

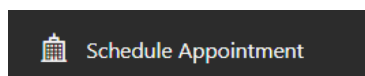
**Objective:** This job aid will guide call center agents through the process of scheduling, registering, and managing client appointments using VASE+.

**Audience:** These features are available to Call Center, Administrator, and Locality Admin roles to display all registrants within the jurisdiction of the operator.

## Scheduling and Registering Appointments

### 1. Access the Schedule Appointment Tab

- Click on “**Schedule Appointment**” from the navigation menu on the left.



### 2. Select Vaccine Type

- From the drop-down menu, choose the **vaccine type** you would like to search for (figure 1).

Note: This will include both community event vaccines (WebVision Integrated) and VASE+ vaccines.

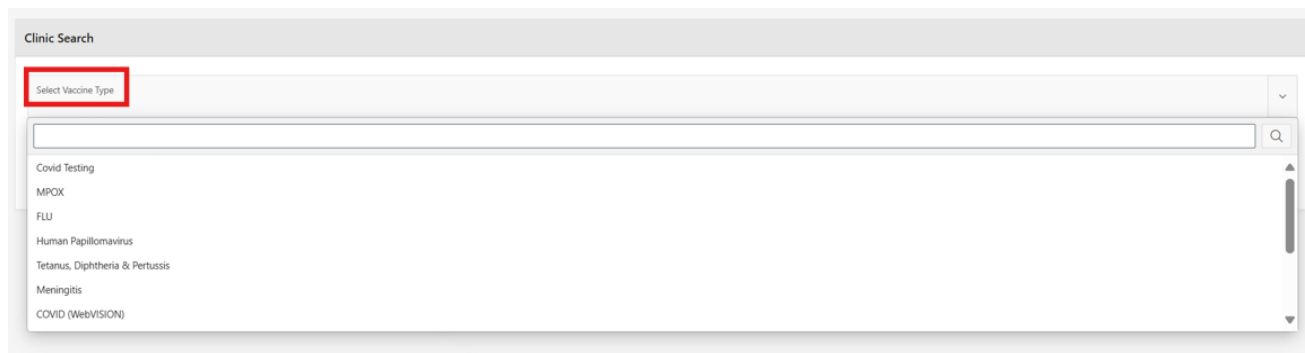


Figure 1 – Select Vaccine Type

### 3. Enter Client Location and Search Parameters

- Enter ZIP Code:** Input the ZIP Code of the client's location.
- Filter Additional Search Parameters:** Optionally, you can filter by distance to ZIP code of clinic date.
- Search for Available Clinics:** Click "Search" to display available clinics (figure 2).
- Only open POD clinics** (those accepting appointments) will be shown.

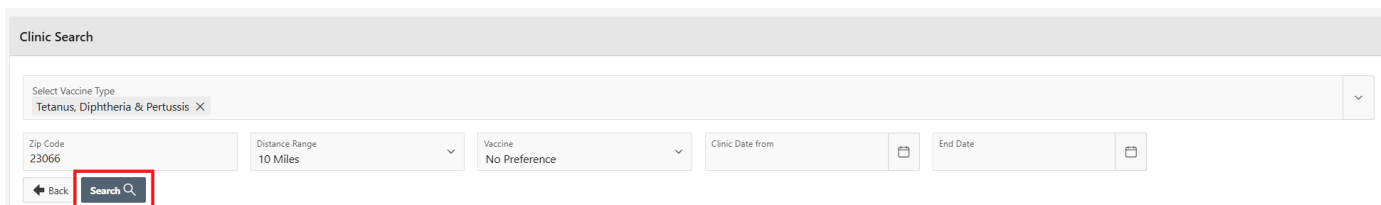


Figure 2 – Clinic Search Page

#### 4. Choose Clinic

- **Select the Available Clinic:** Only open pod clinics will be displayed for scheduling. Choose the relevant clinic from the search results (figure 3).

The screenshot shows the 'Clinic Search' interface. At the top, there's a 'Select Vaccine Type' dropdown with 'Tetanus, Diphtheria & Pertussis' selected. Below this are input fields for 'Zip Code' (23220), 'Distance Range' (10 Miles), 'Vaccine' (No Preference), 'Clinic Date from', and 'End Date'. A 'Search' button is visible. Below the search filters, a section titled 'Open Pod Clinics' contains a table of available clinics. The first clinic, 'GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION', is highlighted with a red box around its 'Select' button.

	Clinic Name	Clinic Date	Clinic Timings	Appointments Available	Vaccine Type	Distance
<b>Select</b>	GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION	05/12/2025	08:00 AM - 05:00 PM	32	TDAP	1 miles

Figure 3 – Select from Available Open Pod Clinics

#### 5. Enter Client Demographics

- **Enter Client's Demographic Information:** Fill in the required demographic details such as name, date of birth, and address.
- **Guarantor Information:** If the client is under 26, the system will prompt for guarantor details. If the client is over 26, this step is not required.
- Verify client information then, **Save and Continue** (figure 4).

