

Best Practices for Effectively Communicating Immunization Workflow Changes Within Your Organization


Overcoming Challenges to Effective Communications When Implementing Change Initiatives

Communicating the right information to the appropriate members of an organization is essential to successful implementation of an immunization workflow change initiative.¹

About 20% of project failures are attributed to ineffective communications.²

This communication best practices guide provides practical suggestions and templates that can be adapted to help your organization communicate change related to immunization workflows, such as:

- Implementing a vaccination reminder recall program
- Enhancing clinical decision support in your EHR



Dear HCP,

Immunizations play an essential role in preventive care, helping to reduce the incidence of many VPDs.¹

Our current pediatric immunization rate for the combined vaccine series is 72%. We are committed to improving this rate and ensuring our pediatric patients receive all vaccinations in a timely manner according to the schedule recommended by the AAP and the ACIP.

Reminder recall programs, which are endorsed by the Centers for Disease Control and Prevention (CDC), have been shown to increase immunization rates by up to 20%.²

To help meet our goal of immunizing 90% of pediatric patients by January 2021, beginning in January 2020, we will be implementing a new Pediatric Reminder Recall Program across several pediatric clinics. The program will identify patients as either having missed a vaccine dose or approaching a well visit, according to ACIP pediatric immunization recommendations. Parents or caregivers will then be notified via email, text, or mail.

Health care professionals play an important role in helping to identify adult patients eligible for influenza and pneumococcal vaccination after their parents or caregiver information in the coming weeks regarding resources to help ensure this supports them.

If you have any questions regarding the Bonder at (123) 456-7890 or email@organization.com.

Sincerely,
John Brown
Director of Quality

You are invited to participate in a research study to evaluate the impact of various types of reminders on patient behavior. The study is being conducted by the CDC and the CDC's National Immunization Program. For more information, please contact the CDC at (404) 616-1000.

Reference: 1. National Immunization Program. (2019). *Immunization Best Practices for Pediatric Patients*. <https://www.cdc.gov/nip/publications-and-reports/immunization-best-practices-for-pediatric-patients/>.
2. American Academy of Pediatrics. (2019). *Reminder/Recall Programs*. <https://www.aap.org/clinical-resources/reminder-recall-programs>.

Dear HCP,

Immunizations play an essential role in preventive care, helping to reduce the incidence of many VPDs.¹ This year we are focused on improving adult flu and pneumococcal immunization rates, based on the HEDIS 2020 AIS measure.

Our current influenza and pneumococcal immunization rates for adults 65+ are 69% and 64%, respectively. By January 2021, we are committed to ensuring 90% of adults 65+ receive flu and pneumococcal vaccinations in a timely manner according to the schedule recommended by the ACIP.

To make it easier for HCPs to identify and administer vaccinations to eligible adults, in January 2020, our EHR Health Maintenance plans for Influenza and Pneumococcal Vaccination will be updated to align to current ACIP recommendations.

Health Maintenance Overview

- Accessible in the Health Maintenance section of the patient chart
- Forecasts due dates for influenza and pneumococcal vaccines based on age and vaccination history
- Due dates automatically update when satisfied through appropriate orders or by manual update

Improvements in pneumococcal vaccination rates demonstrate the impact of Health Maintenance and BPA's in influencing provider and patient behavior.³

- In one study of patients >65 years, Health Maintenance Alerts and BPAs were the single most influential factor in improving adult pneumococcal immunization rates by 31% (55% before vs 72% after implementation)³

Health care professionals play an important role in helping to identify adult patients eligible for influenza and pneumococcal vaccination. Training will begin on September 15, 2020 to help you fully utilize EHR CDS Health Maintenance tools with your adult patients who may be eligible for influenza and pneumococcal vaccination.

If you have any questions, please contact James Bonder at (123) 456-7890 or email@organization.com.

