



# COVID-19 Vaccine Outreach and Counseling Program Toolkit

## September 20 to December 31, 2021

Please contact [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov) if you have any questions about the program.

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### Program Notice

**Program Name:** COVID-19 Vaccine Outreach and Counseling Program

**Program Dates:** September 20 to December 31, 2021

Many people have questions and concerns about COVID-19 vaccines and want to speak to a health care provider about getting vaccinated. The New York City Department of Health and Mental Hygiene (NYC Health Department) recognizes that this conversation takes time and effort, so it has partnered with some Medicaid and Medicare Advantage health plans to compensate providers who proactively reach out to eligible patients in their panel who are not vaccinated, counsel them about the importance of vaccination and help arrange vaccination. Once all necessary steps have been completed (detailed below), providers can bill for a Complete Counseling Session.

**Lists of patients eligible for the program are shared with health plan-assigned primary care physicians (PCPs) only. These PCPs can do the counseling directly or delegate to a team member. Providers can only bill for the patients that were assigned to them by the health plan and for whom they performed a Complete Counseling Session according to this Provider Toolkit and health plan guidance.**

The Complete Counseling Session can be performed by a licensed provider (Clinical Outreach rate of \$50 per Complete Counseling Session) or by their designee (Non-Clinical Outreach rate of \$25 per Complete Counseling Session). Providers can be reimbursed for one counseling session for each eligible patient.

To bill for a Complete Counseling Session, the following requirements must be met, in addition to any requirements specified by the patient's health plan.

- A. The provider or designee must confirm eligibility by doing all of the following:
  - Reviewing the Unvaccinated Patient List provided by each participating health plan.
  - Reaching out to eligible patients on the Unvaccinated Patient List.
  - Confirming with the patient that they are unvaccinated, that is, that they have not received any dose of a COVID-19 vaccine authorized or approved by the U.S. Food and Drug Administration (FDA) or are not fully vaccinated with a vaccine authorized for emergency use by the World Health Organization (WHO).
  
- B. If the patient confirms being unvaccinated, the provider or designee can proceed to deliver a Complete Counseling Session. This is a minimum three-minute oral conversation with the patient, during which the provider or designee must do all of the following:
  - Make a strong recommendation for COVID-19 vaccination (unless medically contraindicated, in which case the counseling session is not billable).
  - Counsel the patient on the safety and effectiveness of COVID-19 vaccines consistent with NYC Health Department guidance and respond to questions they may have (see the **Provider Resources** section for resources to assist in talking to patients).
  - Arrange for vaccination:
    - If the patient agrees to vaccination, assist the patient in booking a vaccine appointment in the provider's office, at another location (visit **vaccinefinder.nyc.gov** or call 877-VAX-4NYC (877-829-4692) and press 2 for a provider-dedicated phone line), or at home (**nyc.gov/homevaccine**).
    - If the patient does not agree to vaccination, offer information on how they can obtain a vaccine at a later time through **vaccinefinder.nyc.gov** or by calling 877-VAX-4NYC (877-829-4692).
  
- C. For each Complete Counseling Session, the provider or designee must document the following in the patient's medical record:
  - Name of provider or designee who performed the Complete Counseling Session
  - How the counseling session was performed (for example, telephone)
  - Content of the counseling session that shows the conversation included information on vaccine safety and effectiveness (for example, for clinical counseling, state that conversation included vaccine safety and effectiveness; for non-clinical counseling, state that information on vaccine safety and effectiveness was included in the script)

- Content of the counseling session that shows the patient was provided with information on how and where to get vaccinated and that interested patients were offered assistance arranging vaccination (for example, indicate what options for vaccination were offered to the patient and whether an appointment was made or home visit form submitted)

**For the encounter to be billable, all steps must be completed. If the patient has already received one or more doses of an FDA-authorized or approved COVID-19 vaccine or is fully vaccinated with a vaccine authorized for emergency use by the WHO, the encounter will not be billable under this program.**

Providers billing for the Complete Counseling Session are subject to medical record review to confirm documentation is complete for all patients for whom a bill was submitted.

This program is intended to fill gaps in Medicaid and Medicare coverage for pre-vaccination outreach and counseling services. Counseling services are not reimbursable under the program if the counseling session is otherwise reimbursable or covered under the member's Medicaid or Medicare plan, or if the service is required by a federal or state agency to be furnished by the provider. It is also not reimbursable if it is provided concurrent with, or as part of, other billable services.

