

Set Up a Clinic

Purpose:

This document is a quick reference guide for creating a clinic as a Clinic Manager. This is only applicable to COVID functionality.

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For the latest My Turn educational materials, please visit [EZIZ-Covid](#), [EZIZ-Flu](#), [YouTube](#) or the Knowledge Center tab on My Turn Clinic



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Set Up a Clinic

1.	Select the Clinics tab from My Turn Clinic toolbar.
2.	Click the Setup Clinic Wizard button to the right of the screen. See Notes
3.	In Step 1: Set up your clinic , begin by entering the Internal Clinic Name . (Format: Site Name – Location – Vaccine Brand – Dose Type; Ex: Woodland Clinic – Redwood City – San Francisco – Pfizer – Dose 1)
4.	Enter the Public Clinic Name . (Format: Site Name – Location; Ex: Woodland Clinic – Redwood City)
5.	Enter [Clinic Description] in the Clinic Description field.
6.	Enter [Google Maps URL] for the clinic to the Location Map URL field.
7.	Enter the Clinic Address into the Address fields. (Street, City, State, Zip/Postal Code, and Country)
8.	Enter your [Provider Account Name] into the Healthcare Provider Location field by selecting the option from the drop-down menu.
9.	In the Vaccine Type section, select “COVID-19” from the drop-down.
10.	In the Vaccine brand(s) section, check the boxes to indicate what brands your clinic will offer. (Moderna, Pfizer (12+), Pfizer (5-11), Johnson and Johnson)
11.	Check the boxes to indicate the types of appointments your clinic will host. (First Dose Only, Second Dose Only, Additional Dose, Both Doses or Booster). (See Notes)
12.	In the Clinic Settings section, check the boxes to indicate setting up some additional functionality. (See Notes)
13.	Click the Next button to proceed.

Notes:

- Create separate clinics for single dose (first dose only, second dose only, additional dose and booster) and both dose options to ensure Patients are scheduling either one or two appointments as prompted by the clinic's dose type.
- Additional Dose and Booster Dose are available to certain populations, *please review the Dose Type Options Chart in the [CM Resources and Special Use Cases](#) presentation for more information.*
- *The New Clinic Button can also be used to set up a new clinic. It is recommended to use Setup Clinic Wizard to ensure the needed information is entered in the correct format*
- Check the box under **Clinic Settings** to indicate if you would like to [Enable Geofencing](#), [Accept Walk-in Patients](#), [Allow Group Scheduling on My Turn](#) or [Accept pediatric patients only](#) for this clinic. (see [Clinic Details](#) section)

Set Up a Clinic

13.	In Step 2: Clinic Operations , select Available Date from the calendar.
14.	Select the Start Date .
15.	Select the End Date .
16.	Indicate whether your clinic will use a third-party site for scheduling. (See Notes)
17.	Indicate if you would like this clinic visible on the My Turn Public scheduling portal. (See Notes)
18.	When complete, click the Next button.
19.	In Step 3: Clinic Availability follow the on-screen instructions to complete your clinic setup. (See Notes)

Notes:

- Third-party site, If "Yes", you will be prompted to enter an external URL; this is only for clinics with integrated Electronic Health Record (EHR) / Electronic Medical Record (EMR) scheduling.
- Clinic Visibility: If you select "Yes" the clinic will be available for scheduling on the Available Date; you MUST set to "No" to exclude clinic from search until you are ready for patients to start scheduling appointments at your clinic; [see Clinic Details section](#))
- Please see the Add Availability and Vaccine Management Quick Sheet under the "For Clinic Manager" section on [EZIZ](#).

Clinic Details

1.	Select the Clinics tab from the My Turn Clinic toolbar.
2.	Search and select the clinic you wish to view.
3.	To edit information on the Clinic Details tab, click the pencil icon to the right of any field.
4.	Select the Coded Clinic field drop-down arrow to update as it applies to your clinic.
5.	Uncheck the Exclude from Search box to make your clinic visible to patients on My Turn Public on the Available Date.
6.	Checkbox Enable Geofencing
7.	To check for any setup errors and make the clinic live on the public site, click the Activate Location toggle.
8.	Review glossary for Clinic Detail field definitions.

Notes:

- If you have a mobile clinic, please see the mobile clinic "Special Use Case" in the [CM Resources and Special Use Cases](#) presentation on [EZIZ](#) for instruction on setting clinic address.
- Exclude Checkbox: **Do not** uncheck this box until you are ready for patient scheduling, which will show on the Available date.
- The Coded Clinic field is for reporting purposes only and does not affect the status of your clinic.
- New function, the **Activate Location** toggle switch , In the Clinic Detail page if you toggle the switch, it will check if there are any clinic set-up errors and will make the clinic visible on My Turn.

Searching and Filtering Clinics

This feature enables users to quickly find a specific clinic in My Turn Clinic.

