Welcome to the Vaccine Management System!

**ARIZONA DEPARTMENT
OF HEALTH SERVICES**

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--Purpose--

The purpose of this User Guide is to provide detailed information of the resources available on the Clinic Portal, and how to carry out the tasks and responsibilities of the Staff role. The Clinic Portal will be used by the Staff to manage patient appointments.

--Overview--

The role of the Staff is to check-in patients with scheduled online appointments, cancel and reschedule patient appointments as needed, and also accommodate registration and scheduling for walk-in patients. The Staff is responsible for managing the Appointment Dashboard for a given site location.

--Clinic Portal Features - Staff--

- Logging into the Clinic Portal
- Appointments Dashboard
- Checking in a Patient
- Rescheduling and Cancelling an Appointment
- Booking Walk-In Appointments
- Generate a Summary of Appointments
- Export appointments to a CSV

Navigate the Clinic Portal as Staff

1. From the Login screen, check the box to confirm you understand and will comply with confidentiality and acceptable use rules and click **Login**.

2. Log into the Clinic Portal using the staff credentials sent to your registered email address.

Once you are logged in, the Appointments Dashboard will display. This is the default view for the Staff.

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Look Up An Appointment ID

To check in a patient, you will need the QR code or the Appointment ID. This section reviews the steps for finding the Appointment ID if the patient is unable to provide it.

You will begin the search on the Dashboard, searching under the patient's appointment ID or their entire first or last name and date of birth.

If you're unable to retrieve the appointment with a basic search, you will use the Advanced Search tool. This feature lets you enter as few as three letters of the patient's name, which can be helpful if a name was misspelled when the appointment was scheduled. The steps for using the Advanced Search tool are detailed after the Dashboard Search
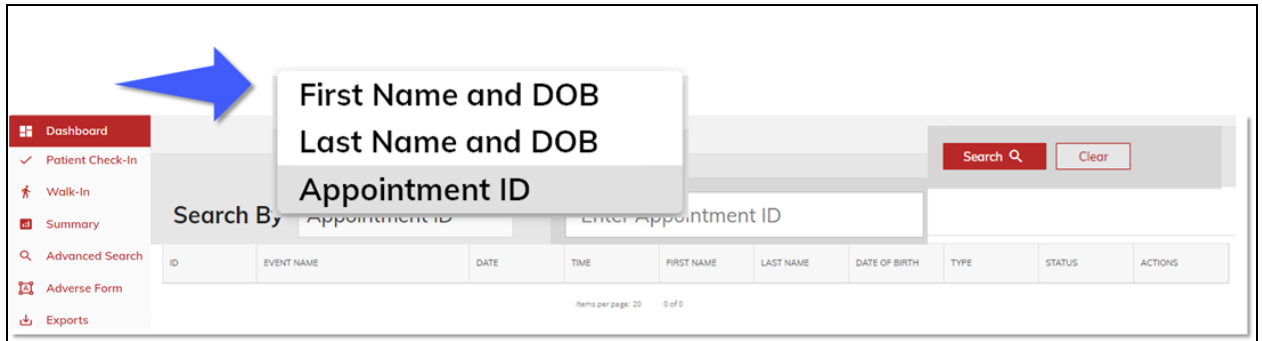

Dashboard Search

1. **Click** the dropdown arrow in the field to the right of **Search By** and select the filter you want to use.
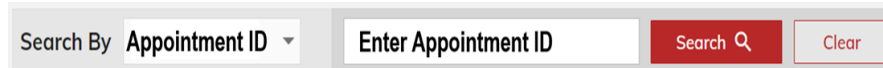
You can filter by:

- Appointment ID
- First Name and DOB (Date of Birth)
- Last Name and DOB

Once you select the search filter, an entry field will display that corresponds with your selection.

- Appointment ID: A text entry box displays. Whenever possible, search on Appointment ID, as this search will always return a single result.

- Name and Date of Birth (DOB): A text entry box for first name or last name will display. A date box will also display to enter or select the DOB. When using either of the name filters on the Dashboard Search, you must enter the ENTIRE first or last name.

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2. **Enter** your criteria and **click Search**.

The dashboard will display all appointments that match the criteria you entered.

Advanced Search

If you are unable to retrieve an appointment from a search on the dashboard, you have additional options under the Advanced Search tool. With this tool you can search on either Phone number or Date of Birth (DOB) and partial spellings of the patient's first, middle, or last name.

