

# ENHANCING VACCINATION WORKFLOW

A year-round reference  
tool for pharmacists

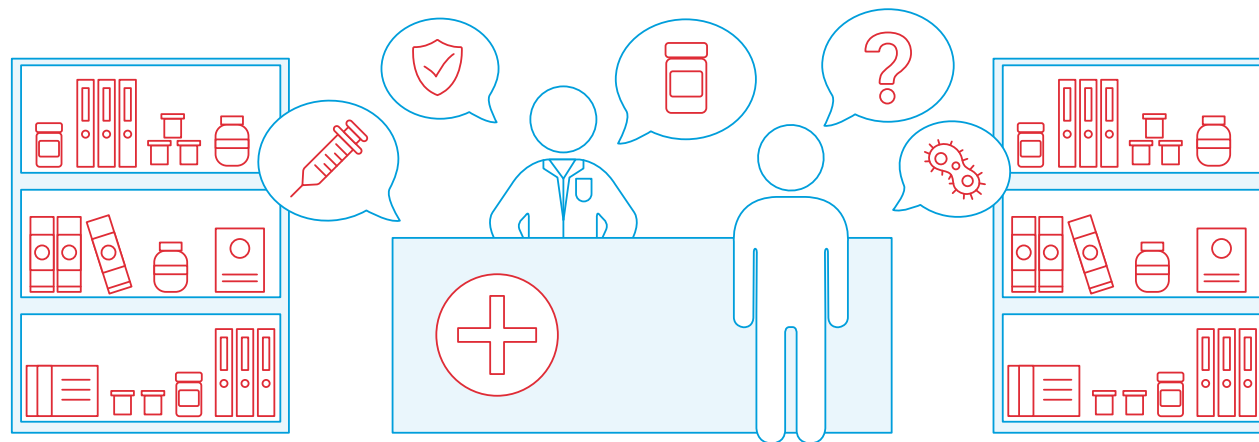


[Start Here](#) →



**Creating opportunities for people to be vaccinated**, like most everything else in health care, can be approached in different ways. The suggestions in this presentation are drawn from information provided to Merck by public health resources and are being supplied for informational purposes only. You may find information that is useful to you and some information that is not applicable to your circumstances.

This resource is not intended to be directive or encompass all available options, and Merck makes no representation or guarantee as to the accuracy or appropriateness of this information for your particular use. Additionally, in-store pharmacy vaccination laws and regulations, including which vaccines pharmacists are permitted to administer, vary by state. Consult the appropriate resources, including the relevant state pharmacy boards, for more information.





## Pharmacists play a significant role in overcoming barriers to vaccination as some of the most accessible and trusted health care providers<sup>1</sup>

- ❖ Patients are often in pharmacies.<sup>2</sup>
  - In 2019, nearly 3.8 billion prescriptions or 11.6 prescriptions per-capita, were filled at community pharmacies in the United States.<sup>3,4,a</sup>
  - Approximately 89% of Americans live within 5 miles of one of these pharmacies.<sup>5</sup>
- ❖ In a 2020 survey conducted by a pharmaceutical company, patients most commonly shopped at their pharmacy 1-2 times per month.<sup>2</sup>
  - Study Design: 20-minute online survey conducted with a geographically representative sample of US pharmacy customers 18 years or older (N=33,529).
  - In order to qualify for the survey, respondents had to have filled 6+ prescriptions (new and/or refill) in the past 12 months and shopped at a pharmacy in the past 30 days.
- ❖ Nationwide, pharmacies have become an increasingly critical part of a patient's health care network. Pharmacist-provided patient vaccine education, screening, and recommendations have been shown to increase vaccination rates.<sup>1</sup>

<sup>a</sup>Based on data from the IQVIA National Prescription Audit database and 2019 civilian population estimates from the US Census Bureau.<sup>3,4</sup>



## Expanded vaccination services can reinforce your ever-expanding role as a valued health care provider<sup>1</sup>

- Improved community access to vaccination services means that more appropriate adult patients may be protected against potentially serious vaccine-preventable diseases.

