

# Tips for Creating Immunization Workflow User Guides for Reminder Recall Programs

The creation of end-user guides and tip sheets for an immunization reminder recall initiative may ensure your organization is fully prepared for the corresponding response from patients who may be eligible for vaccinations. This resource provides guidance on the creation of a Reminder Recall end-user guide.

## User Guide for an Immunization Reminder Recall Program

A reminder recall program has been implemented to help our organization increase patient awareness of ACIP-recommended vaccines and improve immunization rates.<sup>1</sup>

- A workflow has been established to standardize scheduling of immunization-focused visits<sup>2</sup>
- Routinely assess that vaccines are fully stocked
- During patient visits, review vaccination history within the EHR and determine which vaccines are appropriate

- Indicate which ACIP-recommended vaccines your organization or practice is targeting for outreach
- Post the current recommended immunization schedule in a consistent spot, like the vaccine refrigerator or nurse's station, and ensure your tip sheet provides clarity on where the schedule is displayed

- Provide details regarding how patients are being notified and the exact timing of outreach
- Show the postcard or intervention so office staff are aware of what the reminder recall assets look like
- After making your administrative staff fully aware of the reminder recall program, include a prepared response to incoming patient inquiries on your tip sheet

- Ensure all vaccination coordinators are aware of the program, and ensure recommended vaccines that the organization is targeting for outreach are in stock

- Emphasize that the patient's vaccination history should be verified in the EHR or immunization registry prior to administering any vaccine
- As a function of your specific outreach program, provide guidance in the end-user guide regarding when it is, and is not, appropriate to administer multiple vaccinations in the same office visit

# Tips for Creating Immunization Workflow User Guides for Reminder Recall Programs (Cont'd)

## User Guide for an Immunization Reminder Recall Program (Cont'd)

- Know where vaccines will be administered in the office<sup>3</sup>
- Document vaccine administration or refusal to ensure patient record is up to date<sup>4</sup>
- Provide a VIS to patients who elect to be vaccinated (prior to vaccination) and record receipt in the patient's chart<sup>5</sup>

**For more information regarding this vaccine patient outreach initiative, contact your Reminder Recall Champion or appointed content expert.**

• Provide guidance on where staff will prepare and administer vaccinations

• If patients decline the recommended vaccines, provide guidance on how to document refusal in the patient record regarding why the vaccine was not administered (allergy, parent refusal)

• Prior to vaccination, ensure HCPs/staff provide patients with a VIS, and then record in the patient's chart the edition of the VIS distributed and the date it was provided

• To ensure successful rollout, appoint a content expert to troubleshoot any potential challenges post implementation. Include name and contact information in your end-user guide

• Consider providing supplemental information on your tip sheets on ways the organization will assess performance and desired outcomes post implementation. This will help foster end-user understanding and align accountability to your organizational goals

HCP = health care professional; VIS = Vaccine Information Statement.

**References:** **1.** Loo TS, Davis RB, Lipsitz LA, et al. Electronic medical record reminders and panel management to improve primary care of elderly patients. *Arch Intern Med.* 2011;171(17):1552-1558. **2.** Ledwich LJ, Harrington TM, Ayoub TW, et al. Improved influenza and pneumococcal vaccination in rheumatology patients taking immunosuppressants using an electronic health record best practice alert. *Arthritis Rheum.* 2009;61(11):1505-1510. **3.** Immunization Action Coalition. Step 2: Setting up for vaccination services. <https://www.immunize.org/guide/pdfs/vacc-adults-step2.pdf>. Accessed December 17, 2019. **4.** Immunization Action Coalition. Suggestions to improve your immunization services. <https://www.immunize.org/catg.d/p2045.pdf>. Accessed December 17, 2019. **5.** Immunization Action Coalition. Step 4: Deciding when to vaccinate. <https://www.immunize.org/guide/pdfs/vacc-adults-step4.pdf>. Accessed December 17, 2019.

# Tips for Creating Immunization Workflow User Guides for Clinical Decision Support

The creation of end-user guides and tip sheets when implementing EHR workflow changes, such as a new Clinical Decision Support (CDS) alert, may ensure consistent use post implementation. This resource provides guidance on the creation of an EHR CDS end-user guide.

