Epic

Instructions for the Epic Electronic Health Record (EHR) System

ADDING SHINGLES EDUCATION TO AN AFTER VISIT SUMMARY FOR PATIENTS WHO DECLINE VACCINATION IN OFFICE OR SCHEDULE WITH THEIR PHARMACY



INDICATION

SHINGRIX is a vaccine indicated for prevention of herpes zoster (HZ) (shingles):

- in adults aged 50 years and older.
- in adults aged 18 years and older who are or will be at increased risk of HZ due to immunodeficiency or immunosuppression caused by known disease or therapy.

SHINGRIX is not indicated for prevention of primary varicella infection (chickenpox).

IMPORTANT SAFETY INFORMATION

- SHINGRIX is contraindicated in anyone with a history of a severe allergic reaction (eg, anaphylaxis) to any component of the vaccine or after a previous dose of SHINGRIX
- Review immunization history for possible vaccine sensitivity and previous vaccination-related adverse reactions. Appropriate medical treatment and supervision must be available to manage possible anaphylactic reactions following administration of SHINGRIX

Please see additional Important Safety Information for SHINGRIX on <u>page 5</u> and full <u>Prescribing Information</u>, also available at <u>SHINGRIXHCP.com</u>.

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01. Background and Limitations

This document is intended to provide health systems with instructions for how to add relevant shingles-related patient education resources to a patient's After Visit Summary (AVS) following a consultation with their healthcare provider in which they declined SHINGRIX or were referred to the pharmacy.

This guide provides educational materials about shingles and how patients can schedule their shingles vaccination.

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 healthcare provider.

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 2022 version or later. Setting up patient education content in an AVS requires minimal time. Some configuration may be required by a clinical analyst.



02. Key Considerations

This guide provides technical instructions to help a health system configure and deliver educational content in AVS messages for all patients eligible for shingles immunization. Specifically, the instructions help the health system to:

- 1. Configure two SmartText Objects for inclusion in After Visit Summaries.
- **2.** Embed the first SmartText Object in an AVS for patients 50 years and older who have deferred or rejected an in-office vaccination for shingles.

Important Note: The suggested AVS message for this patient group will include content for both immunocompetent and immunocompromised patients.

3. Embed the second SmartText Object in an AVS for immunocompromised patients aged ≥18 years and <50 years who have deferred or rejected an in-office vaccination for shingles.

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, or
- 2. By automatically adding educational content to the AVS based on patient characteristics.

Steps for both options are included in sections 04 and 05 of this guide. Setting up learning assessments, education titles, topics, and points are out of scope for this guide.

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 can easily be shared across the organization. SmartTexts are generated by the health system.



03. Indication and Important Safety Information

INDICATION

SHINGRIX is a vaccine indicated for prevention of herpes zoster (HZ) (shingles):

- in adults aged 50 years and older.
- in adults aged 18 years and older who are or will be at increased risk of HZ due to immunodeficiency or immunosuppression caused by known disease or therapy.

SHINGRIX is not indicated for prevention of primary varicella infection (chickenpox).

IMPORTANT SAFETY INFORMATION

- SHINGRIX is contraindicated in anyone with a history of a severe allergic reaction (eg, anaphylaxis) to any component of the vaccine or after a previous dose of SHINGRIX
- Review immunization history for possible vaccine sensitivity and previous vaccination-related adverse reactions. Appropriate medical treatment and supervision must be available to manage possible anaphylactic reactions following administration of SHINGRIX
- In a postmarketing observational study, an increased risk of Guillain-Barré syndrome was observed during the 42 days following vaccination with SHINGRIX
- Syncope (fainting) can be associated with the administration of injectable vaccines, including SHINGRIX.

