



10 STEPS TO STARTING A
**VACCINE
PROGRAM**

Copyright 2026 R.J. Hedges & Associates



Starting a new service, like an **immunization program**, is a great way to expand your pharmacy's clinical services, reach new patients, and strengthen your role as a healthcare provider in your community. But for many independent pharmacy owners, knowing where to begin can feel daunting.



WE'RE HERE TO GUIDE YOU WITH THESE TOP
10 STEPS TO STARTING A VACCINE PROGRAM
IN YOUR INDEPENDENT PHARMACY.

**1**

CHECK WITH YOUR STATE PHARMACY BOARD

Every state has its own requirements for pharmacy-based immunization services, including which vaccines pharmacists may administer and the conditions that must be met. Because these requirements can change, pharmacies should review current guidance from their State Board of Pharmacy, Department of Health, and other applicable state authorities.

Our Pharmacy Immunization Compliance Program provides an overview of state-specific requirements, along with references to applicable state resources and supporting materials to help you identify and navigate the requirements for your pharmacy.

2

COMPLETE IMMUNIZATION TRAINING

Before administering vaccines, pharmacists must complete immunization education and training required by their state. Immunization training may be available through schools of pharmacy, state pharmacy associations, and other approved organizations.

The American Pharmacists Association (APhA) Pharmacy-Based Immunization Delivery certificate training program is

widely recognized throughout the pharmacy profession and is an excellent resource for pharmacists preparing to provide immunization services.

3

COMPLETE STATE REGISTRATION & APPLICATION REQUIREMENTS

Depending on your state, pharmacists and/or pharmacies may be required to complete additional applications, registrations, certifications, or licensing requirements before administering vaccines. Review the requirements established by your State Board of Pharmacy or Department of Health, and complete any required steps before beginning your immunization services.

Processing times and requirements vary by state, so plan ahead when establishing your program.

4

APPLY FOR A MEDICARE
IMMUNIZATION PTAN

If you plan to provide Medicare-covered vaccines, your pharmacy must be properly enrolled with Medicare; the enrollment option you choose will depend on the services your pharmacy plans to offer.

Mass Immunizer enrollment can simplify billing for large-scale vaccine clinics but is limited to specific vaccines, including COVID-19, influenza, and pneumococcal vaccines. Claims are submitted using the roster billing process, which allows multiple patients vaccinated on the same date to be billed together.

The Pharmacy Supplier option provides greater flexibility, allowing pharmacies to bill individual claims for a broader range of covered items and services, including eligible vaccines, prescription drugs, and certain clinical services.

Obtaining a Medicare PTAN can help expand your pharmacy's reach to Medicare Part B patients. Applications are submitted electronically through PECOS. The 2026 application fee is \$750, and processing generally takes approximately 4–6 weeks.

5

GET YOUR IMMUNIZATION
DOCUMENTATION IN ORDER

A successful immunization program requires more than administering the vaccine. Your pharmacy needs processes for patient screening, consent, vaccine administration records, Vaccine Information Statements (VIS), adverse event documentation, emergency response, and applicable state and federal reporting.

Establish your documentation and recordkeeping processes before administering your first vaccine so your team knows what to document, where to document it, and how records will be maintained.

A Pharmacy Immunization Compliance Program can help bring these policies, procedures, forms, and supporting resources together in one place.

6

STANDING ORDERS AND
VACCINE POLICIES &
PROCEDURES

Depending on your state's requirements and the vaccines your pharmacy administers, you may need standing orders, protocols, collaborative practice agreements, or other authorizing documentation. Review your state's current requirements to determine what is needed for your pharmacy.

Even when a specific standing order is not required, written policies and procedures are an important part of a well-managed immunization program. They help establish consistent processes for vaccine administration, patient screening, emergency response, documentation, storage and handling, and staff responsibilities.

Our Pharmacy Immunization Compliance Program provides policies, procedures, standing-order resources, emergency protocols, forms, and other supporting materials to help pharmacies build and maintain their immunization program.



7

MAKE IMMUNIZATION BILLING EASY

Independent pharmacists are great at giving vaccines, but navigating immunization billing can be a challenge. The key is having the right tools and resources in place to make checking coverage, submitting claims, and receiving appropriate reimbursement as simple as possible.

TransActRx offers a billing solution designed to help pharmacies check patient insurance coverage and process claims at the time of vaccination. This can help streamline the billing process, reduce the need for roster billing, and help pharmacies capture appropriate reimbursement for the services they provide.

DocStation, an R.J. Hedges & Associates partner, provides pharmacies with medical billing technology and support to help simplify billing beyond the traditional pharmacy benefit. DocStation can help pharmacies navigate medical billing for immunizations and other clinical services, giving pharmacies another option for managing claims and reimbursement as they expand their patient care services.

Additional billing solutions are also available, including eRx Network, Easy DME, and OmniSys. We encourage pharmacies to evaluate available options and select a billing solution that best fits their services, workflow, and payer needs.

