



Training Materials

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HELP!!!

I am having Zotec log-in Issues!

I did not receive an email from Zotec:

1. Please check with your facility/health department POC to ensure that your information was submitted
 - a. If you need vaccine administrator access this will require specific credentials that **MUST** be included
 - b. Look at your inbox to verify you did not mistakenly miss the email. It will come from no-reply@zotecpartners.com. **DON'T FORGET THAT PESKY SPAM FOLDER.**
2. If you had a prior request, reach out to your IDOH POC

I have forgotten my password

1. Go to: <https://recovery.zotecpartners.com/showLogin.cc> (Do not use Internet Explorer or Edge)
2. Select "Reset Password"
3. Follow the prompts and answer the security codes
4. You may also want to restart your computer or clear history if several other staff have also recently signed on to the device.
5. Wait 15 minutes before trying. The sites do not always talk to each other immediately and if you continue to enter your password incorrectly you will lock your account.
6. **YOU CAN ONLY RESET YOUR PASSWORD 1 TIME EVERY 24 HOURS.**

I have locked my account

1. If you have locked your account after resetting your password in the last 24-hours, please
 - a. Wait 30 minutes
 - b. Restart your device
2. If you have not reset your password in the last 30 minutes
 - a. Go to: <https://recovery.zotecpartners.com/showLogin.cc> (Do not use Internet Explorer or Edge)
 - b. Select "Unlock Account"
 - c. Follow the prompts
 - d. You may also want to restart your computer or clear history if several other staff have also recently signed on to the device.
 - e. Wait 15 minutes before trying. The sites do not always talk to each other immediately and if you continue to enter your password incorrectly you will lock your account.
3. Contact your facilities POC that is able to create and reset user accounts.

I logged in but am not at the correct site/under the wrong service (testing vs vaccine)

1. Select the menu button (three bars to the left of the date)
2. Clear out the name of the facility listed in location
3. Start to type the name or use the drop-down option to select the correct location
4. If it is not listed contact your IDOH POC

Helpful Zotec Tips/Notes

Cannot log into your account:

1. Restart your computer – type slow and carefully
2. Ensure that you have fully enrolled in your account
 - a. Email sent from non-reply@zotecpartners.com
 - b. Complete the instructions
 - c. Information for account sent but cannot find the email:
<https://recovery.zotecpartners.com/showLogin.cc>
3. If you do not remember your password or have been logged out
 - a. <https://recovery.zotecpartners.com/showLogin.cc>
 - b. Restart computer
 - c. Wait 15 minutes and try again
4. If you have not received an email from Zotec:
 - a. Ensure that the user request has been submitted by the facility's POC
5. If you are a vaccinator but do not have vaccinator rights, the facility's POC will need to resubmit asking for access and must include credentials of the individual

What eligibility to choose:

- Adults 19 and older:
 - 317 Eligible – Default
- Adults 18 and Minors:
 - Identify what insurance the patient is under
 - If they have Medicaid – Eligible Medicaid/Medicaid Care (Caresource, MHS)
 - If they are American Indian or Alaskan Native – Eligible American Indian/Alaskan Native
 - If they have private insurance – Ineligible (parent insurance, fully insured)
 - If they have public insurance but the insurance does not cover immunizations– Eligible Underinsured
 - If they do not have insurance – Eligible Uninsured
 - If they have public insurance that covers immunizations & CHIP eligible – CHIP Eligible

Important Contacts:

- When there is a request to schedule changes: POC will contact IDOH through redcap
- Recovering/Resetting Zotec: <https://recovery.zotecpartners.com/showLogin.cc>
- To reschedule your COVID-19 vaccine appointment – You can assist the patient or have them call 211
- LINK FOR ACCESS ZOTEC (REQUIRES USER ACCESS): <https://checkin.coronavirus.in.gov/>
- Provider Portal to update your schedule, ask vaccine questions, submit corrections your POC cannot do, etc.: <https://eportal.isdh.in.gov/C19VaxHelpDeskCustomer/>

Special Considerations:

- Patient under the age of 18
 - Should have parental consent
 - Can only receive the Pfizer vaccine (ages 16 and older)
- Had another vaccine in the last 2 weeks
 - CDC recommends waiting 15 days until receiving the vaccine and waiting at least 15 days before getting another vaccine
- If they have had a positive test
 - CDC guidelines state to patients could wait 90 days before receiving a vaccine
 - Some facilities have developed their own policies on when to accept these patients
- Continue to watch for which phase we are delivering vaccinations to and ask for credentials when applicable
 - Some facilities have developed their own policies for those that have already have a scheduled an appointment but do not fall under the correct phase
- The patient wants to know if they can schedule at another location: patients should schedule their second dose at the same facility as their first dose as second dose vaccines if possible. To change facilities, the staff would need to change their location to the site the patient would like to go to. If the staff does not have access to that site, the patient will need to call 211.
- The patient wants to know what they should do if they need to reschedule their appointment
 - Come back to the clinic and ask for a reschedule.
 - Call 211

If you have an error on the vaccine

- If you cannot see how to enter the vaccine information
 - Remove all the vaccines you will not be administering
- If you have entered incorrect vaccine information
 - Select “Edit Vaccine Info”
- If you have deleted the wrong vaccine
 - Click “Add vaccine”
 - Type “Covid”
 - Select the correct vaccine
 - Select to add the vaccine
 - Delete the incorrect vaccine
- If you have also started to log the vaccine information
 - Select “Remove Vaccine Info”
 - Click “Add vaccine”
 - Type “Covid”
 - Select the correct vaccine
 - Select to add the vaccine
 - Delete the incorrect vaccine

Common errors on pages:

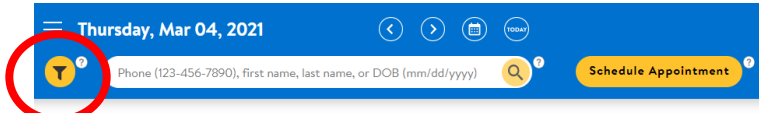
- Cannot send information to IDOH when selecting “Check-In”
 - Check the address and verify zip code
- I am unable to see or select “Check-In”
 - Ensure all information is completed in demographics
 - Ensure both boxes are completed in the “Patient Intake Form”
 - Select eligibility
 - Remove any hyphens or accent marks in the name
- I see the “Check-In” option but it is not checking-in the patient
 - Ensure the address is complete
- Unable to “Complete Appointment” or “Check Out” patient
 - Ensure the vaccine not provided has been removed
 - Ensure that the administer information has been provided
- Errors within Zotec
 - Ensure you are using Firefox, Chrome, or Safari (does not work with Internet Explorer or Edge)
 - If you receive a screen asking for apps after login: go to the URL and type <https://checkin.coronavirus.in.gov/>
 - Receive an Oops Error: go to the URL and type <https://checkin.coronavirus.in.gov/>
 - Receive an Error 503 or 504 error: back and try again. If it keeps occurring, we need to place a ticket with Zotec and should move to paper until it is updated. Sometimes this is a 5-minute process but others it is an hour.

Cannot find the insurance:

- Try different names
- Blue Cross Blue Shield is sometimes listed as BCBS
- Typing in the name of the state helps
- Caresource – Type in Source
- MHS – Manage Health Services
- HIP – MDWISE Health Indiana Plan (start with only MDWISE)
- Out of state – search by state
- Medicare of Indiana – it is listed. Sometimes you need to only put Medicare and add the space, or attempt multiple times typing in “Medicare” or “Indiana” as it may take a few attempts to pull up
- To have added – take a picture of the front and back of the card and submit a ticket to the provider portal

Filters

Where to find the filter option:

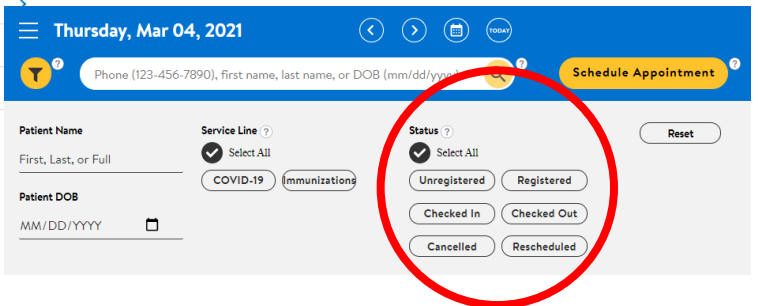


Thursday, Mar 04, 2021

Phone (123-456-7890), first name, last name, or DOB (mm/dd/yyyy)

Schedule Appointment

Time	First Name	Last Name	DOB	Service	Appointment Type	Status
8:50 AM	ZoLocadivya	Test	01/01/2000	Immunizations	COVID VACCIN...	Checked Out
10:50 AM	Paul	Test	01/01/1980	Immunizations	COVID VACCIN...	Cancelled
12:50 PM	New	Test	08/15/2014	Immunizations	COVID VACCIN...	Checked Out
1:20 PM	Test	Test 3 4 2021	01/01/2013	Immunizations	COVID VACCIN...	Rescheduled
1:30 PM	Test	Test 3 4 2021	01/01/2013	Immunizations	COVID VACCIN...	Cancelled



Thursday, Mar 04, 2021

Phone (123-456-7890), first name, last name, or DOB (mm/dd/yyyy)

Schedule Appointment

Service Line ?