 Procedures should be in place to avoid falling injury and to restore cerebral perfusion following syncope
- Solicited local adverse reactions reported in individuals aged 50 years and older were pain (78%), redness (38%), and swelling (26%)
- Solicited general adverse reactions reported in individuals aged 50 years and older were myalgia (45%), fatigue (45%), headache (38%), shivering (27%), fever (21%), and gastrointestinal symptoms (17%)
- Solicited local adverse reactions reported in autologous hematopoietic stem cell transplant recipients (aged 18 to 49 and ≥50 years of age) were pain (88% and 83%), redness (30% and 35%), and swelling (21% and 18%)
- Solicited general adverse reactions reported in autologous hematopoietic stem cell transplant recipients (aged 18 to 49 and ≥50 years of age) were fatigue (64% and 54%), myalgia (58% and 52%), headache (44% and 30%), gastrointestinal symptoms (21% and 28%), shivering (31% and 25%), and fever (28% and 18%)
- The data are insufficient to establish if there is vaccine-associated risk with SHINGRIX in pregnant women
- It is not known whether SHINGRIX is excreted in human milk. Data are not available to assess the effects of SHINGRIX on the breastfed infant or on milk production/excretion
- · Vaccination with SHINGRIX may not result in protection of all vaccine recipients



04. Instructions for Creating a SHINGRIX Patient Education SmartPhrase or SmartText and Manually Adding It to the AVS

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

NOTE: Health systems do <u>not</u> 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 education content.

4.1 Instructions for 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, ".ShinglesInfo50plus").
- 3. Select the General button and insert desired text. Suggested content can be found on page 11.
- Click Accept after uploading and formatting as desired.
 NOTE: Some manipulation may be required. Consider adjusting the SmartLinks as desired.
- **5.** Repeat the above steps 1-4 to configure a SmartPhrase appropriate for immunocompromised patients aged ≥18 years and <50 years at risk for shingles. For the mnemonic in step 2, consider ".ShinglesInfoIC". Suggested content for this SmartPhrase can be found on page 12.
- 6. Open a patient chart and confirm both SmartPhrases render the form as expected.
- **7.** To use either of the newly created SmartPhrases from Step 2, **enter** the SmartPhrase name during wrap-up activity.

Important notes:

- SmartPhrases can be created at the end user level or at the health system level. When SmartPhrases are created by an individual provider, they are stored in the MyPhrases folder.
 SmartPhrases can also be shared with other users by adding them in the Sharing section
- To copy SmartPhrases created by other users, navigate to the SmartPhrase tool and in the Sharing section, use Copy User to find other SmartPhrases. Select one or more SmartPhrases of interest and copy to save to your personal MyPhrases



See next page for additional steps.



O4. Instructions for Creating a SHINGRIX Patient Education SmartPhrase or SmartText and Manually Adding It to the AVS (continued)

4.2 Instructions for Configuring SmartText

- 1. Open the SmartTool Editor and select the SmartText option.
- 2. Click Accept.
- 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 (SHINGRIX, GSK Shingles).
- 5. Select the General tab and enter the desired SmartText. Example content can be found on page 11.
- **6.** Repeat the above steps 1-5 to configure SmartText appropriate for immunocompromised patients aged ≥18 years and <50 years at increased risk for shingles. Example SmartText content can be found on page 12.
- **7.** 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:

- 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 shingles patient education content, **confirm** and **validate** the content in the wrap-up activity when selecting Clinical References/Patient Instructions.
- See next page for additional steps.



05. Instructions for Automatically Adding a SHINGRIX Patient Education Resource to the AVS Based on Patient Characteristics

Setting up the shingles patient education content to conditionally appear in an AVS requires a few steps to be completed by a clinical analyst. First, follow the steps on page 7 of this guide (SmartText Setup) to add the patient education content as a SmartText in the system. Next, the cohort of patients to receive the conditional AVS needs to be defined by using a rule or a 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. Finally, the new print group can be added to the AVS report.

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

5.1 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:
 - Scenario 1: Adults aged 50 years and older
 - Scenario 2: Adults aged ≥18 years and <50 years who are or will be at increased risk of herpes zoster (HZ) due to immunodeficiency or immunosuppression caused by known disease or therapy
- 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 for which the shingles vaccine is indicated").
- **6.** In the Properties tab folder, **find the first value** (eg, Patient > Age: Years). **Double-click the property** to add it to the criteria form.
- 7. Set the age parameter for each of the scenarios. For Scenario 1, set the age parameter to ≥50 years (operator: ≥ Value/Property: 50). For Scenario 2, set the age parameter to ≥18 years and <50 years (operators: ≥ Value/Property: 18 AND < Value/Property: 50).

