COVID – Vaccine Administrator & Assistant Quick Sheet

For the latest My Turn educational materials, please visit EZIZ, EZIZ – Flu or YouTube or the Knowledge Center tab on My Turn Clinic

My Turn Help Desk
Direct Line: 1-833-502-1245, Option 4
Email: My Turn.Clinic.HD@accenture.com

Search for Appointment

Purpose:

This document is a quick reference guide on how to search for appointments as a Vaccine Administrator or VA Assistant. This is applicable to both flu and COVID functionality.

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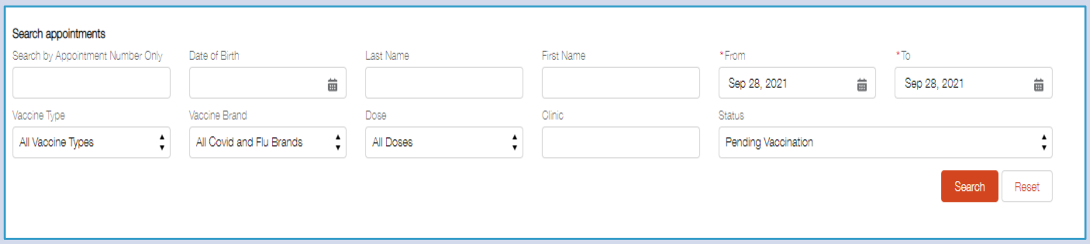
Search for Appointment

1	To search for an appointment, enter **Appointment Number Only** or search using the patient's **Date of Birth, Last Name, First Name, Clinic, Vaccine Type, Vaccine Brand, and/or Date.** 
2	Select the **Status** drop-down menu to filter for specific appointments (See Glossary).
3	To filter rows in appointments' rows in ascending or descending order, click the corresponding column header.

Glossary

Pending Vaccination	Patient is registered for an appointment and has not yet been check-in.
Checked-in	Patient is registered for an appointment and has been check-in by clinic staff.
Vaccinated	Patient's vaccine appointment has been completed
Cancelled	Cancelled appointment.
Pending Complete	Patient is in the waiting/observation period.
Pending Cancellation	Temporary status when registered appointment is initially cancelled.
Resubmission	Patient's IIS record has been cancelled and is awaiting resubmission. The record is unlocked and editable.
All Status	All the above statuses.

Note:

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

My Turn

Add a Walk-In Appointment

Purpose:

This document is a quick reference guide for Adding a Walk-in Appointment as a Vaccine Administrator/Vaccine Administrator assistant. This is applicable to COVID and Flu functionality.

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Add a Walk-In Appointment (Step 1)

1	Select the **Add Walk-In Appointment** tab at the top of the homepage.
2	Select COVID-19 Vaccine from **Vaccine Type** drop-down menu.
3	Enter the patient's background information including**: First Name, Middle Name** (optional), **Last Name, Date of Birth, Mother or Guardian's First Name, Gender, Hispanic/Latino/Spanish Origin** (if applicable), **Race or Nationality**, Email (optional), **Phone Number, Homelessness Status, Industry**, and **Client Type.**
4	If the patient answers **Yes** to having Hispanic/Latino/Spanish origin, you will be asked to select their ethnicity from the drop-down menu.
5	Select the patient's **Race or Nationality** from the drop-down menu.
6	If the patient answers **Yes** to experiencing homelessness, answer the follow-up question about where they sleep.
7	If the patient answers **No** to experiencing homelessness, enter patient (**Industry** and **Client Type** are required).
8	Enter Contact information (**Mobile Number, City, State, Zip Code, County** are required)
9	If the patient requires a **reasonable disability accommodation** to be made for their appointment, check any boxes that apply.

Notes:

- A minor is permitted to schedule an appointment as early as 4 days before their 12th birthday. If the patient is a minor, **Parent/Guardian section** information must be completed
- If the patient is an emancipated minor , they will enter their own information into the Parent and Guardian Information section.
- If the parent mobile number differs from a minors, the parent phone number will be recorded.

