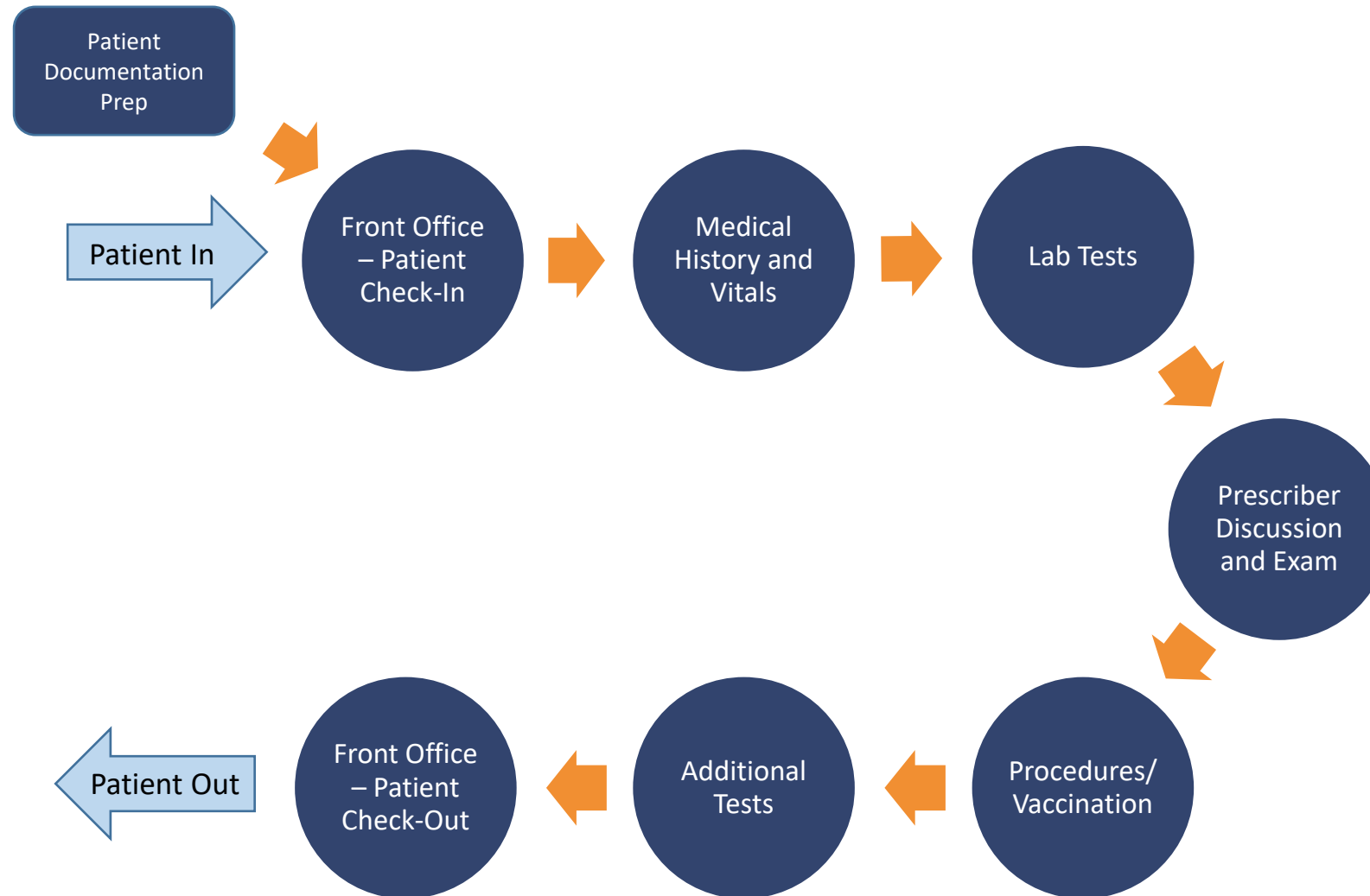






# Vaccination Workflow Assessment Tool











## Points to consider:





1. Does that location have a vaccination policy for patients? How is it shared with patients?
2. Who reviews the patient's vaccination history and determines needed vaccines? When is this done? What source is used (IIS or EHR)?
3. Who discusses vaccines with the patient/parents? When is this done?
4. Is adherence to the ACIP schedule and the importance of vaccination promoted by all staff and visible in all areas of the clinic?
5. Which staff can play a part in making or reinforcing a strong vaccine recommendation?
6. When are vaccination data documented in the IIS or EHR?
7. When and by whom are the due dates for future vaccination discussed?
8. When and by whom is the next vaccination appointment made? Are there patient reminders before the next visit?
9. How is the vaccination policy and vaccine services promoted using all possible communication channels?