Important notes:

- The suggested AVS message for the above defined scenario 1 will include content that is specifically intended for immunocompromised patients.
- See next page for additional steps.



05. Instructions for Automatically Adding a SHINGRIX Patient Education Resource to the AVS Based on Patient Characteristics (continued)

8. Add parameters to include appropriate diagnostic codes. Below are example disease categories and diagnoses that may be associated with immunocompromised patients, as described in scenario 2 outlined in Step 2 of section 5.1. Health systems may use these categories and example diagnoses to assist in potentially identifying the parameters for inclusion.

NOTE: The conditions listed in the table below are not exhaustive and only serve as an example to help identify potentially immunocompromised patients. Health system stakeholders should review and amend as they see fit to identify and manage immunocompromised patients.

>	Example Disease Categories & Diagnoses That May Be Associated With an Immunocompromised Patient		
	Disease Category	Example Diagnosis	
	Hematologic malignancies	Chronic lymphocytic leukemia of B-cell type	
	Human immunodeficiency virus	Human immunodeficiency virus (HIV)	
	Malignant neoplasm (solid tumors)	Malignant neoplasm of breast	
	Stem cells transplant	Stem cells transplant	
	Renal transplant	Kidney transplant	

- 9. Set the number of completed SHINGRIX immunizations to 0.
- **10.** Complete the Evaluation logic for all rules.
- **11.** Click Save. Review proper operation of the rules and click Accept.

Important notes:

• Immunodeficiency or immunosuppression can be a result of a disease and/or therapy. The degree of altered immunocompetence in a patient should be determined by a physician.

See next page for additional steps.



05. Instructions for Automatically Adding a SHINGRIX Patient Education Resource to the AVS Based on Patient Characteristics (continued)

5.2 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:
 - Piece 1: Enter the ID of your shingles patient education SmartText
 - Piece 2: Enter the ID of the newly created rule
 - Piece 3: Enter "="
 - Piece 4: Enter "1"
 - c. Parameters 3 and 4: Optional; set as desired
- **4. Save** the new Print Group.

5.3 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.



O6. Example Shingles Education SmartText ObjectsPatients Aged 50 Years and Older

Understanding Shingles

WHAT IS SHINGLES?

Shingles is a painful, blistering rash caused by the same virus that causes chickenpox (the varicella zoster virus). Once a person has chickenpox, the virus remains in the body and can reactivate later in life as shingles.

AM I AT RISK FOR SHINGLES?

For patients aged 50 years and older

Age is one of the most important risk factors for the development of shingles. As people age, their immune systems naturally weaken, increasing their risk of having shingles. After 50 years of age, a person's risk of developing shingles sharply increases.

For patients aged 50 years and older, certain chronic conditions may also increase risk for shingles Certain chronic conditions like asthma, chronic kidney disease, COPD, cardiovascular diseases (including heart failure, hypertension, hyperlipidemia, stroke, and atrial fibrillation/flutter), or diabetes may also increase your risk for shingles.

For immunocompromised patients

If you are immunocompromised due to a condition such as HIV or cancer, or you are taking a medication which suppresses your immune system, you may be at increased risk for shingles. Ask your doctor.

WHAT ARE THE SYMPTOMS OF SHINGLES?

Shingles is a painful, usually itchy rash that develops on one side of the face or body, typically lasting 7-10 days. The pain during a shingles episode can be severe and can disrupt daily activities like work, family time, and sleep.

WHAT ARE THE POTENTIAL COMPLICATIONS OF SHINGLES?

Some people with shingles may experience complications. The most common complication is postherpetic neuralgia: severe pain that can last for months or even years in the area of the healed rash. Other possible complications include skin infections, scarring, complications with vision (if the rash appears around the eye), and partial weakness/paralysis of the areas served by affected nerves.

WHAT CAN I DO TO HELP PREVENT SHINGLES?