Add a Walk-In Appointment (Step 2)
Health Insurance

1	Enter the patient's **health insurance** information
2	If they don't have health insurance, or if they refuse to provide their health insurance information, select "**No**" on the slider and confirm the uninsured status by checking the box below. If the patient does have health insurance, select "**Yes** on the slider**.**
3	If the patient has **Medicare or Medicaid** select "**Yes"** and enter the **MBI or BIC Number** in the additional space provided. Otherwise, select "**No"** and continue.
4	Enter the **Health Insurance Carrier**, **Medical Record Number or Policy Number**, as well as the optional **Group Number** and **Workforce Number.**
5	Select **Yes** or **No** from the drop-down menu as to whether the patient is the **Primary Policy Holder**.
6	If the patient is not the policy holder, enter the **Policy Holder's Name**, **Date of Birth**, and **Relationship to Patient**.

Notes:

- A patient is not required to have insurance in order to receive the COVID-19 vaccine.

Add a Walk-In Appointment (Step 3)
Appointment Details

1	Select **Clinic Name** from the drop-down menu.
2	Select the dose type from the "**Which does is this**?" and **Vaccine Brand** from the drop-down menus
	To create a single appointment, tick the **"Do you want to create a single appointment?** checkbox
3	Select the **Date and Time** for **Dose 1 Appointment and Dose 2 Appointment** (if applicable).
4	**Protect Records in IIS Registry** field, Select **Yes** or **No** (If **No**, all clinicians can view the record, if **Yes** then only your clinician can view the record)
5	Once the appointment details are confirmed, select the **Confirm Appointment** button.

Notes:

- If **Pfizer** is selected, the second dose appointment must be scheduled between **17 and 63 days** after the first appointment; for **Moderna**, it must be scheduled between **24 and 70** days. **Johnson & Johnson** will default to a single dose appointment.
- If an additional dose or booster is selected, **Pfizer and Moderna** will be the only vaccine brands available to select.
- If this appointment is for an additional dose, confirm that the patient states they are immunocompromised and that they received the second dose of vaccine at least 28 days prior.
- If the appointment is for a booster dose, confirm that the patient it has been 6 months since the patient received the second dose.
- You may not schedule a walk-in appointment for a date in the past. To find available clinic hours, use the **View Clinic hours** button.

Add a Walk-In Appointment (Step 4)
Appointment Details

1	**The Create New Appointment window displays. Review the information and click the Confirm Appointment** button. • If the patient has any existing appointments in the system, you will see the appointments listed under the **Existing Appointments Section** of the **Create New Appointment** window. Please follow the onscreen instructions before proceeding to the next step.
2	The Walk-in appointment confirmation displays a message of successful creation of a Walk-in appointment inside a green banner.
3	Select **Return Home** to exit and return to the appointments page.

Edit Walk-in Appointments

1	To edit details in the appointment record, From the **Home** screen; search for the appointment to be edited.
2	The results of the search will display the appointment. Select the drop-down **arrow** on the right side of the appointment. Select **Edit Appointment.** Fields available to edit **Date, Time, Clinic Name and Dose #.**
3	Click **Confirm Appointment** button again to update the appointment record. A green banner will display a message: Success! Appointment Edited.

Patient Check-in

Purpose:

This document is a quick reference guide for checking in a patient as a Vaccine Administrator/Vaccine Administrator assistant. This is only applicable to COVID functionality.