Each health plan will provide you with billing instructions, including what procedure codes to use. The NYC Health Department does not guarantee that any particular health plan will reimburse you for any particular service, and this program notice does not alter the terms of any agreement you have with any health plan. This program toolkit is intended for informational purposes only, and does not grant you any legal, contractual or other rights.

## **Frequently Asked Questions**

### **Patient Eligibility**

#### ***How do I know which patients are eligible for this outreach program?***

Each health plan will provide an Unvaccinated Patient List to providers listing all their patients who reside in NYC and may be eligible for this service. Reach out to participating plans if you do not receive a list. The provider must confirm vaccination status at the beginning of the outreach and proceed with a Complete Counseling Session only if the patient self-reports that they have not received a COVID-19 vaccine.

#### ***What health plans are participating in the program?***

Please visit [nyc.gov/health/covidvaccineprovider](https://nyc.gov/health/covidvaccineprovider) and look under NYC Updates for a list of participating health plans.

The dissemination of Unvaccinated Patient Lists to providers started in early October; some health plans will likely disseminate their lists in early November. If you have patient assignments as Primary Care Provider for any of the participating plans and have not received lists from all or some of the participating plans yet, please contact [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov) with your name, email, practice name, IPA and the health plan lists that you are interested in.

***Do I need to ask if the patient has been vaccinated or can I assume that everyone in the Unvaccinated Patient List is eligible for the service?***

You must ask the patient to confirm their vaccination status at the beginning of the counseling session even though they appear in the Unvaccinated Patient List.

***Should I expect that some patients on the Unvaccinated Patient List will state that they have been vaccinated?***

Yes, this may occur. Patients may have been vaccinated outside New York State (NYS), information may have been entered incorrectly into Citywide Immunization Registry (CIR) (which was used to produce the Unvaccinated Patient List) or they may have been vaccinated since the list was produced. Also, some patients may state they are vaccinated even if they are not. For this outreach effort, you should accept a patient's statement that they have been vaccinated even if the Unvaccinated Patient List or your own search in the CIR does not confirm it and you should not proceed to provide a Complete Counseling Session.

***What should I do if a patient on the Unvaccinated Patient List has already received a COVID-19 vaccine?***

If the patient has already received a dose of an FDA authorized or approved COVID-19 vaccine or is fully vaccinated with a vaccine authorized by the WHO, the encounter is not billable under the program. However, please offer counseling, as appropriate (for example, remind the patient if a second dose is needed and provide information about the need for continued COVID-19 prevention measures, such as wearing a face mask). Please note in the patient's medical record that they reported being vaccinated, and ask them to bring documentation at the next visit so it can be recorded in their medical record and in the CIR.

***What should I do if the patient received a vaccine not authorized or approved by the FDA?***

If the patient is fully vaccinated with a COVID-19 vaccine authorized by the WHO, the patient does not need any further COVID-19 vaccination. This patient is considered vaccinated and is not eligible for this program.

If the patient is partially vaccinated with a COVID-19 vaccine authorized by the WHO, start a new series with an FDA-authorized COVID-19 vaccine. This patient is considered unvaccinated and is eligible for this program.

If the patient is fully or partially vaccinated with a COVID-19 vaccine not authorized by the WHO, start a new series with an FDA-authorized COVID-19 vaccine. This patient is considered unvaccinated and is eligible for this program.

***Can I make accommodations for patients with whom I cannot have an oral conversation due to a disability?***

Yes. If a patient is unable to communicate orally due to a disability, you can offer an accommodation such as communicating via text messaging. All other counseling sessions must be oral.

***What should I do if the patient is between the ages of 12 and 17?***

You should speak to the patient's parent or guardian instead of the patient.

## **Compensation**

***Can I send a recorded message, leave a voicemail, or communicate by text or email instead of speaking with the patient?***

No. To bill for a Complete Counseling Session, there must be an oral conversation between the provider and the patient for at least three minutes that includes all the components needed to be deemed a Complete Counseling Session. Communication that is not done orally is only acceptable if the patient has a disability that prevents them from doing so.

***Can I be compensated for a Complete Counseling Session provided to patients who are unvaccinated but not on the Unvaccinated Patient List provided by a health plan?***

No.

