

How to Implement Standing Orders in Your Practice

Immunization Action Coalition

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How to Implement Standing Orders in Your Practice

In this session we will:

- Work through the implementation guidance
- Review tools and materials available to help you
- Discuss the logistics of setting up and operating a standing orders program

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Standing Orders - Review

The goal of using standing orders is to increase vaccination coverage in a practice by:

- **Reducing** clinician involvement in vaccine needs assessments and writing vaccination orders one patient at a time
- **Delegating** to a nurse or other legally qualified health care professional the role of assessing patients' vaccination needs and vaccinating them
- **Empowering** nurses (and/or others) to improve their practice's vaccination program

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10 Steps to Implementing Standing Orders for Immunization in Your Practice Setting

Introduction

Standing orders are written protocols approved by physicians or other authorized personnel that allow qualified health care professionals to assess the need for and administer certain immunizations without a physician's order. They are used to improve patient outcomes, reduce the burden on physicians, and to improve practice efficiency. Standing orders are most commonly used for immunizations that are given to patients at a specific age or at a specific interval. Standing orders are most commonly used for immunizations that are given to patients at a specific age or at a specific interval.

Phase 1: Get Ready - Build Support of Leadership

- Assess the benefits of implementing standing orders programs with the leading medical practice, physician, other strategic lead, internal or external partner.
- Identify a champion for the program.
- Develop a plan for implementation.
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- Develop a plan for implementation.

Implementation Guidance aka "The Cookbook"

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Three Phases of Standing Orders Implementation

- **Phase 1:** Build Support of Leadership
- **Phase 2:** Develop Materials and Strategies
- **Phase 3:** Make It Happen

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Phase 1: *Get Ready* - Build Support of Leadership

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Phase 1: Build Support of Leadership

STEP 1: Discuss the benefits of implementing standing orders protocols with the leadership (medical director, clinicians, clinic manager, lead nurses) in your medical setting.

It is critical that leadership support the use of standing orders from the beginning of your program.



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Why Use Standing Orders?

Standing Orders will:

- **Free up** clinicians from active roles in immunization
- **Delegate** clinician authority to vaccinate to other qualified health care professionals in the practice, facilitating efficient assessment for need of and administration of vaccines
- **Improve** influenza (and other) vaccination rates in your practice, protecting more patients
- **Decrease** opportunities for influenza transmission in your health care setting
- **Empower** nursing staff or others to take a leading role in prevention activities



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Be Prepared to Illustrate Why Standing Orders Will Benefit Your Practice

- Consider determining the vaccination rate in your practice *prior* to meeting with Upper Management
- Measured rates are inevitably less (sometimes much less) than perceived rates
- Lower-than-expected vaccination rates will support your request to develop a standing orders program



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Leadership Agreement Is Critical

Medical Director

- This person is either responsible for signing the standing orders protocols or supervises the clinician who signs them, so it is critical that he/she agrees with the need for standing orders and supports their use



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Leadership Agreement Is Critical

Clinicians

- Determine which clinician will review and sign the standing orders protocols in the practice
- Identify issues that might lead to any resistance among other providers

Nurse Leaders

- Involve nurse leaders in the planning from the start
- Nurses (or perhaps pharmacists) are the key players in implementing and carrying out standing orders programs



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Discussion with State Health Authorities and Others

- Consult with your state immunization program and state medical or nursing boards to determine who is legally qualified to vaccinate using standing orders under your state law.
- Some practices may want to check with their legal counsel.



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Significance of State Law

- Immunization Practice is Medical Practice
- All states have laws governing how physicians delegate medical tasks to health professionals
- Laws may address:
 - The medical practice eligible for delegation
 - Which professionals may participate
 - Level of required supervision
 - Where the practice may occur
- Broad variability among states – No state authorizes all Non Physician Healthcare Providers to assess, prescribe and administer vaccines



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Phase 1: Build Support of Leadership

STEP 2: Identify the person who will take the lead and be in charge of your standing orders program.

- In most practices, the lead person will be a nurse, nurse practitioner, or physician assistant.
- The lead person must be an influential leader who has medical knowledge, understands the standing orders protocol, and is able to answer questions about them from other staff members.



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Phase 1: Build Support of Leadership

The lead person must be motivated to protect patients by improving the adult vaccination levels in your practice – a true **Immunization Champion**.