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Check in a Patient

1	To search for an appointment, enter the **Appointment Number Only**, or search using the patient's **Date of Birth, Last Name, First name, Clinic**, **Vaccine Type**, **Vaccine Brand**, **Date** and/or appointment **Status.**
2	Verify the patient's identity (Name, DOB, etc.) located at the top of **Patient Background** section**.**
3	Review the **Patient Background** section and confirm the information entered is accurate.
4	To edit the patient record, click the **Edit** button in the top-right corner which will open a pop-up window where you can make changes. Once edited, click **Save**.
5	Review the patient's responses to the **COVID screening questions**. If an answer has changed, select either **Yes** or **No** to update the response for the appropriate question (See **Notes**).
6	Verify the patient's **Health Insurance** information and update as needed using the **Edit** button.
7	Click the **Yes button** on the **Check-In** slider at the bottom of the page after reviewing the information on the page.
8	Click **Next button** to complete the check-in process.
9	Click the **Back to Appointments** button to return you to your most recent search result (with accompanying filters) on the **Home** tab.

Notes:

- If you need to undo a patient's check-in, you can return to their record after check-in and click the **Cancel Check-in** button.
- If the patient answers **Yes** to any of the **COVID screening questions**, a pop-up notice will instruct you to reschedule the appointment., in this case you can either reschedule or proceed with the appointment depending on your Clinic's policies and procedures.
- Vaccine Administrator Assistants will be redirected to the **Home** tab after checking in a patient, and a message will appear at the top of the screen noting that the patient was checked in successfully.

Enter Vaccine Administration Data

Purpose:

This document is a quick reference guide for entering vaccine administration data after the patient has been checked in, as a Vaccine Administrator. This is only applicable to COVID functionality.

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Enter Vaccine Administration Data

Patient Background

1.	Select the **Home** tab.
2.	Search for all checked in patients by selecting **Checked-in** from the **Status** drop-down menu.
3.	Click the **Search** button. A list of all checked-in patients displays.
4.	Select the [Patient Name] hyperlink of the desired patient. The Vaccine Administration page displays.
5.	Expand the Patient Background section and verify the patient's information. If edits are needed, select the **Edit** button, and update the information in the Edit Contact Information section.
6.	Click the **Save** button to save changes made to Patient Background.

Enter Vaccine Administration Data

Vaccine Disclosure & Consent

1.	Read the Vaccination Disclosure Statement to the patient (see Notes).
2.	Check the box below the Disclosure Statement after receiving written/verbal consent from the patient.

Consent for Minors

1.	Verify the information in the Consent for Minors section
2.	Click the **Edit** button and the Edit Parent/Guardian Information window will display.
3.	Click the check box at the top after verifying that the individual providing patient information is at least 18 years old.
4.	Click the **Save** button.

Notes:

- View the EUA fact sheet for additional information.

Enter Vaccine Administration Data

Vaccination Details

1.	Enter the name of the Vaccine Administrator administering the vaccine in the **Vaccine Administrator** field.
2.	Click the button that corresponds to the **injection site**.
3.	Click the button that corresponds to the **route** that the injection will take.
4.	Enter the date and time of the appointment.
5.	Select the product being administered from the **Product** drop list.
6.	Select the vaccine lot number from the **Lot Number** drop list.
7.	• Click the **Next** button if all information was correct and the vaccine was administered (see **Notes**). • Click the **Previous** button to revisit the COVID screening questions or to review/edit patient background or health insurance information.

Notes:

- To complete the appointment, see the COVID – Document Adverse Reactions Quick Sheet.

Clear a Patient Record

Purpose:

This document is a quick reference guide on how to clear a patient record as a Vaccine Administrator. This is applicable to both flu and COVID functionality.

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Clear a Patient Record

Only Vaccine Administrators can clear a patient record

1	To undo a vaccination, select Vaccinated from the **Status** drop-down menu and locate the patient's appointment using the **Search** button.
2	Once found, click the **Patient name** to open the patient record.
3	Navigate to the **Immediate Adverse Reactions** page by clicking the **Next** button. Continue to click the **Next** Button until you reach the final page.
4	Click the **Clear Form** button at the bottom of the page to clear the vaccination details and reset the patient's record.
5	Click **Proceed** when prompted.
6	You will be redirected to the first page of the patient's record; exit the patient's record by clicking Home or **Back to Appointments** button.

