

1

Vaccine Needs Assessment

A Series on Standards for Adult Immunization Practice



Assessment is the critical first step in ensuring that your adult patients get the vaccines they need for protection against serious vaccine-preventable diseases.

As a standard of care—whether you provide vaccines or not—you should assess your patients' immunization status at *every clinical encounter* and strongly recommend vaccines that they need.

Assessing your patients' vaccination status at every clinical encounter will decrease missed opportunities to vaccinate.^{1, 2, 3}

- Many adults do not schedule annual check-ups or come in for preventive services, therefore it is critical to assess vaccine status whenever they do come in for a visit.
- Some vaccines are indicated for adults based on factors other than age, making it important to assess regularly whether your patients have had lifestyle, health, or occupational changes that may prompt the need for additional vaccines.
- Vaccine recommendations for adults change over time, and your patients may not be up to date with the latest recommendations.

There are simple ways to implement routine vaccine assessment into your office patient flow.

- Give patients a vaccine assessment form at check-in.
- Include standing orders or protocols for nursing staff to assess and administer needed vaccines.
- Integrate vaccine prompts into electronic medical records.

See back for more tips and resources.

Routinely assessing patient vaccination status will make a difference.

Adults think immunization is important, but most don't know which vaccines they need throughout their lives. Research indicates that your recommendation is the strongest predictor of whether patients get vaccinated.⁴ Implement policies to ensure your patients' vaccination needs are routinely reviewed.

For information on insurance coverage of vaccines for adults, visit: www.cdc.gov/vaccines/hcp/adults

U.S. vaccination rates for adults are extremely low.

For example:

- Only 20% of adults 19 years or older have received Tdap vaccination.
- Only 28% of adults 60 years or older have received zoster (shingles) vaccination.
- Only 20% of adults 19 to 64 years old, at high risk, have received pneumococcal vaccination.
- Only 44% of adults 18 years or older had received flu vaccination during the 2014–2015 flu season.

Sources: NHIS 2014 (MMWR 2016; 64(4)), BRFSS 2014–2015 (www.cdc.gov/flu/fluview)

For resources and tips on vaccine recommendation, administration, referral, and documentation, visit:

www.cdc.gov/vaccines/adultstandards

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Tips for Improving Vaccine Assessment in Your Practice

- **Implement standing orders or protocols.** Routinely incorporate vaccine assessment and vaccination the same way you incorporate measuring weight and blood pressure during patient office visits.
Examples: www.immunize.org/standing-orders
- **Give your patients a vaccine questionnaire to complete at check-in.** This can help identify vaccines your patients may need based on factors such as upcoming travel or changes in medical conditions.
Example: www.cdc.gov/vaccines/hcp/adults/downloads/patient-intake-form.pdf
- **Use reminders to help your practice stay on top of needed vaccines that are due soon or are overdue.** These reminders can be generated by a computer system (Electronic Health Record) or immunization registries, or you can make a note of needed vaccines on a patient's vaccination chart.
Example: www.immunize.org/catg.d/p2023.pdf
- **Send your patients reminders about missed vaccines or vaccines that are due soon.** This can help keep vaccines on your patients' radar and encourage them to stay up to date.
Example: <http://www.adultvaccination.org/professional-resources/adult/appointment-reminder-cards.html>
- **Review how your practice does in keeping your patients up to date on vaccines.** This can be done by reviewing a sample of patients' charts or analyzing electronic health record data for your practice. Learn more about the CDC Comprehensive Clinic Assessment Software Application (CoCASA) tool here: www.cdc.gov/vaccines/programs/cocasa/index.html

CDC's recommended Adult Immunization Schedule is available in various formats, including an online scheduling tool and mobile phone application:

www.cdc.gov/vaccines/schedules

To learn more about evidence-based strategies for improving vaccination rates, visit: www.TheCommunityGuide.org/vaccines

Don't forget to review contraindications and precautions for vaccination when assessing your patients' vaccine needs.

Learn more: <http://www.cdc.gov/vaccines/hcp/admin/contraindications-adults.html>

References:

1. Hurley LP, Bridges CB, Harpaz R, Allison MA. US physicians survey regarding adult vaccine delivery: Missed opportunities. *Ann Intern Med.* 2014; 160:161-70.
2. Nowalk MP, Zimmerman RK, Feghali J. Missed opportunities for adult immunization in diverse primary care office settings. *Vaccine.* 2004; 22(25-26):3457-63.
3. Nowalk MP, Zimmerman RK, Cleary SM, Bruehlman RD. Missed opportunities to vaccinate older adults in primary care. *J Am Board Fam Pract.* 2005; 18(1):20-7.
4. Johnson DR, Nichol KN, Lipczynski K. Barriers to Adult Immunization. *Am J Med.* 2008; 121:528-535.