Select All

COVID-19 Immunizations

Status ?

Select All

Unregistered Registered

Checked In Checked Out

Cancelled Rescheduled

Reset

Why use the filter:

- Makes the patient list more manageable.
- Able to easily identify no-show appointments.
- Able to see if there if the patient is not checked out.

Who should use filters:

- Registration Staff – Should use the “Unregistered” and “Registered” options. As patients check-in, their list will decrease and incoming patients are more toward the top
- Vaccinators – Should use the “check-in” option. It will allow vaccinators to see only the patients that are waiting for their vaccine, will make their list more manageable, and will easily see if a patient is mistakenly not checked-out.
- Supervisors/Clinic Leads – Should use “Unregistered”, “Registered”, and “Checked-in” status to ensure there are no patients under these statuses at the ends of the day. Any patients that did not come in for their appointment should be canceled. Any patients that are marked as “Checked-in” should be checked-out or canceled if they did not receive their vaccine.

What do the statuses mean:

- Unregistered – The patient has an appointment but there is patient information missing.
- Registered – The patient has an appointment and demographics have been completed by the patient.
- Checked-in – The patient has arrived and is waiting for their vaccine.
- Checked-out – The patient has received their vaccine.
- Canceled – The patient had an appointment but has since canceled their appointment.
- Rescheduled – The patient had an appointment but has rescheduled for a different time and day.

Check-In/Registration Errors and Questions

Special Considerations:

- Monitor patient's age
 - Moderna as well as Johnson and Johnson – Only approved if they are 18 and older; if not you will need to cancel or reschedule their appointment.
 - Under 18 - Should have parental/guardian consent
 - Pfizer- Only approved if they are 16 years or older; if not you will need to cancel or reschedule
- Check to make sure the patient does not already have an upcoming appointment
 - Ensure that it falls inside the correct timeline for a dose
 - Cancel appointment if the appointment is a duplicate or too soon for a second dose
- Continue to watch for which phase we are delivering vaccinations to and ask for credentials when applicable
 - Some facilities have developed their own policies for those that have already have a scheduled an appointment but do not fall under the correct phase
 - IDOH would rather a facility give a vaccine than waste it
- The patient wants to know what they should do if they need to reschedule their appointment
 - Come back to the clinic and ask for a reschedule.
 - They can call 211
 - Patient will receive a noticed to cancel or reschedule the appointment 48 hours before the scheduled appointment.

Common errors on pages:

- Cannot send information to IDOH when selecting “Check-In”
 - Check the address and verify zip code
- I see the “Check-In” option, but it is not checking-in the patient
 - Ensure the address is complete

I am not able to see the “check-in” button

1. Click on “Re-check” to see what required fields are missing
2. Look to make sure the patient's appointment is at the same location that you are signed in under
3. Ensure the address, city, and zip code are all included and did not error out
4. Review the “Patient Intake Form” and “Update Eligibility”

Cannot find the insurance:

- Try different names
- Blue Cross Blue Shield is sometimes listed as BCBS
- Typing in the name of the state helps
- Caresource – Type in Source
- MHS – Manage Health Services
- HIP – MDWISE Health Indiana Plan (start with only MDWISE)
- Out of state – search by state
- Medicare of Indiana – it is listed. Sometimes you need to only put Medicare and add the space, or attempt multiple times typing in “Medicare” or “Indiana” as it may take a few attempts to pull up
- To have added – take a picture of the front and back of the card and submit a ticket to the provider portal

What eligibility to choose:

- Adults 19 and older:
 - 317 Eligible - default
- Adults age 18; Minors:
 - Identify what insurance the patient is under
 - If they have Medicaid – Eligible Medicaid/Medicaid Care (Caresource, MHS)
 - If they are American Indian or Alaskan Native – Eligible American Indian/Alaskan Native
 - If they have private insurance which covers vaccines – Ineligible (parent insurance, fully insured)
 - If they have public insurance but the insurance does not cover immunizations– Eligible Underinsured
 - If they do not have insurance – Eligible Uninsured
 - If they have public insurance that covers immunizations & CHIP eligible – CHIP Eligible



Understanding Overbooking

Do not select "Overbook" unless you are truly overbooking an appointment.

Before Use of Overbooking:

Select a time for your appointment
COVID VACCINE

No Provider Preference

Allow Overbooking

March

Sun 14	Mon 15	Tue 16	Wed 17	Thu 18	Fri 19	Sat 20
--------	--------	--------	--------	--------	--------	--------

11:40 AM	11:50 AM	12:00 PM	12:10 PM	12:20 PM
12:40 PM	12:50 PM	1:10 PM	1:20 PM	1:40 PM
1:50 PM	2:10 PM	2:40 PM	2:50 PM	3:10 PM

Select a time for your appointment
COVID VACCINE

No Provider Preference

Allow Overbooking

February 28 - March 6

Sun 28	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6
--------	-------	-------	-------	-------	-------	-------

We're sorry. There are no appointments available today. Select another day.

Find Next Available Appointment

After Use of Overbooking:

Select a time for your appointment
COVID VACCINE

No Provider Preference

Allow Overbooking

Please confirm provider's availability before overbooking.
Overbooking Reason

WALK IN

March

Sun 14	Mon 15	Tue 16	Wed 17	Thu 18	Fri 19	Sat 20
--------	--------	--------	--------	--------	--------	--------

8:00 AM	8:10 AM	8:20 AM	8:30 AM	8:40 AM
8:50 AM	9:00 AM	9:10 AM	9:20 AM	9:30 AM
9:40 AM	9:50 AM	10:00 AM	10:10 AM	10:20 AM
10:30 AM	10:40 AM	10:50 AM	11:00 AM	11:10 AM
11:20 AM	11:30 AM	11:40 AM	11:50 AM	12:00 PM
12:10 PM	12:20 PM	12:30 PM	12:40 PM	12:50 PM
1:00 PM	1:10 PM	1:20 PM	1:30 PM	1:40 PM
1:50 PM	2:00 PM	2:10 PM	2:20 PM	2:30 PM
2:40 PM	2:50 PM	3:00 PM	3:10 PM	3:20 PM

What do the colors mean?

Red – Either the slot is filled or, if you are view same-day appointments, that the time was in the past (example: if it is 2:00 pm all slots before 2:00 will be red)

White – The appointment is upcoming AND there are slots available to be filled.

When is it appropriate to use overbooking?

When it is at the end of the day and you are adding patients to the schedule because you have doses left.