This tool is for locating appointments only. You will not be able to schedule, reschedule, or cancel appointments from this screen. Once you retrieve the appointment, you will copy the Appointment ID and enter it into the Dashboard Search to retrieve the appointment and complete the desired action.

1. Click Advanced Search from the menu.

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2. **Enter** EITHER a phone number or Date of Birth into the designated field. Once you enter data into one of those fields, the Name field will become active.

   Enter at least three letters of the first, middle, OR last name.

   Click Search.

   If multiple results are returned, you can click on any column title to sort the data in that column.

   When you retrieve the patient's appointment, copy the Appointment ID so you can paste it into the Dashboard Search field to retrieve the patient's record for check-in.

Check In Patients

To check in a patient, you will need the QR code or the Appointment ID. The steps for finding the Appointment ID if the patient doesn't have it are reviewed in the previous section.

1. To check in a patient, click **Patient Check-in** on the menu bar, on the left hand side or click **Check-in** from the dashboard. The Patient check-in screen will display.
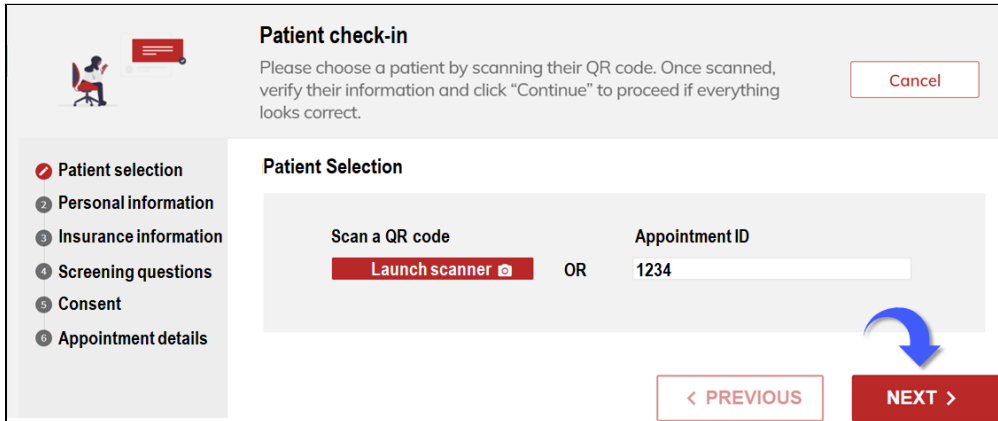

The Patient Check-In screen will display.

2. To begin check-in, you can scan a patient's QR code (received in their confirmation email or text) or verify and enter the patient's Appointment ID.

   a. To scan a QR code, click '**Launch Scanner**'. A camera will launch to read the QR code. Align the QR code with the camera so that the QR code is showing on screen.

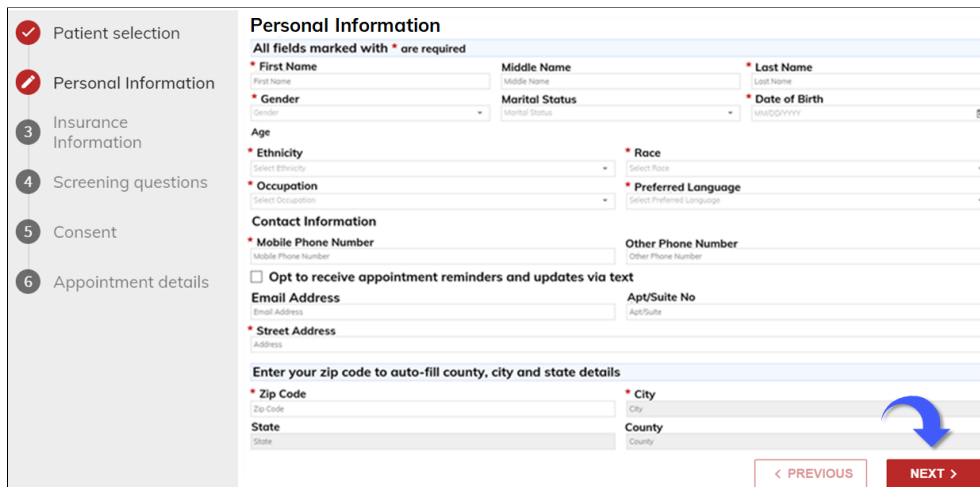   b. No QR code? No problem. Just enter the Appointment ID into the Appointment ID field and click **Next.**

3. Verify the patient's personal and contact information.

   You can update information by typing corrections directly into the field. The updates will save when you click the Next button.

