

# Planning and Conducting a Small-Scale Immunization Event

Pharmacists who have conducted immunization events agree: the more planning you do, the more smoothly the event will run. The purpose of this guide is to walk you step-by-step through the details of planning and conducting a typical small-scale immunization event conducted at the pharmacy or a designated facility (eg, local employer, community college, assisted living facility) with minimal personnel.

Not all of the activities in this timeline may be needed for your event. Conversely, you may need to complete tasks that aren't included here. Use this list as a general framework and modify it to fit your particular circumstances.

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### Need More Information?

If you need more in-depth information about any aspect of the immunization process, consult these Immunization Action Coalition resources.

#### Pharmacists and Immunization:

Adult Vaccination Resources for Health Care Providers (HCPs)

Learn More



#### Vaccinating Adults:

A Step-by-Step Guide

Learn More



You can also access additional information and resources from APhA.

#### Immunization Resource Center:

Vaccination News, Tools, and Resources

Learn More



## Recommended Tasks to Complete at Least 3 to 6 Months Before the Event

Determine the date, time, and location of the event. (This information is covered in Guide 1, “Deciding to Conduct an Immunization Event.”)

Order vaccines and clinic supplies to arrive in time for the event.

- Some vaccines (eg, influenza) may need to be ordered many months in advance of the event date.
- If at all possible, arrange to have vaccines shipped directly to the event location if appropriate vaccine storage is available.



### Give It a Shot

Try to use vaccine from a single lot number. This makes it easier to complete forms and record required information.

If the event will be held off-site, verify that existing standing order protocols will cover off-site immunizations. Establish a standing order protocol if one does not exist.

- You should have standing orders for both administering vaccines and managing vaccine reactions.
- The Immunization Action Coalition offers templates for standing orders for all routine vaccines and managing adverse events ([www.immunize.org/standing-orders/](http://www.immunize.org/standing-orders/)). Templates should always be customized according to local conditions and legal requirements.

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Ensure access to the local immunization information system. Verify local requirements for reporting administered vaccinations.

If the event will be held off-site, confirm that your liability insurance covers off-site immunizations.

- Individual policies for pharmacists may be advisable in addition to coverage through a company policy. Typical coverage minimums, based on pharmacists interviewed, are \$1 million per occurrence and \$3 million aggregate per policy interval.<sup>1</sup>

If the event will be held off-site, discuss the need for general business liability insurance with the event venue.

Determine how and when payment and third-party billing will be managed and completed.

- If needed, obtain a Medicare mass immunization provider number(s) for the clinic site. Consult the resource [“Mass Immunizers and Roster Billing”](#) from the Centers for Medicare and Medicaid Services (CMS) for additional information.<sup>2</sup>

Begin to visualize how you want patients to flow through the immunization process from arrival to departure.

- Immunization administration clinics ideally are designed as a series of well-delineated areas that allow participants to progress in a unidirectional flow from the entrance to the exit. This may or may not be feasible for smaller-scale events.

### Possible Areas for Small-Scale Immunization Events

- A “clinic entrance” area where staff (eg, a pharmacy technician) greets participants and provides paperwork for participants to complete. This area ideally has an obvious spot for arriving participants to queue and seating for participants who need to complete forms.
- Vaccination stations with tables for supplies and seats for immunizers and participants. If individual rooms are not available, the stations should be enclosed by portable screens to provide patient privacy during vaccination. There should be adequate space to place sharps containers (for used needles) and waste baskets (for other trash) close to where the vaccinations will be administered.

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### Possible Areas for Small-Scale Immunization Events

- A post-vaccination observation area with seating. Participants may be asked to complete an event evaluation in this area.
- An exit separate from the clinic entrance, with a spot (eg, box or bin) for collecting completed evaluations. Note that for events managed by one pharmacist and one technician, the clinic entrance/observation area/exit may need to be in the same place, to facilitate oversight of all areas by the technician.

Estimate personnel needs.

- For maximum efficiency, pharmacists and other immunizers should be involved *only* in clinical patient care activities such as reviewing patient intake information and administering vaccines.
- Ensure that all event personnel are trained and demonstrate competency in vaccine storage, handling, and, if appropriate, administration.
- If it is likely that participants will speak languages other than English, efforts should be made to have someone available who is conversant in those languages.

Set up a system for record keeping and documentation.