When the schedule was full, but you have additional doses to provide. Examples would be that you had patients that did not show for their appointment or because you have an extra dose. **These should be approved by the lead/supervisor.**

When your scheduled day is closed to the public due to specific circumstances. **These are rare, are pre-approved, and you will need to manually track appointments for that day to ensure you do not book too many patients.**

How to Cancel & Reschedule at other “locations”

Find your patient by doing a search:

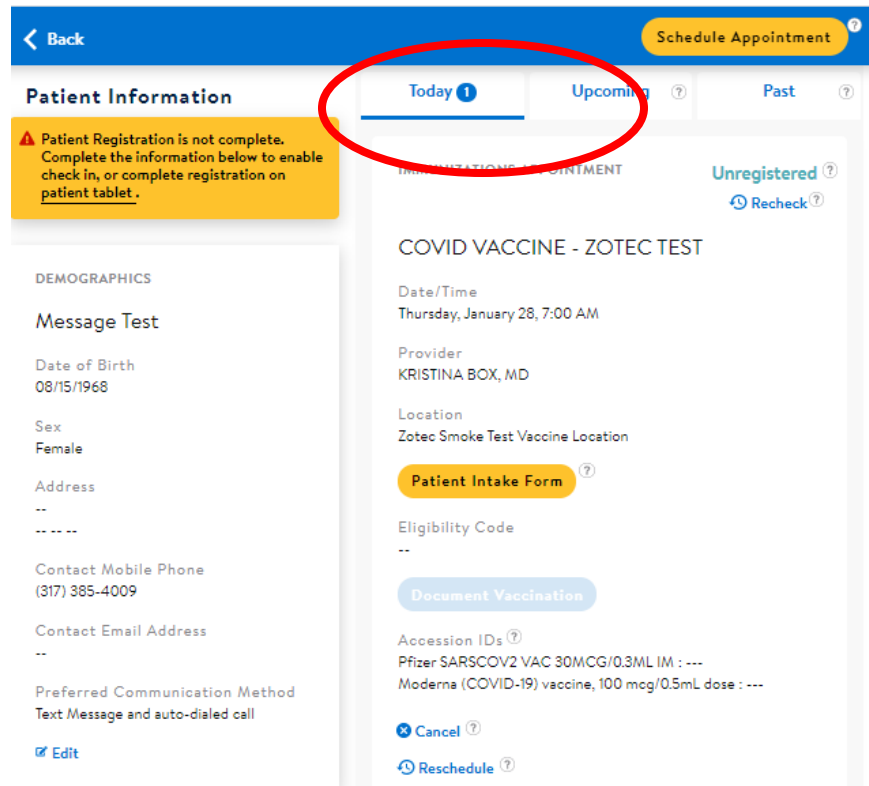


Search bar with a blue header containing a back arrow and a yellow filter icon. The search text is "Patient Test". There is a clear button (x) and a search button (magnifying glass).

Search results for Patient Test

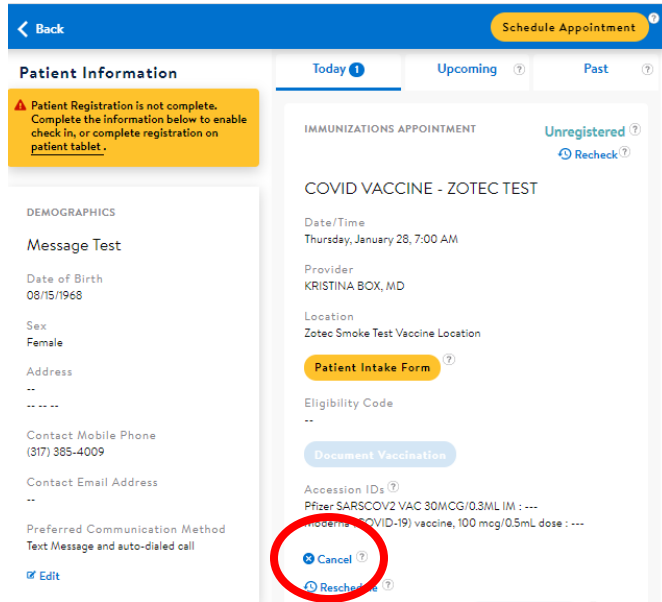
First Name	Last Name	DOB	Sex	ZIP	Phone Number	
Patient	Test	12/23/1960	Other	460324530	(317) 910-7443	>
Patient	Test	01/01/2000	Male	46360	(219) 851-6184	>
PATIENT2	TEST	01/01/2001	Male	460324530		>

Find your appointment on the Patient Information page using the associated tabs



The screenshot shows the "Patient Information" page. At the top, there are tabs for "Today 1", "Upcoming 7", and "Past 7". The "Today" tab is selected and circled in red. Below the tabs, there is a yellow warning box: "Patient Registration is not complete. Complete the information below to enable check in, or complete registration on patient tablet." The main content area shows appointment details for "COVID VACCINE - ZOTEC TEST" on Thursday, January 28, 7:00 AM, at the "Zotec Smoke Test Vaccine Location" with provider "KRISTINA BOX, MD". There are buttons for "Patient Intake Form", "Document Vaccination", "Cancel", and "Reschedule".

Cancel appointment by selecting the cancel option and entering a reason:



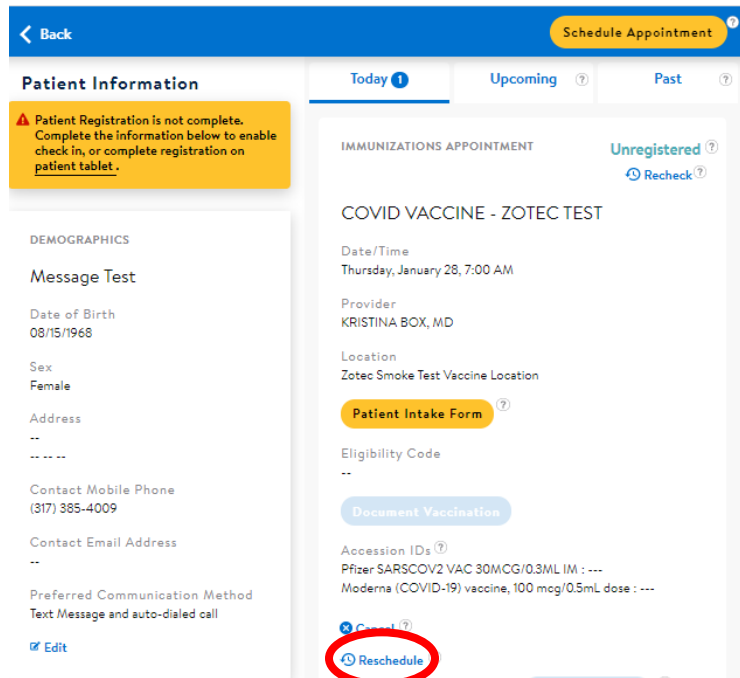
The screenshot shows a mobile application interface for managing appointments. At the top, there is a blue header with a 'Back' arrow and a 'Schedule Appointment' button. Below the header, there are tabs for 'Today', 'Upcoming', and 'Past'. The main content area is divided into two columns. The left column is titled 'Patient Information' and contains a warning message: 'Patient Registration is not complete. Complete the information below to enable check in, or complete registration on patient tablet.' Below this, there are fields for 'DEMOGRAPHICS', 'Message Test', 'Date of Birth', 'Sex', 'Address', 'Contact Mobile Phone', 'Contact Email Address', and 'Preferred Communication Method'. The right column is titled 'IMMUNIZATIONS APPOINTMENT' and shows details for a 'COVID VACCINE - ZOTEC TEST' appointment on Thursday, January 28, 7:00 AM, provided by Kristina Box, MD, at the Zotec Smoke Test Vaccine Location. There are buttons for 'Patient Intake Form', 'Document Vaccination', and 'Accession IDs'. At the bottom of the appointment details, there are two buttons: 'Cancel' and 'Reschedule', both circled in red.

Before we cancel the appointment, please tell us the reason for the cancellation.

REASON

To reschedule an appointment (If the appointment you are rescheduling is at a different location, the system will auto reschedule the appointment to the same location as the original appointment. If you are wanting to have their appointment location to change to your location, you will need to cancel the appointment and then use the "Schedule Appointment" option at the top right corner of the page.)

You will pull up the appointment you want to reschedule and select the reschedule option:



This screenshot is identical to the one above, showing the same appointment details for 'COVID VACCINE - ZOTEC TEST'. In this view, the 'Reschedule' button at the bottom of the appointment details is circled in red, while the 'Cancel' button is not.