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Figure 1. Recommended immunization schedule for adults aged 19 years or older by age group, United States, 2017

Vaccine	19–27 years	28–39 years	40–49 years	≥ 50 years
Influenza ^a	1 dose annually	1 dose annually	1 dose annually	1 dose annually
Td/Tdap ^b	Subcutaneous Tdap for 19 years, then Td booster every 10 yrs			
MMW ^c	1 or 2 doses depending on indication			
MVP ^d		2 doses		
MZV ^e		1 dose		1 dose
HPV-4-valent ^f	1 dose			
HPV-9-valent ^g	1 dose			
PCV13 ^h				1 dose
PPV23 ⁱ	1 or 2 doses depending on indication			1 dose
HepA ^j		2 or 3 doses depending on indication		
HepB ^k		3 doses		
MenACWY or MPSV4 ^l		1 or more doses depending on indication		
MenB ^m		2 or 3 doses depending on indication		
RSV ⁿ		1 or 2 doses depending on indication		

Legend: Yellow = Recommended for adults who meet the requirements for administration of vaccination, or lack evidence of past infection. Purple = Recommended for adults with additional medical conditions or other indications. White = No recommendation.

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General Best Practice Guidelines for Immunization

Best Practices Guidance of the Advisory Committee on Immunization Practices (ACIP)

Kroger AT, Duchin J, Vázquez M

1. Introduction

The Centers for Disease Control and Prevention (CDC) recommends routine vaccination to prevent 17 vaccine-preventable diseases that occur in infants, children, adolescents, or adults. This report provides information for clinicians and other health care providers about concerns that commonly arise when vaccinating persons of various ages. Providers and patients must navigate numerous issues, such as the timing of each dose.

www.cdc.gov/vaccines/hcp/acip-recs/general-recs/downloads/general-recs.pdf



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Phase 1: Build Support of Leadership

STEP 3: Reach agreement about which vaccine(s) your practice will administer using standing orders.

- It may be best to start using standing orders only for influenza vaccine if you have not implemented standing orders previously.
- When staff are trained and know how standing orders work, you can expand their use to additional vaccines.*

* Standing orders work well for improving coverage for child and adolescent vaccines, too!



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Phase 2: *Get Set* – Develop Materials and Strategies

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Phase 2: Develop Materials and Strategies

STEP 4: Create standing orders protocols for the vaccine(s) you want to administer.

- The Immunization Action Coalition has standing orders templates for all routinely recommended vaccines available to download at www.immunize.org/standing-orders.
- IAC standing orders are reviewed by the Centers for Disease Control and Prevention (CDC) for technical accuracy.
- You may use IAC's standing orders templates as written, or you may modify them to meet your practice's needs.

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STANDING ORDERS FOR Administering Influenza Vaccine to Adults

Purpose
To ensure medical staff comply with the goal of ensuring all adults who meet the criteria for the influenza vaccine receive the vaccine through standing orders.

Policy
Influenza vaccine will be administered to all eligible patients and staff who meet the criteria for the vaccine through standing orders.

Procedure

1. Review the criteria for standing orders for influenza vaccine.
2. Review the criteria for standing orders for influenza vaccine.
3. Review the criteria for standing orders for influenza vaccine.

Responsibilities and Roles

Medical Director's Signature

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Phase 2: Develop Materials and Strategies

Have the standing order(s) reviewed and signed by the medical director or clinician responsible for the program.

Standing Orders Authorization

This policy and procedure shall remain in effect for all patients of the _____ until rescinded or until _____

Medical Director's signature _____ Signature date _____ Effective date _____

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Phase 2: Develop Materials and Strategies

Have the standing order(s) reviewed and signed by the medical director or clinician responsible for the program.

Standing Orders Authorization

This policy and procedure shall remain in effect for all patients of the _____ until rescinded or until _____

Medical Director's signature _____ Signature date _____ Effective date _____

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Standing Orders for all routine vaccines are available on the IAC website

Immunization Action Coalition

Handouts for Patients & Staff | Clinic Resources | Vaccine Information Statements | Diseases & Vaccines | Talking about Vaccines | Topics

www.immunize.org/standing-orders
Latest revision date indicated on web page

Handouts: Clinic Resources

Standing Orders for Administering Vaccines

Administering Vaccines

- Adult Vaccination
 - Administering vaccines
 - Documenting vaccination
 - Patient-friendly schedules
 - Screening questionnaires
 - Standing orders
 - Vaccine summaries
 - Vaccine recommendations
- Documenting Vaccination
 - Parent Handouts
 - Patient Schedules
 - Questions and Answers

Using standing orders for administering vaccines: What you should know
FAQ provides an overview of standing orders about the use of standing orders for vaccination. (PDF 2008, 813)

Checklist for influenza vaccine - Children and teens
Influenza vaccine - Adults
Influenza vaccine - Adults
Diphtheria, tetanus, acellular pertussis vaccine (DTaP) - Infants and Children
Hepatitis A vaccine - Children and teens

Phase 2: Develop Materials and Strategies

STEP 5: Hold a meeting to explain your new standing orders program to all staff members.