| Key   |  |   |  |
|---|--|---|--|
|  | <b>Facilitate return for vaccination</b> |  | <b>Leverage IIS functionality</b>            |
|  | <b>Give a strong recommendation</b>      |  | <b>Strengthen vaccination communications</b> |

| Practice Management   |  |   |       |
|---|--|---|-------|
| Related Strategies  | Vaccination Workflow Topics  | Discussion Prompts  | Notes |
|    | <p><b>Vaccination Policy</b></p> <ul style="list-style-type: none"> <li>Ensuring every patient/parent that visits the practice is aware of the vaccination policy sets the stage for consistent messaging about the importance of on-time vaccination. It lays the foundation for an effective vaccination recommendation.</li> </ul>  | <ul style="list-style-type: none"> <li>Does your site have a written vaccination policy/philosophy for patients?               <ul style="list-style-type: none"> <li>How do you inform new patients/parents about the policy?</li> <li>How do you make staff aware of the policy and train them to use it in conversations with parents/patients?</li> </ul> </li> <li>How is the policy accessed by patients/parents?</li> </ul>                                    |       |
|     | <p><b>Education and Training</b></p> <ul style="list-style-type: none"> <li>Education on the ACIP immunization schedule and using presumptive language or similar methods when recommending vaccines equip your staff to support on-time vaccination.</li> <li>Training on vaccine confidence, vaccine-positive messaging, and vaccination overall prepare your staff to convey support for vaccination throughout the patient's visit.</li> </ul> | <ul style="list-style-type: none"> <li>How is training on vaccine confidence, presumptive language, and the ACIP schedule incorporated into your new hire training protocol for all staff interacting with patients?</li> <li>How are staff trained to address a parent's or patient's vaccine questions or concerns?</li> <li>What continuing education credit (e.g., CME, MOC) opportunities do you offer that focus on vaccine education and promotion?</li> </ul> |       |
|     | <p><b>Immunization Champion</b></p> <ul style="list-style-type: none"> <li>Having a staff person take the lead in promoting vaccination activities helps ensure constant attention is given to vaccination workflow issues throughout the practice.</li> </ul>   | <ul style="list-style-type: none"> <li>Who is your immunization champion?               <ul style="list-style-type: none"> <li>If they <u>do</u> have an immunization champion - What activities do their role include?</li> <li>If they <u>do not</u> have an immunization champion – Are you aware of all the activities that could involve supporting vaccination?</li> </ul> </li> </ul>  |       |







| Patient Documentation Preparation  |   |   |       |
|--|---|---|-------|
| Related Strategies   | Vaccination Workflow Topics   | Discussion Prompts  | Notes |
| <br> | <b>Patient vaccination status</b> <ul style="list-style-type: none"> <li>Knowing what vaccines are due before the patient's visit helps keep everyone on track.</li> </ul>  | <ul style="list-style-type: none"> <li>How does staff prepare the patient's vaccination history and list of vaccines due for the scheduled visit?</li> <li>If they don't use the IIS, how does staff reconcile parent's records with the provider's vaccination record or EHR?</li> </ul>                             |       |
|   | <b>Patient contact information</b> <ul style="list-style-type: none"> <li>Maintaining accurate contact information supports IIS-based reminder/recall.</li> </ul>   | <ul style="list-style-type: none"> <li>How does staff ensure they can contact parents to schedule appointments or other follow-up care issues?               <ul style="list-style-type: none"> <li>How does staff reconcile differences between patient information in the IIS and their EHR?</li> </ul> </li> </ul> |       |
|   | <b>Patient status in IIS</b> <ul style="list-style-type: none"> <li>Maintaining accurate active/inactive status supports practice-level coverage rates, patient lists, and IIS-based reminder/recall accuracy.</li> </ul> | <ul style="list-style-type: none"> <li>How do staff maintain accurate patient active/inactive status in the IIS?</li> </ul>   |       |