Find the day and time that you are looking for:

Select a time for your appointment

COVID VACCINE - ZOTEC TEST

No Provider Preference

Allow Overbooking

January ▾

Sun	Mon	Tue	Wed	Thu	Fri	Sat	>
24	25	26	27	28	29	30	

10:00 AM	10:10 AM	10:20 AM	10:30 AM	10:40 AM
10:50 AM	11:00 AM	11:10 AM	11:20 AM	11:30 AM
11:40 AM	11:50 AM	12:00 PM	12:10 PM	12:20 PM
12:30 PM	12:40 PM	12:50 PM	1:00 PM	1:10 PM
1:20 PM	1:30 PM	1:40 PM	1:50 PM	2:00 PM
2:10 PM	2:20 PM	2:30 PM	2:40 PM	2:50 PM
3:00 PM	3:10 PM	3:20 PM	3:30 PM	3:40 PM
3:50 PM	4:00 PM	4:10 PM	4:20 PM	4:30 PM
4:40 PM	4:50 PM	5:00 PM	5:10 PM	5:20 PM
5:30 PM	5:40 PM	5:50 PM	6:00 PM	6:10 PM
6:20 PM	6:30 PM	6:40 PM	6:50 PM	

Select This Time

Save patient information.

Please complete the fields below.

How can we contact you with the results?

Name

Message Test

Date of Birth

8/15/1968

Sex 

Male

Female

To your knowledge, are you now pregnant?

Yes

No

Contact Preference

Email

Text message and auto-dialed call

Email Address (Optional)

Mobile Phone Number

3173854009

Message and data rates may apply.

[Submit Patient Information](#)

Verify the location is correct:

Ready to confirm your appointment?

Review the details below

COVID VACCINE - ZOTEC TEST

\$0.02

Thursday, January 28, 10:10 AM

[Edit](#) [+ Add services](#)

Patient Name **Message Test**

Date of Birth **08/15/1968**

Phone **(317) 385-4009**

[Edit](#)

Zotec Smoke Test Vaccine Location
11460 N Meridian Street
Suite 200
CARMEL, IN 46032

Vaccinators Tips/Notes

Special Considerations:

- Ask about
 - Past appointments
 - Open any past appointments in Zotec to verify information
 - Some patients may have received a vaccine from a different state or at a facility not using Zotec
 - Ask about allergies and serious reactions
 - Open patient intake form to identify answers submitted
- Age of patient
 - Pfizer is approved if they are over the age of 16
 - Moderna as well as Johnson and Johnson are approved if they are over the age of 18
- Pregnant patients are eligible for the vaccine but should speak to their OB to determine if the vaccine is a good choice for them
- Had another vaccine in the last 2 weeks
 - CDC recommends waiting 14 days until receiving the vaccine and waiting at least 15 days before getting another vaccine
- If they have had a positive test
 - CDC guidelines state to wait 90 days before receiving a vaccine
 - Some facilities have developed their own policies on when to accept these patients
 - Will be at the discretion of the facility

I cannot see how to enter the vaccination information

- You must review the vaccines that you are not going to provide that day

Vaccine Errors (For any patients not checked-out)

- If you have entered incorrect vaccine information – select “Edit Vaccine Info”
- If you have deleted the wrong vaccine
 - Click “Add vaccine”
 - Type “Covid”
 - Select the correct vaccine
 - Select to add the vaccine
 - Delete the incorrect vaccine
- If you have also started to log the vaccine information
 - Select “Remove Vaccine Info”
 - Click “Add vaccine”
 - Type “Covid”
 - Select the correct vaccine
 - Select to add the vaccine
 - Delete the incorrect vaccine

I cannot select “Complete Appointment”

- Open “Document Vaccination
- Ensure all information for administration has been documented



Submitting Corrections for Errors in Vaccination /Appointment Documentation

Items that you can edit through your “Master Vaccinator” or the vaccinator with client admin access:

- Lot Number
- Expiration Date
- Injection Site
- Administered Method

Items that you cannot change and will need to be escalated:

- Location of the vaccine
- Date of Service
- Vaccinator (Will need the vaccinator’s name and email address)

Please use the Vaccine Correction Request excel template to submit corrections to incorrectly documented patients.

All submissions must include the patient's:

- **First name**
- **Last name**
- **DOB**
- **Date of Service (if there is not an error on the date of service please only list “correct date of service”)**
- **Administering Facility.**

The correct information should be noted in the appropriate column. Aside from the 5 mandatory columns, you only need to submit the correct information in the column where appropriate. (Not every column needs to be completed.)

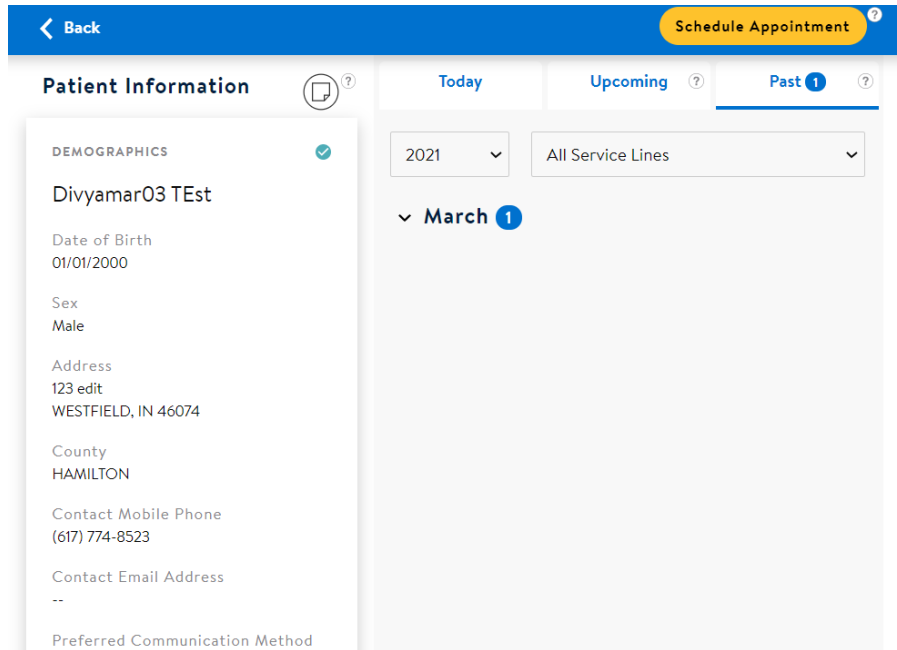
These excels should be submitted to the provider portal by EOD each day for the corrections needed. We understand there maybe corrections needed from days prior to today. Please submit those ASAP.

<https://eportal.isdh.in.gov/C19VaxHelpDeskCustomer/>

IDOH will review the submissions and work with ZOTEC to correct the errors on the back end.

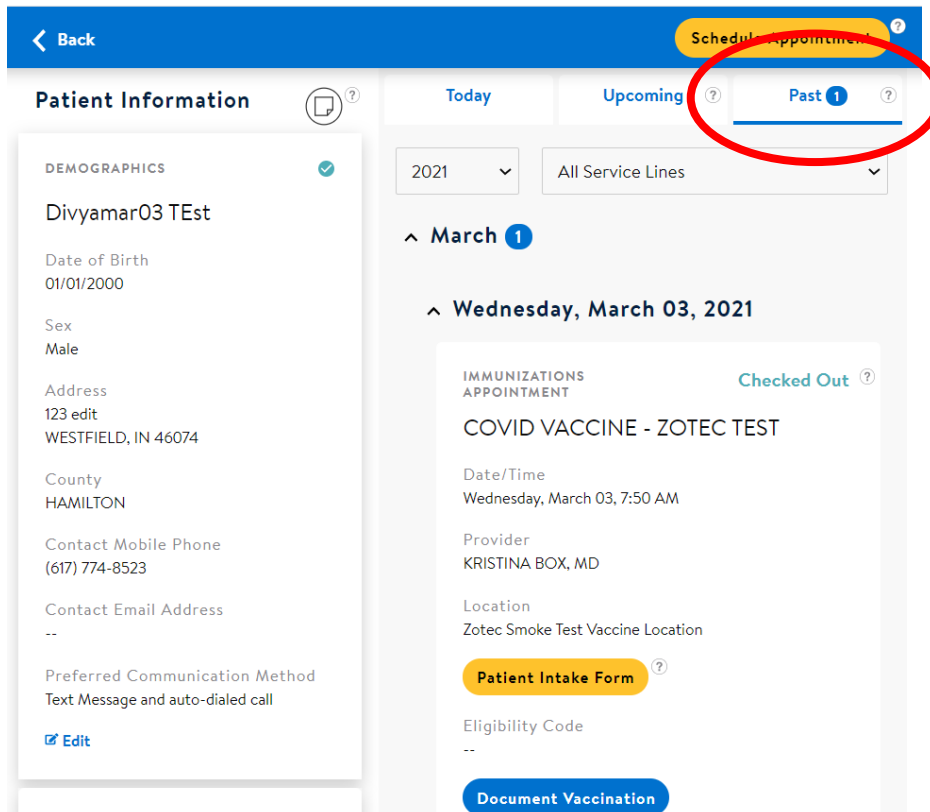
How to Edit Vaccine Information

Pull up patient information page:



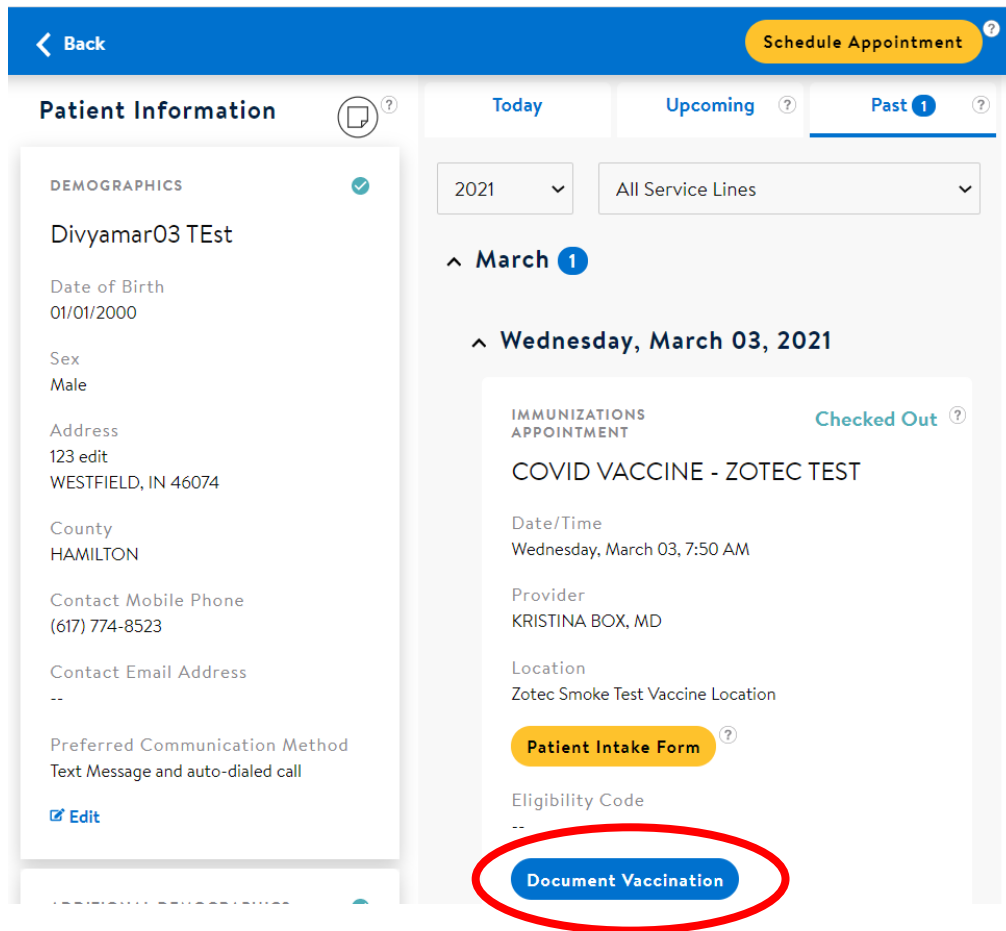
The screenshot shows the patient information page for Divyamar03 TEst. The page is divided into two main sections. On the left is the 'Patient Information' section, which includes demographic details: Name (Divyamar03 TEst), Date of Birth (01/01/2000), Sex (Male), Address (123 edit, WESTFIELD, IN 46074), County (HAMILTON), Contact Mobile Phone ((617) 774-8523), Contact Email Address (--), and Preferred Communication Method. On the right is the appointment section, which has tabs for 'Today', 'Upcoming', and 'Past 1'. The 'Past 1' tab is selected, and a dropdown menu shows 'March 1' with a '1' notification badge. There are also filters for '2021' and 'All Service Lines'.

If the vaccine was prior to today, select the past appointment you wish to view from the “past” tab:



This screenshot shows the same patient information page, but with the 'Past 1' tab selected and circled in red. The appointment section is expanded to show a specific appointment for 'Wednesday, March 03, 2021'. The appointment details are: IMMUNIZATIONS APPOINTMENT (Checked Out), COVID VACCINE - ZOTEC TEST, Date/Time (Wednesday, March 03, 7:50 AM), Provider (KRISTINA BOX, MD), Location (Zotec Smoke Test Vaccine Location), and a 'Patient Intake Form' button. There is also an 'Edit' button in the patient information section and a 'Document Vaccination' button at the bottom.

Select "Document Vaccination" (This will be on the "Today" tab if the appointment was today.)



Back Schedule Appointment

Patient Information

DEMOGRAPHICS

Divyamar03 TEst

Date of Birth
01/01/2000

Sex
Male

Address
123 edit
WESTFIELD, IN 46074

County
HAMILTON

Contact Mobile Phone
(617) 774-8523

Contact Email Address
--

Preferred Communication Method
Text Message and auto-dialed call

Edit

2021 All Service Lines

March 1

Wednesday, March 03, 2021

IMMUNIZATIONS APPOINTMENT

Checked Out

COVID VACCINE - ZOTEC TEST

Date/Time
Wednesday, March 03, 7:50 AM

Provider
KRISTINA BOX, MD

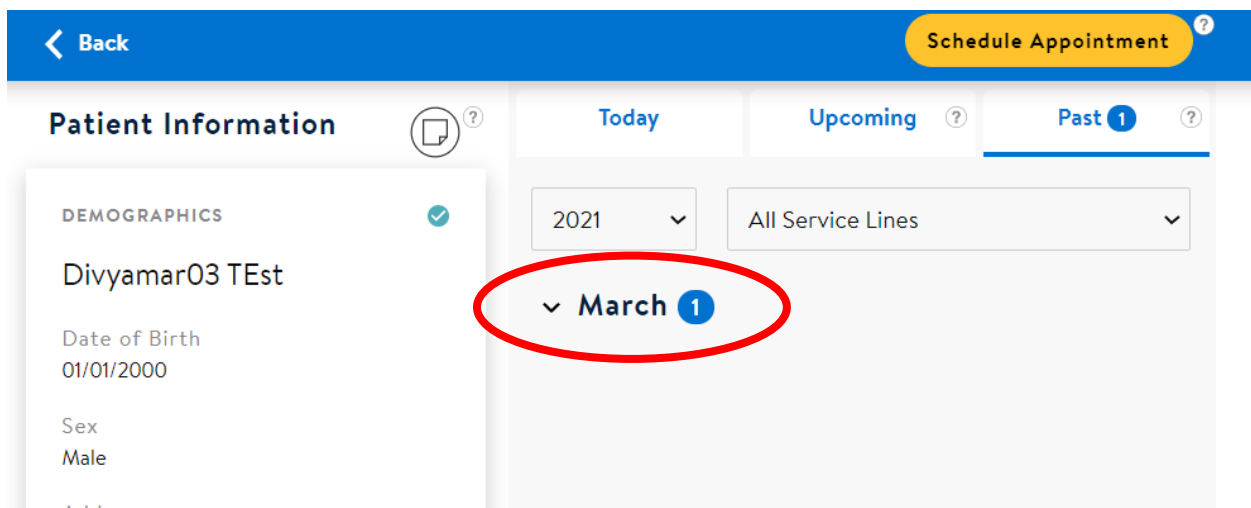
Location
Zotec Smoke Test Vaccine Location

Patient Intake Form

Eligibility Code
--

Document Vaccination

If the appointment was a prior appointment, the page will reset, and you will need to select your appointment again.