Notes:

- Completed patient records can only be undone within the 4-hour buffer period set between the hours of 12:00am and 7:00pm, or the 1-hour buffer period set between the hours of 7:00pm and 11:59pm. Afterward the specified time, records will be locked for editing and be sent to IIS

Glossary

Pending Vaccination	Patient is registered for an appointment and has not yet been check-in.
Checked-in	Patient is registered for an appointment and has been check-in by clinic staff.
Vaccinated	Patient's vaccine appointment has been completed
Cancelled	Cancelled appointment.
Pending Complete	Patient is in the waiting/observation period.
Pending Cancellation	Temporary status when registered appointment is initially cancelled
Resubmission	Patient's IIS record has been cancelled and is awaiting resubmission. The record is unlocked and editable.
All Status	all the above statuses

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

Document Adverse Reactions

Purpose:

This document is a quick reference guide on how to document adverse reactions as a Vaccine Administrator or VA Assistant. This is applicable to COVID functionality only.

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Document Adverse Reactions – VA Only

1	After entering the **Vaccination Details** on the patient record, click the **Next** button to the **Immediate Adverse Reactions** page.
2	Observe the patient and note any **Immediate adverse reactions they** experience by clicking on the checkbox next to corresponding reaction.
3	If the patient has a reaction that is not listed, click the **Other** checkbox and type the reaction in the space provided. For any additional comments, use the Note section.
4	After documenting any adverse reactions, click the **Complete Appointment** button to check out the patient. This will save the record and update the appointment status to **Vaccinated**.
5	If someone else (e.g., an observer) will be documenting for adverse reactions, click **Assess Later** to exit the page. This will update the appointment status to **Pending Complete**
6	If you return to this page and update any adverse reactions, be sure to click the **Complete Appointment** button to save your changes.

Notes:

- Appointments set to the Vaccinated or Pending Complete status will lock and prevent edits after a 4-hour buffer period between the hours of 12:00am and 7:00pm. Records completed between 7:00pm and 11:59pm are only editable for 1-hour. At the end of the buffer period, records will lock and be sent to IIS.
- Organizations must submit and report Vaccine Administration Data to IIS registries either through My Turn or their own EHR.

Document Adverse Reactions – VA Assistant Only

1	Locate the patient record by selecting **Pending Complete** in the **Status** drop-down menu.
2	After clicking on the patient's name link, the **Immediate Adverse Reactions** page will load.
3	Observe the patient and note any **Immediate adverse reactions** they experience by selecting the checkbox next to corresponding reaction
4	If the patient has a reaction that is not listed, click the **Other** checkbox and type the reaction in the space provided. For any additional comments, use the Note section.
5	After documenting any adverse reactions, click the **Complete Appointment** button to check out the patient. This will save the record and update the appointment status to **Vaccinated**.

Notes:

- Appointments set to the Vaccinated or Pending Complete status will lock and prevent edits after a 4-hour buffer period between the hours of 12:00am and 7:00pm. Records completed between 7:00pm and 11:59pm are only editable for 1-hour. At the end of the buffer period, records will lock and be sent to IIS.
- Organizations must submit and report Vaccine Administration Data to IIS registries either through My Turn or their own EHR.

Glossary

Vaccinated	Patient's vaccine appointment has been completed
Pending Complete	Patient is in the waiting/observation period.

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

Edit a Patient Record

Purpose:

This document is a quick reference guide on how to edit a patient record as a Vaccine Administrator or VA Assistant. This is applicable to both flu and COVID functionality.

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Edit a Patient Record

1	Locate the patient's record under Appointments using the **Search** button.
	Click on **Patient Name** link in the appointment table to open the patient's record.
2	Navigate to the section that needs to be edited by using the **Previous** and **Next** buttons at the bottom of the page.
3	Make any necessary changes to fields using the **Edit** and **Save** buttons.
4	Navigate to the final page and click **Complete Appointment** button to save your changes to the patient record.