For more information and resources on adult immunization,
visit: www.cdc.gov/vaccines/hcp/adults

2

Vaccine Recommendation

A Series on Standards for Adult Immunization Practice



Your recommendation is a critical factor in whether your patients get the vaccines they need.

Routinely assess patient immunization status and strongly recommend vaccines that patients need, whether you stock the vaccines or not.

Recommending vaccines prompts most patients to get immunized.

Research indicates that most adults believe that vaccines are important and are likely to get them if recommended by their healthcare professionals.

For some patients, a clear and strong recommendation may not be enough. You can encourage these patients to make an informed decision about vaccination by sharing critical information.

S

SHARE the tailored reasons why the recommended vaccine is right for the patient given his or her age, health status, lifestyle, occupation, or other risk factors.

H

HIGHLIGHT positive experiences with vaccines (personal or in your practice), as appropriate, to reinforce the benefits and strengthen confidence in vaccination.

A

ADDRESS patient questions and any concerns about the vaccine, including side effects, safety, and vaccine effectiveness in plain and understandable language.

R

REMIND patients that vaccines protect them and their loved ones from many common and serious diseases.

E

EXPLAIN the potential costs of getting the disease, including serious health effects, time lost (such as missing work or family obligations), and financial costs.

For tips on answering common patient questions and links to patient education materials, see back.

U.S. vaccination rates for adults are extremely low.

For example:

- Only 14% of adults 19 years or older have received Tdap vaccination.
- Only 20% of adults 60 years or older have received zoster (shingles) vaccination.
- Only 20% of adults 19 to 64 years old, at high risk, have received pneumococcal vaccination.
- Only 41% of adults 18 years or older had received flu vaccination during the 2012–2013 flu season.

Sources: NHIS 2012 (MMWR 2014;63(5))
BRFSS 2012–2013 (www.cdc.gov/flu/fluview)

For resources and tips on vaccine assessment, administration, referral, and documentation, visit:

www.cdc.gov/vaccines/adultstandards

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Tips for Addressing Common Questions About Adult Vaccination

Do I really need vaccines?

- All adults need immunizations to help prevent getting serious diseases that could result not only in poor health, but also missed work, medical bills, and not being able to care for their families.
- You may not have received all of your recommended childhood vaccines. Also, the protection from some vaccines you received as a child can wear off over time and you might need a booster (tetanus and whooping cough). Some vaccines are recommended based on your age, job, lifestyle, or health conditions. For example, adults with chronic conditions like asthma or COPD are at higher risk for complications from certain diseases like flu and pneumonia.
- Getting vaccinated not only reduces your chance of getting sick, but also reduces the chance that you will spread a serious disease to those around you—including those most vulnerable to severe illness (infants, older adults, and people with chronic health conditions and weakened immune systems).

For tips on addressing common questions about specific adult vaccines, visit: www.cdc.gov/vaccines/hcp/patient-ed/adults/for-practice/standards/recommend.html

How well do adult vaccines work?

- Vaccines work with the body's natural defenses to reduce the chances of getting certain diseases and suffering from their complications.
- The amount of protection you will get varies by vaccine and other factors like your age and health, but immunization is the best defense against many of these serious, and sometimes deadly, diseases.
- The greatest risk of vaccine-preventable diseases occurs among people who are not vaccinated.

Are adult vaccines safe?

- Vaccines are one of the safest ways to protect your health.
- Vaccines go through thorough testing before they can be licensed by the Food and Drug Administration (FDA). Once a vaccine is licensed, research is reviewed by medical and scientific experts to make recommendations on who should be vaccinated. Even after a vaccine is licensed, CDC and FDA continue to carefully monitor the safety of vaccines.
- It is safe to receive vaccinations while taking prescription medications. If you take medication that suppresses your immune system, you may not be able to get certain live vaccines including MMR, varicella, and shingles vaccines.

Patients vary in their level of knowledge about immunization and their preferences for learning about it.

Find free education materials for your patients:

www.cdc.gov/vaccines/AdultPatientEd

What are possible risks from adult vaccines?

- Side effects from vaccines are usually minor and temporary, such as feeling sore where you get the shot or a slight fever, and go away within a few days.
- Some people may have allergic reactions to vaccines, but serious or long-term effects are rare.

For additional information and resources on adult immunization, visit: www.cdc.gov/vaccines/hcp/adults.

3

Vaccine Administration

A Series on Standards for Adult Immunization Practice



Take steps to improve vaccine administration in your office and better protect your patients from vaccine-preventable diseases.

1. Assess patient vaccination status at every visit.

U.S. vaccination rates are extremely low, and research shows that there are many missed opportunities for vaccination of adult patients during clinical encounters.

2. Recommend and offer vaccines at the same visit.

Research shows when patients receive a vaccine recommendation and are offered the vaccine at the same time, they are more likely to get vaccinated. **For vaccines you don't stock, it is still critical to make the recommendation and then refer to another immunization provider.**

See fact sheet 4 in this series for tips on referral.