## The CDC and FDA recognize community pharmacies and pharmacists as nontraditional settings and providers<sup>1,6-8</sup>

- Pharmacists are able to play an integral role in vaccine education, mobilization, distribution, access, record keeping, and administration—ultimately helping to improve vaccination rates.<sup>1</sup>

*CDC, Centers for Disease Control and Prevention; FDA, US Food and Drug Administration.*



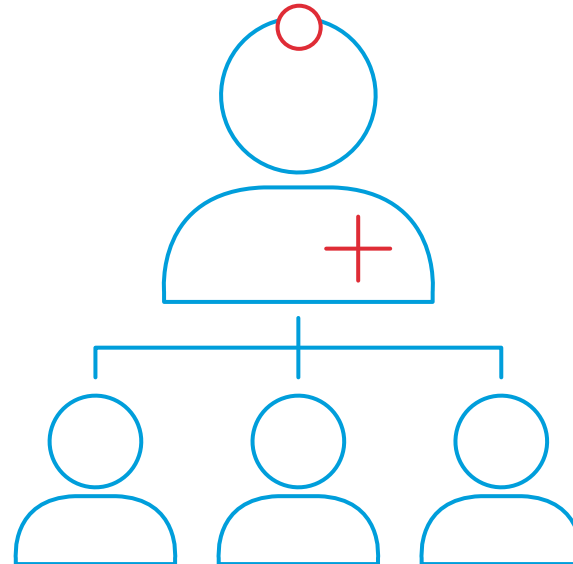




# Pharmacy teams should work together and be proactive when it comes to vaccination<sup>9</sup>

This section will focus on specific ways to support your pharmacy team<sup>9,10</sup>:

- 1 Delegate roles and responsibilities
- 2 Set goals and milestones
- 3 Establish protocols to educate staff
- 4 Anticipate vaccination opportunities year-round





# 1 Delegate roles and responsibilities to help your pharmacy function as a cohesive team and improve vaccination process efficiencies<sup>9</sup>

- ❖ As appropriate, assign pharmacy employees with specific, manageable tasks or parts of the vaccination process. Rely on them to help champion these responsibilities<sup>9-11</sup>:
  - Providing patient vaccination cost and coverage details, including co-payments or out-of-pocket costs
  - Consistently communicating with physicians or other health care partners
  - Having educational materials ready as a resource for adult patients and staff
  - Maintaining vaccine inventory and proper storage conditions
- ❖ Encourage staff members to take ownership of vaccination services by embracing these different roles. Help them understand how critical their role is in building and maintaining an effective year-round routine.<sup>11,12</sup>



*"Pharmacy technicians and ancillary staff members have a meaningful role to play in the provision of clinical services, specifically regarding immunizations."<sup>12</sup>*

*Journal of the American Pharmacists Association*



OVERVIEW

TEAM EFFORT

PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERS

REFRESH ON  
THE BASICS

## 2 Set goals and milestones to help motivate and focus staff on vaccination<sup>10</sup>

- At the store level, your pharmacy can establish goals and incentives.
  - Pursuing goals or milestones can help staff improve awareness of their progress as vaccinators, and reaching these goals can reinforce the accomplishments of the team.

## 3 Establish store protocols for educating staff<sup>9,10</sup>

- Have materials available for staff education.
- Refer your staff to additional sources of information from organizations, such as:
  - The American Pharmacists Association (APhA)<sup>13</sup>
  - The Advisory Committee on Immunization Practices (ACIP)<sup>14</sup>
  - Centers for Medicare and Medicaid Services (CMS)<sup>15</sup>
  - The National Community Pharmacists Association (NCPA)<sup>16</sup>



OVERVIEW

TEAM EFFORT

PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERS

REFRESH ON  
THE BASICS

4

### Anticipate opportunities for vaccination year round<sup>9,10</sup>

- ✦ Ensure staffing reflects the ability to focus on vaccination during all hours of operation (including evening and weekend hours).
- ✦ Understand patients' physical barriers to vaccination:  
Clinic hours | Wait time | Transportation | Cost
- ✦ Consider taking appropriate actions such as extending clinic hours or holding vaccination events in order to improve patient access.
- ✦ Recognize opportunities to discuss all appropriate vaccines in a single visit.



