

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.

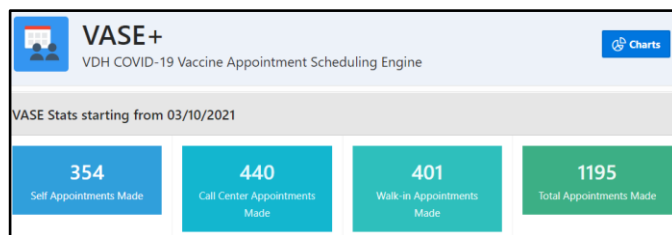


Figure 1 – Today's Clinic Summary

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.

Clinic	Clinic Type	Clinic Date	Clinic Timings	Open POD	Clinic Capacity	Self Scheduled	Call Center Scheduled	Walk-in Scheduled	Total Appys Scheduled	% Filled	Unfilled Slots	Vaccine Name
PATRICK PONTAC - BARRINGTON	COMMUNITY VACCINATION	08/05/2023	08:00 AM - 05:00 PM	Yes	56	2	1	2	5	9%	51	HPV

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.

Action	Header	Client Matched	Insurance Verified	Certification	Appointment Slot	First Name	Last Name	Date of Birth	Phone	Vaccine Type	Show Info
Check in	1003	✓	✓	1003	08/05/2023 04:00 PM	JANE	DOE	01/01/2010		HPV	Info
Check in	1004	✓	✓	1004	08/05/2023 04:00 PM	JANE	DOE	01/01/2010		HPV	Info
Check in	1005	✗	✗	1005	08/05/2023 04:00 PM	JANE	DOE	01/01/2010		HPV	Info
Check in	1006	✓	✓	1006	08/05/2023 04:00 PM	GEORGE	WASHINGTON	01/01/2010		HPV	Info

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

Action	Review	Client Matched	Insurance Verified	Confirmation#	Appointments Slot	First Name	Last Name	Date of Birth	Phone#	Vaccine Type
Check in	R			52653	09/05/2023 04:00 PM	JOHN	DOE	01/01/2010		TDAP HPV
Incomplete	R			52643	09/05/2023 10:15 AM	INSURANCE	TEST	01/01/2010		TDAP
Incomplete	R			52655	09/05/2023 04:45 PM	JANE	DOE	01/01/2000		HPV
Check in	R			52654	09/05/2023 04:30 PM	GEORGE	WASHINGTON	01/01/2010		TDAP

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.

Action	Review	WIS Lookup	Client Matched	Insurance Verified	Confirmation#	Appointments Slot	First Name	Last Name	Date of Birth	Phone#	Vaccine Type	More Info
Incomplete	R				52761	09/29/2023 07:45 PM	INDIANA	JONES	09/09/1988	(111)111-1111	TDAP FLU (WW)	
Check in	R				52760	09/29/2023 07:00 PM	KERMIT	FROG	06/01/1975		TDAP FLU (WW)	
Incomplete	R				52757	09/29/2023 10:00 AM	BLOSSOM	RETUNBA	01/01/2001		MMEN FLU (WW)	

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.

Please review all of the details entered. To make any corrections, please click on the Edit button in the corresponding section.				
Registrant Information Completed	Health Questionnaire Pending	Consent Form Pending	Insurance Details Not Verified	Client Match Pending

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).

The screenshot shows a form titled "Registrant Information" with a blue header. In the top right corner, there are two buttons: "Client Lookup" (with a magnifying glass icon) and "Edit" (with a pencil icon). Both buttons are highlighted with a red rectangular box. Below the header, the form contains several fields for personal and contact information, including First Name (BLOSSOM), Last Name (PETUNIA), Middle Name (GLADYS), Email Address (mail@mail.com), Phone Number, Preferred Pronouns, Date of Birth (01/01/2001), Race (Do not wish to disclose), Ethnicity (Not a Hispanic or Latino), Gender (Female), PIN Type (None), PIN, Guarantor First Name (BLOSSOM), Guarantor Last Name (PETUNIA), Guarantor Date of Birth (01/01/2001), Guarantor SSN (111222333), Guarantor Relation (Self), House No. Street Address, P.O. Box (1 Main), Apt./Suite/Floor, City (RICHMOND VA), and Zip Code (23219). Below this is a "Special Accommodations" section with two questions: "Do you need a spoken language interpreter?" (No) and "Are you a person with a disability?" (No).