Determine and order needed signage. If the event will serve diverse populations, be sure to have signs in multiple languages (or universal language).

- Signs with the date, time, and location of the clinic can be used to promote the event during the preceding weeks and identify the venue on event day.
- Signs may be needed both outside and inside the event venue.
- Be sure to determine whether there are any regulations governing sign placement.



### Signage You May Need

- General sign indicating the event location and times (to post outside the venue).
- Entrances and exits.
- One-way flow of traffic inside the clinic.
- Restrooms.

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If the vaccine that will be administered during the event is part of a series, consider how participants will receive the remaining doses.

- Will you conduct additional immunization events at the appropriate time intervals?
- Will you encourage participants to visit the pharmacy to receive subsequent doses?
- Will you refer participants to their primary care physician or other providers in your immunization neighborhood?

## Tasks to Complete 1 to 3 Months Before the Event

Review the **“Immunization Clinic Supplies Checklist”** to determine what may need to be ordered.

- Ensure that an emergency medical kit (including epinephrine and equipment for maintaining an airway) will be available at the site for the duration of the event. Ensure that appropriately trained and qualified personnel are present at the immunization event to use the kit in case of an emergency. Develop a protocol for medical emergencies prior to the immunization event and make sure personnel are trained on it.

If the event will be held off-site, arrange a meeting with the group or facility to discuss the desired clinic layout and clarify what is provided at the site (eg, tables, chairs, waste baskets, office supplies).

Ensure that telephone access will be available during the event in case of medical emergencies (eg, to call 911).

- If the facility does not have telephones, plan for at least two people to have working cell phones and verify cell phone reception at the facility.

If you will need internet access during the event (eg, to access the immunization information system or for credit card processing), consider what equipment (eg, laptop computers, hotspot) and services (eg, secure internet connection) will be required.



### Give It a Shot

Investigate whether you can scan patients' insurance information into a laptop computer or using an iPad. This can save telephone calls to patients after the event if there are questions about insurance coverage or if any information was transcribed incorrectly. Be sure to check your pharmacy HIPAA policies.

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Develop a plan for maintaining vaccine at appropriate temperatures during transport to the event venue and throughout the clinic day. Consult the Centers for Disease Control and Prevention (CDC) "[Vaccine Storage & Handling Toolkit](#)" for detailed information.

- Determine how the cold chain will be maintained during vaccine transport and confirmed upon arrival at the event venue.

Review and consider using the "[Checklist of Best Practices for Vaccination Clinics Held at Satellite, Temporary, or Off-Site Locations](#)" from the National Adult and Influenza Immunization Summit.<sup>3</sup>

If the event will be held off-site, determine how medical waste will be collected and disposed of during and after the event.

Begin to create or gather and make copies of needed forms.

### Forms You May Need

- General information/fact sheets about the target disease state.
- Current immunization schedules.
- Sign-in sheets.
- Patient contact information forms.
- Informed consent forms.
- Release of information forms.
- Screening questionnaires.
- Current Vaccine Information Statements for the types of vaccines to be administered (available in English on the [CDC website](#) and in multiple languages on the [Immunization Action Coalition website](#)).
- Blank vaccine administration record forms or cards (cards can be ordered from the Immunization Action Coalition).
- Vaccine administration documentation form.
- Billing forms.
- Immunization roster billing log.
- Participant exit survey questionnaires.
- Vaccine Adverse Event Reporting System (VAERS) forms (available at [vaers.hhs.gov](http://vaers.hhs.gov)).

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### Give It a Shot

Fill out as much information on forms as possible before the event to be able to devote as much time as possible to vaccine administration during the event. If you are working with a defined population (eg, employees of a local business), see if you can provide some forms (eg, consent form) for participants to complete ahead of time.

If you anticipate a large turnout, consider how you will manage the queue of people waiting.

- One approach is to allow participants to sign up for a designated block of time later during the clinic.

If the event staff consists of more than one pharmacist and one technician, identify roles for everyone involved and assign specific day-of-event tasks.

- If you will be using the [“Checklist of Best Practices for Vaccination Clinics Held at Satellite, Temporary, or Off-Site Locations,”](#) designate one person to be responsible for ensuring adherence to the guidelines.

Begin promoting the event. (This information is covered in Guide 4, “Raising Awareness of Immunization Events.”)