The screenshot shows the 'Registrant Information' form. It includes fields for 'First Name', 'Last Name', 'Middle Name', and 'Date of Birth'. Below these are sections for 'Gender', 'Ethnicity', and 'Race'. There are also fields for 'Preferred Pronouns', 'PIN Type', 'PIN', 'Email Address', and 'Phone Number'. A section for 'Address' includes 'House No, Street Address, P.O. Box', 'Apt/Suite/Floor', 'Zip Code', and 'City'. A 'Guarantor' section includes fields for 'Guarantor Relation', 'Guarantor First Name', 'Guarantor Last Name', 'Guarantor Middle Name', 'Guarantor Date of Birth', and 'Guarantor SSN'. At the bottom, there are 'Special Accommodations' questions: 'Do you need a spoken language interpreter?' and 'Are you a person with a disability?'. A 'Save and Continue' button is highlighted with a red box.

Figure 4 – Registrant Personal Information

## 6. Enter Insurance Details

- Check one or more of the insurance plan(s) that pertains to the client.
- Full insurance details are optional but at least one plan option must be selected to proceed.

Note: You do have the option to indicate that the client **is not insured**.

- Verify insurance information then, **Save and Continue** (figure 5).

Figure 5 – Insurance Plan Selection Page

## 7. Select Vaccine(s)

- On the vaccine selection page, you may choose **vaccines** offered at the selected event.
- Select vaccine(s) then, **Save and Continue** (figure 6).

Figure 6 – Selecting Vaccine(s)

## 8. Select Appointment Time

- Choose a **preferred time slot** from available options (figure 7).

**Note:** The appointment time slot selection page is bypassed for school-based clinics occurring during school hours.

First Name <b>JANE</b>	Last Name <b>DOE</b>	Email Address <b>jd@mail.com</b>	Phone Number <b>(111) 111-1111</b>
Clinic <b>COOL SPRING ELEM. - IMMUNIZATION - GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION</b>			
Clinic <b>TDAP</b>			

Appointment Date 12 May 2025				
01:45 PM To :02:00 PM 2 Slots Available	02:00 PM To :02:15 PM 2 Slots Available	02:15 PM To :02:30 PM 2 Slots Available	02:30 PM To :02:45 PM 2 Slots Available	02:45 PM To :03:00 PM 2 Slots Available
03:00 PM To :03:15 PM 2 Slots Available	03:15 PM To :03:30 PM 2 Slots Available	03:30 PM To :03:45 PM 2 Slots Available	03:45 PM To :04:00 PM 2 Slots Available	04:00 PM To :04:15 PM 2 Slots Available
04:15 PM To :04:30 PM 2 Slots Available	04:30 PM To :04:45 PM 2 Slots Available	04:45 PM To :05:00 PM 2 Slots Available		

Figure 7 – Time Slot Selection Screen

## 9. Confirm the Appointment

- Review all information
- Click **"Confirm Appointment"** (figure 8)
- A confirmation is sent via **SMS, email, or both**, depending on client preferences.



### Alert

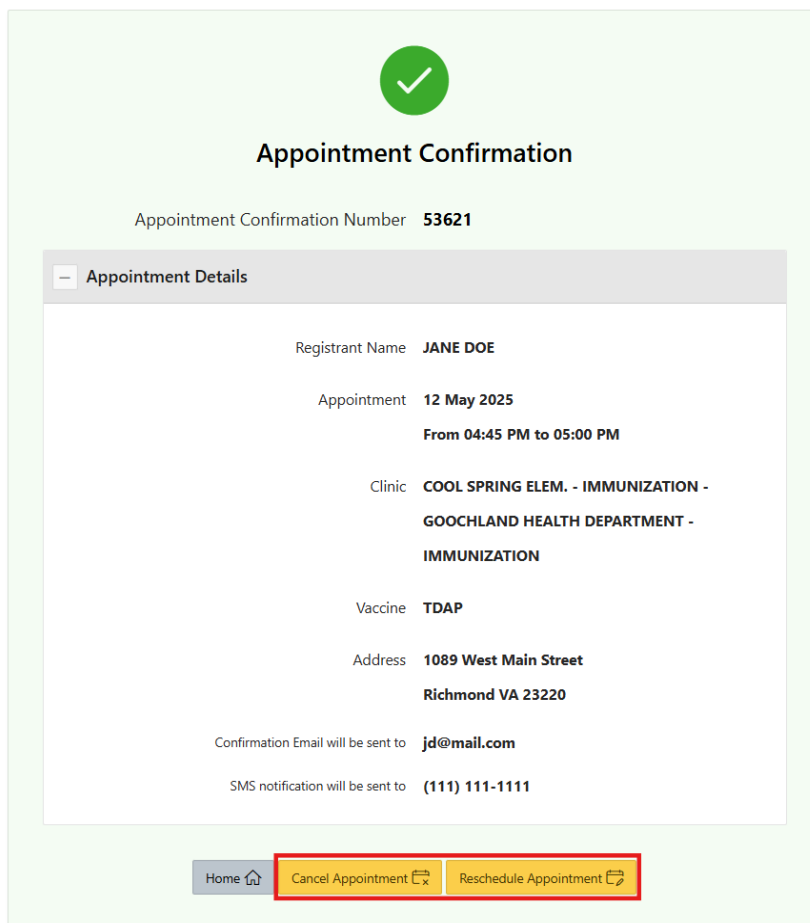
This Appointment will ONLY be scheduled AFTER pressing the "Confirm Appointment" button below.

