VASE+
Job Aid – Community Event Operations & Check-in Process

Version 1.0

In this job aid, users will learn how check-in community event registrants who have appointments as well as how to create walk-in appointments. This guide applies to the Front Desk and Vaccine Appointment Scheduler roles.

VASE+ Homepage

Today's clinic summary (figure 1) on the VASE+ homepage shows the following statistics:

- Self appointments made
- Call center appointments made
- Total appointments made
- Total opted out
- Yet to make appointments

This dashboard allows for quick review of appointment scheduling status at a high-level.

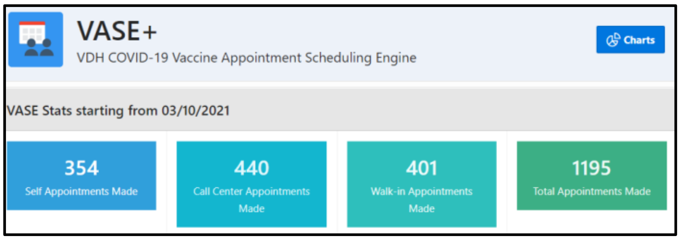

Figure 1 – Today's Clinic Summary

The clinic summary on the home screen displays real-time data to monitor their real-time stats for today's community events (Figure 2). The dashboard features a color-coded status report which displays the following:

- Clinic capacity
- Appointments scheduled (including walk-ins)
- Walk-ins
- Vaccinated
- Checked-ins not yet vaccination
- No-shows. This section displays individuals whose appointment times have passed, and they are yet to check in
- Yet to check-in. This section shows the number of unexpired/active appointments of registrants yet to be checked-in.
- Doses accounted for. This section displays the sum of the vaccinated, yet to check in, and checked-in but not yet vaccinated counts

Today's Clinic Summary

Site Name	Clinic Location	Clinic Type	Clinic Date	Clinic Timings	Clinic Capacity	Appointments Scheduled (Including Walk-ins)	Walk-ins	Vaccinated	Checked-ins Not Yet Vaccinated	No-shows	Yet To Check-in	Doses Accounted For
Hanover Cafe 13185 Hanover Courthouse Road Hanover VA 23069	POLE GREEN ELEM. - IMMUNIZATION	COMMUNITY VACCINATION	09/05/2023	08:00 AM - 05:00 PM	192	0	0	0	0	0	0	0
Hanover Museum 7496 County Complex Road Hanover VA 23069	PATRICK PONTIAC - IMMUNIZATION	COMMUNITY VACCINATION	09/05/2023	08:00 AM - 05:00 PM	96	1	1	1	0	0	0	1

Figure 2 – Today's Clinic Summary Dashboard

To access a community event, click on the community event name found in the clinics listing (figure 3) on the home page.

Figure 3 – Clinics listing

Upon clicking the clinic name, the user will be guided to the clinic's waitlist page (figure 4), which shows a list of patients awaiting scheduling. Users can search registrants by the following criteria:

- Appointment confirmation no.
- First Name
- Last Name
- Email Address
- Phone Number

Each registrant will display once on the waitlist, even if they are scheduled to receive multiple vaccine types. The vaccines that they are scheduled to receive can be found in the vaccine type column.

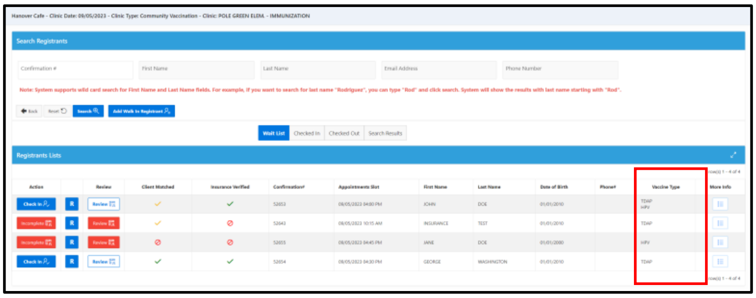

Figure 4 – Community Event Waitlist

Pre-check-in Tasks

Before a registrant can be checked-in, community event staff will need to:

1. Ensure the client's health questionnaire is completed
2. Ensure the client's consent form is completed
3. Verify the client's insurance information
4. Perform a client matching process with WebVISION records

All tasks listed above are completed in the VASE+ system and can occur any time between client registration and check-in.

The status of the pre-check-in tasks is color coded (figure 5) on the waitlist page for both client matching and insurance verification.