   Click **Next** when the patient's details have been verified.

   NOTE: Updates to the Personal and Contact Information can only be completed while the patient's status is Not checked in. Once they are checked-in, this information can no longer be changed.

4. Verify the insurance information

To add or edit the insurance information, you can update information by typing corrections directly into the field.

Click **Next** when the information is verified.

Health Insurance Information

All fields marked with * are required

* Do you have Insurance?

( ) Yes ( ) No

* **Type of Insurance**

Medicaid

* **Insurance Company Name**

Insurance Company Name

* **Member ID/Policy Number**

Member ID/Policy Number

* **Health Plan Phone Number**

Health Plan Phone Number

* **Health Plan Address**

Health Plan Address

< PREVIOUS   NEXT >

Patient selection
Personal Information
Insurance Information
4 Screening questions
5 Consent
6 Appointment details

5. Ask the patient the screening questions.

Click Next

Screening questions

Patient information and health status will be evaluated on-site by a Department of Public Health nurse who will determine if you are able to receive the vaccine on the clinic date, All fields marked with * are required

*Are you feeling sick today?
( ) Yes ( ) No

*Have you ever received a dose of COVID-19 vaccine?
( ) Yes ( ) No

If yes, which vaccine product?

*Have you ever had a severe allergic reaction (e.g., anaphylaxis) to something? For example, a reaction for which you were treated with epinephrine or EpiPen, or for which you had to go to the hospital?
( ) Yes ( ) No

*Was the severe allergic reaction after receiving a COVID-19 vaccine?
( ) Yes ( ) No

*Was the severe allergic reaction after receiving another vaccine or another injectable medication?
( ) Yes ( ) No

*Do you have a bleeding disorder or are you taking a blood thinner?
( ) Yes ( ) No

< PREVIOUS   NEXT >

Patient selection
Personal Information
Insurance Information
Screening questions
5 Consent
6 Appointment details

6. Review the consent to ensure consent was received electronically.

    a. If consent was not received electronically, have the patient fill out a paper consent and check the box stating 'Consent Received on Paper.

    Click Next.

7. Confirm the appointment details and ask any additional questions required for vaccination. If the patient is not eligible to receive the vaccine for any reason (i.e. sickness), you can reschedule or cancel the appointment by clicking the Reschedule or Cancel button.

    If the patient is confirmed to receive the vaccination, click **Submit**.

The appointment status will update and the clinician can select Start to begin the vaccination.

Reschedule Patients

To reschedule an appointment, you will need to retrieve the appointment. Review the steps for finding the Appointment ID if the patient doesn't have it.

To reschedule an appointment, retrieve the appointment from the Dashboard. **Click Reschedule**.

Two scheduling options:

Schedule the first available appointment date. The event with the earliest appointment available will automatically display in the upper right of the screen. If this location and date are convenient for the patient, you will only need to select an appointment time.

Select another event or date. The events to schedule within 50 miles of the patient's zip code and events the patient was invited to will display under Select Event. You can easily select a different date or event for the patient.

Reschedule an appointment - 3 simple steps

If the earliest available appointment date and location are convenient for the patient, skip to step 3.

To change the location and / or date for the appointment:

1. **Select an Event**

    To select a different location, scroll through **Select Event**. Events within a 50 mile radius of the zip code and events that the patient was invited to will display under Select Events.

    If you want to expand your search beyond 50 miles, just click to uncheck the box. You can also enter another zip code to search for events.

    Once you've completed your search, **click the button to the left of the event** the patient wants to attend.

2. **Select a Date**

When you click on an event, the Select Date calendar will automatically update to show appointment availability for that event.

Dates that have available appointments will display in red. If there are no appointments for a date, it will show in gray and you will not be able to click on it.

The first available appointment for the month will have a red circle around it.

Click on **a date** to select it.

3. **Pick a Time**

Blocks of time that the event has open for appointments will display under Select Time.

Ask the patient what time of day they prefer for their appointment.

Click the **down arrows** on the right of each red bar to display the appointment times.

The number under "Available" shows the number of appointments available for that time.

Click the **button to the left of the time** the patient wants to schedule.

> **You may need to scroll down to see all the times available for that block**.

Click Book Appointment.

Provide the Appointment ID

After clicking Book Appointment, the appointment details screen will display.