Shingles can be prevented. Talk to your healthcare provider. If your healthcare provider referred you to a pharmacy, you can schedule your vaccination via EasyVax.com.



06. Example Shingles Education SmartText ObjectsImmunocompromised Patients Aged ≥18 years and <50 years

Understanding Shingles

WHAT IS SHINGLES?

Shingles is a painful, blistering rash caused by the same virus that causes chickenpox (the varicella zoster virus). Once a person has chickenpox, the virus remains in the body and can reactivate later in life as shingles.

AM I AT RISK FOR SHINGLES?

For immunocompromised patients aged 18 years and older

If you are immunocompromised due to a condition such as HIV or cancer, or you are taking a medication that suppresses your immune system, you may also be at increased risk for shingles.

WHAT ARE THE SYMPTOMS OF SHINGLES?

Shingles is a painful, usually itchy rash that develops on one side of the face or body typically lasting 7-10 days. The pain during a shingles episode can be severe and can disrupt your daily activities including work, family time, and even sleep. In people who are immunocompromised, the rash tends to be more severe and lasts longer.

WHAT ARE THE POTENTIAL COMPLICATIONS OF SHINGLES?

Some people with shingles may experience complications. The most common complication is postherpetic neuralgia: severe pain that can last for months or even years in the area of the healed rash. Other possible complications include skin infections, scarring, complications with vision (if the rash appears around the eye), and partial weakness/paralysis of the areas served by affected nerves.

WHAT CAN I DO TO HELP PREVENT SHINGLES?

Shingles can be prevented. Talk to your healthcare provider. If your healthcare provider referred you to a pharmacy, you can schedule your vaccination via EasyVax.com.

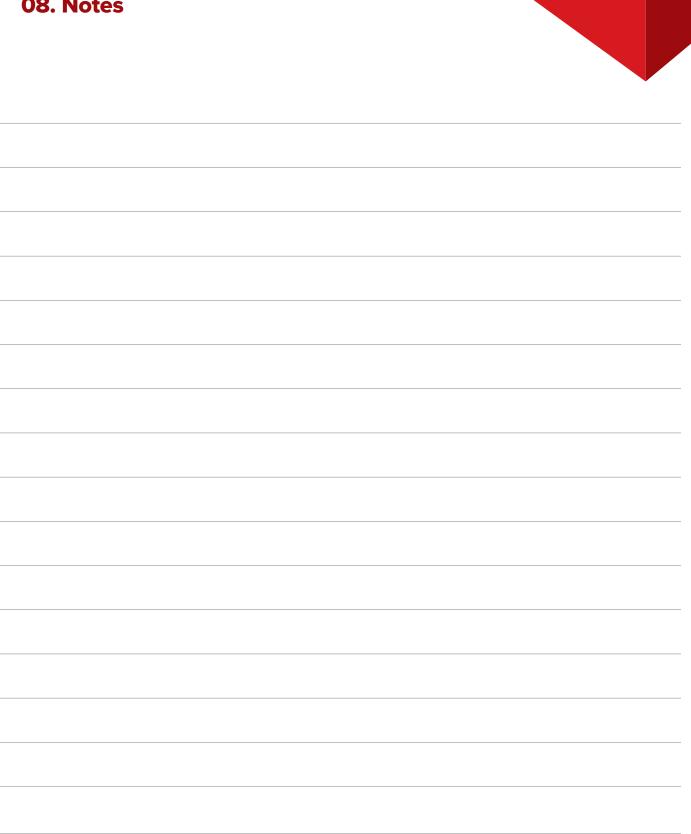


07. Disclaimers

- 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
- 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
- While GSK tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems and GSK shall have no liability thereto
- While EHRs may assist providers in identifying appropriate patients for consideration of assessment, treatment, and referral, the decision and action should ultimately be decided by a provider in consultation with the patient, after a review of the patient's records to determine eligibility, and GSK shall have no liability thereto
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08. Notes





Please see Important Safety Information for SHINGRIX on <u>page 5</u> and full <u>Prescribing Information</u>, also available at <u>SHINGRIXHCP.com</u>.

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