color Color User Training: MDPH Vaccine Platform

January 24, 2024



- 1. What is Color?
- 2. Staff Management Tool
- 3. Appointment Management Tool
- 4. Creating a new site
- 5. <u>Inventory Management Tool</u>
- 6. Vaccination Tool
- 7. <u>Population Management Tools</u>
- 8. **Dashboard Overview**
 - a. Appointments Dashboard
 - b. Vaccines Dashboard
 - c. <u>Insurance Dashboard</u>
- 9. Resources
 - a. Knowledge Base
 - **b**. Color Support
 - c. MDPH Best Practices

01

What is Color?



Color Platform Overview

What is Color?

The Massachusetts Department of Public Health (MDPH) provides access to a digital interface known as Color via the Vaccine Clinic Management Platform (VCM), aimed at helping health providers within the state optimize and streamline their vaccination clinics.

Color gathers registration information, schedules appointments, assist with billing processes, and seamlessly transmit vaccination records to the Massachusetts Immunization Information System (MIIS).

Navigation Bar

What is Color?

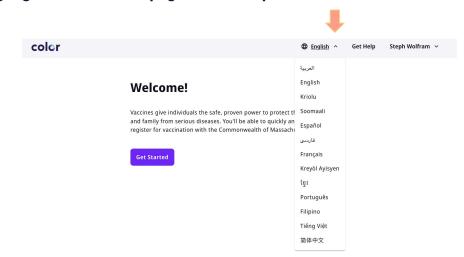
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13 Languages Available in Color

- Arabic
- 2. English
- 3. Creole Cape Verdean
- 4. Somali
- 5. Spanish
- 6. Farsi/Persian
- 7. French
- 8. Haitian Creole
- 9. Cambodian (Khmer)
- 10. Portuguese
- 11. Filipino/Tagalog
- 12. Vietnamese
- 13. Chinese (Simplified)

Patients can register in one of these languages by clicking this drop down menu and selecting their language of choice. The page will then update with the translation



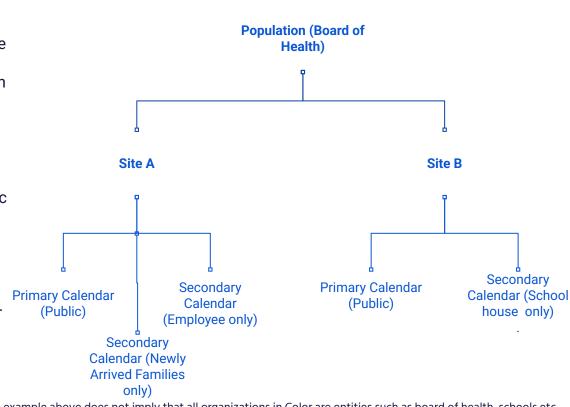
If you want to see which language patients registered in to understand what their preferred language might be, refer to this slide with instructions on how to pull this information in dashboards

Key Terms and Structure

- Populations: The Board of Health <u>or</u>
 Organization managing the vaccination clinics (all under the same MIIS)
- Site: The location or clinic where vaccines are occuring
- Calendar: Where appointments for clinics can be managed

4 Registration Methods See details Here

- Pre-registration: QR code and URL for patients to book appointments ahead of clinic
- Walk Up registration: QR code and URL for patients to register themselves at the clinic
- On the spot registration: Site Staff adds individual directly into the onsite tool during clinic
- Paper registration: <u>Paper templates</u> for Color registration and vaccination (English, Spanish)





The example above does not imply that all organizations in Color are entities such as board of health, schools etc.

Permission Access Overview

Access to the various tools outlined in this document will depend on your permissions

Population Level Roles

- Onsite Tool manage vaccination clinic by site
- Contact Management manage site contact for patients and clinic administration
- Staff Management manage permissions across population
- Inventory Management manage inventory across population

Dashboard Roles

- Dashboard Admin ability to add permissions to dashboards. This is now given under the Staff Management Population Level Roles
- Vaccines: Overview can view non-PHI aggregate states on vaccination clinics
- Vaccines: Appointments and Records (Access to PHI) - can view patient appointment, records, insurance information

Site Level Access

- Vaccination checking in patients and administering vaccines
- **Inventory Management** managing inventory for the specific site
- Appointment Management adding and managing appointments
- Staff Management managing site level permissions
- **Site Settings** managing site specific details and configurations

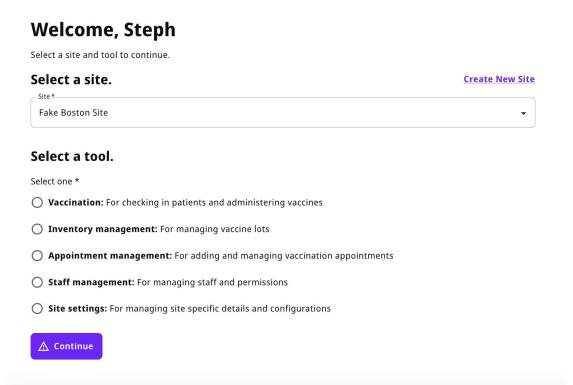


Learning Environment: Fake Boston Site

For training and practice purposes, we have created a Sandbox site (Fake Boston Site) where you can practice setting up clinics and using the different tools.

