

# Vaccine Management Plan

## KEEP YOUR MANAGEMENT PLAN NEAR THE VACCINE STORAGE UNITS

Practices must maintain a vaccine management plan for routine and emergency situations to protect vaccines and minimize loss due to negligence. The Vaccine Coordinator and Backup are responsible for implementing the plan.

**Instructions:** Complete this form and make sure key practice staff sign and acknowledge the signature log whenever your plan is revised. Ensure that all content (including emergency contact information and alternate vaccine storage location) is up to date. Keep the plan in a location easily accessible to staff and available for review by VFC Field Representatives during site visits. **(For practices using mobile units to administer VFC vaccines:** Complete the VFC [“Mobile Unit Vaccine Management Plan”](#) to itemize equipment and record practice protocols specific to mobile units.)

## Section 1: Important Contacts

### KEY PRACTICE STAFF & ROLES

Office/Practice Name	VFC PIN Number
Address	

Role	Name	Title	Phone #	Alt Phone #	E-mail
Provider of Record					
Provider of Record Designee					
Vaccine Coordinator					
Backup Vaccine Coordinator					
Immunization Champion (optional)					
Receives vaccines					
Stores vaccines					
Handles shipping issues					
Monitors storage unit temperatures					

### USEFUL EMERGENCY NUMBERS

Service	Name	Phone #	Alt Phone #	E-mail
VFC Field Representative				
VFC Call Center		1-877-243-8832		
Utility Company				
Building Maintenance				
Building Alarm Company				
Refrigerator/Freezer Alarm Company				
Refrigerator/Freezer Repair				
Point of Contact for Vaccine Transport				

# Vaccine Management Plan

## Section 2: Equipment Documentation

### VACCINE STORAGE UNITS/LOCATIONS AND MAINTENANCE

Maintenance/Repair Company:

Phone:

Unit Type	Unit/Location ID	Brand	Model	Dates / Types of Service
Refrigerator				
Refrigerator				
Refrigerator				
Refrigerator				
Freezer				
Freezer				
Freezer				
Freezer				

**For Manual-Defrost Freezers:** Outline the practice's protocol for defrosting these freezers—if different from the instructions provided under "Routine Maintenance" in the [Provider Operations Manual](#) (POM) topic "Configuring Vaccine Storage Units."

Location of Completed Temperature Logs:

# Vaccine Management Plan

## Section 2: Equipment Documentation (Continued)

### DIGITAL DATA LOGGERS

Location of Temperature Data Files			
IT/Support Provided by		Phone	
Auto-Alert Notifications Sent to Staff Contact		Text/ E-mail	
Auto-Alert Notifications Sent to Staff Contact		Text/ E-mail	
Auto-Alert Notifications Sent to Staff Contact		Text/ E-mail	

**For Devices with Auto-Alerts:** Outline or attach the practice's protocol for responding to temperature excursions after the practice is closed. Consider implementing a phone tree. Ensure staff safety is addressed (e.g., for alerts after dark).

--

# Vaccine Management Plan

## Section 2: Equipment Documentation (Continued)

### DIGITAL DATA LOGGERS/MAINTENANCE

Calibration Company/Laboratory		Contact		Phone	
Calibration Company/Laboratory		Contact		Phone	
Location of Certificates of Calibration					
Location of Backup Digital Data Logger					

Temperature Monitoring Device Model/Serial Number	Primary?	Backup?	Calibration Expiration Date	Alarm Setting Low	Alarm Setting High

# Vaccine Management Plan

## Section 3: Summary of Key Practice Staff Roles and Responsibilities

This document highlights key duties of designated vaccine management staff. However, all personnel working with vaccines should be familiar with VFC Program requirements.

### PROVIDER OF RECORD

- ☐ Oversees key practice staff to ensure VFC Program requirements are met.
- ☐ Completes required EZIZ training lessons.
- ☐ Designates one provider as the Provider of Record Designee responsible for ensuring all VFC Program requirements are met when the Provider of Record is not available.
- ☐ Complies with all federal vaccine management requirements, including key areas outlined in this plan.
- ☐ Designates one staff as the Backup Vaccine Coordinator responsible for vaccine management when the primary Vaccine Coordinator is not available.
- ☐ Authorizes and reports staffing changes regarding the Vaccine Coordinator, Backup Vaccine Coordinator, Provider of Record, and Provider of Record Designee to the VFC Call Center.
- ☐ Meets and documents required annual training for the practice's vaccine management staff.
- ☐ Ensures that vaccine management staff are knowledgeable of VFC Program requirements for temperature monitoring and vaccine storage.
- ☐ Ensures that the practice's vaccine inventory management is consistent with VFC Program requirements.
- ☐ Ensures that the practice's vaccine storage units and temperature monitoring devices meet VFC Program requirements.
- ☐ Updates and revises vaccine management plan at least annually and when necessary.
- ☐ Reviews VFC Program requirements and management plan with staff at least annually and when necessary.
- ☐ Participates in VFC Program compliance site visits.