## Tasks to Complete 1 to 2 Weeks Before the Event

Arrange for delivery and appropriate storage of vaccines.

Review the [“Checklist of Best Practices for Vaccination Clinics Held at Satellite, Temporary, or Off-Site Locations”](#) for items that must be completed before the event.

Review the [“Immunization Clinic Supplies Checklist”](#) to ensure you have all needed supplies and materials available.

- Determine who will be responsible for gathering and transporting supplies.
- If needed, procure or purchase several plastic totes or bins to transport supplies (**not** vaccines) to the site.

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If the event will be held off-site, gather important documents that must be available during the event.

- Standing order protocols.
- Proof of licensure for immunizers.

If the event will be held off-site for a defined group (eg, local employer), ask for an estimate of the number of participants.

- Consider accommodating special-needs clients (eg, persons with disabilities, elderly adults) during a dedicated time at the start or end of the event.

If participants will need to receive subsequent doses in a vaccine series, consider ways to remind them of the need for follow-up.

- Collect email or mailing addresses for reminder messages.
- Create “save the date” cards with information about future follow-up clinics.

Determine how you will capture important information about each participant in HIPAA-compliant fashion.

- Medical history including potential contraindications to vaccination.
- Contact information.
- Insurance information.
- Other information needed for billing.

Determine how information will be reported to the appropriate immunization information system (IIS) and the documentation provided to the vaccine recipient. (Note: if available, will IIS be accessed to assess patient immunization status?)

Post signs promoting the event at and near the venue.

- Be mindful of any regulations governing sign placement.

Continue to promote the event. (This information is covered in Guide 4, “Raising Awareness of Immunization Events.”)

Have a plan in place for activating the emergency medical protocol.

- Make sure appropriately trained personnel will be present at the event.
- Make sure all personnel know what needs to be done if a medical emergency occurs.
- Assign specific tasks to personnel (eg, technician calls 911, facility representative waits by entrance to direct emergency responders to patient).
- If at all possible, run through a medical emergency scenario to ensure all personnel are comfortable with and competent in their roles.



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### Give It a Shot

Read insurance policies for off-site events *carefully*. If a participant offers to assist with CPR or other emergency measures, you must know what is covered and permitted.

## Tasks to Complete 1 Day Before the Event

Review the “**Immunization Clinic Supplies Checklist**” to ensure that all needed materials will be transported to or available at the event venue.

- Conduct a pre-event inventory of the exact quantity of items and supplies that will be brought to the venue. Bring the inventory list to the venue.

If the event will be held off-site for a defined group, send (or arrange) a final communication to participants with reminders about event start and end times, what to bring (eg, insurance card/information for both medical and pharmacy benefits), and what to wear (eg, loose clothing that enables easy access to the site of vaccine administration).

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### Conducting the Event

The day of your immunization event is finally here! Time for all of your hard work and planning to pay off in a successful event.

Plan to arrive (or begin arriving) at the venue well before the start of the event—at least 1 to 1.5 hours—to allow plenty of time for setup. And try to be flexible when unexpected situations arise on event day. Changes are inevitable; it's how you deal with them that counts.

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### Before the Event

Place signs outside the event venue.

- Be sure to comply with any regulations governing sign placement.

Set up the registration area.

Consider collating forms (eg, screening questionnaire, disease fact sheet, Vaccine Information Statement, billing information form, consent form) onto clipboards to ensure that a complete set is handed to each participant and facilitate form completion.

If you need internet access during the event, set up computers and verify access.

Set up the vaccination station(s) with furniture (eg, tables, chairs) and administration supplies. Ensure at least one vaccination station offers privacy (eg, is in a separate room or surrounded by portable screens).

#### Considerations for Vaccination Station Setup

- Where will vaccines be stored before use?
- Where will syringes be prepared and filled?
- How will patient preference for vaccination site (eg, left arm or right arm) be accommodated?
- How can the vaccine and other supplies (eg, alcohol swabs, cotton balls, adhesive bandages, sharps container, trash bin) be arranged for maximum efficiency?
- How will data entry be handled?



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As you unpack supplies brought from the pharmacy to off-site events, verify that the quantities match those on the pre-event inventory.

Designate or section off a separate private area where participants who experience acute adverse events after vaccination or who have medical problems can be evaluated and treated. Ensure that the on-site emergency medical kit is available in or near this area.

Determine the location of the nearest restrooms.

