



Facilitate Return for Vaccination

Session 5: IQIP Core Strategies

Topics

- Strategy overview and rationale
- Best practices for strategy implementation
- Examples of implementation gaps, solutions, and technical assistance
- Additional guidance and resources

Learning Objective

- Become familiar with the overview and rationale of this strategy.
- Describe best practices for strategy implementation.
- Identify implementation barriers and solutions for this strategy.
- Describe technical assistance options and available resources to support the implementation of this strategy.

Overview

- This core strategy focuses on implementing clinical and clerical processes that support making and keeping appointments and addressing barriers to patients returning for timely vaccination.
- Providers can help keep patients on time for vaccination by making vaccination more accessible.
 - This includes expanding practice hours, allowing walk-in vaccination appointments, and ensuring the next vaccination appointment is scheduled before the patient leaves the office.
- Systems that remind patients of upcoming vaccinations and recall patients who have missed vaccinations can help reduce the likelihood of a patient missing recommended vaccinations.

Strategy Overview and Rationale

Strategy Rationale

- A 2017 [AAP clinical report](#) asserts that making families aware of when vaccines are needed and scheduling follow-up appointments before they leave are crucial steps to increase adolescent vaccination rates.
- Studies from [2010](#) and [2016](#) of seasonal influenza vaccine uptake demonstrated the success of various scheduling default vaccination appointments that require parents to opt out instead of opting in.
- A [2018 Cochrane review](#) of 75 studies concluded that using reminder and recall systems in primary care settings likely improves vaccination coverage across all age groups.

Best Practices for Strategy Implementation

Best Practices Overview

- Assessing the current implementation of this strategy allows awardees, providers, and their staff to address low coverage that may exist because of missed opportunities or scheduling oversights.
- The following best practices are examples of implementing the Facilitate Return for Vaccination strategy.
- Although not an exhaustive list, these best practices are standards that providers should strive to meet and may be adapted to meet the providers' needs and that consultants should look for during the vaccination workflow assessment.

Best Practices for Strategy Implementation

- **Conduct routine training** on current ACIP-recommended immunization schedules to inform scheduling patients for subsequent visits.
- **Maintain accurate patient contact information** by verifying and updating patient contact information at each appointment to support scheduling and reminder and recall efforts.
- **Take action to prevent missed opportunities** by routinely generating lists of patients that have upcoming appointments using various technologies via EHR, IIS-based, or scheduling software platforms; screening patients for vaccination eligibility at each visit regardless of the type of visit (e.g., sick visit, well-child, sports physicals, etc.); and maintaining accurate vaccination records.

Best Practices for Strategy Implementation

- **Use effective scheduling protocol** by scheduling the next appointment (e.g., well-child visit, nurse-only, etc.) before the patient leaves the office, either in the exam room or at check-out; scheduling the next vaccination visit and the next well-child visit to occur the same day whenever possible; offering various types of appointments (e.g., nurse-only appointments, vaccination-only clinic days, etc.) where vaccinations can occur.
- **Inform parents of future vaccine dates** by giving parents a copy of their current immunization record and a list of future recommended vaccines with precise due dates.

Best Practices for Strategy Implementation

- **Implement reminder and recall systems** using multiple methods (e.g., text messages, portal messages, e-mails, postcards, phone calls, etc.) to remind patients of upcoming appointments and to recall patients who have missed an appointment or become overdue for vaccination.
- **Track no-shows and canceled appointments** and contact those patients within the same week to reschedule.

Examples of Implementation Gaps, Solutions, and Technical Assistance

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Use effective scheduling protocol by</p> <ul style="list-style-type: none">• Scheduling the next appointment (e.g., well-child visit, nurse-only, etc.) before the patient leaves the office, either in the exam room or at check-out.• Scheduling the next vaccination visit and the next well-child visit to occur on the same day whenever possible.• Offering various types of appointments (e.g., nurse-only appointments, vaccination-only clinic days, etc.) where vaccinations can occur.	<p>The provider's EHR or scheduling software does not allow scheduling appointments far in advance.</p>	<p>Investigate and implement modifications to their EHR or scheduling software to support the advance scheduling of vaccination visits.</p>