### PROVIDER OF RECORD DESIGNEE

- ☐ Completes required EZIZ training lessons.
- ☐ Meets responsibilities listed above for the Provider of Record in his/her absence.

### VACCINE COORDINATOR

- ☐ Completes required EZIZ training lessons.
- ☐ Meets responsibilities described in the [Vaccine Coordinator job aid](#).
- ☐ Oversees the practice's vaccine management plan for routine and emergency situations.
- ☐ Monitors vaccine storage units.
- ☐ Maintains VFC-related documentation in an accessible location.
- ☐ Participates in VFC Program compliance site visits.

### BACKUP VACCINE COORDINATOR

- ☐ Completes required EZIZ training lessons.
- ☐ Meets responsibilities described in the [Vaccine Coordinator job aid](#) when the primary Vaccine Coordinator is not available.

### IMMUNIZATION CHAMPION

Consider assigning the role of Immunization Champion to focus on ensuring providers and staff are knowledgeable about IZ schedules, vaccine products and dosages, and on improving coverage levels. This is not an official role, but practices and clinics that assign an Immunization Champion often have better compliance rates.

#### The Immunization Champion

- ☐ ensures staff know how to and are completing VFC eligibility screening and documentation consistently;
- ☐ ensures vaccinators are consistently pulling from private or VFC stock as instructed in written orders;
- ☐ ensures vaccinators are urging parent/guardian to schedule follow-up doses before leaving;
- ☐ ensures vaccinators are educating patients and their parent/guardian about immunizations; and
- ☐ researches and collaborates with provider to implement essential immunization strategies practice-wide.

# Vaccine Management Plan

## Section 4: Management Plan for Routine Situations

Refer to the [Provider Operations Manual](#) (POM) for instructions on completing each task.

### INITIAL EQUIPMENT SETUP

- Use vaccine storage units and digital data loggers that meet VFC Program requirements. (Refer to "Vaccine Storage Unit Specifications" and "Data Logger Specifications.")
- Configure all storage units and digital data loggers to meet VFC Program requirements. (Refer to "Configuring Vaccine Storage Units" and "Configuring Data Loggers.")
- Post [VFC-supplied temperature logs](#) on vaccine storage unit doors, or nearby in an accessible location.
- Do not store vaccines in storage units until temperatures are stable (refrigerators at around 40.0°F and freezers below 0.0°F) for 3–5 days.
- **For providers designated solely as mass vaccinators:** Only use purpose-built, vaccine transport units for transport and on-site storage.

### DAILY TASKS

#### Temperature Monitoring

- Read CURRENT, MIN, and MAX refrigerator & freezer temperatures twice a day, when the clinic opens and before it closes—even though using digital data loggers. (Refer to "Monitoring Storage Unit Temperatures.")
- Document temperatures on VFC refrigerator ([Fahrenheit](#) | [Celsius](#)) and freezer ([Fahrenheit](#) | [Celsius](#)) temperature logs.
- Take action for temperature excursions, if any, and take immediate action to protect vaccines. (Refer to "Taking Action for Temperature Excursions.")

### BI-WEEKLY TASKS

#### Review and Certify Temperature Data

- Supervisor: Certify and sign that temperatures were recorded twice daily, staff printed names and initials, and corrective actions were taken—for each two-week reporting period. (Refer to "Monitoring Storage Unit Temperatures.")
- Download and review data files at the end of every two-week reporting period to look for missed excursions or temperature trends that might indicate performance issues with vaccine storage units. (Refer to "Monitoring Storage Unit Temperatures.")

