

Preparation Checklist for Michigan IQIP Activities

PREPARING FOR AN IQIP SITE VISIT

- Schedule the site visit.** During the scheduling discussion:
 - Identify the primary IQIP contact at the provider location to discuss logistics and confirm their title and contact information; this can differ from the VFC contacts.
 - Discuss the importance of participation by physicians and other vaccine prescribers in the site visit, along with the immunization champion, QI coordinator, nursing, and office management staff. Any changes to workflow, policies, or procedures will require their buy-in and approval.
 - Discuss the amount of time needed for the site visit.
 - Choose the date and time for the visit, confirming provider location address or webinar platform if tele-IQIP
 - Ask if the provider has a written vaccination policy/philosophy for patients; if yes, ask for a copy before the visit.
 - Confirm cohorts (i.e., childhood, adolescent, and older teen) served by the provider.
 - For in-person site visits, discuss any on-site consultant needs (e.g., meeting space, internet, or power sources)
- Send confirmation** by email or calendar appointment to the primary IQIP contact that includes:
 - Date, time, and location of IQIP site visit or webinar link if tele-IQIP
 - Benefits of provider-level immunization QI
 - The *IQIP At-A Glance for Providers* document for a description of IQIP and what to expect
 - IQIP consultant contact information
- Prepare** for the site visit by:
 - Reviewing the provider's vaccination policy if provided before the site visit
 - Reviewing provider's communication platform (e.g., website, social media, etc.) for vaccine-related content (e.g., vaccination policy, links to trusted vaccination resources)
 - Ensuring readiness to discuss assessment report specifications (i.e., age cohorts, parameters, and doses for single vaccine and combination series coverage), data sources (i.e., IIS, her, or charts), and core IQIP strategies and the awardee-developed custom strategy, if applicable.
- Generate and review** IIS-based assessment reports within one week of the site visit date; prepare to explain results during the visit
- Review historical** vaccination coverage rates, cohort size(s), and IQIP database entries (i.e., selected strategies, action items, and consultant notes) if the provider has participated in IQIP previously.
- Reconfirm** the site visit two to three business days before the visit.

GENERAL IQIP RESOURCES

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

ITEMS TO BRING TO THE IQIP 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)
- Names, roles, and contact information of staff, including immunization champion and QI coordinator, physician, and practice management staff

OTHER HELPFUL INFORMATION FOR IQIP CONSULTANTS

- IIS reporting method and status of use by provider staff
- General knowledge about the patient population served by the provider (i.e., race/ethnicity, equity or access issues, insurance status, and English proficiency or other languages spoken)

PREPARING FOR 2- AND 6-MONTH CHECK-INS

- Gather and review** all relevant provider information before the check-in, including:
 - Notes and data from the site visit and previous check-in.
 - Selected QI strategies and action items, including the due dates and the staff responsible.
 - Status of any technical assistance the consultant agreed to schedule or provide
- Send written confirmation** to the IQIP contact that includes:
 - Date, time, approximate duration, purpose, goals, and method of delivery (phone or virtual)
 - Requested participation of provider staff with a role in vaccination 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 before the scheduled check-in.

ITEMS NEEDED FOR CHECK-INS

- 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 IQIP site visit or previous check-in
- IQIP resources to assist with completing action items (e.g., IQIP strategy information or parent-focused materials, etc.)

PREPARING FOR 12-MONTH FOLLOW-UPS

- Gather and review** all relevant provider information before the follow-up, including:
 - Notes, information, and assessment reports from the IQIP site visit and check-ins
 - Selected QI strategies, latest status of action items, including the due dates and the staff responsible, and coverage goals set at the site visit
 - Status of the technical assistance the consultant agreed to schedule or provide
 - Generate and review assessment reports. Coverage rate assessments should be generated using the same parameters as those used for the coverage rate reports used for the site visit and within one week of the date of the 12-month follow-up.
- Prepare** to discuss the follow-up coverage reports with the provider staff by reviewing year-over-year changes in coverage rates and denominators and the progress in reaching coverage goals.
- Send written confirmation** to the IQIP contact that includes:
 - Date, time, purpose, goals, and recommended participants
 - Communication method for sharing the provider's coverage reports (e.g., e-mail attachments or virtually)
- Reconfirm** the follow-up two to three business days before the scheduled 12-month follow-up.

ITEMS NEEDED FOR FOLLOW-UPS

- Tool for documenting the follow-up call (i.e., computer with internet connection for recording follow-up information in the IQIP Database)
- Notes, information, and assessment data from the site visit and check-ins
- IQIP resources to assist with continued work on action items and strategies (e.g., IQIP strategy information or parent-focused materials, etc.)

CONCLUDING THE IQIP CYCLE

Send correspondence to the primary IQIP contact to acknowledge and thank them for their participation and encourage continued QI efforts with immunization. The correspondence should include the following:

- Summary of IQIP strategies selected at the site visit, the areas of success that have occurred, and the ongoing work needed with the action items for continued success
- Year-over-year changes in coverage, commenting on any significant changes with rates and denominators
- Synopsis page from the IQIP Database or an awardee-developed summary document
- Consultant contact information for follow-up questions