Examples of Technical Assistance

- **Use effective scheduling protocol:** Work with the provider to identify steps to address any software limitations that prevent scheduling visits months in advance. Help develop a plan of action to be made into action steps for the strategy implementation plan.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Maintain accurate patient contact information by verifying and updating patient contact information at each appointment to support scheduling and reminder and recall efforts.</p>	<p>The provider does not have a routine protocol for updating patient contact information.</p>	<p>Establish a written protocol and add it to the office SOP for check-in staff.</p>

Examples of Technical Assistance

- **Maintain accurate patient contact information:** Brainstorm with the provider to identify workflow changes to ensure all patient contact information is reviewed and updated upon check-in, regardless of the type of patient visit, and develop steps for adding those changes to the office SOP.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
Conduct routine training on current ACIP-recommended immunization schedules to inform when to schedule patients for subsequent visits.	There is limited time to train staff on the ACIP schedule.	Designate time periodically (e.g., bi-monthly, quarterly, etc.) for staff training and incentivize them to complete it (e.g., provide a working lunch).

Examples of Technical Assistance

- **Conduct routine training:** Provide links to training videos, webinars, and courses staff could complete. Assist with partner collaboration (ACS, AAP, Coalition, etc.) to arrange for staff training.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Take action to prevent missed opportunities by</p> <ul style="list-style-type: none">• Routinely generating lists of patients that have upcoming appointments using various technologies via EHR, IIS-based, or scheduling software platforms.• Screening patients for vaccination eligibility at each visit regardless of the type of visit (e.g., sick visit, well-child, sports physicals, etc.).• Maintaining accurate vaccination records.	<p>Check-in staff runs a daily report of upcoming appointments for the following day at the close of business. However, the list does not include vaccination information.</p>	<p>Train check-in or designated clinical staff to use the IIS to look up vaccinations due for patients with appointments the following day and indicate who is due for vaccination.</p>

Examples of Technical Assistance

- **Take action to prevent missed opportunities:** Work with provider staff to determine who should be responsible for reviewing patient charts or looking for prompts for upcoming vaccinations and list workflow changes that can be added to the office's SOP.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Inform parents of future vaccine dates by giving parents a copy of their current immunization record and a list of future recommended vaccines with precise due dates on paper and via electronic sources.</p>	<p>Parents are not provided a copy of the patient’s immunization record or a list of future doses and due dates.</p>	<p>Give the parents a paper version of the patient’s immunization record and a list of forecasted due dates for future vaccinations and promote using the provider’s patient portal to access the information. Encourage parents to place the next scheduled appointment date and time on their mobile calendar.</p>

Examples of Technical Assistance

- **Inform parents of future vaccine dates:** Brainstorm with the provider and list viable options for how the provider can keep parents informed of patient immunization status and future doses. Help to create a standard process for staff to follow.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Implement reminder and recall systems using multiple methods (e.g., text messages, portal messages, e-mails, postcards, phone calls, etc.) to remind patients of upcoming appointments and to recall patients who have missed an appointment or become overdue for vaccination.</p>	<p>Provider staff have limited time for reminder and recall efforts, such as phone calls and postcards.</p>	<p>Implement standard procedures for reminders and recall notices that use multiple methods.</p>

Examples of Technical Assistance

- **Implement reminder and recall systems:** Review EHR and jurisdictional IIS capabilities for reminder and recall options. Share evidence-based best practices for available options, including the language and timing of reminders. Connect the provider with a partner that offers free reminders.

Examples of Implementation Gaps and Solutions

Best Practice	Example of a Gap in Implementation	Example of a Solution
<p>Track no-shows and canceled appointments and contact those patients within the same week to reschedule.</p>	<p>The practice has many no-shows and canceled appointments because of parents' schedules. Staffing is not trained in calling patients to reschedule missed visits.</p>	<p>Offer appointments outside standard office hours and periodically hold weekend clinics. Train staff to call or text patients who are no-shows to reschedule. Develop standing orders allowing nurse-only vaccination visits.</p>

Examples of Technical Assistance

- **Track no-shows and canceled appointments:** Explore options with the provider for holding extended office hours or weekend clinics. Discuss how the provider can use quick nurse-only appointments for vaccination. Share samples of standing orders to allow nurse-only vaccinations.