## User Guide for Adult Influenza Vaccination CDS Alert

A CDS alert for adult influenza vaccination has been implemented to help simplify HCP identification of adults eligible for vaccination.<sup>1</sup>

- The ACIP recommends an annual influenza vaccination for patients aged 6 months and older<sup>2</sup>
- If the patient is indicated for the influenza vaccine, the CDS alert will now notify the HCP that the patient is eligible for the vaccine, according to recommended guidelines<sup>1</sup>
- Even if the CDS alert does not fire, consult with patients to verify current immunization status<sup>3</sup>
- Review vaccination history with patients and document accordingly within your EHR to determine if the influenza vaccine is appropriate for your patient<sup>4</sup>
- Assess and document any contraindications, allergies, or adverse event histories within the EHR system during the screening process<sup>3,5</sup>

• Consider pointing out differences between the original immunization workflow and the new workflow, specifically highlighting simplified workflow, reduction in steps, and/or enhanced decision support

• Consider providing supplemental information on your tip sheets regarding specific actions an HCP should take within the EHR once a CDS alert has been fired

• Summarize ACIP recommendations and provide clarity regarding any specific patient populations

• Emphasize that the patient's vaccination history should be verified prior to administering any vaccine

• Encourage HCPs and staff to maintain a comprehensive immunization record in a consistent location in each patient's EHR and provide guidance on location of record within your end-user guide

• If a vaccine is contraindicated for a patient, provide guidance on how to document within the immunization record

# Tips for Creating Immunization Workflow User Guides for Clinical Decision Support (Cont'd)

## User Guide for Adult Influenza Vaccination CDS Alert (Cont'd)

- Order and administer the influenza vaccine
- Document patient immunization acceptance or refusal in your EHR to ensure vaccination record accuracy. If patient refuses, the required vaccine will still appear in Health Maintenance at the patient's next visit<sup>4</sup>
- Provide a VIS to patients who elect to be vaccinated (prior to vaccination) and record receipt in the patient's chart<sup>6</sup>
- Use reports to track missed appointments specific to vaccinations and contact patients via phone, text, or patient portal to remind them to reschedule the appointment

**For more information and troubleshooting assistance regarding use of CDS alerts, contact your EHR Champion or appointed content expert.**

• Ensure vaccines are consistently available and in stock once the CDS alert is activated

• Reinforce that if a patient is eligible but the vaccine is not administered, HCPs must select an appropriate reason to dismiss the BPA alert, such as "Patient Refused"

• If you've incorporated standing orders within your EHR workflow, provide tips and screenshots on how to place the order in the EHR

• Prior to vaccination, ensure HCPs/staff provide patients with a VIS, and then record in the patient's chart the edition of the VIS distributed and the date it was provided

• Reinforce within your end-user guide that reports can be run to assess when patients are due to receive their influenza vaccine or have missed an appointment to receive their influenza vaccine

• To ensure successful rollout, appoint a content expert to troubleshoot any potential challenges post implementation. Include name and contact information in your end-user guide

• Consider providing supplemental information on your tip sheets addressing ways the organization will assess performance and desired outcomes post implementation. This will help foster end-user understanding and align accountability to your organizational goals

BPA = best practice alert; VIS = Vaccine Information Statement.

**References:** **1.** Vasey J. Improving adult vaccination rates through EHR workflow messaging. [https://www.practicefusion.com/assets/pdfs/PracticeFusion\\_PneuWhitePaper.pdf](https://www.practicefusion.com/assets/pdfs/PracticeFusion_PneuWhitePaper.pdf). Accessed December 17, 2019. **2.** Fiore AE, Uyeki TM, Broder K, et al. Prevention and control of influenza with vaccines: recommendations of the Advisory Committee on Immunization Practices (ACIP), 2010. *MMWR Morb Mortal Wkly Rep.* 2010;59(RR-8):1-62. **3.** Immunization Action Coalition. Step 4: Deciding when to vaccinate. <https://www.immunize.org/guide/pdfs/vacc-adults-step4.pdf>. Accessed December 17, 2019. **4.** Immunization Action Coalition. Suggestions to improve your immunization services. <https://www.immunize.org/catg.d/p2045.pdf>. Accessed December 17, 2019. **5.** Immunization Action Coalition. Screening checklist for contraindications to inactivated injectable influenza vaccination. <https://www.immunize.org/catg.d/p4066.pdf>. Accessed December 17, 2019. **6.** Centers for Disease Control and Prevention (CDC). Instructions for using VISs. <https://www.cdc.gov/vaccines/hcp/vis/about/required-use-instructions.pdf>. Accessed December 17, 2019.