Sincerely,
David Marlow
Medical Information Officer

ACIP = Advisory Committee on Immunization Practices; ACOG = American College of Obstetricians and Gynecologists; AHA = American Heart Association; CDC = Centers for Disease Control and Prevention; CDS = Clinical Decision Support; EHR = electronic health record; HEDIS = Healthcare Effectiveness Data and Information Set.
The Patient Forum CDS accreditation program, sponsored by Plan, studied a 5-month period from November 2015 through March 2016, utilizing CDS alerts to enhance uptake of influenza and pneumococcal vaccinations.
1. *Year of the Adult Immunization Best Practices Collaborator*—a case study supported by Plan in partnership with AHA and AHA's e-Community Physician Network, a nationally premier group serving 150,000 patients across several states, implemented a system to identify eligible, unvaccinated adults for influenza and pneumococcal vaccinations.
2. *Reference: 1. National Immunization Program. (2019). Immunization Best Practices for Pediatric Patients. https://www.cdc.gov/nip/publications-and-reports/immunization-best-practices-for-pediatric-patients/*
3. *Reference: 1. National Immunization Program. (2019). Immunization Best Practices for Pediatric Patients. https://www.cdc.gov/nip/publications-and-reports/immunization-best-practices-for-pediatric-patients/*
2. *Reference: 1. National Immunization Program. (2019). Immunization Best Practices for Pediatric Patients. https://www.cdc.gov/nip/publications-and-reports/immunization-best-practices-for-pediatric-patients/*
3. *Reference: 1. National Immunization Program. (2019). Immunization Best Practices for Pediatric Patients. https://www.cdc.gov/nip/publications-and-reports/immunization-best-practices-for-pediatric-patients/*

Immunization Reminder Recall Communication Templates

The templates offer communication ideas for before, during, and after implementation, including sample content regarding target goals and impact data on how reminder recall programs have been shown to increase immunization rates.



Immunization HIT/EHR Communication Templates

The templates provide examples of communications before, during, and after updates to EHR functionalities, such as Health Maintenance for Influenza and Pneumococcal Vaccination.

EHR = electronic health record; HIT = health information technology.

To view all of the communications templates, see pages 4-9.

Facilitating Communication Across All Phases of a Change Initiative

Change management is a structured process that relies on an organization employing a targeted and strategic communication plan before, during, and after implementation of immunization workflow change initiatives.¹



PEOPLE

Before a change

- Outline target goals and milestones for successful execution of change initiatives
- Gain buy-in and ensure all stakeholders understand their role, the benefits of the change initiative, and its impact

PROCESS

During a change

- Provide updates and offer stakeholders detailed how-to information, including training or one-on-one sessions, to help them meet their goals
- Motivate stakeholders to get involved and help them feel empowered to commit and engage in the desired change

PRACTICE

After a change

- Evaluate and send regular communications updating stakeholders on the ongoing impact of the change initiative, as well as ways to sustain and continue to improve
- Recognize stakeholders or groups of people that have supported the success of the change initiative

An effective communication plan can help organizations reach their goals, successfully moving from a current to a future state.^{1,2}

Communicating Effectively to the Right Person at the Right Time

Immunization workflow change initiatives can be communicated in a variety of different formats based on the complexity of the change initiative and the stakeholders impacted.



When implementing immunization workflow changes, consistent communication across a variety of platforms may help organizations meet target goals.²

References: **1.** The Office of the National Coordinator for Health Information Technology. Change management in EHR implementation: primer. <https://www.healthit.gov/playbook/pdf/change-management-ehr-implementation.pdf>. Published June 2016. Accessed December 16, 2019. **2.** Project Management Institute (PMI). The high cost of low performance: the essential role of communications. <http://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/the-essential-role-of-communications.pdf>. Published May 2013. Accessed December 16, 2019. **3.** Campbell RJ. Change management in health care. *Health Care Manag (Frederick)*. 2008;27(1):23-39.

Immunization Reminder Recall Communication Templates



Reminder Recall Template

Before Implementation

The following are examples of organizational emails or communications to inform and prepare health care professionals for an immunization reminder recall program before, during, and after implementation.

Dear HCP,

Immunizations play an essential role in preventive care, helping to reduce the incidence of many VPDs.¹

Our current pediatric immunization rate for the combined vaccine series is 72%. We are committed to improving this rate and ensuring our pediatric patients receive all vaccinations in a timely manner according to the schedule recommended by the AAP and the ACIP.

Reminder recall programs, which are endorsed by the Centers for Disease Control and Prevention (CDC), have been shown to increase immunization rates by up to 20%.^{2*}

To help meet our goal of immunizing 90% of pediatric patients by January 2021, beginning in **January 2020,** we will be implementing a new Pediatric Reminder Recall Program across several pediatric clinics. The program will identify patients as either having missed a vaccine dose or approaching a well visit, according to ACIP pediatric immunization recommendations. Parents or caregivers will then be notified via email, text, or mail.

Health care professionals play an important role in helping ensure pediatric patients get the appropriate vaccination after their parents or caregivers receive these immunization reminders. Look out for more information in the coming weeks regarding implementation of the Pediatric Reminder Recall Program and resources to help ensure this supports improvement in pediatric vaccination rates.