Additional Guidance and Resources

Additional Guidance and Resources

- CDC ISD Awardees SharePoint Portal
 - CDC IQIP Program’s “IQIP Resources Index”
 - Sortable Excel spreadsheet with online and IQIP program resources available

The screenshot shows the Microsoft Excel interface with the following data:

	A	B	C	
1	Item Name	Source	Link	Topic
	Deciding to Vaccinate Your Child: Common Concerns CDC	Centers for Disease Control and Prevention (CDC)	Deciding to Vaccinate Your Child: Common Concerns CDC	Core S Return
2	Materials That Can be Used to Educate Patients	Centers for Disease Control and Prevention (CDC)	2023 Recommended Immunizations for Children from Birth Through 6 Years Old (cdc.gov)	Core S Return
3	Materials That Can be Used to Educate Patients	Centers for Disease Control and Prevention (CDC)	2023 Recommended Immunizations for Children from Birth Through 6 Years Old (cdc.gov)	Core S Return
	CoreStrategy Give a Strong Rec	CoreStrategy Facilitate Return	CoreStrategy Leverage IIS	

CDC-Developed Session Resources

All CDC-developed resources can be found in the IQIP Library in the ISD Awardee SharePoint Portal.

- ✓ [Overview of IQIP Core Strategies](#)
- ✓ [Description of IQIP Core Strategies for Providers](#)

Description of IQIP Core Strategies for Providers



Immunization Quality Improvement for Providers (IQIP) promotes and supports the implementation of provider-level strategies designed to help increase on-time vaccination of children and adolescents. The IQIP core strategies call for quality improvement activities that focus on improvements to the vaccination workflow. IQIP supports both the implementation *and* improvement of these core strategies. If the practice already uses one of these strategies, IQIP can help to advance the efforts within that strategy.

Facilitate Return for Vaccination

Making vaccination more accessible by expanding practice hours available for appointments, allowing walk-in vaccination appointments, and ensuring the next vaccination appointment is scheduled before the patient leaves the office, are a few examples that can support parents in keeping their children on time for vaccination. Reminder and recall systems can also help reduce the likelihood of missed appointments.

Questions to Consider

Are staff verifying scheduling and
 Are staff routinely e.g., sick visit, well-appointments to software platforms;
 for all future child visit, nurse-at check-out; the same day appointments, ?
 Are staff providing a copy of their with precise due
 Are staff using multiple postcards, phone

Overview of IQIP Core Strategies			
Facilitate Return for Vaccination			
Strategy Overview			
This core strategy focuses on implementing clinical and clerical processes that support making and keeping appointments and addressing barriers to patients returning for timely vaccination. Providers can help keep patients on time for vaccination by making vaccination more accessible. This includes expanding practice hours, allowing walk-in vaccination appointments, and ensuring the next vaccination appointment is scheduled before the patient leaves the office. Systems that remind patients of upcoming vaccinations and recall patients who have missed vaccinations can help reduce the likelihood of a patient missing recommended vaccinations.			
Examples of Strategy Best Practices, Implementation Gaps, Solutions, and Technical Assistance			
Best Practice	Example of a Gap in Implementation	Example of a Solution	Example of Technical Assistance
Use effective scheduling protocol by <ul style="list-style-type: none"> Scheduling the next appointment (e.g., well-child visit, nurse-only, etc.) before the patient leaves the office, either in the exam room or at check-out. Scheduling the next vaccination visit and the next well-child visit to occur on the same day whenever possible. Offering various types of appointments (e.g., nurse-only appointments, vaccination-only clinic days, etc.) where vaccinations can occur. 	The provider's EHR or scheduling software does not allow scheduling appointments far in advance.	Investigate and implement modifications to the EHR or scheduling software to support the advance scheduling of vaccination visits.	Work with the provider to identify steps to address any software limitations that prevent scheduling visits months in advance. Help develop a plan of action to be made into action steps for the strategy implementation plan.
Best Practice	Example of a Gap in Implementation	Example of a Solution	Example of Technical Assistance
Maintain accurate patient contact information by verifying and updating patient contact information at each appointment to support scheduling and reminder and recall efforts.	The provider does not have a routine protocol for updating patient contact information.	Establish a written protocol and add it to the office SOP for check-in staff.	Brainstorm with the provider to identify workflow changes to ensure all patient contact information is reviewed and updated upon check-in, regardless of the type of patient visit, and develop steps for adding those changes to the office SOP.

Thank You