

CONFIGURING DOCUMENTATION OF VACCINE HESITANCY REASONS

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01. Overview

This guide is intended to help health systems document patients' reason(s) for hesitating to receive a recommended vaccine. Current vaccine documentation practices are focused on the administration, declining, or postponing of vaccines, but don't prompt for a patient's reason for hesitation to accept a recommended vaccine.

The suggested EHR configuration in this guide also includes example messages that a provider can share with a patient verbally. These messages provide an opportunity to educate the patient on the benefits of recommended vaccines.

Lastly, the guide includes instructions for creating a custom report to quantify the hesitancy reasons for each recommended vaccination across the health system's patient population. Insights from this report can be helpful to support programs for improving vaccination rates.

02. Background

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

The Epic EHR system provides an opportunity to address vaccine hesitancy during and beyond clinical encounters. To address underlying concerns in a systemic fashion, it is important for the health system to document patients' hesitancy reason(s) in the patient chart. The configuration of this feature is currently lacking in most health systems' EHR systems. Once properly identified, the hesitancy reason(s) may be addressed with the patient and/or their caregivers. And finally, hesitancy reasons for vaccines across a health system can be visualized in a report.

03. Technical Instructions for Configuring Vaccine Hesitancy Reason Capture

The following section provides health systems with instructions to capture and store patients' reason(s) for hesitating or declining a recommended vaccine. When a provider discontinues a Health Maintenance Topic for a vaccine due to reasons of hesitancy, the specific hesitancy reason can be documented in the EHR.

To configure a reason for editing a Health Maintenance Topic, follow the steps below:

1. **Access the Decision Support, Pop Management option** while editing System Definitions in Clinical Administration.
2. **Navigate to the “Health Maintenance Settings - 1” screen.**
3. In the Discontinue field (I LSD 18232), **enter the desired status** (“Required” or “Recommended”).

Add the primary reasons for vaccine hesitancy. To add the reasons for discontinuing a topic, follow the steps below:

1. **Access the HM Edited Topic Reason category list** in Hyperspace.
2. **Navigate to Category List Maintenance** by entering “Category List Maintenance” in the search window or following the path Admin > General Admin > Category List Maintenance.
3. **Enter the values:**
 - a. Database: “EPT”
 - b. Item: “16105”
4. Add the below vaccine hesitation categories to the list:
 - a. “Safety concerns and fear of side effects”
 - b. “Misinformation and media influence”
 - c. “Low perceived risk of disease”
 - d. “Preference for natural immunity or alternative approaches”
 - e. “Religious, moral, or personal beliefs”
 - f. “Distrust in institutions and the healthcare system”
 - g. “Desire for more information and time”
5. **Save the Category List.**

03. Technical Instructions for Configuring Vaccine Hesitancy Reason Capture (continued)

Specific reasons for discontinuing a Topic can be set for all desired Health Maintenance Topics. This action limits the available reasons for discontinuation. Follow the steps below:

1. Access a Health Maintenance Topic in Hyperspace (or use the search window and enter "HM Topic").
2. In the Topic details form, check the "Allow patient exclusion" checkbox.
3. In the Valid exclusion reasons table, enter the hesitancy reasons ("religious reasons", "personal or philosophical reasons", "safety concerns", and "a need for additional education") and any additional recommended discontinuation reasons from the HM Edited Topic Reason (I EPT 16105) category list. If this table is left blank, a clinician can select any reason from the list for discontinuing a topic.

04. Suggested Copy for HCP Counseling¹⁻⁵

Once the hesitancy reasons are documented in the EHR, counseling for providers can be added to provide specific information to address the hesitancy reasons. This healthcare provider (HCP) content can then be leveraged in the Visit Summary document or leveraged in a print group. Suggested copy provided below can be created as a SmartPhrase or SmartText and subsequently added to the Visit Summary, or delivered as a topic-specific print group report.

Safety concerns and fear of side effects

Example Patient-Ready HCP Messaging:

- “Vaccines are among the most carefully studied medical products we use, and serious side effects are extremely rare compared with the diseases they prevent.”
- “Based on large studies in both children and adults, vaccines have not been shown to be associated with autism, infertility, or long-term health problems.”
- “Most people experience only mild, short-term side effects, which are signs that the immune system is responding.”

Misinformation and media influence

Example Patient-Ready HCP Messaging:

- “There is a lot of vaccine information online, and not all of it is accurate or complete.”
- “I’m happy to go through anything you’ve seen and explain what we know from large, well-designed studies.”
- “My role is to help you separate credible medical evidence from misinformation.”

Low perceived risk of disease

Example Patient-Ready HCP Messaging:

- “These diseases seem rare today largely because vaccines have worked so well.”
- “When vaccination rates drop, we often see these illnesses return and cause serious complications.”
- “Vaccination can help protect you and, in some instances, those around you before exposure ever happens.”

Preference for natural immunity or alternative approaches

Example Patient-Ready HCP Messaging:

- “Vaccines essentially train the immune system safely without requiring you to get the disease itself.”
- “Natural infection can lead to unpredictable and sometimes serious complications.”
- “Vaccination helps provide protection while avoiding the risks that come with illness.”