[Visit TransActRx](#) | [Learn More About DocStation](#)



8

MAKE TEMPERATURE MONITORING AS SIMPLE AS POSSIBLE

Proper vaccine storage and temperature monitoring are critical to maintaining vaccine safety and effectiveness. Vaccines must be stored within the appropriate temperature range, using storage and monitoring equipment that meets applicable requirements. Because requirements may vary by vaccine and program, pharmacies should follow current CDC vaccine storage and handling guidance, manufacturer instructions, and any applicable state requirements. The CDC recommends using a digital data logger (DDL) with a buffered temperature probe to monitor each vaccine storage unit. A DDL continuously monitors temperatures and provides valuable information to help identify temperature excursions that could affect vaccine viability.

[Reference the CDC's Vaccine Storage & Handling Toolkit](#)



When setting up your vaccine storage and monitoring process, keep these important considerations in mind:

- Use a DDL with a current Certificate of Calibration Testing
- Use a separate temperature monitoring device for each vaccine storage unit.
- Position the buffered probe with the vaccines to more accurately reflect vaccine temperatures.
- Review and document temperature information according to current CDC and applicable state requirements.
- Maintain temperature records for the required retention period.
- Establish a process for responding to and documenting temperature excursions.

Household combination refrigerator/freezer units with a single exterior door (dormitory- or bar-style units) should **not** be used for vaccine storage.



9

CREATE A GREAT SCREENING QUESTIONNAIRE

A well-designed screening and documentation process helps your pharmacy consistently collect important patient information, identify potential contraindications or precautions, and document vaccine administration. Your documentation should capture applicable information such as the vaccine administered, lot number, expiration date, dose, administration date and site, patient screening responses, and required vaccine information provided to the patient. Be sure to review federal and state documentation and reporting requirements applicable to your pharmacy.

10

PROMOTE YOUR IMMUNIZATION BUSINESS & INCREASE OTC SALES

Once your immunization program is established, let your community know these services are available. Promote your program through your website, social media, in-store signage, local healthcare providers, employers, senior organizations, community groups, and other organizations that serve the patients you want to reach. Having an immunization program is a great way to drive traffic into your pharmacy while demonstrating your commitment to the health and well-being of your community. Immunization visits also create opportunities to connect patients with other pharmacy services, refill prescriptions, provide pharmacist consultations, and introduce patients to additional health and wellness products and services.

GETTING STARTED CHECKLIST

- | | | | | | | | |
|--------------------------|----------|---|--|--------------------------|-----------|---|---|
| ☐ | 1 |  | CHECK WITH YOUR STATE PHARMACY BOARD | ☐ | 6 |  | STANDING ORDERS AND VACCINE POLICIES & PROCEDURES |
| ☐ | 2 |  | COMPLETE IMMUNIZATION TRAINING | ☐ | 7 |  | MAKE IMMUNIZATION BILLING EASY |
| ☐ | 3 |  | COMPLETE STATE REGISTRATION & APPLICATION REQUIREMENTS | ☐ | 8 |  | MAKE TEMPERATURE MONITORING AS SIMPLE AS POSSIBLE |
| ☐ | 4 |  | APPLY FOR A MEDICARE IMMUNIZATION PTAN | ☐ | 9 |  | CREATE A GREAT SCREENING QUESTIONNAIRE |
| ☐ | 5 |  | GET YOUR IMMUNIZATION DOCUMENTATION IN ORDER | ☐ | 10 |  | PROMOTE YOUR IMMUNIZATION BUSINESS & INCREASE OTC SALES |

Having a Pharmacy Immunization Compliance Program helps...

- Build a strong compliance foundation for your immunization services
- Protect your pharmacy, pharmacists, and patients with documented policies and procedures
- Establish consistent processes for vaccine administration, documentation, storage, and emergency response
- Navigate changing federal and state immunization requirements
- Give your team the tools and resources to confidently manage your immunization program
- Expand your pharmacy's clinical services and strengthen your role as a trusted healthcare provider in your community

You don't have to start from scratch

R.J. Hedges & Associates has done the compliance legwork for you. Our Pharmacy Immunization Compliance Program brings the policies, procedures, forms, training, and supporting resources you need together in one convenient location.

As requirements change, we help you navigate those changes and provide updated resources and guidance to support your program—so you can spend less time figuring out compliance and more time caring for your patients.

ORDER NOW

Why R.J. Hedges & Associates?

Spend less time building and maintaining your compliance program, and more time serving your patients.

Our Pharmacy Immunization Compliance Program includes:

- Comprehensive immunization policies and procedures
- Standing orders and vaccine-specific resources
- Emergency protocols and response procedures
- Patient screening and documentation forms
- Vaccine storage and temperature monitoring resources
- Workflow and recordkeeping tools
- OSHA and facility safety resources
- Staff training and supporting materials
- State-specific requirement overviews and links to applicable state resources
- 24/7 online access through the R.J. Hedges & Associates Compliance Portal®

Everything in one place. Expert compliance support behind you.

Build your immunization program with confidence;

Annual subscription \$600

We're here to keep you
stress-free and in compliance!™



www.rjhedges.com

sales@rjhedges.com

Phone: (724) 357-8380