Notes:

- You can edit the patient record within 4 hours of completing the appointment (Vaccinated or Pending Complete status) if the patient's appointment was completed between 12:00am and 7:00pm.
- If the patient's appointment was completed between 7:00PM and 11:59PM, you will only have 1- hour before the record is locked and sent to IIS.
- See **Search for Appointment** Quick sheet for details on how to find a specific appointment.

Edit or Bulk Update Appointments

Purpose:

This document is a quick reference guide on how to Edit or Bulk Update appointments as a Vaccine Administrator or VA Assistant. This is applicable to COVID & Flu functionality.

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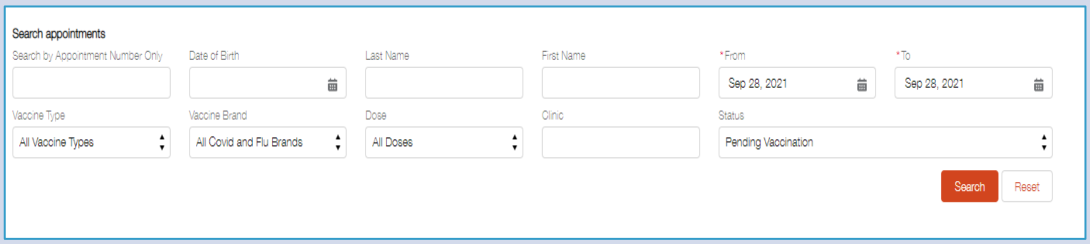
Search for Appointment

1	To search for an appointment, enter **Appointment Number Only** or search using the patient's **Date of Birth, Last Name, First Name, Clinic, Vaccine Type, Vaccine Brand, and/or Date.** 
2	Select the **Status** drop-down menu to filter for specific appointments (See Glossary).
3	To filter rows in appointments' rows in ascending or descending order, Click the corresponding column header for **Date, DOB, Patient Name, Clinic, Status**.

Edit an Appointment

1	To reschedule an appointment or change the vaccine dose number, click the **drop-down arrow** on the right-hand side of the appointment and select **Edit Appointment**.
2	In the pop-up window, update the **Date and Time** of the appointment, and if applicable, update the **Clinic Name** and **Dose Number.**
3	Once complete, click the **Edit Appointment** button to update the information.

Notes:

- Updated appointments will not affect or update existing appointment time slots on My Turn Public.
- An appointment can only be rescheduled if it is in the "Pending Vaccination" status.
- When rescheduling a second dose appointment, ensure it is within the range required by the vaccine brand.
- This season's flu vaccine is recommended for **everyone 6 months of age or older**. The vaccine is available in shot form for everyone (including babies as young as 6 months) with rare exceptions.

Bulk Edit Appointments

1	To update a group of appointments, select the **check box** to the left of all the appointments that require updating.
2	After selecting the appointments, click the **Bulk Update** button.
3	In the pop-up window, choose the field to update including; **Date, Time, Clinic Name, Dose Number,** and **Vaccine Brand**. Click **Edit Appointment.** (See **Notes**)
4	Review the update details, then click the **Confirm** button to complete the update.

Notes:

- For Flu Bulk Updates:
  - There will not be a **Dose Number** field.
  - User must select **Presentation** (syringe, vial, etc.)
- Bulk updated appointments will not affect or update existing appointment time slots on My Turn Public tab.
- My Turn is unable to reschedule appointments for a date in the past.
- If **Dose Number** is being changed to Additional Dose, you must ensure that the patient is immunocompromised and that their appointment is 28 days after their last shot.
- If **Dose Number** is being changed to Booster, you must ensure that the patient has already completed their initial dose series and their appointment is 6 months after their previous shot.
- This season's flu vaccine is recommended for **everyone 6 months of age or older**. The vaccine is available in shot form for everyone (including babies as young as 6 months) with rare exceptions.