Provide the patient with the Appointment ID and instruct them to make note of it and take it to their appointment.

Instruct the patient to bring their Vaccination Record Card with them to the appointment to have it updated with the date they received their second dose.

Appointment Details	
APPOINTMENT ID	1234
NAME	Jane Test
DATE OF BIRTH	05/05/1955
EVENT	ABC Vaccine Event
ADDRESS	123 Main Street, Anytown, Arizona, 85034
APPOINTMENT DATE	03/07/2021
APPOINTMENT TIME	6:00 PM
EVENT INFORMATION	Bring your appointment ID and arrive 15 minutes early

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Schedule Walk-In Appointments

You have the option to book appointments for people who come to an event without an appointment.

1. From the Dashboard, click Walk-In
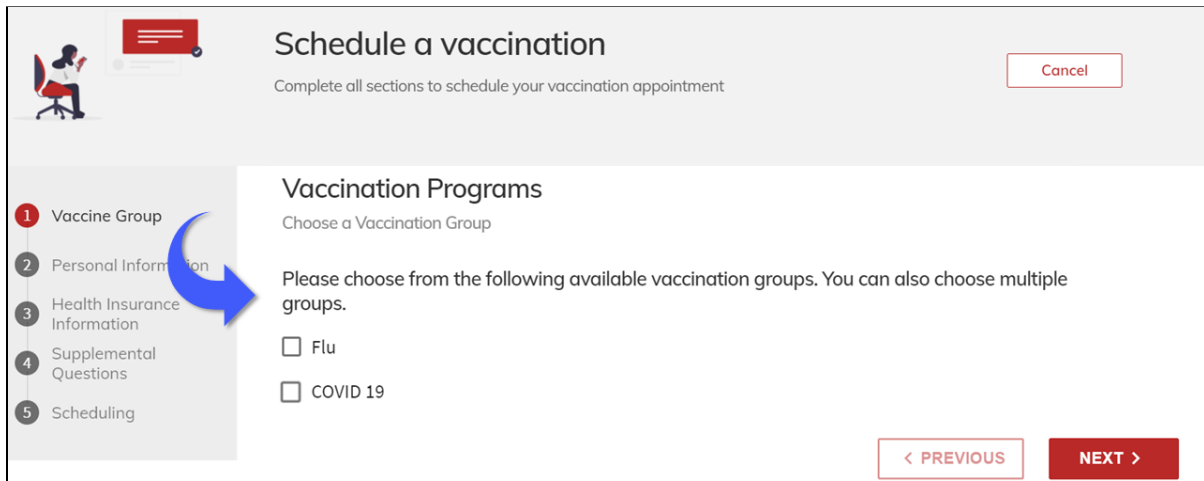
2. Click to choose from the available Vaccination Programs. You can select more than one. **Click Next** once you have selected the appropriate Program(s).
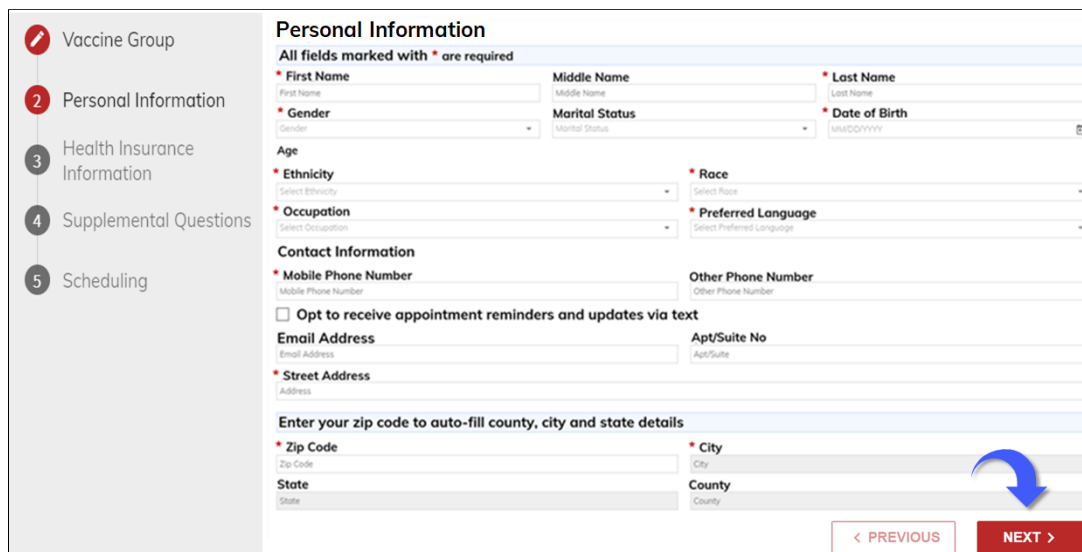
3. Enter the patient's personal and contact information. Fields marked with an asterisk (*) are required. **Click Next** once completed.