04. Suggested Copy for HCP Counseling¹⁻⁵ (continued)

Religious, moral, or personal beliefs

Example Patient-Ready HCP Messaging:

- “Many people of faith view vaccination as a way to protect life and care for their health and the health of others.”
- “If specific ingredients or beliefs are a concern, we can talk through those in detail.”
- “My goal is to respect your values while making sure you have accurate medical information.”

Distrust in institutions and the healthcare system

Example Patient-Ready HCP Messaging:

- “You don’t need to make a decision today—I’m here to provide honest, transparent information.”
- “I recommend vaccines because I’ve seen how they protect patients across all ages.”
- “We can revisit this conversation over time if that’s helpful.”

Desire for more information and time

Example Patient-Ready HCP Messaging:

- “It’s completely okay to have questions—many people do.”
- “We can talk through the benefits and risks at your pace.”
- “You’re always welcome to revisit this decision as new questions come up.”

Creating a Topic-Specific Report and Print Group With Suggested Copy for HCP Counseling

1. **Access** the Report Master File.
2. **Create a copy** of report 24022.
3. **Proceed to** Clinical Administration and open the copy of report 24022.
4. **Navigate to** the Print Group Configuration screen and select the Action column.
5. **Add the first column print group** by entering the name of the print group in the Print Group column.
6. **Access** the HM Topic Editor.
7. **Navigate to** the Topic Details form and **enter the name** in the Topic Details Report field.

05. Technical Instructions for Configuring the Vaccine Hesitation Reason Population Health Reports

The following instructions are intended to help generate reports that quantify the reasons that patients share with their doctors regarding vaccine hesitancy. These reports can be used to support educational initiatives to address patients' concerns and questions regarding the benefits and safety of vaccines.

There are two options to create the vaccine hesitancy report:

- Reporting Workbench
- SlicerDicer

Option 1: Reporting Workbench:

1. **Access** Reporting Workbench (click the Epic logo > Reports > My Reports).
2. **Navigate** to the Library tab from the Reports menu.
3. **Enter** "generic criteria" in the search field and **click** Search.
4. **Select** the "Find Patients - Generic Criteria Report" template and **create** a New Report.
5. The Report Settings field will display. **Click the Criteria tab** in the toolbar.
6. **Enter "status"** in the search field (Filter Criteria).
7. **Select the Patient Status criterion** and **set the status** to Alive.
8. **Click** + Add new criterion.
9. **Click Item** for the Criterion type and find and select the HM Edited Topic Reason.
10. **Select** the desired Topic Reasons.
11. Once all the criteria have been added, **set the Criterion Logic** to AND.
12. In the General tab, **enter the desired report name** (eg, "Vaccine Hesitancy Reason Report") and a description.
13. **Select all the desired display columns** (eg, DOB [Date of Birth], patient name, etc) to include in the report.
14. In the Detailed view section, **enter and select** the Reporting Workbench Health Maintenance View.
15. **Click Save and then Run** to create the Patient List. The list will display all patients matching the criteria. Use the filters to narrow down the Patient List or export to Excel.

05. Technical Instructions for Configuring the Vaccine Hesitation Reason Population Health Reports (continued)

NOTE: To find the hesitancy reason specific to the immunization series, add the desired immunization criteria. If the desired immunization criterion is not available, click + Add new criterion and select it from the Add Criterion window. For example, consider the “Imm get dose count given a reference date” criterion and set the details to:

- a. Immunizations: Enter the vaccine mnemonic
- b. Start date: N/A
- c. When received: Ever
- d. Relationship: Less than
- e. Imm get dose count given a reference date: enter the dose count (eg, 1)

05. Technical Instructions for Configuring the Vaccine Hesitation Reason Population Health Reports (continued)

Option 2: SlicerDicer

1. **Access SlicerDicer** (click the Epic logo > Reports > SlicerDicer).
2. **Select the Patients data model.**
3. **Click New** to start a new query.
4. **Select the desired patient base.**
5. In the Search for criteria field, **enter “status”**.
6. **Select the Patient Status criterion and set the status to Alive.**
7. In the Search for criteria field, **enter “HM”**.
8. **Select** the HM Edited Topic Reason criterion.
9. **Select** the desired Topic Reasons.
10. **Confirm the logic** in the Population section in the middle of the screen.
11. In the Visual Options section, **select the last icon on the first row** to view the results. If desired, **right-click the bar** with the patient results and **select Export** the Slice to Reporting Workbench if Reporting Workbench is preferred to manipulate the results.
12. **Select the General tab** and **complete all report details** (eg, name and description).
13. **Click Run** to execute the report. The list displays all patients matching the criteria.
14. To refine the results of the patient query, **click the Filters tab**. **Select the radio button** next to the desired filter criteria to narrow down the patient list.
15. **Export the data** for further manipulation if desired.

NOTE: To find the hesitancy reason specific to the immunization series, add the desired immunization criteria. If the desired immunization criterion is not available, click + Add new criterion and select it from the Search criteria window. For example, consider the “Health Maintenance Topic” criterion and enter the desired immunization series. Select it from the list. Select the Overdue status from the available options and complete all details.

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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