Client Matching

- Green check mark: client record has been successfully matched with a WebVISION client record
- Yellow check mark: client matching search has been completed and the client will be added as a new record in WebVISION
- Red alert symbol: Client matching has not yet been completed

Insurance Verification

- Green check mark: Insurance verification has been completed
- Red alert symbol: insurance verification has not yet been completed

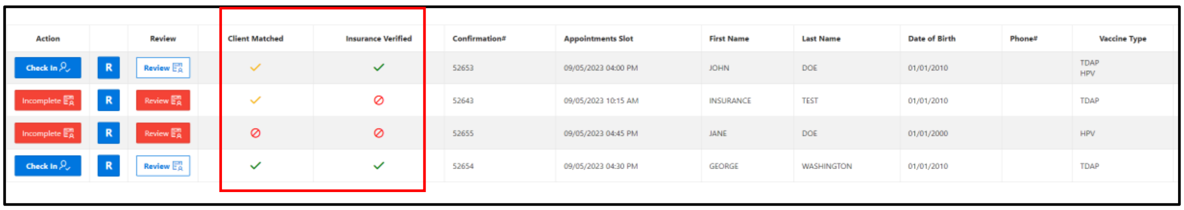

Figure 5 – Pre-Check-In Task Indicators

Pre-check-in tasks can be accessed by clicking the review or incomplete action buttons (figure 6) to direct to the registration confirmation page. Client records that have all pre-check-in tasks completed can be directly checked-in from the waitlist screen. If any information needs to be updated, the review button can be selected.

Figure 6 – Red Review and Incomplete Buttons

The dashboard at the top of the registration confirmation page (figure 7) provides an overview of the status of all pre-check-in task. All the tasks must be completed before a client can be checked in. Red highlighted tasks have yet to be completed, while green highlighted tasks have been completed.

Figure 7 – Pre-check-in dashboard

If registrant information, health questionnaire, or consent form must be completed or updated, select the “edit” button (figure 8) in the corresponding section, change the necessary information, and click “Save” to confirm updates.

The “client matching” button (figure 8) will be highlighted in red if this task has yet to be completed. When you select the button, a pop-up screen will appear (figure 9).

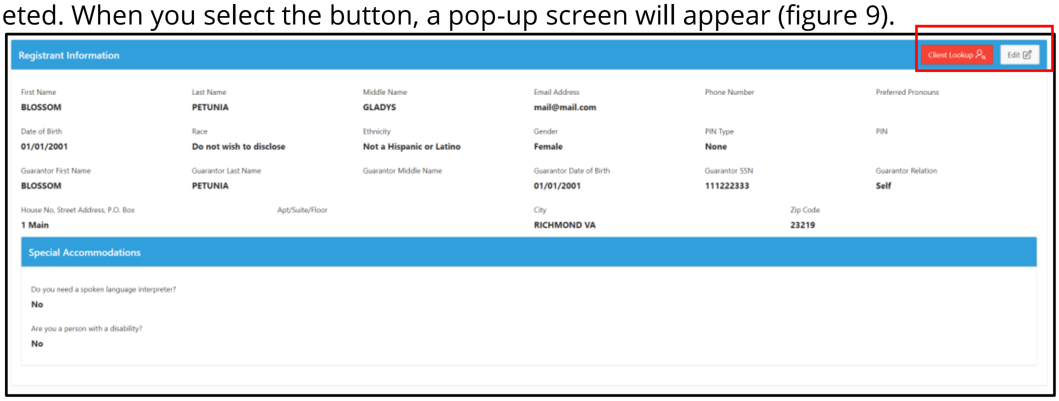

Figure 8 – The “edit” and “client matching” action buttons

The WebVISION Client Lookup field allows for client record lookup and matching with existing WebVISION records. Client record lookup allows for search based on the following criteria:

- First Name*
- Last Name*
- Middle Name
- Date of Birth
- Gender

*At least three characters are required in these fields. Wildcard search can be denoted using the percent symbol (%) (figure 9) to include leading or trailing characters in the search.

Pin is also included in the WebVISION Client Lookup search. This search field is display only. By default, the page displays a WebVISION record if there is an exact pin match.

Figure 9 – The client matching search dialog with wildcard search in the First Name field

WebVISION records that match the search criteria will display under the search. The compare button (figure 10) can be selected to view addition details regarding the client record.

	Compared	First Name	Middle Name	Last Name	Date of Birth	Gender	Pin	Race	Ethinicity	Address	Last Encounter Date	Guarantor
Compare		MICKEY	MORTON	MOUSE	01/01/1970	Male	123456789			25 W MAIN RICHMOND VA-23219	10/23/2023	Guarantor

Figure 10 – Comparing Client Records

The top portion of the compare screen (figure 11) will display a Client Details Report and a Guarantor Details report. These reports each display VASE+ and WebVISION columns that compare the information in each system. Data elements that are an exact match are highlighted in green. Data elements that are not an exact match are highlighted in red.