   Note: Although an email address is not required, we strongly encourage the patient to provide one so they receive notifications about their vaccinations (appointment reminders, confirmation vaccines were administered, confirmation of follow up appointments, etc.)

   If the appointment is being scheduled for someone under 18 years of age, when you enter the date of birth, you will be prompted to enter the first and last name of a guardian.

4. Ask the patient whether they have insurance and select Yes or No depending on their insurance status. If No, **click Next**.

   If the patient asks why this information is being requested, it may be helpful to explain that "COVID-19 vaccines are free; however, insurance information is being requested during appointment scheduling so that an administration fee can be billed to insurance if you are insured. There will be no out-of-pocket costs requested during your appointment time and you should not receive a bill. "

5. If the patient responds '**Yes**' for insurance, fill in the required information. All fields marked with an asterisk (*) are required. **Click Next** when you're done.

Health Insurance Information

All fields marked with * are required

* Do you have Insurance?

(●) Yes   ( ) No

* Type of Insurance

Private ▼

Private Insurance Information

* Insurance Company Name	* Member ID / Policy Number	* Group number
Insurance Company Name	Member ID / Policy Number	Group number

* Policy Holder/Subscriber First Name	Policy Holder/Subscriber Middle Name	* Policy Holder/Subscriber Last Name
Policy Holder/Subscriber First Name	Policy Holder/Subscriber Middle Name	Policy Holder/Subscriber Last Name

* Policy Holder/Subscriber relationship to Patient	* Policy Holder/Subscriber Date of Birth	* Health Plan Name
--Select Relationship--		Health Plan Name

* Health Plan Phone Number	Medical Assistance Number, Recipient Number (If Applicable)
Health Plan Phone Number	Medical Assistance Number, Recipient Number

* P.O. Box Address for Claims

P.O. Box Address for Claims

‹ PREVIOUS   NEXT ›

6. Ask the patient the supplemental questions. **Click Yes or No** to answer all of the questions and **click Next.**

- ✏ Vaccine Group
- ✏ Personal Information
- ✏ Health Insurance Information
- ④ Supplemental Questions
- ⑤ Scheduling

Supplemental Questions

Please answer the questions to provide additional information for public health. All fields marked with * are required.

* Do you live in a shelter or other congregate living settings with vulnerable populations?   ( ) Yes ( ) No

* Are you immunocompromised or do you have an underlying medical condition not limited to COPD, heart disease, diabetes, or chronic kidney disease?   ( ) Yes ( ) No

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Schedule the appointment - 3 simple steps

The events that the account has access to will display.

1. **Select an Event**

   To select a location, scroll through **Select Event**. All events that the account has access to book into will display under Select Events.

   Once you've completed your search, **click the button to the left of the event**.