Immunizers should review relevant vaccine package inserts, Vaccine Information Statements, and emergency medical protocols before the clinic begins.

If you are using the [“Checklist of Best Practices for Vaccination Clinics Held at Satellite, Temporary, or Off-Site Locations”](#), begin completing each item.

**Do not administer any vaccine until the designated person confirms that it is acceptable to move forward with the clinic.**

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## During the Event

### Clinic Entrance/Registration Area

As participants arrive, have them sign in and complete needed paperwork (or collect forms completed before the event).

If the process begins to have people waiting to get vaccinated, estimate and communicate the wait time.

### Vaccine Preparation

Prepare vaccines using aseptic technique in a clean, designated area not adjacent to any area where potentially contaminated items are placed—and not adjacent to the patient care area. Vaccines should be prepared just prior to administration.

For smaller events, use single-dose vials or prefilled syringes whenever possible to save time and prevent errors.

If you are preparing more than one vaccine for a participant, be sure to label which syringe contains which vaccine.

- A simple way to “label” vaccines is to use a silverware tray with permanently labeled separate “slots” for different vaccine syringes.

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### Vaccine Administration

Review each participant's screening questionnaire *carefully* to ensure there are no contraindications or precautions to vaccine administration.

Vaccine recipients always should be seated during vaccine administration.

Hand hygiene should be performed before vaccine preparation, between patients, and any time hands become soiled.

Follow the pharmacy's rules and procedures pertaining to use of gloves when administering vaccines. When gloves are worn when administering vaccines, they should be changed and hand hygiene performed between patients.

Use a new, appropriate-gauged needle and new syringe for each patient.

Immediately place the used needle and syringe in a sharps container following administration (do not recap the needle).

Consider providing colorful bandages or stickers to children.

- Avoid items that could be problematic in the case of latex or other allergy.

Provide the CDC Vaccine Information Sheet (VIS) for each vaccine administered to patients.

Provide documentation of the vaccine(s) administered to patients for their personal records.

Direct participants to the post-vaccination observation area. Ideally, clinicians should observe participants for 15 minutes (or longer, if appropriate) after vaccination.<sup>4</sup> This can be done in a separate waiting area.

Document any post-vaccination adverse events reported by participants, regardless of whether you think the vaccine caused the event.

Collect completed evaluation forms as participants exit the clinic. Consider distributing "I Got My Shot" stickers to participants on their way out.

Record the following information for all vaccines administered:

- Patient name.
- Vaccine type.
- Vaccine expiration date.
- Vaccine manufacturer and lot number.
- Date vaccine administered.
- Injection site location and route of vaccine administration (eg, left deltoid, IM).
- Name, address, and title of person administering the vaccine.
- Date printed on the Vaccine Information Statement.
- Date the Vaccine Information Statement is given to the vaccine recipient or that person's legal representative.

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Record unanticipated situations as they arise so they can be addressed during the event evaluation meeting.



### Give It a Shot

If unanticipated situations arise, use the cell phone voice memo function to record important details.

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## When the Event Ends

Tear down the clinic setup and clean up all areas.

Conduct a post-event inventory to ensure no items or supplies are left behind.

Dispose of sharps and medical waste in compliance with legal requirements.

- Ensure the receptacles are sealed tightly, especially if sharps and other waste must be transported back to the pharmacy for disposal.

Remove all event signage.

Record the number of vaccinations provided during the event.

Ensure proper storage and handling of unused vaccine ensuring that cold chain is maintained.

If unused vaccines are going to be returned to the pharmacy after the event, qualified personnel should be assigned to consulting the CDC Vaccine Storage and Handling Toolkit <https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf> and/or consulting the manufacturer(s) of the vaccine(s) regarding cold chain requirements and assuming cold chain has been retained. This should be determined prior to the event.

Get ready to celebrate! You've helped to make a difference by upping vaccination rates. Well done!

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### After the Event

Submit information on vaccinations administered to your local immunization information system.

Report the occurrence of any adverse events to the Vaccine Adverse Event Reporting System ([vaers.hhs.gov](https://vaers.hhs.gov)).

To the extent possible, notify participants' physicians detailing which vaccines the patient received.

Finalize and submit billing for the vaccine(s) and administration fee.

Tabulate responses to participant exit surveys.

Send thank-you notes or other expressions of appreciation to everyone who helped make the event a success.

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