Back Schedule Appointment

Patient Information

DEMOGRAPHICS

Divyamar03 TEst

Date of Birth
01/01/2000

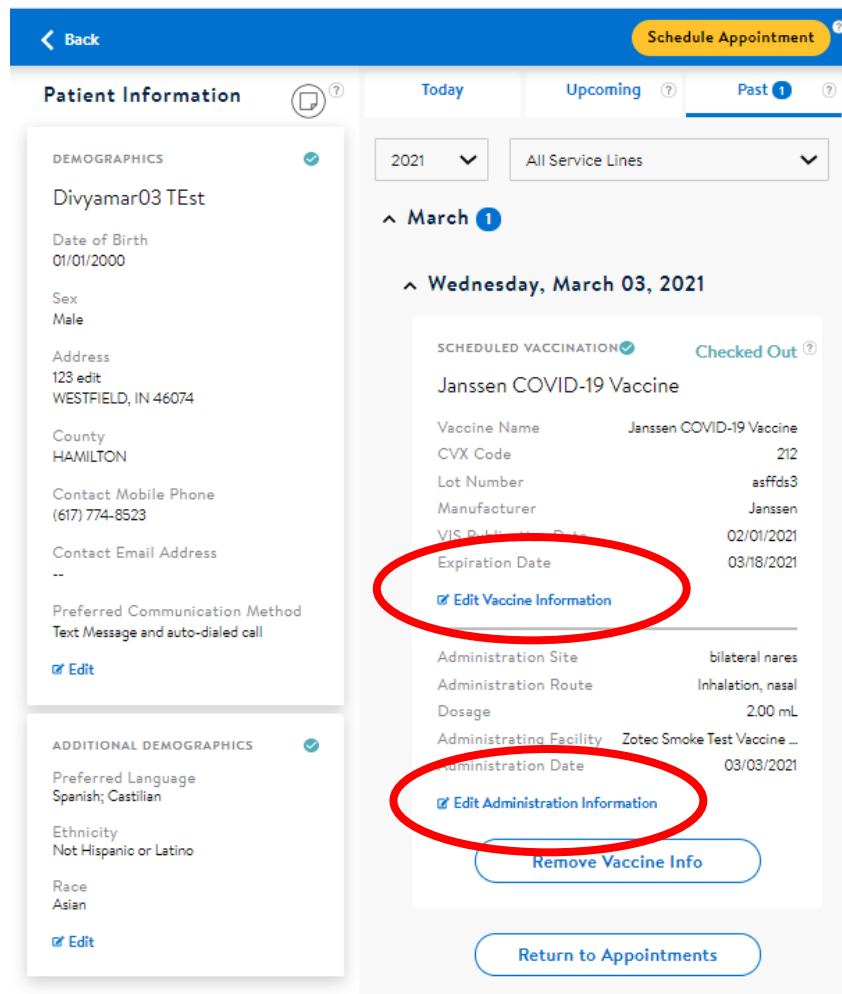
Sex
Male

Address

2021 All Service Lines

March 1

Review the information and determine what needs to be changed. You can then select “Edit ... Information.”



Back Schedule Appointment

Patient Information

DEMOGRAPHICS

Divyamar03 TEst

Date of Birth
01/01/2000

Sex
Male

Address
123 edit
WESTFIELD, IN 46074

County
HAMILTON

Contact Mobile Phone
(617) 774-8523

Contact Email Address
--

Preferred Communication Method
Text Message and auto-dialed call

[Edit](#)

ADDITIONAL DEMOGRAPHICS

Preferred Language
Spanish; Castilian

Ethnicity
Not Hispanic or Latino

Race
Asian

[Edit](#)

2021 All Service Lines

March 1

Wednesday, March 03, 2021

SCHEDULED VACCINATION [Checked Out](#)

Janssen COVID-19 Vaccine

Vaccine Name Janssen COVID-19 Vaccine
CVX Code 212
Lot Number asffds3
Manufacturer Janssen
VIS Date 02/01/2021
Expiration Date 03/18/2021

[Edit Vaccine Information](#)

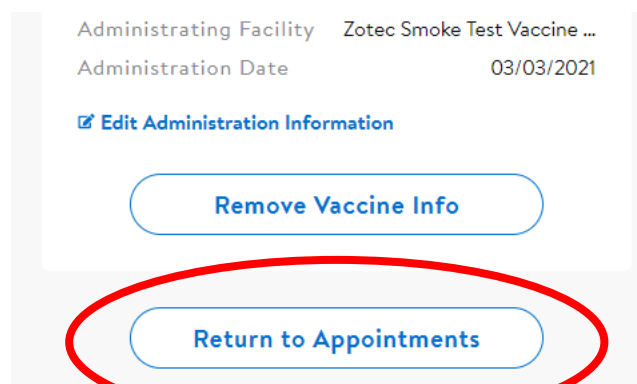
Administration Site bilateral nares
Administration Route Inhalation, nasal
Dosage 2.00 mL
Administrating Facility Zotec Smoke Test Vaccine ...
Administration Date 03/03/2021

[Edit Administration Information](#)

[Remove Vaccine Info](#)

[Return to Appointments](#)

Once the information is correct, select “Return to Appointments”.



Administrating Facility Zotec Smoke Test Vaccine ...
Administration Date 03/03/2021

[Edit Administration Information](#)

[Remove Vaccine Info](#)

[Return to Appointments](#)

Dashboard

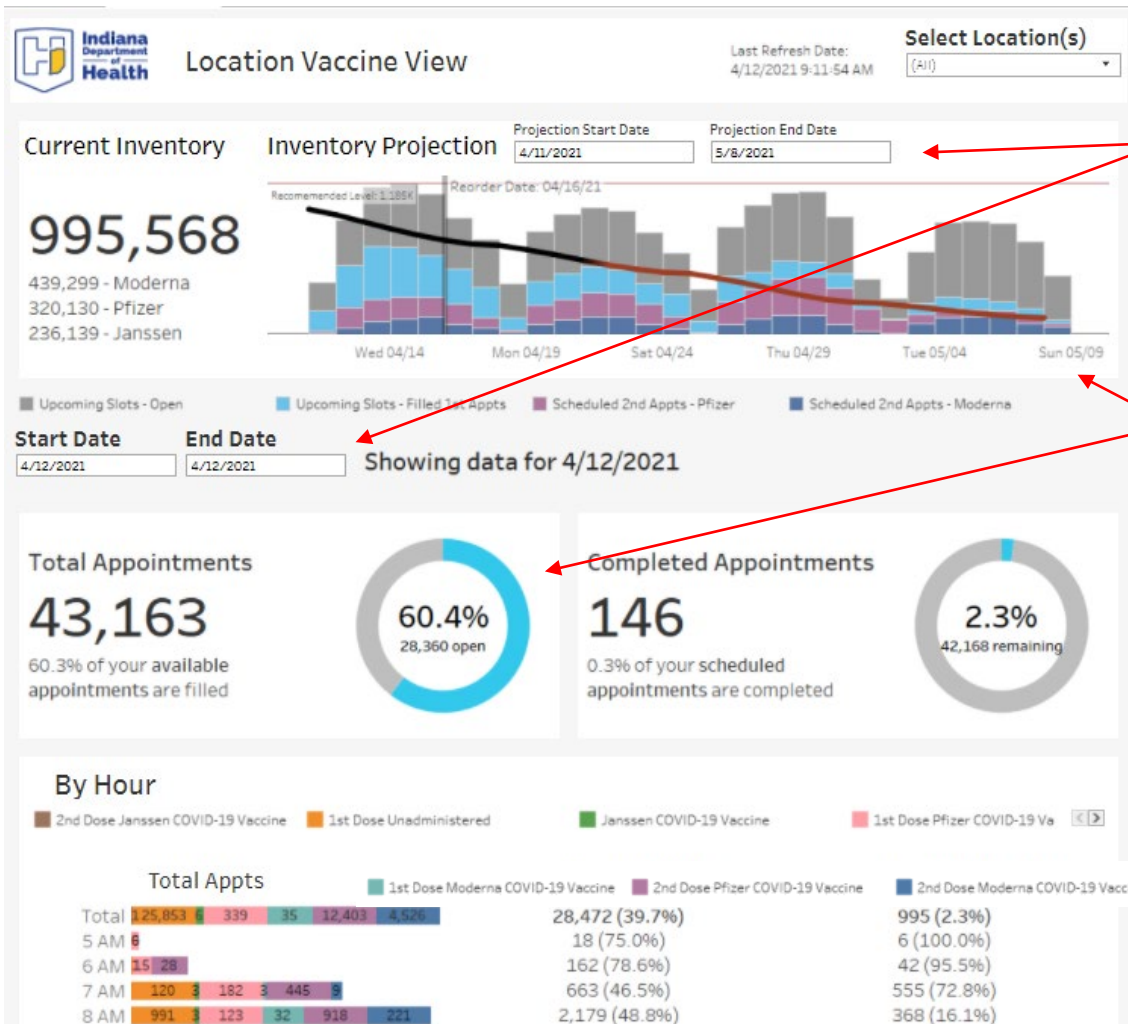
URL:

