

# Vaccination Roadmap Self-Assessment





## Purpose

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The purpose of this roadmap is to assess current vaccination practices at your organization. Use this roadmap to help implement or reinforce these best practices for your patients/residents. It can also be used as a guide to improve your organization's efficiency and effectiveness in administering vaccines and increase your vaccination coverage rates.

### Here are the basics:

- Keep staff up-to-date with current recommendations.
- Maintain complete, up-to-date patient records.
- Maintain and protect your vaccine supply.
- Help your patients/residents anticipate their own vaccine needs, and those of their family members as well.
- Avoid “missed opportunities” to vaccinate.
- Maintain administration best practices.
- Improve access to your vaccination services.
- Evaluate and improve your organization's performance, then CELEBRATE!

Mark the tasks on the following pages with **Yes** (fully implemented), **No** (Not implemented), or **Partially** (In progress, not fully implemented).



# 1

## Keep Staff Up-to-Date With Current Vaccine Recommendations

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Yes

No

Partially

We keep the current, official CDC U.S. immunization schedules (or the official schedule of our medical association or state health department) accessible for all staff in a visible area.

Covid

- [Immunization Schedule](#)
- [Vaccination Recommendations for the Immunocompromised](#)

Pneumococcal

- [Pneumococcal Recommendations](#)
- [Pneumococcal Vaccine Timing for Adults Greater Than or Equal to 65 Years](#)

Flu

[Flu Vaccine Recommendations](#)

We routinely receive, read, and share updates on vaccines and other immunization issues from government agencies (e.g., CDC), our state or local health department, [Immunize.org](#), or other trusted organizations.

We adhere to the “Rights” of medication administration by ensuring we have the: Right patient; Right vaccine(s); Right time (including the correct age and interval, as well as the product expiration time/date); Right route (including the correct needle gauge and length and technique); Right administration site; and Right documentation.



## 2

# Maintain Complete, Up-to-Date Patient Vaccine Records

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Yes    No    Partially

      

We participate in our local/regional/state immunization registry ([Immunization Information System](#) or “IIS”).

      

When admitting new patients/residents, we request their record of immunizations and/or check the state IIS.

      

If the patient/resident is from a nursing home, we obtain vaccination information from the nursing home and update our patient chart or electronic medical record (EMR).

      

If the patient/resident is in the hospital or ED, vaccination status information is requested and updated in our patient chart or EMR.

      

We maintain a comprehensive immunization record in a highly visible location in each patient’s/resident’s chart or EMR, including documentation on reasons for vaccine refusals.

      

We report vaccinations of patients/residents and healthcare workers in the CMS-identified system for reporting vaccinations. (NHSN, EQRS)

      

We monitor labs associated with vaccinations (e.g. Hep B).



# 3

## Maintain and Protect Your Vaccine Supply

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Yes    No    Partially

      

We designate a “**vaccine coordinator/champion**” and “**backup vaccine coordinator**” to oversee vaccine storage and handling activities.

- [Vaccine Storage and Handling Toolkit - March 2024](#)

      

We provide vaccine storage and handling training to each new staff member, as well as updates to all staff whenever recommendations are changed, or a new vaccine product is introduced.

- [You Call the Shots Vaccine Training Module](#)

      

We follow the guidance provided in CDC’s “[Vaccine Storage and Handling Toolkit](#).”

      

We have a system in place to ensure vaccines are ordered in a timely manner and are consistently available.



# 4

## Provide Vaccine Education for Staff

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Yes

No

Partially

We train all patient/resident-facing staff on the current vaccine recommendations and how to determine valid and invalid contraindications to vaccinations. We post this information in places available to all staff.

- [The Adult Vaccine Quiz](#)
- [Adult Immunization Schedule by Age](#)

We routinely complete a simple screening checklist for vaccine contraindications to check if the patients/residents need any vaccinations to be considered “up-to-date.”

- [Before You Vaccinate Adults, Consider their “H-A-L-O”!](#)
- [Screening Checklist for Contraindications to Vaccines for Adults](#)
- [Checklist of Current Versions of US COVID-19 Vaccination Guidance and Clinic Support Tools](#)

Staff are trained on how to discuss misperceptions, concerns, and the importance of vaccinations with patients/residents when discussion opportunities arise.

- [Vaccine Misinformation Toolkit](#)
- [How to Address COVID-19 Vaccine Misinformation](#)



# 5

## Avoid “Missed Opportunities” to Vaccinate

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Yes

No

Partially

We train our staff to administer multiple vaccinations (as appropriate) to residents/patients who are due/eligible for multiple vaccinations.

We promote vaccination days at our organization. For example: “Pneumo Mondays” or “Flu Shot Fridays”.

