epic

Registry metrics provide insights into what needs to be measured for the subset of patients in the registry.

Epic-released registries come with multiple registry metrics. Metric rules can be edited, modified, or added. Registry metric CER rules work slightly differently compared to standard rules in that they not only evaluate a true or false status but also find the data point and store it in the registry data record.

To create or modify rules:

1. **Access the Rule Editor activity**.
2. **Create a new rule** or **edit an existing rule** with a registry metric context.
3. **Edit all parameters** for the rule and save the rule record.
4. **Return to the Registry Editor and add the new registry metric rules to the registry** in the Metrics and Rules section. Standard properties such as "Is HM Topic Due Date in Range" or "Is on Health Maintenance Modifier" may be useful properties to consider. The registry metrics used for risk indications for RSV have Epic-released metrics assigned.

08. How to Configure Registry Metrics/Key Performance Indicators to Monitor Population Health Metrics in Epic (continued)

For the Immunization registry metrics, consider the following Key Performance Indicators (KPIs) and related parameters. These KPIs serve as examples of reports a health system may find useful for tracking RSV immunizations. However, each health system can customize and configure KPIs based on its specific population health priorities and initiatives.

Registry Metric	KPI	Rule Parameters	Intended Improvement
RSV Vaccination Rate ≥75 YOA	% of adults aged 75 years and older who are vaccinated against RSV	- Age: Years - Operator: ≥ - Value (or Property): 75	Increase the % of adults aged 75 years and older who have completed RSV vaccination
RSV Vaccination Rate (older adult patients at risk for severe RSV)	% of adults 50 through 74 YOA who are or will be at risk for severe RSV	- Age: Years - Operator: ≥ AND < - Value (or Property): 50-75 AND - Diagnosis: Problem List - Active Problems Only?: Yes - Operator: Equal to (=) - Value (or Property): See page 12 for examples of conditions that have been associated with increased risk for severe RSV	Increase the % of adults 50 through 74 YOA who have completed RSV vaccination
Underperforming Sites	Sites that are below the RSV vaccination goal for this health system	Rule to set the RSV vaccination goal AND SER Facility item number (**NOTE:** the rule to set the RSV vaccination goal may already exist)	Increase % of RSV vaccination for eligible older adult patients across the underperforming sites

08. How to Configure Registry Metrics/Key Performance Indicators to Monitor Population Health Metrics in Epic (continued)

Health system customers are encouraged to rely on existing Diagnosis Related Groups (DRGs) within their EHR systems to identify specific patient populations.

The Wellness Registry will identify patients for RSV vaccination per CDC recommendations. You may also want to educate these patients regarding their risk of severe RSV disease associated with certain chronic conditions. The following diagnosis codes may help identify those patients in your search query.

Table 1: Examples of Comorbidities That Have Been Associated With Increased Risk of Severe RSV Disease[2]

Disease	**ICD-10 Code/Description**[3]
Coronary Artery Disease (CAD)	I25 - Chronic ischemic heart disease
COPD	J44.0 - Chronic obstructive pulmonary disease with (acute) lower respiratory infection J44.1 - Chronic obstructive pulmonary disease with (acute) exacerbation J44.9 - Chronic obstructive pulmonary disease, unspecified
Asthma	J45 - Asthma
Congestive Heart Failure	I50.2 - Systolic (congestive) heart failure

NOTE: The conditions listed in Table 1 are not exhaustive and only serve as an example to help identify older adult patients who may be at increased risk for severe RSV. Health system stakeholders should review and amend as they see fit to identify and manage older adult patients.

09. Key Population Health Configuration Use Cases

9.1 How to access and use the registry data/scorecards

Population health registry data can be accessed in the Epic EHR in a number of ways:

1. Reports via Reporting Workbench and SlicerDicer
2. Dashboards via Radar
3. Displayed in a patient's Storyboard

The below provides an overview and instructions for accessing each of the above-listed options.

Reports

Reporting Workbench and SlicerDicer are end-user reporting tools and can be used to access registry data. Access and permission to either reporting tool may vary but both can be used to review patient information. All patients who meet the registry inclusion rule are included in the registries and can be included in the report. Consider the registry and the registry metric criteria to create the desired report. For example, to find all appropriate patients without an RSV immunization, use the Wellness Registry criterion and the Registry Metric count criterion for the patient.