***Can I be compensated for counseling a patient who reports having received one or more vaccine doses of an FDA authorized or approved vaccine but has not completed vaccination or for patients who are eligible for an additional vaccine dose?***

No. You cannot be compensated for these patients under this program, even if the patients appear on the Unvaccinated Patient List.

***Must all the required steps be accomplished during a single encounter with the patient?***

No. You can counsel the patient over the course of multiple conversations if needed to meet all requirements of a Complete Counseling Session, but you can only bill once for the Complete Counseling Session. You must clearly document in the patient's medical record all attempts that included components of the counseling session. None of the components may happen concurrent with any other billable encounter.

***Can I bill for every patient I reach out to even if they do not meet all the criteria of the Complete Counseling Session?***

No. All the components must be performed for the interaction to be billable as a Complete Counseling Session.

***Can I bill for a Complete Counseling Session provided as part of another billable encounter?***

No. This program can only be utilized for counseling that is not otherwise reimbursed by Medicaid or Medicare separately or as part of another services. Counseling for COVID-19 vaccine is an expectation of regular and emergency medical encounters.

***Who must perform a Clinical Outreach counseling session to be reimbursable?***

The Complete Counseling Session must be provided by NYS-licensed physicians (MD and DO), nurse practitioners, physician assistants, certified nurse midwives, clinical nurse specialists, registered nurse, licensed practical nurse, or pharmacist.

***Who must perform a Non-Clinical Outreach counseling session to be reimbursable?***

Care team staff designated by the billing provider can perform the counseling session. The care team staff must use a script approved by the billing provider and be under their supervision. Providers should maintain a copy of the script.

***If my non-clinical care staff and I each perform part of the counseling session, can I bill both the \$25 Non-Clinical Outreach and the \$50 Clinical Outreach fee?***

No. You can only bill for one of the two rates. The provider and the non-clinical care team staff can each perform part of the counseling session, if together, they cover all elements of the Complete Counseling Session (for example, the staff member verifies eligibility and helps book an appointment and the provider responds to clinical questions). If the clinician spent at least three minutes counseling the patient, the \$50 Clinical Outreach rate can be billed; otherwise the \$25 Non-Clinical Outreach rate applies. No part of the Counseling Session may occur concurrent with any other billable encounter or service.

***If telephone/video outreach and counseling as a stand-alone service become eligible for Medicaid/Medicare reimbursement while this program is still in place, can I bill this program rather than the Medicaid or Medicare plan?***

No. The pre-vaccination counseling services approved by Medicaid and Medicare should be used instead.

***Is reimbursement dependent on the patient deciding to get vaccinated?***

No. However, you must note the outcome of the counseling session and other required information in the patient's medical record.

***If I vaccinate the patient who I counseled, can I reimburse separately for vaccination administration?***

For both the Complete Counseling Session and the vaccination administration fee to be billable, they must occur on different days (the counseling session must occur before the vaccination).

***Can I bill for a Complete Counseling Session performed prior to the program start date provided by the health plan?***

No. You need to perform a Complete Counseling Session during the program period and after you have received the Unvaccinated Patient List from the health plan in order to bill for it.

***Can I bill for a Complete Counseling Session performed after the end of the program?***

No. The Complete Counseling Session must be performed during the program period in order to bill for it. The end of the program is scheduled for December 31, 2021. Health plans will notify providers if the date changes.

**Documentation and Reporting**

***Can practice staff help with documenting the Complete Counseling Session?***

Yes. Practice staff may document the Complete Counseling Session on behalf of the provider but it is the provider's responsibility to ensure that the documentation is sufficient to satisfy reimbursement.

***If a patient on the Unvaccinated Patient List provides proof of vaccination, how can I update their information in the CIR?***

Providers should document all COVID-19 vaccines administered, regardless of location. Providers are encouraged to check the CIR if a patient does not have a COVID-19 vaccination documented. Missing doses or doses received in another state or country should be entered into the CIR and the patient's medical record.