We use this site for training demos, videos, or screenshots, so any data you see is not PHI.

If you do not have access to Fake Boston Site and would like to be added, please reach out to vaxsites@color.com.





01

Onsite Tool - Staff Management



What you'll learn:

- 1. Adding staff roles
- 2. Editing staff roles
- 3. Removing staff roles
- 4. Sending/resending invitations to staff

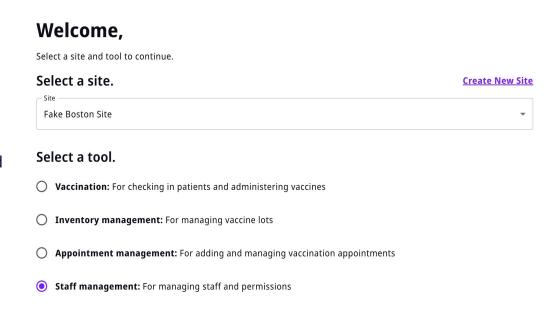
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- The self-serve collection site permissions tool allows site managers to add and remove permissions for site staff.
- To have access to this tool, the staff member must have "Staff Manager" permissions granted to them.
 Individuals that need this access should speak with their Color program operations lead or their site manager.
- Please note: The first time a Site
 Manager is accessing their Color sites,
 they will need to add permissions for themselves to view all tools.





Vaccine Site Roles

General

Site manager

 Site managers can manage permissions for additional staff.

Appointment management

Site scheduler

 Site schedulers can create and modify the schedule and appointments for a site.

Inventory management

Inventory manager

 Inventory managers can add, remove, and otherwise manage vaccine lots.

Onsite patient management

Site staff

 Site staff can see and check in people scheduled for appointments, and view site statistics.

Vaccinating clinician

 Vaccinating clinicians are able to vaccinate patients, enter vaccine details, and edit vaccination records, in addition to all permissions site staff have.

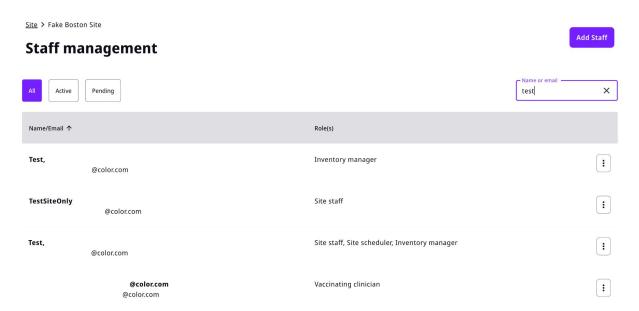
Scribe

 Scribes can record the actions of a vaccinating clinician, enter vaccine details, and edit vaccination records, in addition to all permissions site staff have.



Staff Management Tool Add Staff Permissions

To add staff, click the "Add Staff" button in the top right corner





Add Staff Permissions

- Enter the email address of the individual that will need access. If the user has multiple individuals requiring access, please enter one email per line.
- Choose the staff role and then Click "Confirm".
 - Please note: If provided with "Vaccinating clinician" permissions, the user will need to log into Color and select the "Vaccination Tool" and enter their credentials before they will be able to start vaccinating.

Add staff.

Enter email address(es)

Staff will receive an email to let them know they can set up their account. If entering multiple email addresses, separate with line breaks.

Total: 1

test@test.com		

Choose one or more staff roles for these people.

General

Site manager

Site managers can manage permissions for additional staff.

Appointment management

☐ Site scheduler

Site schedulers can create and modify the schedule and appointments for a site.

Inventory management

☐ Inventory manager

Inventory managers can add, remove, and otherwise manage vaccine lots.

Onsite patient management

Site staff

Site staff can see and check in people scheduled for appointments, and view site statistics.

Vaccinating clinician

Vaccinating clinicians are able to vaccinate patients, enter vaccine details, and edit vaccination records, in addition to all permissions site staff have.

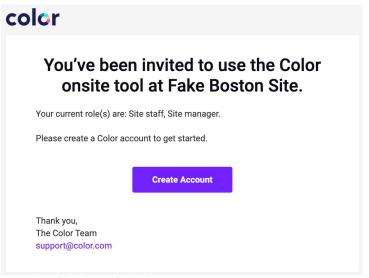
Scribe

Scribes can record the actions of a vaccinating clinician, enter vaccine details, and edit vaccination records, in addition to all permissions site staff have.

