

PDPH Implementation of Standard Operating Procedures within the IIS

Megan Marren, MSHI
IIS Manager
Philadelphia Department of Public Health- Immunization Program

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Background

Summer/Fall 2024 PDPH Transition Period

Loss of historical and institutional knowledge

"If it is not written down, it does not exist"
Philippe Kruchten

Gaps Identified with SOPs

Inconsistent &
Non-
Standardized

Process
Management

Lack of
Organization

Inaccessible

Outdated/Not
following Best
Practices

Unable to
compare data
confidently

Impact

Increased work-time

Frustration, confusion, & miscommunication

Dissatisfaction in IIS outputs

Concern with data quality and comparable reports

Burnout

Methods

Identify SOP Template

Create list of SOPs to Update/Create

Research

Development

Review/Feedback

Monitoring Progress

Methods: SOP Template

PDPH IIS Standard Operating Procedure (SOP) Template			
SOP Title*	<SOP Title>		
Topic Area	<Topic Area>		
Version # (to track revisions)	<Version>		
Effective Date	<XX/XX/XXXX>	Last Reviewed Date Last Modified Date	<XX/XX/XXXX> <XX/XX/XXXX>
SOP Owner	<Name>	Author	<Name>
Document Location	<Repository URL>		
Revision History	<Name>	Brief Description of Change	<Description>

1. Purpose and Background

- ▶ [Describe the overall purpose for this procedure. Describe relevant background information.]

2. Scope

[Identify the intended audience and/or activities where the SOP might be relevant.]

3. Prerequisites/Related Resources/Documents

[Outline information required before proceeding with the listed procedure, or resources/documents related to this procedure; for example, any needed worksheets, documents, etc.]

PDPH IIS Standard Operating Procedure (SOP) Template	

4. Roles and Responsibilities

[Identify the personnel that have a primary role (and, if relevant, personnel who are cross-trained for a backup role) in the SOP and describe how their responsibilities relate to this SOP. If necessary, include contact information.]

5. Procedure

[Provide the steps required to perform this procedure (who, what, when, where, why, how). Include any critical inclusion/exclusion criteria. Include a process flowchart if needed.]

6. Data Confidentiality Considerations

[If the procedure relates to data, list any relevant considerations regarding who is able to access the data, how it might be used, and whether any further actions need to be taken to utilize the data.]

7. References

[List resources that may be useful when performing the procedure; for example, jurisdictional laws or rules (authority, mandates, etc.), Immunization Program policies, manuals, FDDs, and other SOPs.]

8. Definitions

[Identify and define frequently used terms or acronyms. Provide additional and/or relevant information needed to understand this SOP.]

Methods: Create List of SOP's

Located
Existing SOP's

Identified
Needed SOP's

Completed
Based on
Priority

Methods: Research

Best Practices

Sources

- AIRA Repository
- AIRA Info Requests
- CDC
 - Public Facing Documents
 - Subject Matter Expert (SME) & Project Officer
- Immunization Program Websites
- Public Health Informatics Institute (PHII)

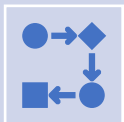
Methods: Development



Fill in SOP Header & Save Document



Complete all sections in chronological order; if sections do not require information, enter "N/A"



Complete the process while typing step by step directions; incorporate information from research into the process



Conduct Independent Reviews

Methods: Development

Independent Reviews

First Independent Review:

All roles/responsibilities, prerequisites, references, and definitions documented.

Second Independent Review:

Complete the process while following the SOP. Remove any added jargon and make sure all steps are included.

Continue Independent Reviews until the process reads clearly and all steps are included.

Methods: Review & Feedback

Drafts shared with staff

Edits reviewed & drafts updated

Resent drafts until no other feedback needed

Followed SOP step-by-step to identify gaps

Final copies saved on Sharepoint

Methods: Monitoring Progress

Platform:
Monday.com

Include SOP Title,
Staff Assigned, Status,
Date Initiated,
Relevant Files/Links

IIS SOP, Policy, & Guidelines. ▾

Sidekick AI suggestions New Integrate Automate / 3 MM Invite

Main table ... +

New document title ▾ Search Person Filter ▾ Sort Hide Group by ...

▼ Template

<input type="checkbox"/>	Document title	Person	Status	Date	File	Link	+
<input type="checkbox"/>	SOP Template		Done				
<input type="checkbox"/>	+ Add document title						

▼ SOP's, Policies, & Guidelines

<input type="checkbox"/>	Document title	Person	Status	Date	File	Link	+
<input type="checkbox"/>	Non-Reporting Providers	EG +2	Done	May 7, 2025		https://phila.sharepoint.com/:b/r...	
<input type="checkbox"/>	Pediatric Influenza Patients Query	MM	Working on it	Sep 2, 2025		https://PDPH%20Pediatric%20In...	
<input type="checkbox"/>	PhilaVax Provider Reporting Agreeeme...	EG	Done	Oct 1, 2025	+1	https://phila.sharepoint.com/:f/r...	
<input type="checkbox"/>	PhilaVax Provider Reporting Agreeeme...	EGMM	Done	Oct 2, 2025		https://phila.sharepoint.com/:b/r...	
<input type="checkbox"/>	HEDIS	MM	Done	Nov 3, 2025		https://phila.sharepoint.com/:b/r...	
<input type="checkbox"/>	+ Add document title						

▼ Annual Review Required

<input type="checkbox"/>	Document title	Person	Status	Date	File	Link	+
<input type="checkbox"/>	CVX for Unspecified Formulations	MM	Done	Apr 1, 2025		https://phila.sharepoint.com/:b/r...	
<input type="checkbox"/>	+ Add document title						

Methods: Monitoring Progress

Use Automations for Annual Reviews

Manage your board automations

Automations Run history My connections Account usage

Q Search

Filter

1 year after Date arrives set Status to Overdue

Minor Updated 2m ago Owner MM Description Add description

When an item is moved to Annual Review Required set Status to Haven't started yet and notify Person

Minor Updated 7m ago Owner MM Description Add description

11 months after Date arrives move item to Annual Review Required

Minor Updated 10mo ago Owner MM Description Add description

Implementation

SOP Template Key for Consistency

Utilized Platforms Currently Used

Initially Tedious and Time-Intensive

Incorporating Into Routine Work

Repetition, Reminders, & Accountability

Results

Accessible

Clear Expectations
Reduce
Discrepancies

Increased
Efficiency

Consistent
Communication

Ensure Best
Practices

Improve Integrity
and Accuracy

Conclusion

Implementing a procedure established expectation.

While the initial process can be time-intensive and tedious being thorough reduces need for updates and ongoing research.

Documentation Increases:

- Ability to Compare Outputs
- Integrity & Confidence of Data
- Establishes Consistency

THANK YOU



Megan Marren, MSHI
IIS Manager
Philadelphia Department of Public Health
Megan.Marren@Phila.gov