Glossary

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Checked-in	Patient is registered for an appointment and has been check-in by clinic staff.
Vaccinated	Patient's vaccine appointment has been completed
Cancelled	Cancelled appointment.
Pending Complete	Patient is in the waiting/observation period.
Pending Cancellation	Temporary status when registered appointment is initially cancelled.
Resubmission	Patient's IIS record has been cancelled and is awaiting resubmission. The record is unlocked and editable.
All Status	All the above statuses

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

My Turn

Cancel or Bulk Cancel Appointment

Purpose:
This document is a quick reference guide to Cancel Edit or Bulk Cancel Appointments as a Vaccine Administrator & VA Assistant. This is applicable to COVID & Flu functionality.

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Cancel an Appointment

1	After logging in, My Turn will automatically navigate to the **Home** tab**.**
2	Use the **Search** function to locate the appointment to be cancelled or edited by selecting "**Pending Vaccination**" from the **Status** drop-down menu.
3	Click the **Search** button.
4	Select the drop-down arrow on the right side of the appointment and select **Cancel Appointment.** The **Cancel Appointment** pop-up window displays.
5	Select a **Reason** from the drop-down menu.
6	Click the **Cancel Appointment** button to complete the cancel function.

Notes:

- Clinic Managers must navigate to the **Appointments** tab.
- An appointment can only be cancelled or edited if it is in the "Pending Vaccination" status.
- This season's flu vaccine is recommended for **everyone 6 months of age or older**. The vaccine is available in shot form for everyone (including babies as young as 6 months) with rare exceptions.

Bulk Cancel Appointments

1	After logging in, My Turn will automatically navigate to the **Home** tab.
2	Use the **Search** function to locate the appointments to be cancelled and select **Pending Vaccination** from the **Status** drop-down menu.
3	Click the **Search** button.
4	Select the checkbox to the left side of the appointments you wish to bulk cancel.
5	Click the **Bulk Cancel** button above the search results. The **Bulk Cancel** pop-up window displays.
6	Select a **Reason** from the drop-down menu.
7	Click the **Cancel Appointment** button to complete Bulk Cancel.

Notes:

- Clinic Managers must navigate to the **Appointments** tab.
- An appointment can only be cancelled if it is in the "Pending Vaccination" status.
- If appointments to be **Bulk Cancelled** have different **Reasons;** group the appointments by reason, then **Bulk Cancel** each group.
- This season's flu vaccine is recommended for **everyone 6 months of age or older**. The vaccine is available in shot form for everyone (including babies as young as 6 months) with rare exceptions.

Bulk Upload Walk-In Appointments

Purpose:
This document is a quick reference guide for **Bulk Upload Appointments** as a **Vaccine Administrator & VA Assistant.** This is applicable to COVID and flu functionality.

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Bulk Upload Template

1.	On the My Turn homepage, click on **Appointment** tab on clinic toolbar.
2.	Select the **More** tab and select the **Download Template** from the drop-down menu.
3.	When the Download Template Window opens, click the **Download Template** button.
4.	A small Download window will display at the bottom left side of the screen. Open the **Template** (after Excel download is complete) and read the detailed instructions.
5.	Enter the required Walk-In Appointments details for each column for each appointment, one appointment per row.
6.	After all Walk-In Appointments have been entered, select the **Export** button in Excel and save the file in a **CSV** format to your PC.
7.	Click the **Choose File** button, select the **CSV file** just created, and click the **Upload File** button, the bulk upload will complete.

Notes:

- This season's flu vaccine is recommended for **everyone 6 months of age or older**. The vaccine is available in shot form for everyone (including babies as young as 6 months) with rare exceptions.
- COVID-19 and flu vaccines can both be uploaded using the downloadable template. Vaccine dose number, brand, and presentation are dependent on the vaccine type selected.
- Funding sources varying depending on the vaccine. Flu vaccines have additional funding options for persons 19 and younger. Indicate “Not VFC Eligible/Private” for all COVID-19 vaccines.