If you have any questions regarding the **Pediatric Reminder Recall Program,** please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

John Brown
Director of Quality

*In a systematic literature search, 47 studies met eligibility criteria and were included in a review to assess the effectiveness of patient reminder and recall systems in improving immunization rates and to compare the effects of various types of reminders in different settings or patient populations. The patient reminder or recall studies were performed in diverse settings, ranging from urban to rural and public to private to university based. Results were presented for individual studies, as relative rates for randomized controlled trials and as absolute changes in percentage points for controlled before and after studies.¹

AAP = American Academy of Pediatrics; ACIP = Advisory Committee on Immunization Practices; VPDs = vaccine-preventable diseases.

References: 1. National Foundation for Infectious Diseases. <http://www.nfid.org/about-vaccines/reasons>. Accessed December 16, 2019. 2. Jacobson Vann JC, Szilagyi P. Patient reminder and patient recall systems to improve immunization rates. *Cochrane Database Syst Rev*. 2005;(3):CD003941.

Immunization Reminder Recall Communication Templates



Reminder Recall Template

During Implementation

Dear HCP,

We are happy to announce that the **Pediatric Reminder Recall Program is now in full swing following the launch on January 30, 2020!** This communication includes important details to help ensure HCPs are familiar with the Reminder Recall Program workflow and are prepared for increased patient visits and requests regarding vaccinations.

Program Overview

As a reminder, our Pediatric Reminder Recall Program for the combined vaccine series is intended to

- Identify pediatric patients identified as having missed a vaccine dose or who are approaching their 12-month well visit. Parents/guardians will be notified via email, text, or mail
- Improve adherence to pediatric immunization schedules recommended by the AAP and the ACIP

Workflow

- Vaccination reminders will be sent to parents/guardians for approximately 1,500 pediatric patients
- Once a patient's parent or guardian receives an immunization reminder, he or she will be prompted to schedule an appointment. Therefore, all office staff should be prepared to manage the increase in vaccination requests
- HCPs should refer to the Health Maintenance tab in the patient's EHR or immunization registry to determine vaccine eligibility
- [Click here](#) for more information on the ACIP schedules for pediatric vaccination

If you have any questions regarding implementation of the **Pediatric Reminder Recall Program**, please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

John Brown
Director of Quality

AAP = American Academy of Pediatrics; ACIP = Advisory Committee on Immunization Practices; EHR = electronic health record; HCP = health care professional.

Immunization Reminder Recall Communication Templates



Reminder Recall Template

After Implementation

Dear HCP,

Immunizations play an essential role in preventive care and disease prevention. **As you know, the Pediatric Reminder Recall Program for the combined vaccine series was launched on January 30, 2020 to help improve our vaccination rates.**

We are happy to announce that after **4 months** and outreach to more than 1,500 pediatric patients, we have vaccinated 92% of pediatric patients in participating clinics, which exceeds our initial goal of 90%.

The program will be extended through **January 2022** and expanded to **5** additional clinics. This would not have been possible without your time and commitment. Learn how **ABC Clinic** took advantage of the Pediatric Reminder Recall program to protect more of their patients:

*“The Reminder Recall Program really helped me and our staff gain insight into what was driving patients into the clinic. We now feel we have the tools and resources needed to fully support an efficient workflow that ensures the right patients are getting vaccinated at the right time.” – **Marcie Smith, MD, Pediatrician***

If you have any questions or feedback regarding the **Pediatric Reminder Recall Program** or would like to request additional training, please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

John Brown
Director of Quality

Immunization HIT/EHR Communication Templates



HIT/EHR Template

Before Implementation

The following are examples of organizational emails or communications to inform and prepare health care professionals for an update to their HIT/EHR system before, during, and after implementation.

Dear HCP,

Immunizations play an essential role in preventive care, helping to reduce the incidence of many VPDs.¹ This year we are focused on improving adult flu and pneumococcal immunization rates, based on the HEDIS 2020 AIS measure.

Our current influenza and pneumococcal immunization rates for adults 65+ are 69% and 64%, respectively.

By January 2021, we are committed to ensuring 90% of adults 65+ receive flu and pneumococcal vaccinations in a timely manner according to the schedule recommended by the ACIP.