- It is crucial that all staff understand the program because they will all be involved directly or indirectly.
- To get buy-in from staff, you will need to explain WHY you are starting this program.
- Review how standing orders work and the specific protocols and procedures with all staff members who will be involved.



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A handy visual aid to use during the staff meeting

Why are we starting a standing orders program?

- ▶ Disease should be prevented whenever possible, and vaccines can do this.
- ▶ Our patients are counting on us to keep them healthy.
- ▶ Adult vaccination rates in the United States are low and significant racial and ethnic disparities exist.
- ▶ Vaccination levels among adults are inadequate in most practices.
- ▶ Standing orders have been demonstrated to streamline the assessment and delivery of immunizations in medical practices.
- ▶ The burden of disease as a result of vaccine-preventable diseases is seen not only in increased morbidity and mortality, but also in increased costs to the health care system.



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Phase 2: Develop Materials and Strategies

STEP 6: Determine the roll staff members will play in implementing and using standing orders

- Think through the physical movement of people through your office
- Determine where each step will occur
 - assessment
 - screening
 - administration
 - documentation
- Determine which staff member will perform each step of the process



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Logistics

- Assessment for the need for vaccination
 - can be done by receptionist at first contact or by other staff after the person has been taken to an exam room
 - those eligible for vaccination should be provided a screening checklist for contraindications and precautions and a Vaccine Information Statement (VIS) at this step



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Screening Checklist for Contraindications to Vaccines for Adults

Education for Health Care Professionals about the Screening Checklist

Logistics

- Screening for eligibility, contraindications and precautions
 - verify that the person is eligible for vaccination by checking the medical record
 - the screening checklist must be reviewed before vaccination
 - should generally be done by the same person who will administer the vaccine
 - may be able to add screening questions to your existing EMR



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Establish a Line of Consultation

- Screening questionnaire will generate “false positive” results
 - Are you sick today?
 - Do you have any allergies?
- Establish a culture that encourages questions from staff without negative ramifications
- Clinician may need to be involved in some cases

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www.immunize.org/vis

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Logistics

- Administration
 - who is legally authorized to administer vaccines?
 - who will prepare the vaccine?
 - where will vaccination occur?

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Logistics

- Documentation
 - ensure the patient’s personal record is updated and given to the patient
- Where will vaccine administration information be recorded? For example:
 - EMR
 - Paper document in medical chart
 - State/local immunization information system or “registry”?
 - If you don’t use an EMR and don’t already have a medical record chart form for vaccination, you can use the IAC’s record forms

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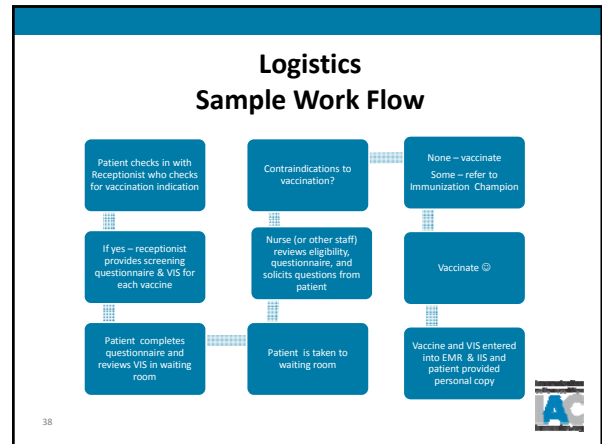


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Available for purchase on the IAC website at www.immunize.org/shop

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Phase 2: Develop Materials and Strategies

STEP 7: Determine your standing orders operational strategy

- Review your existing vaccination services logistics.
- Are there ways to improve patient vaccination and flow?