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.

The screenshot shows a dialog box titled "Web Vision Client Lookup" with a close button in the top right. The main header of the dialog says "Client Look Up for First Name = DISCO; Last Name = DANCE". Below this, there are several input fields: "First Name" containing "DIS%", "Middle Name", "Last Name" containing "DANCE", "Date of Birth" containing "03/21/1981", "Gender" set to "Female", and "PIN" set to "NONE". There are "Reset" and "Search" buttons at the bottom left. The "First Name" field is highlighted with a red rectangular box.

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	Ethnicity	Address	Last Encounter Date	Guarantor
	MICKEY	MORTON	MOUSE	01/01/1970	Male	123456789			25 W MAIN RICHMOND VA-23219	10/23/2023	

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-23225
Race	Do not wish to disclose	
Ethnicity		
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	584797322	SSN-444443832
Phone	LG	
Address		3222 OAK ST RICHMOND, VA-23225
Race		
Ethnicity		
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										WebVISION								
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	Guarantor Name	Relationship	Insurance Name	Policy Number	Group Number	Plan Number	Effective Date	End Date	Priority
Carefirst Blue Cross Blue Shield		423654657			JANE		COTTON	01/01/1980	1									

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).



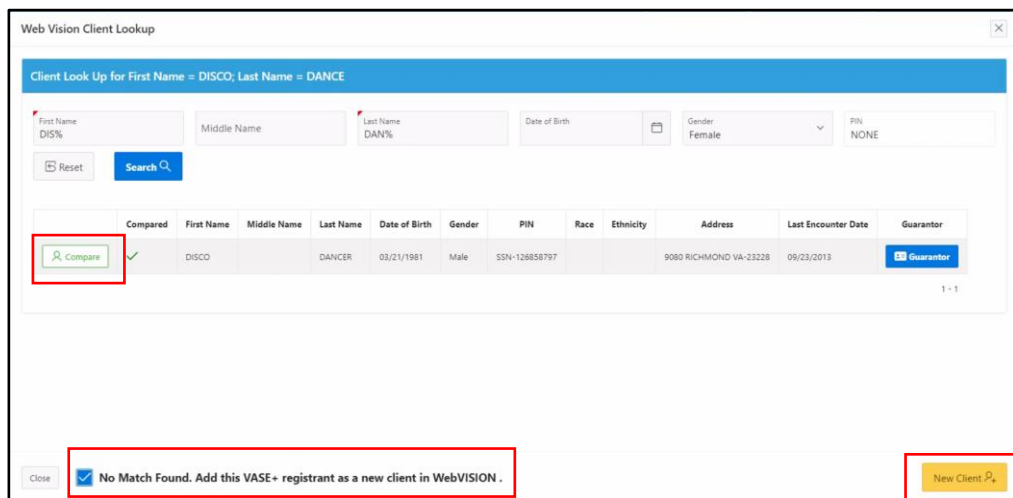
The screenshot shows a form with three main sections. The top section has a checked checkbox labeled "Match current VASE+ registrant information with WebVISION record". The middle section has a radio button selected for "Update the policy holder information in WebVISION" and an unselected radio button for "Do not update the policy holder information in WebVISION". The bottom right corner features a blue "Match" button with a magnifying glass icon. A "Close" button is visible on the left side.

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.



The screenshot shows the "Web Vision Client Lookup" interface. At the top, it says "Client Look Up for First Name = DISCO; Last Name = DANCE". Below this are input fields for First Name (DISCO), Middle Name, Last Name (DANCER), Date of Birth (03/21/1981), Gender (Female), and PIN (NONE). There are "Reset" and "Search" buttons. Below the search fields is a table with the following data:

Compared	First Name	Middle Name	Last Name	Date of Birth	Gender	PIN	Race	Ethnicity	Address	Last Encounter Date	Guarantor
<input checked="" type="checkbox"/>	DISCO		DANCER	03/21/1981	Male	SSN-126858797			9080 RICHMOND VA-23228	09/23/2013	<input type="button" value="Guarantor"/>

At the bottom of the interface, there is a checked checkbox labeled "No Match Found. Add this VASE+ registrant as a new client in WebVISION." and a yellow "New Client" button with a magnifying glass icon. A "Close" button is on the left.

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.