Appointment Details	
<div style="border: 2px solid red; padding: 5px; display: inline-block;"> <b>Confirm Appointment</b> <input checked="" type="checkbox"/> </div>	
Registrant Name	JANE DOE
Appointment	12 May 2025 From 04:45 PM to 05:00 PM
Clinic	COOL SPRING ELEM. - IMMUNIZATION - GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION
Vaccine Name	TDAP
Address	1089 West Main Street Richmond VA 23220
Confirmation Email will be sent to	jd@mail.com
SMS notification will be sent to	(111) 111-1111

Figure 8 – Confirming Appointment

## 10. Appointment Confirmation

- An **appointment confirmation number** is generated for the client and the following **appointment details** (figure 9) are available in read only format:
  - Appointment Confirmation Number
  - Registrant Name
  - Appointment Date & Time
  - Clinic
  - Vaccine(s)
  - Address
  - Email
  - Phone Number
- From here you do have the option to **Cancel** or **Reschedule** an appointment
- Clicking "**Home**" will take you to the VASE+ homepage



The screenshot displays the 'Appointment Confirmation' page. At the top, there is a green circular icon with a white checkmark. Below it, the title 'Appointment Confirmation' is centered. Under the title, the 'Appointment Confirmation Number' is listed as '53621'. A section titled 'Appointment Details' is expanded, showing the following information: Registrant Name: JANE DOE; Appointment: 12 May 2025, From 04:45 PM to 05:00 PM; Clinic: COOL SPRING ELEM. - IMMUNIZATION - GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION; Vaccine: TDAP; Address: 1089 West Main Street, Richmond VA 23220; Confirmation Email will be sent to: jd@mail.com; SMS notification will be sent to: (111) 111-1111. At the bottom of the page, there are three buttons: 'Home' with a house icon, 'Cancel Appointment' with a calendar and 'X' icon, and 'Reschedule Appointment' with a calendar and arrow icon. The 'Cancel Appointment' and 'Reschedule Appointment' buttons are highlighted with a red border.

Appointment Confirmation

Appointment Confirmation Number **53621**

**Appointment Details**

Registrant Name **JANE DOE**

Appointment **12 May 2025**  
**From 04:45 PM to 05:00 PM**

Clinic **COOL SPRING ELEM. - IMMUNIZATION -  
GOOCHLAND HEALTH DEPARTMENT -  
IMMUNIZATION**

Vaccine **TDAP**

Address **1089 West Main Street  
Richmond VA 23220**

Confirmation Email will be sent to **jd@mail.com**

SMS notification will be sent to **(111) 111-1111**




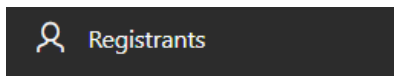
Home  **Cancel Appointment**  **Reschedule Appointment** 

Figure 9 – Appointment Confirmation Details

## 11. Manage or Update Appointments

- Navigate to the "Registrants" tab



- Search for a registrant by **First / Last Name**

**Note:** Additional search fields are available if needed.

- Click the **edit icon** beside their name (figure 10).

Search Registrants

First Name: JANE, Last Name: DOE, Email Address, Phone Number, Appointment Confirmation Number, Date of Birth, Yet to Make an Appointment: ☐

Reset Search

Actions Download

	First Name	Last Name	Date Of Birth	Email Address	Phone Number	Clinic Type	Vaccine Name	Appointment Date	Appointment Confirmation Number	Appointment Status	Clinic Location	Registration Type	Created Date
	JANE	DOE	01/01/1990	jd@mail.com	(111) 111-1111	COMMUNITY VACCINATION	TDAP	05/12/2025 04:45 PM	53621	Scheduled	COOL SPRING ELEM. - IMMUNIZATION - GOOCHLAND HEALTH DEPARTMENT - IMMUNIZATION	Open Pod- Call Center	5/12/2025

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Figure 10 – Search Registrants Page

- From the client details page (figure 11), you can:
  - View vaccination status
  - Reschedule
  - Cancel
  - Schedule additional vaccinations
  - Schedule testing appointment

First Name : JANE Last Name : DOE Date of Birth : 01/01/1990

Back Save Schedule Vaccination Appointment Schedule Testing Appointment

First Name: JANE, Last Name: DOE, Date of Birth: 01/01/1990, Preferred Pronouns: --SELECT--, Email Address: jd@mail.com, Phone Number: (111)111-1111, Address: JD st, GWYNN VA, 23066, Status: Active

Comments: LHD Comments, Comments: Call Center Comments

Appointment(s) Status

Conf #	Confirmation	Appointment Status	Appointment Date	Clinic Type	Vaccine Name	Cancel Appointment	Reschedule Appointment
53621	Confirmation	Scheduled	05/12/2025	TDAP	ADACELTDAP BY SANOFI PASTEUR FOR 10-64 YRS.	Cancel	Reschedule

Figure 11 – Client Appointment Management Page