<https://zview.zotecpartners.com/#/views/ISDHOOperationalTracking/ISDHOOperationalTracking>

What the dashboard can be used for:

- Your estimated inventory compared to appointments (this may not be accurate if you are consistently getting additional doses from vials)
- Information on your appointments:
 - Number of appointments are filled.
 - Number of appointments are open.
 - Number of appointments scheduled are for 1st dose.
 - Number of appointments scheduled are for 2nd dose, and what type of vaccine they are for.
- Patient information for appointments scheduled.
- Number of appointments were overbooked.

Location View (Information is updated hourly, around 10 after the hour)



Select your location(s)

Select date range

Inventory gage

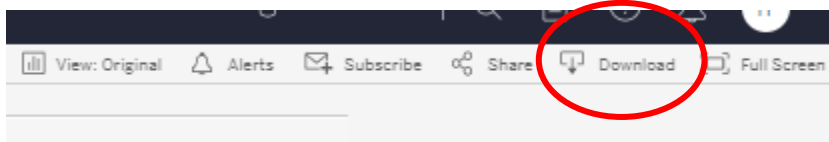
Appointments booked and opened.

How many appointments have been checked-out.

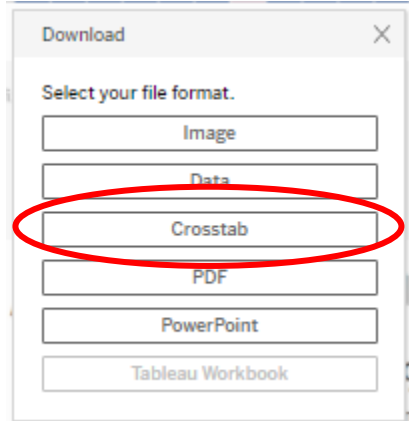
of 1st dose, what those doses were
 # of 2nd dose, and types
Updates hourly through-out they day.

How to pull PHI Information:

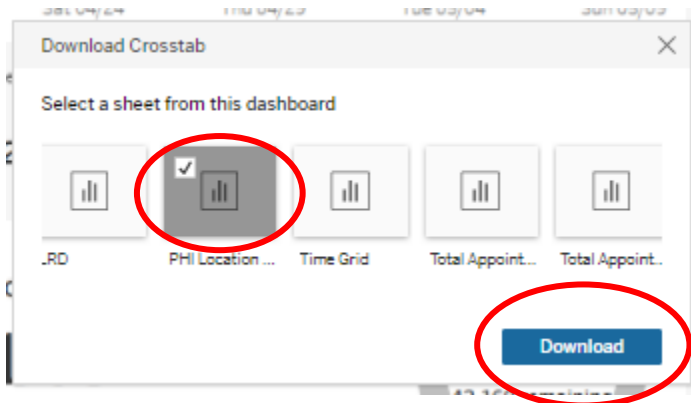
- Use “Location View” tab.
- Select “Download”



- Select “Crosstab” (If not an active option, please cancel, click near in the “By Hour” area, and try again)



- Select “PHI Location..”



- Select “Download”
- Open Excel (Depending on your computer you may have the document automatically open, or show to open at the bottom, or you need to go to your downloads to open)
- Headers for information include the below:

A	B	C	D	E	F	G	H	I
County	LocationID	Location	AppointmentDate	Dose and Vaccine Type	PersonFullName	PersonPhone	Date of Birth	Registration Date

Location Throughput

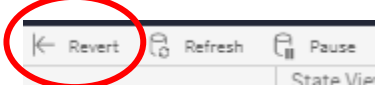
Choose your location(s)

County	Loc. ID	Location	Locatio..	SIIS ID	VFC PIN	Appointment Date	Total Appt Slots	Original Slots	Overbooked Slots	Overbooked %	Filled Appts	Open Appts	Filled %	1st Appts	2nd Appts - Pfizer	2nd Appts - Moderna
MARION	ISDH1496	Indy Motor Speedway Gate2 JVAX	Public	SIISCLIENT135429	LAB001	4/13/2021	6,006	6,000	6	0.10%	6,004	2	100%	5,995	6	3
						4/14/2021	6,004	6,002	2	0.03%	6,004	0	100%	6,002	2	0
						4/15/2021	6,001	5,996	5	0.08%	6,001	0	100%	5,999	2	0
						4/16/2021	6,003	5,999	4	0.07%	6,003	0	100%	5,999	2	2
						4/17/2021	6,000	5,995	5	0.08%	5,996	4	100%	5,991	4	1
						4/18/2021	6,005	6,003	2	0.03%	6,003	2	100%	6,002	0	1
						4/24/2021	6,099	5,607	492	8.07%	6,096	3	100%	5,605	490	1
						4/25/2021	6,001	6,001	0	0.00%	5,984	17	100%	5,981	1	1
						4/26/2021	6,000	6,000	0	0.00%	5,989	11	100%	5,985	3	0
ISDH968	IU METHODIST	NEUROSCIENCE BLDG PVAX	Public	SIISCLIENT135109	H49X01	4/12/2021	812	796	16	1.97%	812	0	100%	170	642	0
						4/13/2021	411	380	31	7.54%	411	0	100%	12	399	0
						4/14/2021	383	362	21	5.48%	383	0	100%	11	372	0
						4/15/2021	384	378	6	1.56%	384	0	100%	7	377	0

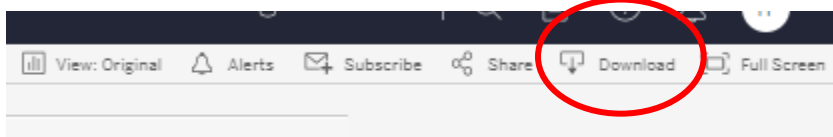
- Identify total of appointments you have per day (Total = Original Slots + Overbooked)
(If the overbooking feature is used on an open slot that slot will change from an "original slots" to an "overbooked". If the number of slots were filled that day it will add an to your existing number it will not take away from your original slots but add to your overbooked.)
- Highlight a day to "keep only" or "exclude"

4/15/2021	6,001
4/16/2021	6,003
4/17/2021	6,000

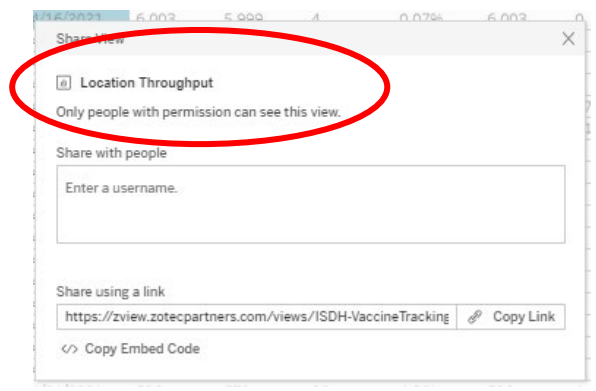
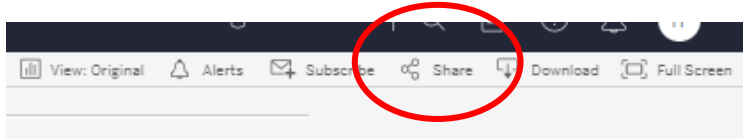
- To go back to prior settings, select "Revert"



- Download to a table or PDF



- Share report with another from your facility that also have access to the dashboard



User Management

What can I do with this access?

