

# Skills Checklist for Vaccine Administration

This “Skills Checklist” is an assessment tool for healthcare staff who administer immunizations. To complete it, staff should review the competency areas below and the clinical skills, techniques and procedures outlined for each area.

**Staff:** Enter a score in the **Self-Assessment** column. If “Needs to Improve” is checked, it indicates further study, practice, or change is needed. When “Meets or Exceeds” is checked, it indicates belief that performance is at the expected level of competence, or higher.

**Supervisors:** Use the “Skills Checklist” to clarify responsibilities and expectations for staff who administer vaccines. When you use it to assist with performance reviews, give staff the opportunity to score themselves in advance. Next, observe their performance as they

administer vaccines to several patients, and score in the **Supervisor Review** columns. If improvement is needed, meet with them to develop a “Plan of Action” (see bottom of page 3) to help them achieve the level of competence you expect; circle desired actions or write in others.

#### CDC’s Web-based Training Courses

- *You Call the Shots*: updated regularly to include the latest guidelines and recommendations in vaccine practice; available at [www.cdc.gov/vaccines/ed/youcalltheshots.html](http://www.cdc.gov/vaccines/ed/youcalltheshots.html).
- Vaccine Administration eLearn: available at [www.cdc.gov/vaccines/hcp/admin/resource-library.html](http://www.cdc.gov/vaccines/hcp/admin/resource-library.html)

AREA	CLINICAL SKILLS, TECHNIQUES, AND PROCEDURES	SELF ASSESSMENT		SUPERVISOR REVIEW		PLAN OF ACTION
		NEEDS TO IMPROVE	MEETS OR EXCEEDS	NEEDS TO IMPROVE	MEETS OR EXCEEDS	
Patient/Parent Education	1. Welcomes patient/family and establishes rapport.					
	2. Explains what vaccines will be given and which type(s) of injection(s) will be done.					
	3. Answers questions and accommodates language or literacy barriers and special needs of patient/parents to help make them feel comfortable and informed about the procedure.					
	4. Verifies patient/parents received Vaccine Information Statements (VISs) and appropriate materials for indicated vaccines and has had time to read them and ask questions.					
	5. Screens for contraindications and precautions (if within employee’s scope of work).					
	6. Reviews comfort measures and aftercare instructions with patient/parents, and invites questions.					
Medical & Office Protocols	1. Identifies the location of protocols for providing immunizations, infection prevention, emergency situations, and for reporting adverse events to the Vaccine Adverse Event Reporting system (VAERS).					
	2. Identifies the location of epinephrine, its administration technique, and clinical situations where its use would be indicated.					
	3. Maintains up-to-date CPR certification.					
	4. Understands the need to report any needlestick injury and to maintain a sharps injury log.					
	5. Demonstrates knowledge of proper vaccine handling (e.g., maintains and monitors vaccine at recommended temperature and protects from light).					

Adapted from California Department of Public Health, Immunization Branch

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AREA	CLINICAL SKILLS, TECHNIQUES, AND PROCEDURES	SELF ASSESSMENT		SUPERVISOR REVIEW		PLAN OF ACTION
		NEEDS TO IMPROVE	MEETS OR EXCEEDS	NEEDS TO IMPROVE	MEETS OR EXCEEDS	
Vaccine Preparation	1. Performs proper hand hygiene prior to preparing vaccine.					
	2. When removing vaccine from the refrigerator or freezer, looks at the storage unit's temperature to make sure it is in proper range.					
	3. Checks expiration date and beyond-use date, if applicable, for both vaccine and diluent if needed. Double-checks vial label and contents prior to drawing up.					
	4. Prepares and draws up vaccines in a designated clean medication area that is not adjacent to areas where potentially contaminated items are placed.					
	5. Selects the correct needle size based on route, site, injection technique, patient age. Weight and gender are considered when administering IM injections to adults.					
	6. Maintains aseptic technique throughout, including cleaning the rubber septum (stopper) of the vial with sterile alcohol prior to piercing it.					
	7. Prepares vaccine according to manufacturer instructions. If directed by manufacturer's instructions, writes beyond use date on vial label. Draws up correct dose of vaccine. Rechecks vial label.					
	8. Prepares a new sterile syringe and sterile needle for each injection. Checks the expiration date on the equipment (syringes and needles) if present.					
	9. Labels each filled syringe or uses labeled tray to keep them identified.					
Administering Vaccinations	1. Verifies identity of patient. Rechecks the provider's order or instructions against the vial and the prepared syringes.					
	2. Utilizes proper hand hygiene with every patient and, if it is office policy, puts on disposable gloves. (If using gloves, changes gloves for every patient.)					
	3. Demonstrates knowledge of the appropriate route for each vaccine.					
	4. Positions patient safely and age appropriately.					
	5. Correctly identifies the injection site (e.g., deltoid, vastus lateralis, fatty tissue over triceps).					
	6. Locates anatomic landmarks specific for IM or Subcut injections.					
	7. Preps the site with an alcohol wipe, using a circular motion from the center to a 2" to 3" circle. Allows alcohol to dry.					

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Administering Vaccinations (continued)	8. Controls the limb with the non-dominant hand; holds the needle an inch from the skin and inserts it quickly at the appropriate angle (90° for IM or 45° for Subcut).					
	9. Injects vaccine using steady pressure; withdraws needle at angle of insertion.					
	10. Applies gentle pressure to injection site for several seconds (using, e.g., gauze pad, bandaid).					
	11. Uses strategies to reduce anxiety and pain associated with injections.					
	12. Properly disposes of needle and syringe in “sharps” container.					
	13. Properly disposes of vaccine vials.					
Records Procedures	1. Fully documents each vaccination in patient chart: date, lot number, manufacturer, site, VIS date, name/initials.					
	2. If applicable, demonstrates ability to use state/local immunization registry or computer to call up patient record, assess what is due today, and update the electronic immunization history.					
	3. Asks for and updates patient’s vaccination record and reminds them to bring it to each visit.					

**Plan of Action**

Circle desired next steps and write in the agreed deadline for completion, as well as date for the follow-up performance review.

- a. Watch video on immunization techniques and review CDC’s Vaccine Administration eLearn, available at [www.cdc.gov/vaccines/hcp/admin/resource-library.html](http://www.cdc.gov/vaccines/hcp/admin/resource-library.html).
  - b. Review manuals, textbooks, wall charts, or other guides (e.g., Key Vaccination Resources for Healthcare Professionals at [www.immunize.org/catg.d/p2005.pdf](http://www.immunize.org/catg.d/p2005.pdf))
  - c. Review package inserts.
  - d. Review vaccine storage and handling guide-lines or video.
  - e. Observe other staff with patients.
  - f. Practice injections.
  - g. Read Vaccine Information Statements.
  - h. Be mentored by someone who has demonstrated appropriate immunization skills.
  - i. Role play (with other staff) interactions with parents and patients, including age appropriate comfort measures. Review resources on vaccination anxiety ([www.immunize.org/clinical/vaccine-confidence/topic/improving-vaccine-experience/](http://www.immunize.org/clinical/vaccine-confidence/topic/improving-vaccine-experience/)).
  - j. Attend a skills training or other appropriate courses/training.
  - k. Attend healthcare customer satisfaction or cultural competency training.
  - l. Renew CPR certification.
- Other \_\_\_\_\_

File the Skills Checklist in the employee’s personnel folder.

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**PLAN OF ACTION DEADLINE**

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**DATE OF NEXT PERFORMANCE REVIEW**

\_\_\_\_\_  
EMPLOYEE SIGNATURE DATE

\_\_\_\_\_  
SUPERVISOR SIGNATURE DATE