2. **Select a Date**

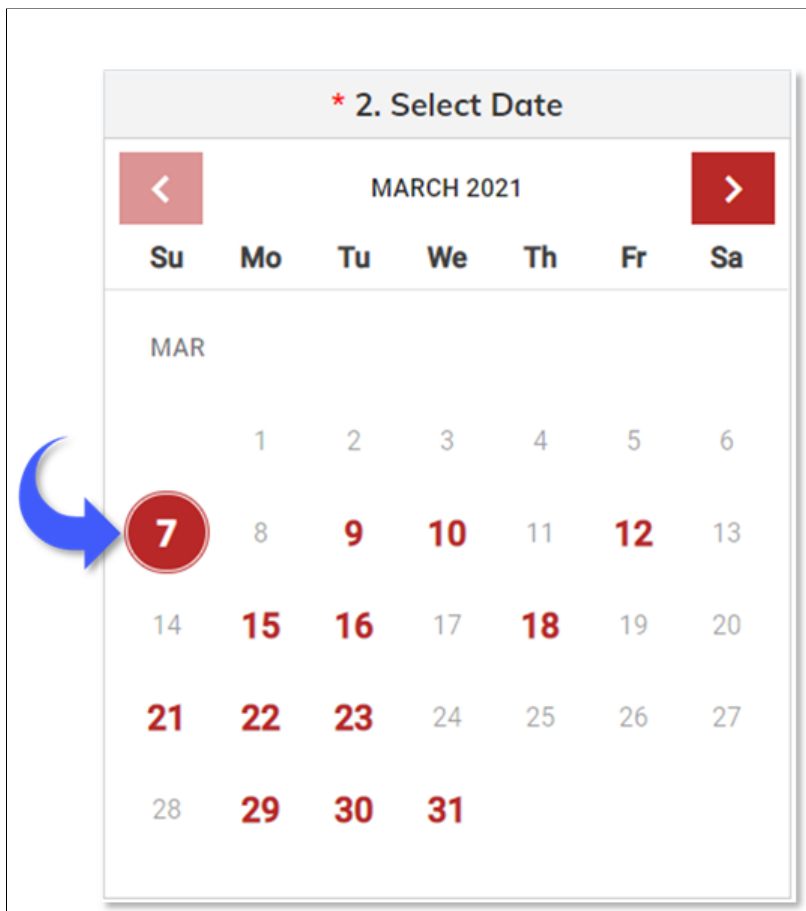When you click on an event, the Select Date calendar will automatically update to show appointment availability for that event.

Dates that have available appointments will display in red. If there are no appointments for a date, it will show in gray and you will not be able to click on it.

The first available appointment for the month will have a red circle around it.

Click on **a date** to select it.

3. **Pick a Time**

Blocks of time that the event has open for appointments will display under Select Time. **Click** the **down arrows** on the right of each red bar to display the appointment times. The number under "Available" shows the number of appointments available for that time.

Click the **button to the left of the time** the patient wants to schedule. **You may need to scroll down to see all the times available for that block**.

Click Book Appointment.

Confirm the appointment

Review the appointment details and **click Confirm** to schedule the appointment**.** If you will be checking them in now, make note of the Appointment ID to retrieve the appointment on the Dashboard and follow the Check-in instructions.

Schedule 2nd Dose (follow up) Appointments

To schedule 2nd Dose (follow up) appointments, you will need to retrieve the appointment. Review the steps for finding the Appointment ID if the patient doesn't have it.

Once you retrieve the record for the patient's first dose vaccination, **confirm their Status = Done**. *

Also, **take note of the date they received the first dose**.

In the next step, you will schedule their 2nd dose appointment on the dashboard. The date for their 2nd dose must be scheduled at least 21 days from their first dose for Pfizer and 28 days for Moderna.

1. Once you have the patient's first dose appointment displayed on the Dashboard, **click Follow-Up.**

2. Review the personal information and **click Next**.

The current event and linked follow-up events will display. The first available date for the selected event will display under Select Date.

There is a minimum waiting time between receiving 1st and 2nd vaccine doses:

- Pfizer: 21 days
- Moderna: 28 days

Book the follow up

1. **Select the event:** The current event and linked follow up events will display. The calendar will automatically update with available appointments once you pick an event.

2. **Select a date:** Determine the first date the patient is eligible to receive their second dose and click that date.

   ○ Dates in red have available appointments. Dates in gray have no appointments available.

   ○ Click the arrow (>) to the right of the month to advance to the next month.

3. **Select a time**: Click the down arrows on the right of each red bar under Select Time. Click the button to the left of the time the patient wants to schedule.

4. **Click Book Appointment.**

Review and confirm the appointment

Review the details of the appointment and when the patient confirms this as their desired appointment, **click Confirm.**

The appointment is now scheduled.

If the patient wants to change the date or time of the appointment, click Cancel and make new selections.
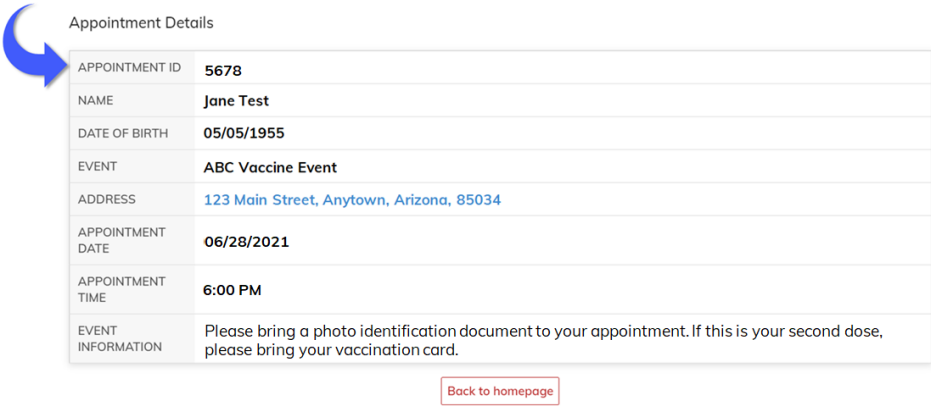

Provide the Appointment ID

After clicking Book Appointment, the appointment details screen will display.