| Patient Check-in   |  |  |       |
|--|--|--|-------|
| Related Strategies   | Vaccination Workflow Topics  | Discussion Prompts   | Notes |
| <br>     | <b>Patient contact information</b> <ul style="list-style-type: none"> <li>Maintaining accurate contact information supports IIS-based reminder/recall.</li> </ul>  | <ul style="list-style-type: none"> <li>How does staff ensure they can contact parents to schedule appointments or other care issues?</li> <li>How does staff verify/update patient contact information?</li> </ul>   |       |
|   | <b>Vaccination promotion</b> <ul style="list-style-type: none"> <li>Making information about vaccines readily available saves time by helping patients and parents answer their questions before meeting with you.</li> <li>Proactively sharing your vaccination policy lays the foundation for effective vaccine recommendations.</li> <li>Welcoming and answering questions helps patients and parents feel supported.</li> </ul>  | <ul style="list-style-type: none"> <li>What information is made readily available to patients and families about vaccination?</li> <li>How is the vaccination policy made available to patients and their families?</li> <li>What training do staff receive to guide them in providing positive vaccine messaging during patient visits?</li> <li>How are staff trained to respond to questions or concerns about vaccines?</li> </ul> |       |
| <br> | <b>Patient vaccination status</b> <ul style="list-style-type: none"> <li>The ACIP immunization schedule is built into the IIS to ensure that staff can inform parents of vaccines needed at the visit.</li> <li>Complete data in the IIS improves vaccine recommendations and accuracy of assessment reports.</li> <li>By assessing vaccination status at every visit, missed opportunities to vaccinate can be avoided, and the message that vaccinations are essential can be reinforced.</li> </ul> | <ul style="list-style-type: none"> <li>How does staff identify which doses are due for the patient's visit?</li> <li>What do staff do with a patient's historical vaccination records if presented at check-in?</li> <li>What is the procedure for assessing vaccination status during sick visits or drop-ins?</li> </ul>   |       |



| Prescriber Discussion & Exam   |   |   |       |
|--|---|---|-------|
| Related Strategies   | Vaccination Workflow Topics   | Discussion Prompts  | Notes |
|   | <p><b>Low Vaccine Confidence</b></p> <ul style="list-style-type: none"> <li>Research has shown that an effective recommendation from a healthcare professional is one of the most essential reasons parents decide to vaccinate.</li> <li>Prescribers are parents' most trusted source of information about vaccination.</li> <li>Welcoming and answering questions helps patients and parents feel supported.</li> </ul>   | <ul style="list-style-type: none"> <li>How does the prescriber recommend vaccines in the exam room? Ask them to demonstrate.</li> <li>What training or education is provided to familiarize prescribers with common reasons parents may not trust vaccines?</li> <li>How does the provider respond when parents express concerns?</li> </ul>  |       |
|   | <p><b>Documentation</b></p> <ul style="list-style-type: none"> <li>Complete vaccination data in the IIS improves vaccine recommendations and accuracy of assessment reports.</li> </ul>   | <ul style="list-style-type: none"> <li>Where does the clinic document vaccine refusals?</li> <li>How and where do staff record information about the vaccines administered to the patient during their visit?</li> <li>How often and using what method does the provider report to the IIS?</li> </ul>  |       |
| <br> | <p><b>Scheduling</b></p> <ul style="list-style-type: none"> <li>AAP recommends scheduling the next vaccination appointment to help keep patients on track for vaccination.</li> <li>Multiple visit types (e.g., nurse-only, vaccination-only) provide more scheduling options for busy parents and help them keep their children on track with their vaccinations.</li> <li>The ACIP immunization schedule is built into the IIS to provide date ranges for scheduling so staff can ensure future vaccination visits are scheduled at the correct intervals.</li> </ul> | <ul style="list-style-type: none"> <li>When is the timing of future vaccination appointments discussed?</li> <li>What appointments are offered to parents when scheduling future vaccination visits?</li> <li>How does the prescriber inform staff when to schedule patients to return for their next vaccination appointment?</li> <li>How is this information shared with the parents?</li> </ul> |       |



