

Health Plan Billing Readiness Checklist

Purpose

Use this checklist to determine whether your jurisdiction is ready to implement a billing model for immunization information system (IIS) data requests from health plans or other partners.

Legal and Policy Readiness

Question	Yes	No	Needs Work
State law permits sharing IIS data with health plans or payers.	☐	☐	☐
Data Use Agreements (DUAs) are in place or can be established.	☐	☐	☐
Internal leadership supports cost recovery for IIS data requests.	☐	☐	☐
Financial policies allow IIS-generated revenue to be retained and used for IIS purposes.	☐	☐	☐

Operational Readiness

Question	Yes	No	Needs Work
The IIS can efficiently generate requested data files.	☐	☐	☐
A process exists to track data requests and fulfillment.	☐	☐	☐
Staff time required to fulfill requests has been estimated.	☐	☐	☐
A billing and invoicing process can be established.	☐	☐	☐



Partner Readiness

Question	Yes	No	Needs Work
Potential partners have been identified.	☐	☐	☐
The value of IIS data to partners has been documented.	☐	☐	☐
A communication strategy has been developed.	☐	☐	☐

Results

Mostly Yes: Ready to explore billing.

Mostly Needs Work: Address gaps before implementation.

Mostly No: Consider strengthening foundational elements first.