3. Train and educate your staff on vaccine administration.

Building your staff's skills and confidence in vaccine administration can help improve vaccine delivery and ensure patient safety.

4. Properly store and handle vaccines.

This critical step can reduce wastage.

5. Distribute Vaccine Information Statements (VIS) to patients.

Help your patients make informed decisions about vaccinations by providing them with up-to-date information about the benefits and potential risks for each vaccine they need.

6. Ensure proper care for patients.

Minimize potential risks to your patients by following safety protocols such as having your patients sit or lie down while you administer vaccines.

7. Follow standard precautions to control infection.

Minimize the risks of spreading disease when administering vaccines.

8. Be aware of and prepared for potential adverse reactions.

All vaccines have the potential to cause adverse reactions. Most are minor (e.g., itching, soreness) but severe reactions (e.g., anaphylaxis), while rare, can occur. Make sure you and your staff are prepared to handle severe reactions.

U.S. vaccination rates for adults are extremely low.

For example:

- Only 20% of adults 19 years or older have received Tdap vaccination.
- Only 28% of adults 60 years or older have received zoster (shingles) vaccination.
- Only 20% of adults 19 to 64 years old, at high risk, have received pneumococcal vaccination.
- Only 44% of adults 18 years or older had received flu vaccination during the 2014–2015 flu season.

Sources: NHIS 2014 (MMWR 2016; 64(4)), BRFSS 2014–2015 (www.cdc.gov/flu/fluview)

For resources and tips on vaccine assessment, recommendation, referral, and documentation, visit:

www.cdc.gov/vaccines/adultstandards

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Resources to Help You and Your Staff Improve Vaccine Administration in Your Practice

- **CDC General Immunization Training**

Self-paced online trainings with free CE or CME credits, webcasts, and more:
www.cdc.gov/vaccines/ed/courses.html

- **Immunization Skills Self-Assessment**

A tool for healthcare staff and supervisors to assess immunization skills and develop a plan of action to improve performance if needed:
www.immunize.org/catg.d/p7010.pdf

- **Storage and Handling**

Training and guidance on proper vaccine storage and handling practices:
www.cdc.gov/vaccines/recs/storage

- **Dose and Route Chart**

Dose, route, injection site, and needle size information for all adult vaccines:
www.immunize.org/catg.d/p3084.pdf

- **Vaccine Information Statements (VIS)**

Federal law requires that you provide VIS to patients prior to administering certain vaccines; however, it is a best practice to do so for all vaccines because the VIS explains both the vaccine benefits and risks to your patients. You can find print-ready VIS at:
www.cdc.gov/vaccines/hcp/vis

- **Guide to Infection Prevention for Outpatient Care**

A downloadable and printable guide on infection prevention including information regarding protective equipment and safe injection practices:
www.cdc.gov/HAI/settings/outpatient/outpatient-care-guidelines.html

- **Chart of Medical Management of Vaccine Reactions in Adult Patients**

Procedures to follow if various adverse reactions occur:
www.immunize.org/catg.d/p3082.pdf

- **Vaccine Adverse Events Reporting System (VAERS)**

The National Childhood Vaccine Injury Act (NCVIA) requires healthcare providers to report certain adverse events that occur following vaccination. VAERS is a national reporting system that accepts reports on adverse events with vaccines licensed in the United States:
www.cdc.gov/vaccinesafety/Activities/vaers.html

Standing orders or protocols save time and reduce missed opportunities by authorizing nurses, pharmacists, and other healthcare professionals (where allowed by state law) to assess patient vaccine status and administer vaccinations without examination or direct order from the attending provider.

For sample standing orders, visit: www.immunize.org/standing-orders

For more information and resources on adult immunization,
visit: www.cdc.gov/vaccines/hcp/adults

4

Vaccine Referral

A Series on Standards for Adult Immunization Practice



Even if your practice doesn't stock all or any vaccines, you still have a critical role to play in ensuring your patients are protected from serious diseases.

Routinely assess your patients' immunization needs, vaccinate with vaccines you do stock, and provide referrals for recommended vaccines you do not stock.

Here's why it's important:

- **Each year, thousands of adults in the United States suffer illness, are hospitalized, or even die from diseases that could be prevented by vaccines.**

Adults believe immunization is important, but most don't know which vaccines they need throughout their lives.

- **Patients rely on you to give them the best advice on how to protect their health.**

If you don't tell them about the vaccines they need, your patients are unlikely to get vaccinated.

Here's what you can do:

- **Refer your patients to other immunization providers for vaccines you don't stock.**

It may not be possible to stock all vaccines in your practice. But you can still ensure that your patients are getting the vaccines they need by following up your strong recommendation with a referral. There is an expanding network of immunization providers, and it is easier than ever to find providers in your area who offer vaccination services. See back for details.