#### Community pharmacies represent a great opportunity to help improve vaccination rates<sup>1</sup>

- More convenient for patients
- Complement the services provided by physician and nurses
- Allows for increased patient-provider contact time



## Proactive interaction with appropriate adult patients is a cornerstone of a successful vaccination program<sup>11</sup>

This section will explore each step of the process that potentially leads to vaccination<sup>11</sup>:

- 1 Identify eligible patients
- 2 Initiate a conversation
- 3 Educate appropriate adult patients about vaccine-preventable diseases and vaccines that can help prevent them
- 4 Provide a strong recommendation when eligible, and vaccinate when appropriate



### RELEVANT RESOURCES

available for download



Tips for Proactively  
Interacting With Patients



Diseases You May  
Be at Risk For



## 1 IDENTIFY eligible patients for appropriate vaccination<sup>9,11</sup>

- ✦ Patient eligibility can be determined based on a number of factors, including:  
Age | Patient medical history/co-morbid conditions | Occupation | Travel
- ✦ Staff should identify the type of insurance coverage plan for each appropriate adult patient (whether it's private medical insurance, Medicare Part B, or Medicare Part D).
- ✦ Consider having your patients complete a vaccination assessment or patient screening questionnaire to learn their vaccination history.
  - Screening patients fully can help you identify all vaccines for which they may be eligible.

### After identifying patient eligibility, consider flagging record prior to next pharmacy visit.

*"If the patient was not present in the store, the prescription bag was flagged with a sticker to indicate that follow-up was needed. When the patient arrived back in the store to pick up the prescription, the cashier notified the patient of vaccine eligibility and directed any clinical questions to the pharmacist."<sup>12</sup>*

*Journal of the American Pharmacists Association*

### RELEVANT RESOURCES

available for download



Patient Screening  
Questionnaire



Flag the Bag  
Sticker Template





OVERVIEW

TEAM EFFORT

**PROACTIVE  
INTERACTION**

REIMBURSEMENT

HEALTH CARE  
PARTNERS

REFRESH ON  
THE BASICS

## 2 INITIATE a conversation and be proactive when engaging appropriate adult patients about vaccination<sup>9,11,12</sup>

- Opportunities to initiate a conversation with patients can be integrated into your workflow by pairing them with other established pharmacy routines.
  - Have educational materials available to help support your discussions.



### RELEVANT RESOURCES

available for download



Tips for Proactively  
Interacting With Patients



Diseases You May  
Be at Risk For



*"Vaccine advocacy is an essential step to positively affecting [vaccination] rates."<sup>12</sup>*

*Journal of the American Pharmacists Association*



### 3 EDUCATE appropriate adult patients about vaccine-preventable diseases and vaccines so they can make an informed decision<sup>11,12,17</sup>

- ✦ Have educational materials ready to help aid a conversation about vaccination.
  - Refer to Vaccine Information Statements (VISs).
  - For patients whose primary language is not English, Immunize.org has VIS documents in several languages.
- ✦ Patients may be more likely to consider appropriate vaccination when they understand the potential seriousness of certain vaccine-preventable diseases and the potential benefits and risks of vaccines.
- ✦ Adult patients may not be aware of their eligibility for specific vaccines.