### MONTHLY TASKS

#### Physical Vaccine Inventory

- Conduct a careful and accurate physical vaccine inventory and complete the VFC "[Vaccine Physical Inventory Form](#)" or electronic equivalent. (Refer to "Conducting a Physical Vaccine Inventory.")
- Check vaccine expiration dates and rotate stock to place vaccines that will expire soonest in front of those with later expiration dates.
- Transfer vaccines that will expire within six months to other VFC providers. (Refer to "Transferring Vaccines between Providers.")

### ANNUAL TASKS

- Allocate time for and complete VFC recertification.
- Review and update the practice's vaccine management plan. (Refer to "Vaccine Management Plan.")
- Review with key practice staff the vaccine management plan's section on preparing for and responding to vaccine-related emergencies and conduct regular vaccine transport drills to maintain competency.
- Calibrate primary and backup temperature monitoring devices every two years (or every three years if the manufacturer's recommendation is for a longer period) following VFC Program requirements. Calibrate primary and backup devices on different schedules to ensure all refrigerators and freezers storing VFC-supplied vaccines are equipped with data loggers at all times. File certificates of calibration in a readily accessible area, keep them for three years. (Refer to "Configuring Data Loggers" for routine maintenance.)

# Vaccine Management Plan

## Section 4: Management Plan for Routine Situations (Continued)

### PER PROVIDER SCHEDULE

#### Routine Vaccine Orders

- Return all spoiled and expired vaccines. (Refer to "Reporting Spoiled, Expired, or Wasted Vaccines.")
- Complete transfers between providers. (Refer to "Transferring Vaccines between Providers.")
- Determine total doses administered since previous order using VFC daily usage logs (or electronic equivalent). (Refer to "Administering Vaccines.")
- Conduct a careful and accurate physical vaccine inventory to determine total doses on hand by vaccine. (Refer to "Conducting a Physical Vaccine Inventory.")
- Submit vaccine orders according to provider category and order frequency. (Refer to "Submitting Routine Vaccine Orders.")

#### Vaccine Deliveries

- Inspect packages carefully and complete the VFC ["Vaccine Receiving Log and Checklist"](#) to report damage or discrepancies immediately. (Refer to "Receiving Vaccine Deliveries.")
- Store vaccines and diluents immediately and rotate stock. (Refer to "Storing Vaccines.")

#### Routine Maintenance

- Establish a regular routine for cleaning vaccine storage units and defrosting manual-defrost freezers. (Refer to "Configuring Vaccine Storage Units" for routine maintenance.)
- Replace batteries in temperature monitoring devices every six months. (Refer to "Configuring Data Loggers" for routine maintenance.)

### TO MINIMIZE LOSS

- Transfer to other VFC providers vaccines that will expire within six months. (Refer to "Transferring Vaccines between Providers.")
- Respond to planned or sudden vaccine-related emergencies following the practice's vaccine management plan. (Refer to "Responding to Vaccine-Related Emergencies.")
- Confirm clinic delivery hours when submitting routine vaccine orders to ensure staff are available to receive vaccines.

### AT EACH IMMUNIZATION VISIT

- Conduct eligibility screening for all children through 18 years of age to ensure vaccines are pulled from the correct inventory. (Refer to "Conducting Eligibility Screening.")
- Administer all age-appropriate, ACIP-recommended vaccines and update VFC daily usage logs with doses used. (Refer to "Administering Vaccines.")
- Recommend non-routine, ACIP-recommended vaccines when indicated or when requested.

# Vaccine Management Plan

## Section 4: Management Plan for Routine Situations (Continued)

### AS NEEDED

#### Spoiled, Expired, and Wasted Vaccines

- Return spoiled and expired vaccines to McKesson within six months of expiration or spoilage for excise tax credit. (See “Reporting Spoiled, Expired, or Wasted Vaccines.”)
- Properly dispose of wasted vaccines. (See “Reporting Spoiled, Expired, or Wasted Vaccines.”)

#### Changes in Staff and Training

- Anyone acting in VFC roles (Provider of Record and Designee, Vaccine Coordinator and Backup) must complete the required EZIZ lessons when hired and annually thereafter; staff must demonstrate competency in their assigned VFC roles.
- Any clinician who administers VFC-supplied vaccines must be knowledgeable of and familiar with all ACIP-recommended immunizations, including schedules, indications, dosages, and new products.
- All staff who conduct VFC Program eligibility screening, documentation, and billing (e.g., front- or back-office staff) must be knowledgeable of VFC eligibility, documentation, and billing requirements.
- All staff and supervisors who monitor storage unit temperatures or sign off on VFC temperature logs must complete the related EZIZ lesson when hired and annually thereafter; they must be fully trained on use of the practice’s data loggers.
- Train staff who are authorized to accept packages to immediately notify the Vaccine Coordinator when VFC-supplied vaccines are delivered.
- Update the practice’s vaccine management plan to reflect any changes in key practice staff.