Registry-based information can be added in many reporting templates. Consider adding registry criteria (for example, the Registry Metric criterion) and display columns (for example, the Patient Registry Metric Value column) in reports. A unique Patient Registry Search report template is available in the Reporting Workbench reporting solution.

One example of a report that may be useful is the report to find All Patients Overdue for RSV, all Patients.

Dashboards

Population Management dashboards may be available as (Radar) dashboards (IDM record), which in turn contain IDBs configured by the health system as desired. If not set up yet, minimal effort is required when looking to deploy an Epic-released registry. For immunizations, consider the 82299 – Wellness Registry – All as a dashboard option.

For RSV immunizations, consider adding IDBs. Existing Print Groups may be available. Consider for example the patient breakdown by age, immunization status, risk conditions, etc. Other dashboards are available. They may include an RSV immunization metric that is relevant for the other dashboard topic.

Storyboard option

A patient's inclusion in a registry can be included in the Storyboard. Access the Storyboard Editor and add report column 82110 – Patient Registries to the Storyboard. All registries where the patient is active will display in the Storyboard.

09. Key Population Health Configuration Use Cases (continued)

9.2 How to share population health reports and scorecards

Users can be provided access to dashboards for the population overview redirector by adding the redirector to a user record. Instructions to do so are listed below.

1. With administrative privileges, **access the User Security activity** in Admin > Access Management.
2. **Navigate** to the Radar form and **add the desired ID** of the dashboard in the Additional dashboard table.

Alternatively, users can copy the dashboard and add users to it using the Admin > Radar Admin > Dashboard Editor activity.

1. **Enter the name and ID** of the dashboard in the Copy field.
2. **Click** Accept.
3. **Add the desired users** in the Access form.

Reports created in Reporting Workbench and/or SlicerDicer can be shared with other users.

For Reporting Workbench:

1. Navigate to the General tab when creating a report.
2. Navigate to the Share Results section and enter the user, group, or pool with whom to share the report.

For SlicerDicer:

1. **Click the Share button** in the menu toolbar and set the Share With field as desired.
2. **Click Save and Share** to complete the process.

09. Key Population Health Configuration Use Cases (continued)

9.3 How to create immunization tactics in Epic's Healthy Planet

Because Population Health touches many stakeholders in a health system, gaining buy-in from the key constituents is critical. Building an RSV immunization program requires a strategy and approved tactics.

When setting up the RSV population health program, consider the following milestones:

1. Identify all stakeholders: The population health/quality team may have extensive knowledge in setting up similar programs and have a playbook available. A clinical champion/leadership team tasked to drive immunizations across the health system can orchestrate the strategy and tactics. The EHR team may need to refine the registry inclusion rule and registry metrics and create reports and clinical decision support aligned to the strategy.
2. Creating an RSV immunization program: A timeline of milestones, objectives, and key personnel involved can set expectations for each phase of the RSV program.
3. An interface may be required to connect with the state immunization registry to provide a complete immunization history of patients.
4. Identify the target population: Given historical RSV immunization rates, what is the target rate to achieve?
5. Besides the overall RSV immunization rate, what other key performance (registry) metrics related to RSV can be defined and are meaningful?

10. Disclaimers

- Conditions and ICD codes listed in this guide are only examples to help identify patients. Ultimately, it is up to the HCP/health system to select the conditions, ICD codes, and/or medications they feel put a patient at increased risk of severe RSV and to determine whether a patient is appropriate for vaccination
- The customer (ie, physician, medical group, IDN) shall be solely responsible for the implementation, testing, and monitoring of the instructions to ensure proper orientation in each customer's EHR system
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11. Notes

References: 1. Centers for Disease Control and Prevention. Respiratory syncytial virus infection (RSV). RSV vaccine guidance for adults. Accessed March 23, 2026. https://www.cdc.gov/rsv/hcp/vaccine-clinical-guidance/adults.html **2.** Centers for Disease Control and Prevention. Respiratory syncytial virus infection (RSV). Clinical overview of RSV. Accessed March 23, 2026. https://www.cdc.gov/rsv/hcp/clinical-overview/index.html **3.** Centers for Medicare & Medicaid Services. ICD-10 codes. Accessed March 23, 2026. https://www.cms.gov/medicare/coding-billing/icd-10-codes



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