The NYC Health Department strongly encourages providers to document all relevant information in the patient's medical record, including vaccine manufacturer, vaccine administration dates (month, day, year) and location administered. Including immunization details in the same system as other patient care information improves continuity of care. Many practice settings connect to the CIR through their electronic medical record (EHR) and data exchange happens automatically. For many, this exchange can be *bi-directional*, both sending immunization information from the provider's EHR to CIR and retrieving immunization information from CIR into the provider's EHR. The following EHRs are able to integrate bi-directionally with CIR: Adaptamed, ADS, Allscripts, Amazing Charts, Athenahealth, Cerner, Criteria, CureMD, Cybermed, DigiDMS, eClinicalWorks, Empower MD, Epic, GE Centricity, Glenwood/Glace, IBM Websphere, iPatientCare, Ironbridge, Kareo, MDLand, Medent, MedGen, Medcat, MTX, NextGen, Office Practicum, PioneerRx-Stc, Point N Click, Practice Fusion and Prescribewellness. Check with your IT department or EHR vendor for more information.

For more information on the CIR, including how to you can enroll your practice how you can look up a patient's vaccination information, or if you have registered and have forgotten your facility code, visit the NYC Health Department's **CIR webpage**. For more information, visit **nyc.gov/health** and search **CIR**.

## Sample Non-Clinician Script

The provider who was assigned the Unvaccinated Patient List by the health plan must approve the script used by their non-clinical team members in performing a Vaccination Outreach and Counseling session. Following are sample scripts that can be adapted for use:

### **Voicemail Script (does not constitute a billable Complete Counseling Session)**

This message is for [patient]. My name is [name]. I am calling from [practice name] on behalf of [provider's name] to provide information about COVID-19 vaccines. COVID-19 vaccines are safe and effective, including against the new variants of the virus. You can call us back at [number] or visit [nyc.gov/covidvaccine](https://nyc.gov/covidvaccine) for more information about the COVID-19 vaccine.

### **Call Introduction**

Hello, may I speak to [patient]?

**If not available:** I am calling on behalf of their provider to provide some information about the COVID-19 vaccine. When is a better time to reach them?

**If available:** My name is [name] and I am calling on behalf of [provider's name] at [organization/practice name]. [Provider's name] is concerned that you may not be protected against COVID-19. Have you received a COVID-19 vaccine?

- **If no, go to Vaccine Information.**
- **If yes:** That is great to hear. What vaccine did you receive? [*If Pfizer or Moderna, remind them to get both doses.*] Could you bring your vaccination card to your next appointment with [provider's name] so we can update our records. Two weeks after your last dose you are considered fully vaccinated. If you know anyone who still needs a vaccine, they can ask their provider for a vaccine, visit [nyc.gov/covidvaccine](https://nyc.gov/covidvaccine) for the latest vaccine information or call 877-VAX-4NYC (877-829-4692).

### **Vaccine Information**

[Provider] wants me to share some information about COVID-19 vaccines with you. With the rapid spread of the delta variant of the virus, it has never been more important to get vaccinated. The delta variant is more contagious and may cause more severe COVID-19 illness. We are also seeing more young people becoming sick with the delta variant. Before I start, do you have any questions about the vaccines?

**COVID-19 vaccines are safe and effective**, including against the delta variant. Scientists used years of research for other vaccines to develop COVID-19 vaccines. The vaccines went through large clinical studies that showed they protect people from severe COVID-19 illness, hospitalization and death, and have been given safely to hundreds of millions of people in the U.S. Between January 1 and June 15, 2021 in New York City, 98% of hospitalizations and 99% of deaths from COVID-19 were in people who were not fully vaccinated.



**COVID-19 vaccines are free.** Insurance, social security number or sharing immigration status is not required.

**You may experience some side effects.** Common side effects include arm soreness, headache, body aches, tiredness and fever. Serious side effects are very rare. The vaccines **do not** contain the virus that causes COVID-19 and cannot change your DNA or give you COVID-19.

**People who are not fully vaccinated** must continue to wear a face mask and maintain physical distance whenever in public. They may also be asked to provide proof of a negative test to enter some settings or not be allowed altogether in others.

The New York City Department of Health and other experts recommend that everyone ages 12 years or older get vaccinated. Vaccines prevent the most serious consequences of COVID-19 infection including hospitalization and death. [Provider's name] asked me to call you because [he/she/they] strongly recommends that you get the vaccine as soon as possible. *[If possible, personalize here with information such as noting a medical condition the patient has that increases their risk of severe COVID-19]* I can help you schedule an appointment.

Do you have any questions about COVID-19 vaccines?