- **Confirm that patients received recommended vaccines by following up at the next visit.**

Document the vaccines your patients receive, whether you administer them or not, to make sure patients are fully immunized. Simple reminders can help your practice and your patients stay up to date.

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- Only 20% of adults 19 to 64 years old, at high risk, have received pneumococcal vaccination.
- Only 44% of adults 18 years or older had received flu vaccination during the 2014–2015 flu season.

Sources: NHIS 2014 (MMWR 2016; 64(4)), BRFSS 2014–2015 (www.cdc.gov/flu/fluview)

For resources and tips on vaccine assessment, recommendation, administration, and documentation, visit:

www.cdc.gov/vaccines/adultstandards

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Vaccine Referral Options

- **HealthMap Vaccine Finder** (<http://vaccine.healthmap.org>) is a free, online service where users can search by zip code for providers who offer vaccines.
- **Health Departments** often provide routine vaccinations or can help you identify other local vaccine providers. Visit www.vaccines.gov/getting/where/ and click on your state to learn more.
- **Pharmacies** are a convenient location for many patients to get vaccinated. Most pharmacies have on-site clinics that provide vaccines.
- **Travel Clinics** are current with vaccine recommendations for international travel and often carry vaccines that are less frequently recommended and might be cost-prohibitive to stock. Find travel clinics in your area: <http://wwwnc.cdc.gov/travel/page/find-clinic>

Remind patients to check with their insurance plans regarding which providers their insurance includes for vaccine services.

When referring, consider giving your patients a vaccine prescription. If your patients can leave your office with a prescription for the vaccines you recommend it may help them to take the next step.

Vaccine prescription pads, customizable with your provider information, are available at: <http://www.cdc.gov/vaccines/hcp/adults/downloads/vaccine-rx-pad.pdf>

**For more information and resources on adult immunization,
visit: www.cdc.gov/vaccines/hcp/adults**

5

Vaccine Documentation

A Series on Standards for Adult Immunization Practice



Since patients can get their vaccines from many different healthcare professionals, assessing current vaccination status for patients can be challenging but it is very important.

Keep an up-to-date record of the vaccines your patients have received to make sure they have the best protection against vaccine-preventable diseases.

To ensure patients get the vaccines they need and to prevent unnecessary vaccination, you should:

- Record vaccination in patients' medical records
- Provide documentation of vaccines received to patients for their personal records
- Document vaccinations in immunization information systems (IIS)

IIS are confidential, community-wide, computerized databases that record vaccines administered by participating healthcare professionals. Documenting vaccines into IIS can benefit your practice by:

- Consolidating vaccination records for your patients
- Helping you assess your patients' immunization status
- Making sure your patients have completed necessary vaccine series (for example, all three doses of hepatitis B vaccine)
- Reducing chances for unnecessary doses of vaccine or missed opportunities to provide vaccines
- Facilitating use of reminder and recall notifications to send to patients
- Making calculation of your office's immunization coverage rates easier

For more information on how to access IIS, contact your state coordinator. (See back for details.)

Even if you do not administer vaccines in your office, follow up with your patients to ensure they received the recommended vaccines from another immunization provider.

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- Only 44% of adults 18 years or older had received flu vaccination during the 2014–2015 flu season.

Sources: NHIS 2014 (MMWR 2016; 64(4)), BRFSS 2014–2015 (www.cdc.gov/flu/fluview)

For resources and tips on vaccine assessment, recommendation, administration, and referral, visit:

www.cdc.gov/vaccines/adultstandards

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Resources for Documenting Vaccines Received by Your Patients

- Learn more about Immunization Information Systems (IIS)
www.cdc.gov/vaccines/programs/iis/training.html
- Reach out to your state's main contact regarding questions about your state or local registry, including whether you may be able to automatically transmit immunization data from your electronic medical records to your state's IIS
www.cdc.gov/vaccines/programs/iis/contacts-registry-staff.html
- Provide your patient with a vaccine administration record
www.immunize.org/catg.d/p2023.pdf
- Learn how to protect the privacy, confidentiality, and security of your patients' information
www.immregistries.org/resources/privacy-security-confidentiality
- Learn more about meaningful use of Electronic Health Record systems and IIS
www.cdc.gov/vaccines/programs/iis/meaningful-use/index.html
www.cdc.gov/ehrmeaningfuluse/introduction.html

Documenting vaccinations in IIS fulfills one of the Centers for Medicare & Medicaid Services "Core" Meaningful Use criteria. Learn more at:

www.healthit.gov/providers-professionals/achieve-meaningful-use/core-measures-2/immunization-registries-data-submission

**For more information and resources on adult immunization,
visit: www.cdc.gov/vaccines/hcp/adults**