#### SHARE WITH YOUR PATIENTS<sup>11,18</sup>:

- Why they may be a good candidate to receive a particular vaccine.
- Their risk factors for certain vaccine-preventable diseases, such as age or chronic condition, and the potential benefits and risks of appropriate vaccination.
- That appropriate vaccination may help protect them from potentially debilitating vaccine-preventable diseases.
- The CDC's adult vaccination schedule and recommendations for who should be vaccinated.
- Visit the following web pages for more information:

[CDC's ACIP Adult Immunization Schedule](#)

[Vaccine Information Statements \(VISs\)](#)

[Immunize.org Vaccine Information Statements in multiple languages](#)

#### RELEVANT RESOURCES available for download



Immunize.org  
Vaccine Information  
Statements







## 4 PROVIDE a strong recommendation to your adult patients, as appropriate, and VACCINATE once they have accepted your recommendation<sup>11</sup>

- ❖ Patients are more likely to get vaccinated if a clear and strong recommendation comes from their pharmacist.<sup>11</sup>
- ❖ Patients want more than just information—they want your advice on vaccination.<sup>9,11</sup>
  - Explain why you believe they should receive a certain vaccine.
  - Choose simple and clear language when making your recommendation.
  - Share a personal experience or story to illustrate the importance of vaccination.
- ❖ How you discuss a patient's coverage and co-pay status can influence their decision to get vaccinated.<sup>11</sup>
  - Help patients identify their insurance coverage for vaccination; vaccine coverage may be restricted to medical benefit only.
- ❖ In instances in which patients do not get vaccinated that day, consider developing a reminder system.<sup>9,11</sup>
  - You may want to develop a system for following up with a patient who remains unvaccinated.
  - If they still want more information, consider reaching out to their physician.
- ❖ After vaccination, the patient should be provided with a personal immunization record that includes the vaccine(s) administered, and the full date of vaccination.<sup>19</sup>

### RELEVANT RESOURCES

available for download



Tips for Proactively  
Interacting  
With Patients



## Understanding reimbursement and coverage eligibility is crucial to both patients and your pharmacy<sup>11</sup>

This section will address your approach to different types of coverage<sup>11,20</sup>:

- 1 Understand Insurance Coverage
- 2 Understand Medicare Parts B and D
- 3 Understand different private insurances
- 4 Keep informed of claims processing procedures





## 1 Understand insurance coverage<sup>10,11</sup>

- ✦ Pharmacy staff must have a strong understanding of coverage options and how they apply to each patient.
  - Pharmacists can often access and explain a patient's individual coverage during a conversation about vaccination.
- ✦ All health plans under the Affordable Care Act (ACA) must provide in-network coverage for many of the available adult vaccines. Check with the patient's individual plan to confirm coverage for a specific vaccine.<sup>21</sup>
  - The Inflation Reduction Act of 2022 requires ACIP-recommended adult vaccines to be free to patients with Medicare drug plans starting in 2023. This makes Medicare Part D cost-sharing and deductible consistent with coverage under Medicare Part B.<sup>20</sup>
- ✦ Staff should be aware of how Medicare Parts B and D and private insurance affect coverage, and how vaccines are adjudicated under each type of plan.<sup>11,20,22-24</sup>
  - You will explore vaccine coverage options in Medicare for insured patients ≥65 years of age, while considering vaccine coverage options through private insurance for patients who are not yet eligible for Medicare.
  - Know which vaccines can be covered under Medicare Part B as a medical expense or Medicare Part D as a prescription expense.
  - Whether reimbursement is available for a specific patient depends on the patient's benefit design, including applicable co-pays, coinsurance, and/or other deductions. Thus, it is important to check with the specific plan when determining coverage.

### RELEVANT RESOURCES

available for download



Adjudication Workflow



Commercial Coverage



## 2 Understand Medicare Parts B and D<sup>20,24</sup>

- ✦ Medicare Part B covers vaccines for flu, pneumonia, hepatitis B (for individuals at high and intermediate risk), COVID-19, and certain vaccines to treat injury or exposure to a disease.
  - Pharmacies typically have the capacity to adjudicate claims as a medical benefit for vaccination of Part B enrollees.
  - In order to file Part B claims, the pharmacist or pharmacy must have a National Provider Identification (NPI) number.
- ✦ For vaccines not covered under Medicare Part B, Part D plans cover all commercially available vaccines considered reasonable and necessary to help prevent illness.
  - You might not be able to bill the Part D plan directly, in which case you may need to work with the patient and the patient's Part D plan to obtain payment.