To make it easier for HCPs to identify and administer vaccinations to eligible adults, **in January 2020, EHR Health Maintenance will be added for Influenza and Pneumococcal Vaccination ACIP recommendations.**

Health Maintenance Overview

- Accessible in the Health Maintenance section of the patient chart
- Forecasts due dates for influenza and pneumococcal vaccines based on age and vaccination history
- Due dates automatically update when satisfied through appropriate orders or by manual update

Improvements in pneumococcal vaccination rates demonstrate the impact of Health Maintenance and BPAs in influencing provider and patient behavior.^{2*}

- In one study of patients ≥ 65 years, Health Maintenance Alerts and BPAs were the single most influential factor in improving adult pneumococcal immunization rates by 31% (55% before vs 72% after implementation)^{3†}

Health care professionals play an important role in helping to identify adult patients who may be eligible for influenza and pneumococcal vaccination. Training will begin on September 15, 2020 to help you fully utilize EHR CDS Health Maintenance tools with your adult patients who may be eligible for influenza and pneumococcal vaccination.

If you have any questions, please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

David Marlow
Medical Information Officer

ACIP = Advisory Committee on Immunization Practices; AIS = Adult Immunization Status; BPAs = Best Practice Alerts; CDS = Clinical Decision Support; EHR = electronic health record; HIT = health information technology; VPDs = vaccine-preventable diseases.

*The Practice Fusion EHR CDS vaccination program, sponsored by Pfizer, studied a 5-month period from November 2015 through March 2016, utilizing CDS alerts to enhance uptake of influenza and pneumococcal vaccinations among adults 65+.

¹As part of the Adult Immunization Best Practices Learning Collaborative—a case study supported by Pfizer in partnership with AMGA and Optum—the Community Physician Network, a multispecialty provider group serving ~350,000 patients across central Indiana, implemented an initiative to identify eligible, vaccine-naïve adults 65+ utilizing Health Maintenance and BPAs for influenza and pneumococcal immunizations.

References: 1. National Foundation for Infectious Diseases. <http://www.nfid.org/about-vaccines/reasons>. Accessed December 16, 2019. 2. Vasey J. Improving adult vaccination rates through EHR workflow messaging. http://www.practicefusion.com/wp-content/uploads/2017/02/PracticeFusion_PneuWhitePaper.pdf. Accessed November 27, 2019. 3. American Medical Group Association (AMGA). Adult Immunization Best Practices Learning Collaborative Case Study: Community Physician Network. <https://www.amga.org/wcm/PI/Collabs/AI2/CS/cpn.pdf>. Accessed December 16, 2019.

Immunization HIT/EHR Communication Templates



HIT/EHR Template

Go Live/During Implementation

Dear HCP,

In January 2020, **EHR Health Maintenance went live for Adult Influenza and Pneumococcal Vaccination** based on ACIP recommendations.

This communication includes important details to help ensure health care professionals are familiar with the new Health Maintenance workflows.

As a reminder, Health Maintenance is intended to

- Improve adherence to immunization schedules for adult 65+ influenza and pneumococcal vaccination as recommended by the ACIP

Health Maintenance Overview

- Accessible in the Health Maintenance section of the patient chart
- Forecasts due dates for influenza and pneumococcal vaccines based on age and vaccination history
- Due dates automatically update when satisfied through appropriate orders or by manual update
- Vaccine orders based on the Health Maintenance forecast can be placed by navigating to the Orders Activity in the HCP's navigator

[Click here](#) to access the updated EHR tip sheet or sign up for a training session.

If you have any questions, please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

David Marlow
Medical Information Officer

ACIP = Advisory Committee on Immunization Practices; EHR = electronic health record; HIT = health information technology.

Immunization HIT/EHR Communication Templates



HIT/EHR Template

After Implementation

Dear HCP,

As you know, Health Maintenance for Adult 65+ Influenza and Pneumococcal Vaccination was implemented to help identify eligible patients and improve vaccination rates.

After 4 months, our vaccination rates have improved significantly – from **69% to 92%** for flu and from **64% to 89%** for pneumococcal. This would not have been possible without your time and commitment to reaching our goal.

ABC Clinic is one of many clinics that took advantage of the new EHR Health Maintenance workflows to identify adults 65+ for vaccination.

*“Health Maintenance alerts were instrumental in helping me quickly identify adult patients during routine office visits who were overdue for a flu or pneumococcal vaccine.” – **Jerry Allen, nurse***

If you have any questions or feedback regarding the updated **EHR Health Maintenance workflows** or would like to request additional training, please **contact James Bonder at (123) 456-7890 or email@organization.com.**

Sincerely,

David Marlow
Medical Information Officer

EHR = electronic health record; HIT = health information technology.