

## Preparing for the QI Site Visit

- Confirm the provider site is in the IQIP Database. If not, advise your field rep
- If the provider received a previous AFIX or QI visit, review the following information prior to the visit:
  - o Number of pediatric and/or adolescent patients served by the provider site*
  - o Vaccination coverage for pediatric and/or adolescent patient populations*
  - o Previously selected QI strategies and site visit notes*
- Contact the provider to schedule the site visit.
  - o Identify the primary QI contact person at the provider site to discuss logistics and confirm their title and contact information.*
  - o Discuss the availability and participation of staff members who have a role in immunization service delivery. CDC recommends participation by prescribers and the provider's immunization champion, as well as the QI coordinator, if applicable.*
  - o Discuss the amount of time needed for the site visit.*
  - o Choose the date and time for the visit and confirm site address and location.*
  - o Confirm cohorts (i.e., child and/or adolescent) served by the provider.*
  - o Discuss any consultant on-site needs (e.g., meeting space, workstation, internet access, or power sources).*
- Prepare to discuss assessment report specifications (i.e., age cohorts, parameters, and doses) and data sources (i.e., IIS, EHR, or charts).
- Prepare to discuss the core IQIP strategies and the awardee-developed custom strategy, if applicable.
- Send a confirmation letter, e-mail, or fax to the primary IQIP contact that includes:
  - o Date, time, and location of site visit*
  - o Benefits of provider-level immunization QI*
  - o Description of IQIP and what to expect during the visit (attach IQIP At-A Glance for Providers)*
  - o IQIP consultant contact information*
- Reconfirm the site visit two to three business days prior to the visit.
- Run IIS-based assessment reports (if generated by the IQIP consultant before the visit).

### General IQIP Resources

- Awardee-specific IQIP Operations Guide
- IQIP Consultant Toolkit
- IQIP Database User Guide

### Items to Have for the QI Site Visit

- Tool for documenting IQIP site visit information (i.e., direct entry into IQIP Database or entry into IQIP Site Visit Form (electronic or hard copy))
- Awardee-specific IQIP Operations Guide and other awardee-developed materials
- IQIP resources for providers (e.g., materials related to IQIP strategies, parent-focused educational materials, etc.)
- IIS-based assessment reports (if generated by IQIP consultant before the site visit)

### Other Helpful Information

- General knowledge about the patient population served by the provider (i.e., race/ethnicity, socioeconomic status, insurance status, and English proficiency or other languages spoken)
- Staff contact information, including immunization champion and/or QI coordinator, physician, and staff with decision-making authority
- IIS reporting method and current status

## Preparing for the 2- and 6-Month QI Check-In Calls

Check-ins are not optional and must be conducted according to IQIP scheduling guidelines. Check-ins can be conducted by phone or webinar. E-mail alone is not permitted.

- Gather and review all relevant provider information prior to call, including:
  - o *Strategy Implementation Plan (SIP)*
  - o *Notes and data from the site visit and/or previous check-in.*
  - o *Status of any technical assistance the program agreed to provide*
- Send written confirmation to the primary IQIP contact for the call that includes:
  - o *Date, time, duration, purpose, goals, and method of delivery (phone or webinar)*
  - o *Requested participation of provider staff with a role in immunization service delivery, including available physicians and other prescribers, nurses, and office managers. The immunization champion and QI coordinator should participate.*
- Reconfirm the check-in two to three business days prior to the scheduled call. Run IIS- based assessment reports (if generated by the IQIP consultant before the site visit).
- Prepare to discuss the provider's progress toward implementing IQIP strategies selected during the site visit or previous check-in

## Items Needed for QI Check-In Calls

- Tool for documenting check-in information (i.e., computer with internet connection for recording check-in information in the IQIP Database)
- Notes and data from the site visit or previous check-in
- IQIP resources (e.g., IQIP strategy information or parent-focused materials, etc.)

## Preparing for the 12-Month QI Follow-Up

12-month follow-up must be conducted by phone or webinar, or in person if beginning a new IQIP cycle with the same provider site. E-mail alone is not permitted.

- Gather and review all relevant provider information before the follow-up, including:
  - o *Strategy Implementation Plan (SIP)*
  - o *Notes and data from the site visit and check-ins*
  - o *Status of any technical assistance the program agreed to provide*
  - o *Previously generated assessment reports (IIS- or EHR-based)*
- Prepare to discuss the provider's progress in implementing IQIP strategies.
- Send a confirmation letter, e-mail, or fax to the IQIP contact for the follow-up that includes:
  - o *Date, time, purpose, goals, and participants for the follow-up*
  - o *Communication method for sharing the provider's coverage reports (e.g., e-mail attachments or webinar)*
- Reconfirm the follow-up two to three business days before the scheduled call.
- Using the same parameters used for the initial assessment reports, run and prepare to discuss the follow-up coverage reports with the provider staff. Review year-over-year change in coverage and progress compared to coverage goals.

## Items Needed for QI Follow-Up

- Tool for documenting the follow-up call (i.e., computer with internet connection for recording follow-up information in the IQIP Database)
- Notes and data from the site visit or previous check-in
- IQIP resources (e.g., IQIP strategy information or parent-focused materials, etc.)
- Follow-up IIS-based coverage reports

## Concluding the QI Cycle

- Send correspondence to the primary IQIP contact to acknowledge their participation and encourage continued QI efforts. The correspondence should include:
  - o Summary of IQIP strategies selected and any ongoing action items
  - o Synopsis page from the IQIP Database or an awardee-developed summary document
  - o Year-over-year changes in coverage
  - o Consultant contact information for follow-up questions