### 3 Understand different private insurances<sup>11,22</sup>

- ✦ Most private health plans cover pharmacy vaccinations.
- ✦ Vaccines may be covered under a patient's medical benefit, pharmacy benefit, or both.
- ✦ If you cannot adjudicate a patient's commercial insurance claim in the pharmacy, you may consider referring them to their physician's office.

### 4 Keep informed of claims processing procedures<sup>20,25</sup>

- ✦ Pharmacy benefit managers are a valuable resource for maintaining accuracy and efficiency.



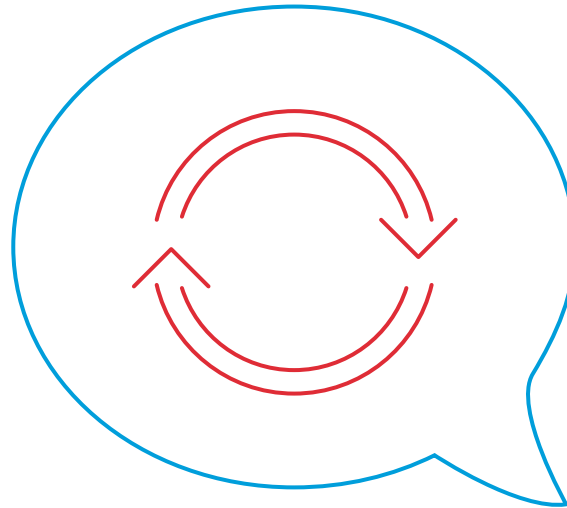
**Remember:** The reimbursement information provided in this section is subject to change. It is not intended to be exhaustive, nor to replace the guidance of a qualified reimbursement advisor, and does not constitute legal or reimbursement advice. The use of the information presented here is not a guarantee of coverage or payment. As a provider, you are solely responsible for billing payers correctly and for determining if any payer-specific guidelines apply. Merck does not guarantee or assure the timeliness or appropriateness of this information for your particular use given the frequent changes in public and private payer billing.



## Consistent communication between pharmacists and other health care providers is critical to patients' well-being<sup>11</sup>

This section will help you reinforce your pharmacy's important role in community health care:

- 1 Establish and maintain communication with health care providers
- 2 Join the [Merck Adult Vaccination Locator](#)





OVERVIEW

TEAM EFFORT

PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERSREFRESH ON  
THE BASICS

## 1 Establish and maintain communication with local health care providers<sup>9,11</sup>

- ✦ Enhance communication between your pharmacy and other health care providers by maintaining up-to-date documentation of vaccination records.
- ✦ Send vaccination documentation to health care providers in a timely and consistent fashion to inform them that their patient has been vaccinated.
  - Set up a staff champion to handle patient documentation, including any notifications, Vaccine Information Statements (VISs), patient forms, or other paperwork.
  - Reach out to the patient's physician if a prescription is needed.

## 2 Join and use the [Merck Adult Vaccination Locator](#) to help other health care professionals and patients find you and your pharmacy



*"...a conscious effort is needed from all health care practitioners, including pharmacists, to reduce the burden of vaccine-preventable illness."<sup>12</sup>*

*Journal of the American Pharmacists Association*

**RELEVANT RESOURCES**  
available for download



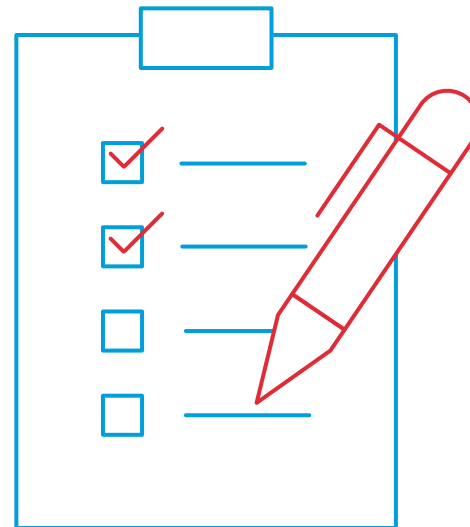
Physician  
Notification  
Template



## Pharmacy staff may need a refresher on the fundamentals of administering vaccines

This section will remind you of some vaccination basics<sup>26-28</sup>:

- 1 Optimize your workspace
- 2 Refine the stocking and inventory process
- 3 Keep refrigeration and freezer storage standards high
- 4 Careful handling of vaccines is as important as proper storage
- 5 Be prepared to treat and report adverse reactions in accordance with your pharmacy protocols







OVERVIEW

TEAM EFFORT

PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERSREFRESH ON  
THE BASICS

## 1 Optimize your workspace<sup>11,26</sup>

- ✦ Display educational materials prominently, as allowed, for patients to view and find easily.
  - Patients can read these materials as they wait for other pharmacy services, which can help educate patients and provide them with an opportunity to ask questions.
- ✦ Develop a system that is well organized, and enable a workflow that allows sufficient time for patient care.
- ✦ Ensure all vaccine materials and supplies are well organized and easily accessible, and that there is a designated area to administer vaccines.
- ✦ Prepare the pharmacy team to optimize the workspace during pharmacy activities like dispensing, processing, and preparing supplies, and have ready Vaccine Information Statements (VISs), vaccination cards, or other forms.

## 2 Refine the stocking and inventory process<sup>27</sup>

- ✦ Monitor expiration dates of the vaccines and their diluents regularly.

### RELEVANT RESOURCES available for download



Checklist for Proper  
Vaccine Handling  
and Storage



Vaccine Inventory  
Control Log



### 3 Keep refrigeration and storage standards high<sup>27,29</sup>

*Store all vaccines as specified by the manufacturer*

- ❖ Keep vaccines at the proper temperatures—maintaining the integrity of the “cold chain.”
  - The refrigerator should maintain temperatures between 36°F and 46°F (2°C and 8°C). The freezer should be between -58°F and +5°F (between -50°C and -15°C). Refrigerator or freezer thermostats should be set at the factory-set or midpoint temperature to prevent likelihood of temperature excursions.
  - Frequently opening the door of the storage unit can interrupt the cold chain.
  - Vaccines should be stored in the center of the storage unit in their original packaging with lids closed.
  - To help maintain temperatures, store bottles of water on the top shelf, the floor, and in the door racks of a household-grade unit.
- ❖ Check the minimum and maximum temperatures of the storage unit at the same time every day—the beginning of the day may be optimal—and keep a temperature log that keeps track of this.
- ❖ Consider other precautions, to avoid major problems and in case of emergency, such as:
  - Installing a temperature alarm to alert pharmacists if levels fall above or below normal.
  - Securing the storage unit plug to the electrical outlet to ensure it does not accidentally come unplugged.
  - Investing in a backup generator to maintain temperatures in case of a power outage.
- ❖ Report temperature excursions to the appropriate parties.

#### RELEVANT RESOURCES

available for download



Vaccine Temperature  
Log, Refrigerator



Vaccine Temperature  
Log, Freezer



Vaccine Storage  
Equipment Failure  
Worksheet



## 4 Know how to prepare different types of vaccines<sup>27</sup>

- ✦ Lyophilized vaccines come in powder or pellet form and must be reconstituted with an appropriate manufacturer-recommended diluent prior to administration.
- ✦ Diluents vary in volume and composition based on the requirements of the corresponding vaccine; refer to the manufacturer's package insert for storage and handling guidance.

## 5 Report adverse reactions if they occur<sup>28</sup>

- ✦ Federal law requires health care providers to report certain post-vaccine health issues to the Vaccine Adverse Event Reporting System ([VAERS](#)), a vaccine-monitoring program that gathers data about adverse events.
- ✦ CDC requires HCPs to report any clinically significant post-vaccination health issues involving any vaccine.