Provide the patient with the Appointment ID and instruct them to make note of it and take it to their appointment.

Instruct the patient to bring their Vaccination Record Card with them to the appointment to have it updated with the date they received their second dose.
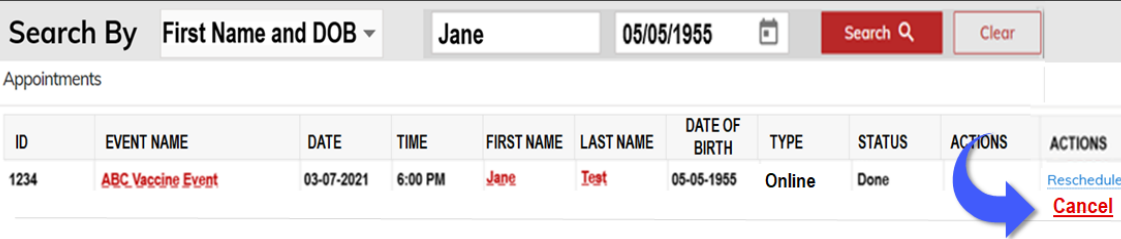

Cancel Appointments

To cancel an appointment, you will need to retrieve the appointment. Review the steps for finding the Appointment ID if the patient doesn't have it.

1. Once you retrieve the record, click Cancel under the far right Actions column.

2. Select the cancellation reason from the dropdown list. Select **Other** if the reasons provided do not describe the patient's reason for cancelling.

   After the cancellation reason is selected, click **Yes.** If you do not want the appointment cancelled, click No to return to the dashboard.

Cancel Appointment

Are you sure you would like to cancel this appointment?

Reason for cancellation:

[▼]

No   Yes

Cancel appointment

Are you sure you would like to cancel this appointment?

Reason for cancellation:

| Changed their mind |
| Administrative Reason |
| Sick |
| Called into work |
| Received vaccine at another facility |
| Experienced reaction to the first dose |
| Other |

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Summary of Appointments

The Appointment Summary feature lets you view and export appointment details for today, tomorrow, and yesterday for any event you have been assigned to. You will be able to filter the appointments to customize what you view and export or if you prefer, you can just export all appointments for the event.

1. To begin, **click Summary** from the Dashboard.
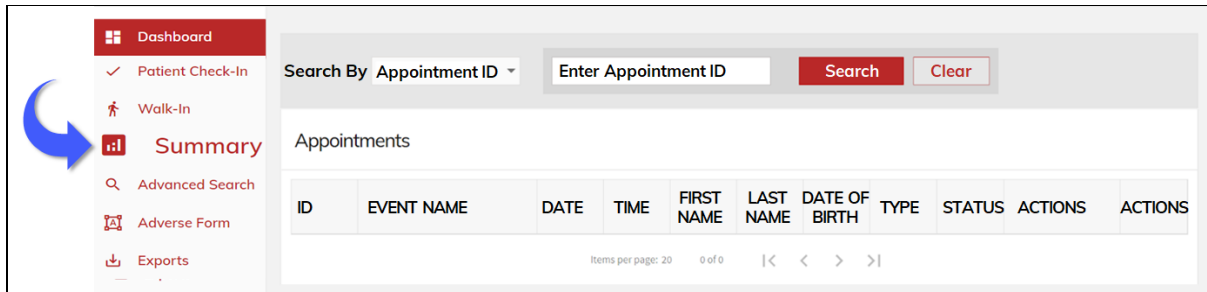
2. Click the down arrow in the Select Event field to review all the events you're assigned to then click the down arrow to select the day, either today, tomorrow, or yesterday.