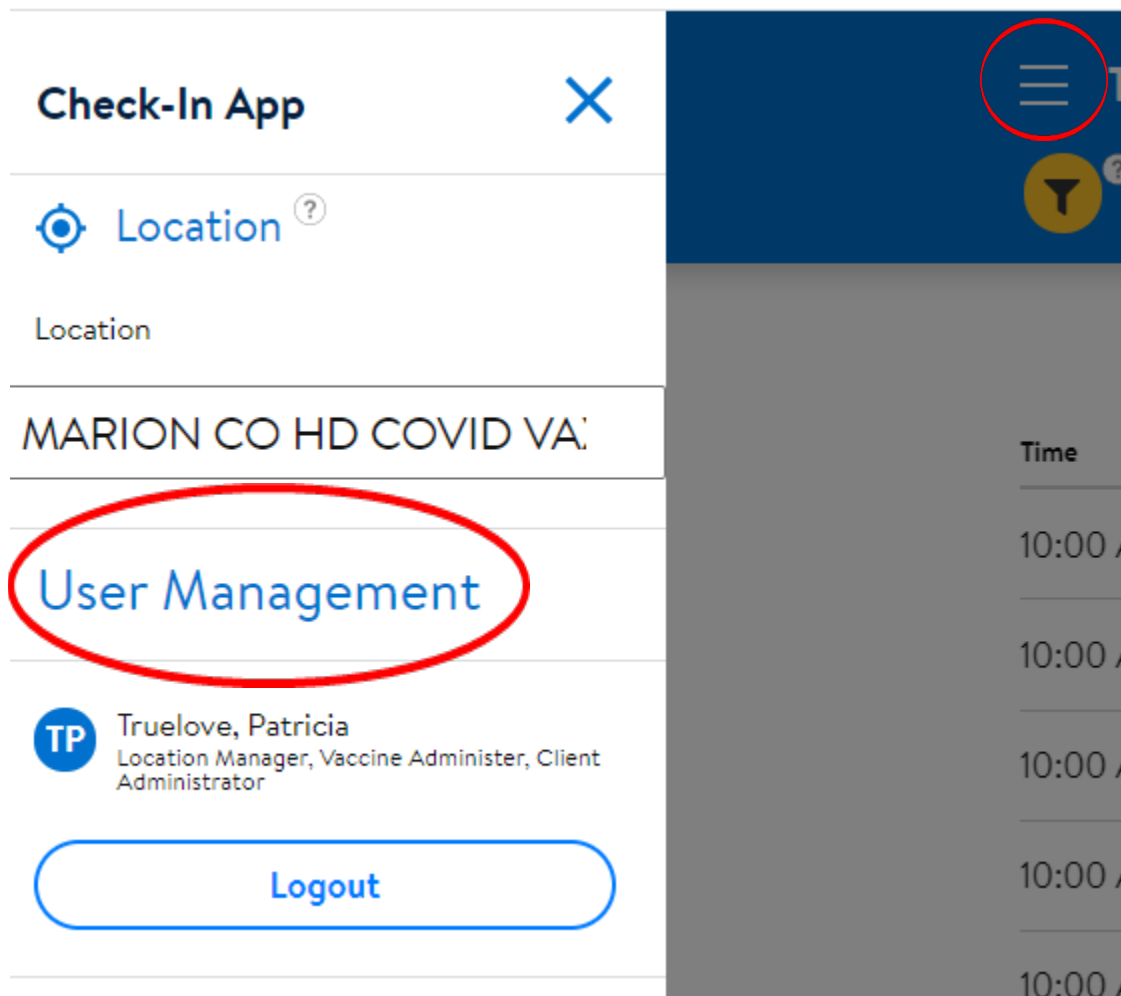
- Create new user accounts
- Change roles for a user
- Reset the user's account if they did not receive their email to set up their account or needs to reset their password
- Update a user's access to include a new location

Training Video:

- <https://youtu.be/FNEElak0TU4>

How do I access User Management?

- Select the three-line, menu icon, to the left of the date.
- Select "User Management" under the location area.



How do I create a new account? ** Before creating a new account you should do a second search to ensure the individual is not already in the system.**

- Search for the individual via: First and/or last name, email address.

Users (25481)

Patricia Truelove

No users match your search.

Users (25481)

ptruelove1@isdh.in.gov

No users match your search.

- Select "New User"

Users (25481)

ptruelove1@isdh.in.gov

No users match your search.

- Enter the first name, last name (with credentials if they could vaccinate at any time), email address, role, and location(s) ***Please ensure the name and email address is correct.**
 - Roles you will need:
 - Location Manager – to be able to schedule appointments, cancel or reschedule appointments, edit information, check-in, and check-out patients.
 - Vaccine Administer – to be able to document the vaccine information and administration information ****Must be able to legally provide vaccines and have credentials listed.**

New User

First Name Last Name

Email

Roles

Location Access

How do I update roles for a user?

- Search for the individual via: First and/or last name, and email address if you do not initially find.

Users (25490)

Eric Beers ✕ 🔍 New User

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Edit ▾

Showing 1 out of 1 users. Previous 1 Next

- Select "Edit" or click on the user's name.

Users (25490)

Eric Beers ✕ 🔍 New User

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Edit ▾

Showing 1 out of 1 users. Previous 1 Next

- Select the role you want to add or remove. If the role is highlighted in blue, this means they currently have access. If it is white, then they do not.

Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Done ^
------	-------	--------------------	--

Email Address

ebeers@isdh.in.gov Send Password Reset Email

Roles

Clinic User
Vaccine Administer
Scheduling User

Location Manager

- Select done.

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Done ^

How do I update locations for a user?

- Search for the individual via: First and/or last name, and email address if you do not initially find.

Users (25490)

Eric Beers

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Edit ↓

Showing 1 out of 1 users.

- Select "Edit" or click on the user's name.

Users (25490)

Eric Beers

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Edit ↓

Showing 1 out of 1 users.

- To add a location, type in the location name. The name will start to auto populate. If it does not, review the list of locations already assigned to see if it is listed. (They are in alphabetical order)

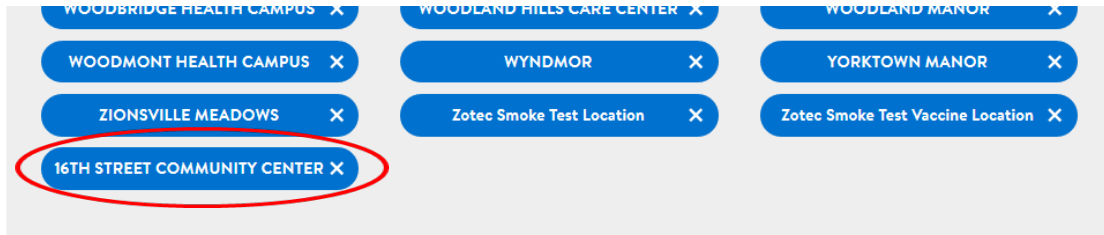
First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	201 E RIPLEY ST RIPLEY CO (+1338 mo... Done ^

Email Address
ebeers@isdh.in.gov

Roles

Location Access

- You know it was added because it will show at the end of the list of locations.



Showing 1 out of 1 users.

Previous 1 Next

- To remove a location, you will find the location and then select the “x”



- Select “Done”.

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Done ↕)

What if my user cannot find their initial email or is locked out and needs a new password?

- Search for the individual via: First and/or last name, and email address if you do not initially find.
- Select “Edit” or click on the user’s name.

Users (25490)

Eric Beers [X] [Q] New User

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	16TH STREET COMMUNITY CENTER (... Edit ↕)

Showing 1 out of 1 users. Previous 1 Next

- Select “Send Password Reset Email”

First Name	Last Name	Email	Location(s)
Eric	Beers	ebeers@isdh.in.gov	201 E RIPLEY ST RIPLEY CO (+1338 mo... Done ↕)

Email Address

ebeers@isdh.in.gov

Send Password Reset Email