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Standing Orders Operational Strategy Modifications to Consider

- Assess the influenza vaccination status of every patient by asking the patient and checking chart
- Provide vaccinations in an easy-to-access site in your practice, away from the normal traffic pattern in office

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Vaccination Services Logistics Changes to Consider

Consider expanding your vaccination services when using standing orders:

- Offer vaccinations on a walk-in basis
- Hold vaccination clinics on evenings or weekends
- Offer “express” service for vaccination during regular office hours for both patients with appointments and those who are walk-ins

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Vaccination Services Logistics Changes to Consider

- If you use an EMR, consider whether the standing orders protocols and screening questionnaires can be added as prompts within your existing system.
- If possible in your clinic setting, determine your current immunization rates so you will be able to measure your improvements after implementing standing orders. (Your local public health department may be able to help you with this.)

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Phase 2: Develop Materials and Strategies

STEP 8: Identify strategies and publicize the program to your patients:

- Review your current methods for contacting patients (e.g., appointment reminders, laboratory results, prescriptions, online communications, text messaging, etc.)
- Can these methods also be used to tell patients about their need for vaccination and the availability of a convenient new program?



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Phase 2: Develop Materials and Strategies

STEP 8 (cont.): Identify strategies and publicize the program to your patients:

- Implement a reminder/recall system
- Most Immunization Information Systems can do this
- Your state/local health department can assist



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Phase 2: Develop Materials and Strategies

Strategies for informing and identifying patients who need vaccines:

- At each visit, inform all patients about when they should come for influenza vaccine.
- Email or text the information.
- Put a notice about the program on the practice's website.
- Social media
- Advertisements in local media
- Promotional mailings
- Add promotional telephone messages or "on hold" messaging
- Signs and posters in the office



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Materials You Will Need On Hand

- A copy of the signed standing orders protocol for each vaccine you plan to use
- Contraindication screening checklists to help you determine if there is any reason not to vaccinate your patients
- Vaccine Information Statements for all vaccines you plan to administer



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Materials You Will Need On Hand

- Adult vaccine administration record forms, if you don't use an electronic medical record and don't already have a medical record chart form
- Information on how to report vaccinations to your state/local immunization information system (registry) if one is available
- A personally held vaccination record card or a printed copy of the vaccine administered, including the date it was given

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Phase 3: *Go!* – Make It Happen

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Phase 3: Make It Happen

STEP 9: Start Vaccinating!

Make sure the nursing and medical staff have all the tools they need to run a successful vaccination program:

- Storage and handling of vaccines
- Vaccine administration techniques
- Strategies to avoid vaccine administration errors
- Documentation requirements for administering vaccines
- Materials to help answer questions of vaccine-hesitant patients

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www.immunize.org/clinic

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Phase 3: Make It Happen

STEP 10: Review your progress – when you start your program and periodically:

- It will take a little practice to optimize the operation of your system
- Monitor closely and maintain good lines of communication when the program begins
- Check in with staff each week until it is running well, then every few months until the end of influenza vaccination season

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Phase 3: Make It Happen

STEP 10 (cont.): Review your progress – at the end of influenza season

- Compare the number of doses of vaccine you gave this season with a season before your standing orders program was put in place.
- Hold a staff meeting to get input from everyone involved in the program to find out what went right and how the program could be improved for next season.
- Consider whether you are ready to expand your use of standing orders to additional vaccines.

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Congratulations!

You have provided a valuable service to your patients and helped keep them healthy!

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IAC Standing Orders Templates & Resources

The screenshot shows the Immunization Action Coalition website. The main navigation bar includes 'Home', 'About IAC', 'Contact', 'A-Z Index', 'Search', and 'Site'. Below the navigation bar, there are tabs for 'Handouts for Patients & Staff', 'Clinic Resources', 'Vaccine Information Statements', 'Diseases & Vaccines', 'Talking About Vaccines', and 'Topics'. The main content area is titled 'Handouts: Clinic Resources' and features a sub-section for 'Standing Orders for Administering Vaccines'. This section includes a list of resources such as 'Adult Vaccination', 'Documenting vaccination', 'Standing orders', and 'Vaccine administration'. A prominent article titled '10 Steps to implementing standing orders for immunization in your practice setting' is highlighted, with a brief description of its content. The page also includes a search bar and a 'Print' button for the selected article.

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www.immunize.org/standing-orders



Resources

- **Immunization Action Coalition**
www.immunize.org
- **IAC free weekly email updates**
www.immunize.org/express
- **Subscribe to IAC Express**
www.immunize.org/subscribe
- **Clinic Resources from IAC**
www.immunize.org/handouts

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