Registrant Name: SALLY COTTON; DOB: 01/20/2011; Gender: FEMALE

Client Details Report

Attribute	VASE+	WebVISION
First Name	SALLY	SILLY
Middle Name		
Last Name	COTTON	COTTON
Date of Birth	01/20/2011	01/20/2011
Gender	FEMALE	FEMALE
PIN	None-	SSN-444443832
Email	mail22@mail.com	
Phone		
Address	3222 OAK ST RICHMOND VA 23219	3222 OAK ST RICHMOND VA-23235
Race	Do not wish to disclose	
Ethinicity		
Encounter Date		

Guarantor Details Report

Attribute	VASE+	WebVISION
First Name	JANE	SILLY
Middle Name		
Last Name	COTTON	COTTON
Date of Birth	01/01/1980	
Gender		FEMALE
PIN	534797322	SSN:444443832
Phone	LG	
Address		3222 OAK ST RICHMOND, VA-23235
Race		
Ethinicity		
Relationship		

Figure 11 – The Client Details and Guarantor Details reports

The bottom portion of the screen (figure 12) contains the Insurance Details report. This report displays the insurance details on file in VASE+ and in WebVISION.

Insurance Details

Insurance Provider	Other Insurance Provider	Policy ID	Provider Address	Provider Phone #	Policy Holder First Name	Policy Holder Middle Name	Policy Holder Last Name	Policy Holder DOB	Priority
Carefirst Blue Cross Blue Shield		423654657			JANE		COTTON	01/01/1980	1

WebVISION

Guarantor Name	Relationship	Insurance Name	Policy Number	Group Number	Plan Number	Effective Date	End Date	Priority

Figure 12 – The Insurance Details report

Once all details have been reviewed, clinic staff can choose to match the current VASE+ registrant information with the WebVISION record by selecting the check box indicator (figure 13).

Clinic staff will also indicate if the policy holder information should be updated in WebVISION based on the VASE+ registration information by selecting the appropriate radio button. After selections have been made, the record can be matched (figure 13).

Figure 13 – Record matching selections

If VASE+ information (first name, last name, DOB, gender) & pin and pin type is an exact match with a WebVISION record, user will be required to select the match.

If VASE+ information (first name, last name, DOB, gender) is a match with a WebVISION record but pin and pin type do not have a value, or the values do not correspond, user may select a match OR add the client as a new record (figure 14). Before a client can be added as a new record, all matching records must be reviewed in VASE+.

If all search results have been compared but none are a match, the client can be added as a new WebVISION record by selecting the check box at the bottom of the page.

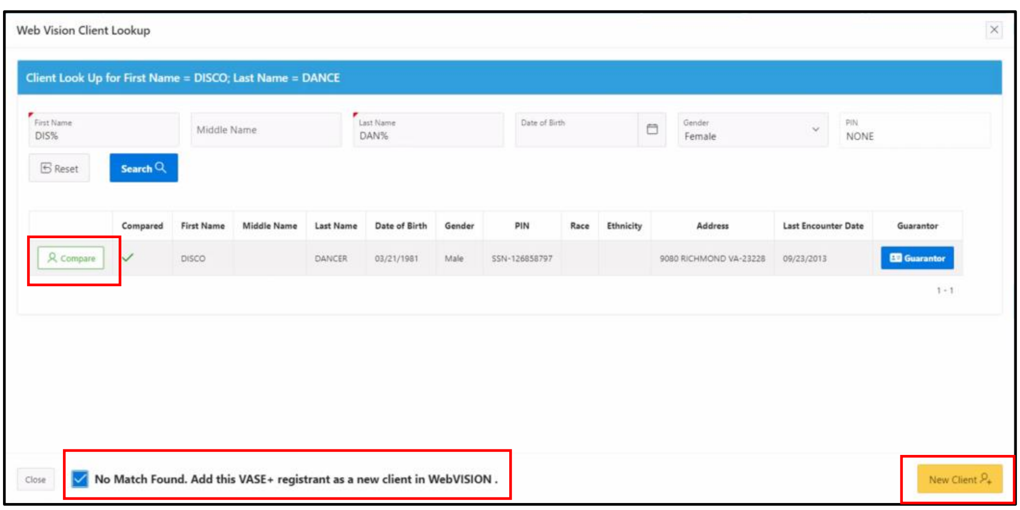

Figure 14 – The "compare" action button and the new client check box

After all pre-check-in tasks have been completed, a check-in action button will become available. Registrant's that have been checked in will move from the waitlist tab to the checked-in tab.