1.	From the Homepage, select the Clinics tabs.
2.	Search for a specific clinic by entering one or more of the following fields: <ul style="list-style-type: none">• Clinic Name• Address• Vaccine Type• Start Date
3.	Toggle the Archived slider to Yes to search for archived clinics
4.	Click the Reset button to remove any filters or parameters on the clinics page

Archiving a Clinic

The Archive a clinic feature allows you to archive any unused or inactive clinics.

1.	From the Homepage, select the Clinics tabs.
2.	Search and select the clinic you wish to archive.
3.	On the Clinic Details page, select the pencil icon next to the field you wish to edit.
4.	Check the Is Archived checkbox.
5.	Click Save .

Notes:

- To unarchive a clinic, deselect the **Is Archived** checkbox on the Clinic **Details** page.
- To view the archived clinics, select the clinics tab from homepage and toggle Archived slider to **Yes**.

Generating a Clinic Specific Link

Clinic Specific Links produce a QR code which allows patients to schedule appointments at a particular clinic. This process bypasses the My Turn Public Portal Patient screening questions and gives the patient automatic access to the calendar for appointment scheduling. (See **Notes**)

1.	From the Homepage, select the Clinics tabs.
2.	Search and select the clinic you wish to generate a clinic specific link for.
3.	Click the drop down next to Add Vaccine Administrators and select Generate Clinic Link .
4.	Select Generate .

Notes:

- If Clinic Managers use the clinic specific link functionality, it is recommended to keep clinics separated by vaccine brand and dose type, since scheduling through a clinic specific link bypasses screening questions and shows the clinic's availability calendar despite potential Patient preferences for booking.

Clone a Clinic

Clone Clinic and Availability

Cloning a clinic will duplicate the Details and Availability (including Availability Overrides) of the original clinic, except for the Clinic Name and the Run Batch Cancellation checkbox. (See **Notes**)

1.	Select the Clinics tab from the My Turn Clinic toolbar.
2.	Search and select the clinic you wish to clone.
3.	From the Clinic Details tab, select the Clone Clinic and Availability button.
4.	Enter the new Internal Clinic Name and Clinic Name .
5.	Change any other clinic details as needed before selecting Submit .

Notes:

- **Vaccine Supply, Vaccine Inventory** and **Tags** are not copied in the Clone Clinic process and need to be added separately.

Glossary

<u>Available Date</u>	The first day patients can view and start scheduling appointments on My Turn.ca.gov
<u>Start Date</u>	The first day your clinic is giving shots
<u>End Date</u>	The last day your clinic is giving shots; if you have a both dose clinic this must account for the interval between doses: 20-25 days interval for Pfizer or 27-32 days for Moderna
<u>Time Window Duration</u>	This is the amount of time for each appointment, not including the observation period
<u>Appointments per Time Window</u>	This is the number of appointments made available per "Time Window Duration." This is based on the number of staff available to give vaccines to patients (i.e., if you have 5 staff who can give shots, set appointments per time window to 5)
<u>Clinic Description</u>	This is additional information for patients booking on My Turn.ca.gov in the Clinic Description field (e.g., parking instructions, if your clinic offers walk-ins)
<u>Provider Account</u>	Healthcare provider hosting clinic (e.g., Sutter Health)
<u>Coded Clinic</u>	Residents can schedule an appointment on My Turn.ca.gov if provided an access code. Codes can be single-use or master codes (used to book multiple appointments) Clinics/providers give single-use or master codes to their target population.
<u>Run Batch Cancellation</u>	Allows no-show appointments to be batch cancelled at the end of the day. If you want to enable this feature, click this checkbox once your clinic is closed for the day.

Note:

- Click on any term in the glossary to go back to the original page in the document where the term appeared.

Glossary

<u>Location Pool</u>	A geofenced clinic is tied to is based on the county of the Provider Account's address. For example, if the Provider Account's address is in Alameda County, the Location Pool will be Alameda County.
<u>Region</u>	Region is always set to California.
<u>Location Setting</u>	Location setting is always set to CalVax.
<u>Account</u>	This is the provider account hosting the clinic.
<u>San Diego Site Code</u>	Insert only if you are a San Diego Clinic.
<u>Is Archived</u>	The Is Archived checkbox allows you to check the box to archive vaccine inventory or uncheck to unarchive vaccine inventory.
<u>Accept pediatric patients only</u>	Pediatric clinics are open to patients under 18 years old ONLY. You will need to add multiple vaccine types to support all pediatric age ranges (<11, 12+, etc)
<u>Accept Walk-ins</u>	Selecting this checkbox will generate a tag on the My Turn Public to let patients know this clinic accepts walk-ins. Please see Covid & Flu - Add Tags Quick sheet for more details
<u>Group Scheduling</u>	Selecting this checkbox will generate a tag on the My Turn Public to let patients know this clinic accepts Group Scheduling. Please see Covid & Flu - Add Tags Quick sheet for more details
<u>Enable Geofencing</u>	This restricts who can schedule appointments at your clinic. If checked, the clinic will be available on My Turn only to patients that work and/or live in the defined Location Pool. If you are a Coded Clinic, please reach out to your Clinic Operations Team if you would like to enable geofencing.