| Vaccination  |  |   |       |
|--|--|---|-------|
| Related Strategies   | Vaccination Workflow Topics  | Discussion Prompts  | Notes |
| <br> | <b>Documentation</b> <ul style="list-style-type: none"> <li>Providing an after-visit summary to the patient and parent serves as a reminder of when to return.</li> </ul>  | <ul style="list-style-type: none"> <li>If the parent requests a copy of their child’s updated vaccination record, how does staff provide it?</li> <li>How does staff inform the parent of electronic methods (e.g., IIS public access portal, provider’s EHR patient portal, etc.) for independent lookup?</li> </ul>   |       |
| <br> | <b>Scheduling</b> <ul style="list-style-type: none"> <li>AAP recommends scheduling the next vaccination appointment to help keep patients on track for vaccination.</li> <li>Scheduling future appointments before vaccination allows the parent to soothe their child without distraction.</li> <li>The ACIP immunization schedule is built into the IIS to provide date ranges for scheduling so staff can ensure future vaccination visits are scheduled at the correct intervals.</li> <li>When providers give a clear “on or after” date to parents and checkout staff for selecting the next appointment date, it helps ensure patients aren’t vaccinated too early, thus avoiding invalid doses.</li> </ul> | <ul style="list-style-type: none"> <li>What steps would be taken to schedule the next appointment before vaccines are administered to the patient in the exam room?</li> <li>How does staff identify upcoming vaccines that must be scheduled for the patient? Using what source of information? The prescriber? The IIS?</li> <li>How is the parent informed about what vaccines are due next and when? Through what age?</li> </ul> |       |



| Patient Check-Out  |  |   |       |
|--------------------|--|---|-------|
| Related Strategies | Vaccination Workflow Topics  | Discussion Prompts  | Notes |
|                    | <b>Documentation</b> <ul style="list-style-type: none"> <li>Providing an after-visit summary to the patient and parent serves as a reminder of when to return.</li> </ul>  | <ul style="list-style-type: none"> <li>If the parent requests a copy of their child’s updated vaccination record, how does staff provide it?</li> <li>How and when does staff inform the parent of technology available, such as the IIS public access portal for independent lookup or EHR/EMR patient portals?</li> </ul>   |       |
|                    | <b>Scheduling</b> <ul style="list-style-type: none"> <li>AAP recommends scheduling the next vaccination appointment to help keep patients on track for vaccination.</li> <li>When providers give a clear “on or after” date to parents and checkout staff for selecting the next appointment date, it helps ensure patients aren’t vaccinated too early, thus avoiding invalid doses.</li> </ul> | <ul style="list-style-type: none"> <li>How does staff identify when to schedule due patient vaccination appointments? Using what source of information? The prescriber? The IIS?</li> <li>How is the parent informed about what vaccines are due next and when? Through what age?</li> <li>Does staff provide the parent with an updated vaccination record with the subsequent doses and due dates? From what source?</li> </ul> |       |
|                    | <b>Reminder and Recall Notices</b> <ul style="list-style-type: none"> <li>Ongoing communication is essential to ensure patients keep their appointments and stay on schedule with vaccinations.</li> </ul>   | <ul style="list-style-type: none"> <li>What processes are in place for appointment reminders?</li> <li>What language is used to ensure accessible scheduling and effective reminders?</li> </ul>  |       |
|                    | <b>Vaccine Promotion</b> <ul style="list-style-type: none"> <li>Providers are parents’ most trusted source of information about vaccination.</li> <li>Making information about vaccines readily available saves time by helping patients and parents get their questions answered before they meet with the provider.</li> </ul>   | <ul style="list-style-type: none"> <li>What regular communications are sent to parents/patients? How could those communications be used to promote on-time vaccination?</li> <li>How can the provider promote vaccination services to parents/ patients or convey positive vaccination messages and resources from trusted messengers (e.g., social media reels/memes, newsletter highlights, website buttons)?</li> </ul>        |       |