

# VACCINE SITE DAILY MANAGEMENT TOOL

**Audience:** Public Health & Community Leaders

**Intended use:** To plan, track, and manage vaccine doses in a small- to medium-sized vaccine site (up to 300 doses a day)

Simple tools developed on readily available software (e.g., Microsoft Excel, Google sheets) can aid in the management of vaccine site operations, helping practitioners to efficiently conduct and monitor COVID-19 vaccination.

The following guidance is intended to aid staff who are responsible for registering patients, as well as those responsible for drawing and administering doses.

The tool highlighted here can be used to:

- Plan for and monitor patient appointment fulfillment
- Anticipate how many vials to open, and when they should be opened during the course of the day
- Inform creation and execution of a waitlist function to use and track unused doses
- Share patient status and vaccine supply updates with other team members
- Track trends over time and support reporting needs

This guidance is intended to be particularly useful for small and medium size vaccine operations that have been deployed to businesses and communities particularly vulnerable to COVID-19 with fewer technological resources for managing operations, and which are closed to the general population. Such focused efforts are necessary to ensure equity in access to vaccination. This tool is most effective when vaccine allocation and registration are facilitated through exclusive partnerships with CBOs and businesses. The tool can be used with other site operations guidance like the [Community-based COVID-19 Vaccination Manual](#).

## Tool section overviews

### Patient attendance tracking (Columns A and B)

**WHAT:** This section is where those tasked with registering or “running” patients from registration to vaccination stations can enter data to keep track of attendance.

**HOW:** Manually track patient attendance in column A and no shows in column B. Tally attendance or no shows throughout the day, as each arrived patient is processed by registration staff or cancelations are confirmed, marking each instance as a “1”.

### Patient progress tracking (Columns D through F)

**WHAT:** This section is where clinic staff can monitor changes in patient attendance, doses drawn/available, and waitlisted patients. The information here can inform when and how many vaccine vials to open, how many remaining doses are available from current vials, and how to ensure that expected and waitlisted patients can all be vaccinated without unnecessarily opening additional vials.

**HOW:** Based on pre-registration data, enter total expected patients in cell E3. Counts of attendance and no shows

populate from the *Patient attendance tracking* area to highlight status of pre-registered/anticipated patients. Cells E9 through E14 area highlight the status of doses used and yet to be used. The range D17:F33 is where any waitlist can be included and updated.

### Vaccine dose tracking (Columns H through J)

**WHAT:** This table tracks vials (including lot numbers) opened, and the number of doses drawn from each vial. This information can be compared to the anticipated number of patients (planned and waitlist) to ensure vial openings are timed correctly and no unnecessary vials are opened during the day. The bottom of this table totals the updated number of doses drawn.

**HOW:** As the clinic progresses, based on anticipated patients, open vials in advance to prepare for patients and to ensure operational efficiency. Make sure to record the lot number and total doses drawn from each vial.

## Integrating tool sections for vaccine operations support

The following scenario highlights how the tool can be used in a typical vaccine operation, using example data.

- At the beginning of the day, enter the anticipated number of patients based on pre-registration and coordination with the partner organization (e.g., senior housing complex, worksite, etc.) Add list of names and affiliations of waitlist patients. In the example, the local health department is working with a local CBO to focus their vaccination operations, and is also able to accept city agency affiliated individuals on its waitlist.
- Based on scheduled visits, open vials and draw doses necessary to ensure adequate throughput of vaccinations, recording the vial lot number and number of doses drawn.

**Implementation tip:** Initially open enough vials to cover half of the expected doses for the day. Open one or two vials at a time through the rest of the day, taking care to be conservative about opening vials towards the end of the day in the event of no-shows, and to avoid wasting doses. It takes approximately 5-8 minutes to open and draw 10-11 doses from a Moderna vial, and similar amount of time to mix and draw 5-6 doses from a Pfizer. Johnson & Johnson will take less than 5 minutes to draw 5 doses.

- As patients arrive and are tallied following registration, monitor how many doses are available for administration. Open new vials and draw doses in accordance with scheduling and remaining expected patients, as well as the waitlist.
  - Count the registrations (paper forms or from electronic registration system) throughout the course of the day to make sure the count matches the “expected patients remaining” number (cell E6).
  - In the event of patients arriving over 30 minutes late to their appointment, confirm status by phoning patient. If patient does not answer the phone, or if they answer and report being unable to make their scheduled appointment, mark them as no-shows and release their doses to waitlist patients.
- At the end of the day, record total patients vaccinated, vials used, and any unused doses (if applicable). If no doses are unused, the dose count (cell J25) should equal the patient count (cell L3).

*The ideas presented in this document reflect the latest public health thinking and scientific evidence as of April 2021. You are advised that the COVID-19 vaccine landscape remains highly fluid, and it is your responsibility to ensure that decisions are made based on the most up-to-date information available. Partners In Health does not provide medical advice, diagnosis, or treatment in the United States. Always seek the advice of a physician or other qualified healthcare provider with any questions regarding a medical condition. The information, including but not limited to text, graphics, images, and other material contained in this document, are intended for informational purposes only.*