We reach out to local partners to assist with transportation to a nearby clinic or pharmacy for vaccinations not offered at our organization.

- [Neighborhood Navigator](#)
- [findhelp.org](http://findhelp.org)
- [Where to Go](#)

## 6

## Vaccine Communication Best Practices for Patients/Families

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Yes    No    Partially

We provide patients/residents/families a simple schedule of recommended vaccinations in a language they can easily understand, based on our patient/resident population.

- [Immunize.org](https://www.immunize.org)

We have a policy that states the importance we place on vaccinations, and we give a copy of it to all new patients/residents and their families.

- [Sample Vaccine Policy Statement](#)

We provide the patients/residents and/or family members with documentation (e.g., record card, print-out) of the vaccinations received each time we administer a vaccine.

- [Qsource Patient Vaccination Card](#)

We provide reliable educational resources (in a language they can read) to staff, patients/residents and their families who have questions or concerns about vaccine safety or who want more vaccine information. This includes vaccine information statement (VIS) documents.

- [Pneumococcal Conjugate Vaccine: What You Need to Know](#)
- [Influenza \(Flu\) Vaccine: What You Need to Know](#)
- [Current VIS Vaccine Information Statement](#)





# 6

## Vaccine Communication Best Practices for Patients/Families (cont.)

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Yes    No    Partially

      

If a patient/resident refuses a vaccine, we document and respect the reason.

      

We encourage patients/residents to keep and maintain a record of their current vaccinations in the event the information is needed for a medical provider or encounter (e.g. emergency department visit).

- [Qsource Patient Vaccination Card](#)

      

We educate patients/residents on the importance of vaccinations by displaying educational materials (e.g. Flu Campaign) and creating interactive opportunities (e.g. Vaccine Word Search, Bingo) to engage in vaccination learning.

- [Immunization Word Search](#)

      

We use Motivational Interviewing to talk and educate patients/residents about recommended vaccinations.

## Evaluate and Improve Your Facility's Performance

Yes No Partially

We routinely assess and track the vaccination status of our patients/residents using a systematic approach (e.g. tracker) with patient/resident vaccination statuses, future vaccination dates, and refusal reasons.

- [Sample Vaccine Tracker](#)
- [CDC | PneumoRecs Vax Advisor](#)

We monitor vaccination compliance rates monthly at the organization level to determine opportunities for improvement. (Ensure the numerator/denominator is aligned with the CMS calculation of being fully vaccinated).

We discuss vaccination rates with our IDT and Medical Director, at least monthly, to identify "focus" patients/residents needing updated vaccinations and discuss patient/resident-specific interventions, as appropriate.

We share the results with all staff, and we use this information to develop strategies to improve vaccination rates and meet/exceed our organization's goals (e.g. Sharing the percentage of the population at the organization that is vaccinated using a bar graph to chart vaccination rates for staff and patients/residents and post in the organization for everyone to see).

Facility EQRS/NSHN users double check reporting is accurate and consistent with vaccinations given in the organization, or reported by the patient/resident/family as received elsewhere.

## Celebrate Your Success!

### Congratulations! You have reached your destination!

Use the following strategies and talk to your quality advisor to ensure ongoing success.

#### 1. Monitor Your Processes and Outcomes

Review your data to identify trends and address special cause variation. Data plays an important role in identifying when you've achieved predictable, consistent results.

#### 2. Create a Sustainability Plan

Sustainability is about ensuring that the improvements you have made will last. In order for these enhancements to be lasting, you must establish a plan for sustainability. As you build your plan for sustainability, ask yourself the following questions:

- What can be done to ensure the most successful interventions will become part of the culture in your facility?
- How will you ensure that these steps will continuously support your current processes?
- Will this require that you modify training in your organization?
- How will you track these interventions to ensure improvements in performance measures are sustained?
- If you have a corporate partner, what is their role in supporting this sustainability plan?

Use our [Sustainability Planning Tool](#) to help you create your plan.

#### 3. Assign a Process Owner

A process owner is the person who is responsible for maintaining and improving a process, and is responsible for the outcomes of the process and sustaining the changes according to the sustainability plan. Choose a person that will be impacted by the gains of the project.

# 9

## Additional Resources

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### Qsource QIO Resources

- [Immunizations](#)
- [Immunization Resource Guide](#)

### Other Resources

- [CDC | Vaccines and Immunizations](#)
- [Health: Immunization: Adult Immunizations \(in.gov\)](#)
- [Indiana Immunization Coalition - Vaccinate Indiana](#)
- [Immunize.org](#)

[qio.qsource.org](http://qio.qsource.org)

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