*Answers to many common concerns can be found in the NYC Health Department's The Truth About COVID-19 Vaccines (available at [on.nyc.gov/truth-vaccines](https://on.nyc.gov/truth-vaccines)) and Addressing Patients' COVID-19 Vaccine Questions (available at [on.nyc.gov/vaccine-questions](https://on.nyc.gov/vaccine-questions)).*

## **Vaccine Scheduling**

### ***On site appointment***

We, at are offering vaccine appointments at our office. *[Provide details of locations/times/vaccines offered]*. I can help you schedule an appointment now. Would that work for you?

- ***If yes:*** When would you like to schedule it? What day or time works best?
  - *Schedule the appointment and skip to the **Closing** section. Given that the Complete Counseling Session that you are performing will be billable only if not concurrent with another billable encounter (such as a vaccine administration), we recommend scheduling the vaccination appointment at least a day after the Counseling Session is completed).*

### ***Home appointment***

Another option is to arrange to have the vaccine given to you in your home. Would that work for you? I can help you register for that now.

- ***If yes,*** complete form at [forms.cityofnewyork.us/f/home](https://forms.cityofnewyork.us/f/home) and skip to the **Closing** section.

### **Off-site appointment**

Where would you like to receive your vaccine? I can search for a vaccination site near your home or another address, such as your work. Do you have a preference as to which vaccine you would like? When would you like to schedule it? What day or time works best?

Use **[vaccinefinder.nyc.gov](https://vaccinefinder.nyc.gov)** to offer locations and filter by vaccine brand if needed. Once the patient selects a location, schedule the appointment and skip to the **Closing** section. If you need assistance scheduling an appointment at a City-run site, call 877-VAX-4NYC (877-829-4692) (press 2 for a provider-dedicated line). To schedule vaccination at the patient's home, visit **[nyc.gov/homevaccine](https://nyc.gov/homevaccine)**.

### **For patients who do not want to schedule an appointment or are not ready to commit to being vaccinated**

Let me share some information with you so you can find a vaccination site when you are ready. You can use **[nyc.gov/vaccinefinder](https://nyc.gov/vaccinefinder)** to make an appointment or find locations where no appointment is necessary. You can also register for free in-home vaccination by visiting **[nyc.gov/homevaccine](https://nyc.gov/homevaccine)**. You can also call 877-VAX-4NYC (877-829-4692) for help making an appointment at City-run sites or scheduling an at home visit.

New Yorkers who get their first dose at City-run sites can get \$100, free tickets, memberships or gifts for getting vaccinated against COVID-19. These giveaways are available for a limited time.

### **Closing**

Do you have any other questions I can answer at this time about the vaccines? Please continue to practice other COVID-19 prevention measures such as wearing a face mask whenever you are outside your home, avoiding crowded places, practicing physical distancing and washing your hands regularly. If you have further questions, you can reach us at [insert phone number]. Thank you for your time.

### **Provider Resources**

<b>Topic</b>	<b>URL</b>
FAQs about COVID-19 for Families	<b><a href="https://on.nyc.gov/youth-vaccine">on.nyc.gov/youth-vaccine</a></b>
COVID-19 Vaccine Incentives	<b><a href="https://nyc.gov/vaccineincentive">nyc.gov/vaccineincentive</a></b>
Vaccination Proof for Indoor Activities (Key to NYC)	<b><a href="https://nyc.gov/keytonyc">nyc.gov/keytonyc</a></b>
Vaccination Help for People with Disabilities	<b><a href="https://www1.nyc.gov/assets/doh/downloads/pdf/covid/covid-19-vaccine-disability-access.pdf">https://www1.nyc.gov/assets/doh/downloads/pdf/covid/covid-19-vaccine-disability-access.pdf</a></b>

Third Dose for People Who Are Immunocompromised	<a href="https://on.nyc.gov/thirddose">on.nyc.gov/thirddose</a>
Vaccine Information for Providers	<a href="https://nyc.gov/health/covidvaccineprovider">nyc.gov/health/covidvaccineprovider</a>
Get Vaccinated Today! Poster	<a href="https://on.nyc.gov/get-vaccinated">on.nyc.gov/get-vaccinated</a>

Visit [nyc.gov/covidvaccine](https://nyc.gov/covidvaccine) for additional resources and information. Please contact [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov) if you have any questions about the program.

The NYC Health Department may change recommendations as the situation evolves.

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