#### Device Replacement

- Purchase a new data logger if existing device or probe malfunctions, is damaged, or if device provides repeated, inaccurate temperature readings. (Exception for replacement probes recommended and replaced by the device manufacturer or calibration company.)
- When purchasing new data loggers: New devices must be able to generate a summary report of recorded temperature data since the device was last reset; summary reports must include minimum and maximum temperatures, total time out of range (if any), and alarm settings. Devices that only generate CSV data files or Excel spreadsheets are not acceptable.



# Vaccine Management Plan

## Section 5: Worksheet for Emergency Vaccine Management

The following sections include space for information and necessary actions to take in the event of an emergency, such as unit malfunction, mechanical failure, power outage, natural disaster, or human error.

In an emergency, contact the following people in the order listed:

Role/Responsibility	First & Last Name	Phone #	Alt Phone #	E-mail Address
1.				
2.				
3.				
4.				

Does the clinic have a generator? If so, where is it?

If your clinic does not have a generator, and/or your vaccine storage unit fails, it might be necessary to transport vaccines to an alternate storage location (e.g., a local hospital or another VFC provider). Identify an alternate location(s) that has vaccine storage units and temperature monitoring devices that meet VFC Program requirements.

Alternate Vaccine Storage	Address & City	Phone #	Alt Phone #	E-mail Address

Location of Emergency Packing Supplies:

## OTHER USEFUL INFORMATION

**Facility Floor Plan:** Attach a simple floor diagram identifying the location of key items needed during an emergency: circuit breakers, flashlights, spare batteries, keys to secured cabinets, backup digital data logger, vaccine storage units, coolers, etc.

# Vaccine Management Plan

## Section 6: Management Plan for Emergencies

**Do not risk staff safety during emergencies.** Use common sense when attempting to protect vaccines. Use the following guidance for safeguarding vaccines in the event of planned or unplanned power interruptions (e.g., power outages, weather-related circumstances, fires, building maintenance/repairs, etc.).

### CHECKLIST: BEFORE AN EMERGENCY

Proper preparation for emergencies is essential for protecting the viability of vaccines. Use the following checklist to help ensure practices are ready for planned or unexpected situations that might affect vaccine viability.

Step	Description
1.	Maintain current emergency contact information for key practice staff in the vaccine management plan.
2.	Maintain current contact information for alternate vaccine storage location(s), including the facility name, address, and telephone number in the vaccine management plan.
3.	Be familiar with backup power sources for commercial- and pharmacy-grade units.
4.	Know the location of the backup data logger used for vaccine transport.
5.	Stock vaccine packing and transport supplies, including a hard-sided cooler, frozen gel packs, and bubble wrap.
6.	Keep copies of the VFC " <a href="#">Refrigerated Vaccine Transport Log</a> " and " <a href="#">Frozen Vaccine Transport Log</a> " and floor plans (when available) for easy access during a vaccine-related emergency.
7.	Review annually the steps key practice staff must take to protect vaccines during short- or long-term outages.
8.	<b>Vaccine Transport Drill:</b> Practice packing the transport cooler using packing supplies and materials that simulate vaccine boxes. Do NOT practice with actual vaccines.

# Vaccine Management Plan

## Section 6: Management Plan for Emergencies (Continued)

### DURING AN EMERGENCY

Due to the risk to vaccines of improper packing and transporting, follow these step-by-step instructions during an emergency to determine whether vaccines should be transported or sheltered in place.