    Note: If the event is not today, tomorrow, or yesterday, then no appointments will display.
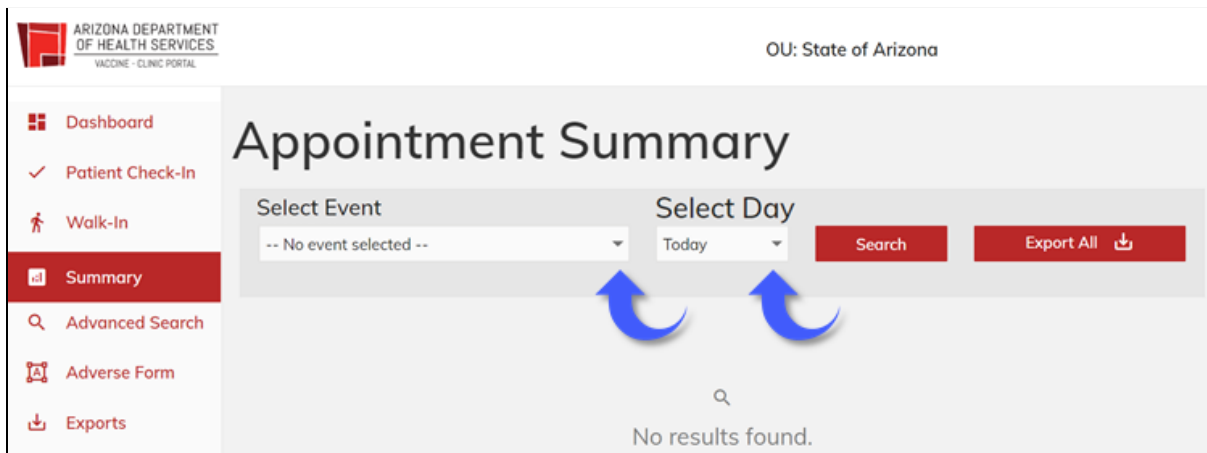
3. Click on the event that you would like to review and which day. If you would like to just review the appointments or you want to select which types of appointments you want to export, **click Search**.

    If you want to export all appointments for the event, click on the event and the day and then click Export All.

You can select the appointments you want to view by clicking one of the following options:

- Scheduled
  - All statuses scheduled out of the number of available appointments
  - The number before the slash (/) refers to the total number of all appointment types for the day you selected (not checked in, cancelled, checked in & vaccinated)
- Scheduled - Not checked in
  - Scheduled appointments that have not yet checked in
- Scheduled - Cancelled
  - Appointments scheduled for the day selected which have been cancelled
- Checked in
  - Appointments that have checked in for the day selected, but have not yet been vaccinated
- Vaccinated
  - Appointments for which vaccinations have been completed

Export Reports

1. To export any of the appointment summaries, just click the desired event and day and click the Export All button.

2. A pop-up will display letting you know that the export has started. Click **Show All Exports** to see the status of the report.

3. While the report is still generating, you will see the status as processing and once it completes, the status will change to completed and you will be able to download the file by clicking **Download.**

Note: a CSV file is generated and will be in your downloads folder.

Export Requests				
ID	REQUEST TYPE	DATE REQUESTED ON	REQUEST STATUS	ACTIONS
553	Appointment	03-07-2021, 08:12	COMPLETED	Download

To return to your Exports later, just click the Exports option from the Dashboard.
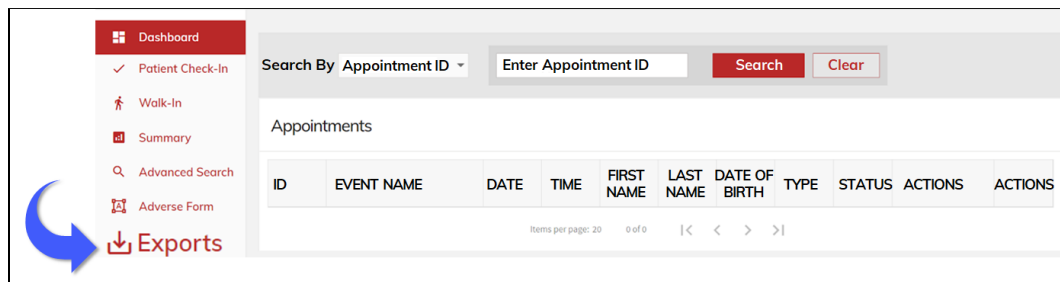
This concludes the instruction guide for staff to schedule, cancel, and reschedule appointments, and generate reports.

Please contact your Site Administrator or Organization Unit (OU) Administrator if you have any questions or need assistance with this portal.