### RELEVANT RESOURCES

available for download



[VAERS Website](#)



[Good Vaccination Practices](#)

*CDC, Centers for Disease Control and Prevention.*





OVERVIEW

TEAM EFFORT

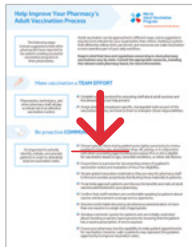
PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERS

REFRESH ON  
THE BASICS

# Vaccination Resources



Vaccination  
Process Sheet



Patient  
Screening  
Questionnaire



Flag the  
Bag Sticker



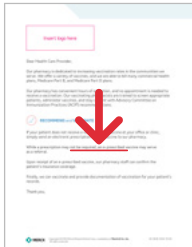
MAVP Tips  
for a Clear  
Recommendation



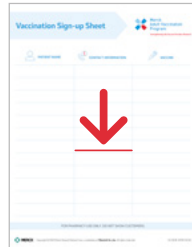
Diseases  
You May Be  
at Risk For



# Community and Health Care Provider Outreach



Our Pharmacy  
Can Help -  
Notification  
of Vaccination  
Services



Vaccination  
Sign-up Sheet



Recommendation  
Ad



Patient  
Notification  
Template



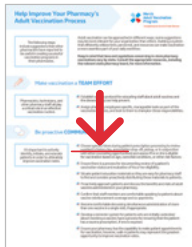
Physician  
Notification  
Template



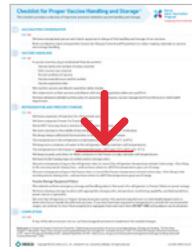
Pharmacist to  
HCP Vaccination  
Template



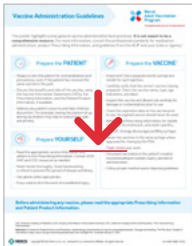
# Pharmacy Staff Education



Vaccination  
Process  
Sheet



Checklist for  
Proper Vaccine  
Handling and  
Storage



Good  
Vaccination  
Practices



6 Tips for  
Pharmacists  
to Help Get  
Eligible Patients  
Vaccinated



## Reimbursement Codes



Adjudication  
Workflow



Commercial  
Coverage

## Plan-Specific Information

The materials available on this page provide Merck vaccine product reimbursement information regarding various third-party payers.

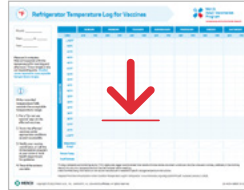
 [Plan-Specific Information](#)



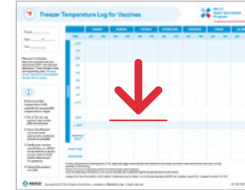
## Storage Logs



Vaccine Inventory Control Log



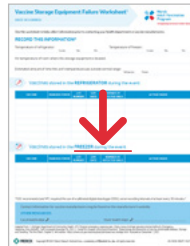
Refrigerator Vaccine Temperature Log



Freezer Vaccine Temperature Log



Vaccine Storage Troubleshooting Record



Vaccine Storage Equipment Failure Worksheet

## Merck Adult Vaccination Pharmacy Locator

Help health care providers looking for access to vaccine services find your pharmacy by signing up for the Merck Adult Vaccination Locator.


 [Sign-up for Locator](#)

 [Search the Locator](#)





## External Resources

-  [Centers for Disease Control and Prevention \(CDC\) Website](#)
-  [CDC Adult Vaccination Schedule](#)
-  [CDC Vaccine Information Statements \(VISs\)](#)
-  [VAERS: Vaccine Adverse Event Reporting System](#)

For more information, consult your Merck vaccine representative. Additional resources can be found at [MerckVaccines.com](https://www.merckvaccines.com) or by calling 1-877-829-6372.

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## REFERENCES (continued)



OVERVIEW

TEAM EFFORT

PROACTIVE  
INTERACTION

REIMBURSEMENT

HEALTH CARE  
PARTNERS

REFRESH ON  
THE BASICS

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31