Step	Description
1.	Do not open the unit.
2.	Place a "DO NOT OPEN" sign on vaccine storage unit(s) and leave door(s) shut to conserve cold air mass.
3.	Notify the emergency contacts identified on the vaccine management plan's "Worksheet for Emergency Vaccine Management."
4.	Note the time the outage started and storage unit temperatures (CURRENT, MIN and MAX).
5.	Assess to determine the cause of the power failure and estimate the time it will take to restore power.
6.	Take appropriate action.  <b>In the event of appliance failure:</b> Place vaccines in any VFC-approved backup storage unit with a VFC-compliant data logger, or transport vaccines to the designated alternate storage facility. (Refer to "Transporting Vaccines" for instructions.)  <b>For power outages after hours:</b> Report any excursion to SHOTS the next morning and take appropriate action. (Refer to "Taking action for Temperature Excursions.")  <b>For planned outages expected to be short-term (approximately fewer than 4 hours)*:</b> Monitor storage unit temperature and report any excursions once power has been restored. (Refer to "Taking action for Temperature Excursions.")  <b>For planned/unplanned outages expected to be longer than approximately 4 hours,* or for any outage that extends beyond the current business day:</b> Transport vaccines to the designated alternate storage facility. (Refer to "Transporting Vaccines" for instructions.) If transport or relocation is not feasible (e.g., alternate location is not available or travel conditions are unsafe), keep vaccine storage units closed and notify the VFC Call Center as soon as possible.
7.	Once power has been restored, follow the steps listed in "After an Emergency."

\* **Note:** Practices using purpose-built (pharmacy-, biologic-, and laboratory-grade) and commercial-grade storage units may need to transport vaccines to an alternate location sooner than **2 hours** as temperatures in these units tend to increase faster during power failures.

# Vaccine Management Plan

## Section 6: Management Plan for Emergencies (Continued)

### AFTER AN EMERGENCY

Follow these step-by-step instructions after vaccine-related emergencies in compliance with VFC Program requirements and best practices.

Step	Description
1.	Verify storage units are functioning properly.
2.	If vaccine storage units are outside the required temperatures ranges, record the time that power was restored and storage unit temperatures (CURRENT, MIN and MAX) on the temperature log.
3.	Once vaccine storage unit temperatures have stabilized, notify the emergency contacts identified on the vaccine management plan's "Worksheet for Emergency Vaccine Management."
4.	If vaccines were transported due to an emergency situation: <ul style="list-style-type: none"><li>A. Follow the same transportation procedures and transfer vaccine back to its original storage unit. (Refer to the "Transporting Vaccines" for instructions.)</li><li>B. If vaccines were kept at the proper temperature during the power outage, notify supervisor that the vaccines may be used.</li></ul>
5.	If vaccines were maintained at required temperatures: <ul style="list-style-type: none"><li>A. Remove the "DO NOT OPEN" sign from storage unit(s).</li><li>B. Notify supervisor that vaccines may be used.</li></ul>
6.	If vaccines were exposed to out-of-range temperatures: <ul style="list-style-type: none"><li>A. Label affected vaccines "Do Not Use."</li><li>B. Document and report the excursion to SHOTS at MyVFCVaccines.org to receive further guidance. (Refer to the <a href="#">"Reporting Temperature Excursions"</a> for instructions.)</li></ul>

## Vaccine Management Plan

## Section 7: Training Log for Required VFC EZIZ Lessons

List all staff with vaccine-related responsibilities to acknowledge that they have completed the required EZIZ lessons.

[illegible]

# Vaccine Management Plan

## Section 8: Annual Signature Log

Print name, sign, and date one signature block each year and when you up update practice-specific information. By signing, staff acknowledge they have reviewed and are familiar with all the information in the document.

Updates & Comments					
Provider of Record		Signature		Date	
Vaccine Coordinator		Signature		Date	
Backup Vaccine Coordinator		Signature		Date	
Provider of Record Designee		Signature		Date	
Staff Who Updates VMP		Signature		Date	
Additional Staff		Signature		Date	

Updates & Comments					
Provider of Record		Signature		Date	
Vaccine Coordinator		Signature		Date	
Backup Vaccine Coordinator		Signature		Date	
Provider of Record Designee		Signature		Date	
Staff Who Updates VMP		Signature		Date	
Additional Staff		Signature		Date	

Updates & Comments					
Provider of Record		Signature		Date	
Vaccine Coordinator		Signature		Date	
Backup Vaccine Coordinator		Signature		Date	
Provider of Record Designee		Signature		Date	
Staff Who Updates VMP		Signature		Date	
Additional Staff		Signature		Date	

Updates & Comments					
Provider of Record		Signature		Date	
Vaccine Coordinator		Signature		Date	
Backup Vaccine Coordinator		Signature		Date	
Provider of Record Designee		Signature		Date	
Staff Who Updates VMP		Signature		Date	
Additional Staff		Signature		Date	