Confirm

Add Staff Permissions

- Users listed in Step 2 who do not have a Color account will receive an email invitation to create a Color Account at https://home.color.com/
- Users who create their account using the link provided in the email will be able to use the onsite tool after creating the account. No additional email confirmation is required.
- 3. If you are experiencing difficulty logging into your account, please contact the Color Support team.



Create a Color account to get started Already have a Color account? Sign In If you are a parent or guardian, create an account for yourself, not your dependent. First name Last name Email address If you are creating an account for an employer or school program, please use your email address from that organization. Password Confirm password By creating an account and/or using Color Health Inc.'s and its affiliates' Services, you agree to Color Health's Terms of Service, and acknowledge its Privacy Policy, and HIPAA Notice of Privacy Practices (collectively, "Terms"). Your use of Color Health's Site, App, and Services is subject to these Terms. **Create Account**



Edit/Remove Roles

- Staff Managers can edit or remove site permissions for staff as needed. Site Managers
 must remove any staff/volunteers who are no longer working with the site and ensure
 they do not have any permissions.
- 2. The staff member can search for the staff by name or email. Once they have located the staff to edit/remove, they should click the three dots on the right side. The user can select "Edit Roles" or "Remove"

		Add Staff
	Name or email	×
Role(s)		
Inventory manager		:
Site manager, Vaccinating clinician, Site scheduler, Inventory manager		Edit Roles Remove



Staff Management Tool Edit Roles

1. Edit Roles: If "Edit Roles" is selected, the user can modify the permissions granted to the site staff and click "Save"

Add or remove roles for **Onsite patient management** Site staff General Site staff can see and check in people scheduled for appointments, and view site statistics. ☐ Site manager Site managers can manage permissions for additional staff. Vaccinating clinician Vaccinating clinicians are able to vaccinate patients, enter Appointment man vaccine details, and edit vaccination records, in addition to all permissions site staff have. Site scheduler Site schedulers can create and modify the schedule and Scribe appointments for a site. Scribes can record the actions of a vaccinating clinician, enter vaccine details, and edit vaccination records, in addition to all **Inventory management** permissions site staff have. Inventory manager Inventory managers can add, remove, and otherwise manage Cancel Save vaccine lots.



Staff Management Tool Edit Roles

1. If a staff member's role changes (ie. they are given permission to a new tool), they will receive an email notifying them that the role has changed.

color

Your role has been updated at Fake Boston Site.

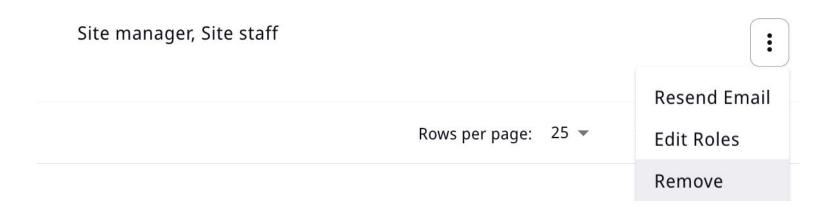
Your current role(s) at Fake Boston Site have been updated. Your current role(s) are: Site staff, Vaccination inventory manager.

Thank you, The Color Team support@color.com



Remove Roles

 Remove User: If remove is select, the staff member will see a page asking to confirm that they would like this individual to have permissions for that site permanently removed. Click "Remove".





Pending Accounts

 Individuals that have had permissions requested by their site manager but have not created a Color account will be displayed in the "Pending" column. These individuals can use the initial invitation email to create their account and access the tool OR they can visit https://home.color.com/

Staff management | Active | Pending | | Name or email | | test | X | | Name/Email ↑ | | Role(s) | | Site manager, Site staff | | Uvaccinating clinician | | testing@color.com |

Add Staff



Staff Management Tool Pending Accounts

 Resend Email: Site managers can resend the invitation email by clicking on the three dots to the right of the individuals name and selecting "Resend Email". This will automatically resend the invitation.



01

Onsite Tool - Site Settings

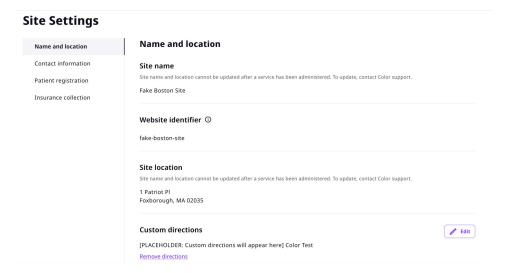


Site Settings

There are four Site settings that can be updated:

- Name and Location
 - Site name*
 - Site Location*
 - Custom Directions
- Contact Information
 - Site Contact
 - Patient Support Contact
- Patient Registration
 - Group Registration
 - Age/Zipcode Restrictions
- Insurance Collection

*Please Note: once vaccines have been administered at a site you have to call support to update these fields



01

Onsite Tool -Appointment Management



Appointment Management Tool

What you'll learn:

- 1. Creating Appointments
- 2. Moving Appointments between Calendars
- 3. Deleting Appointments
- 4. Viewing Appointments

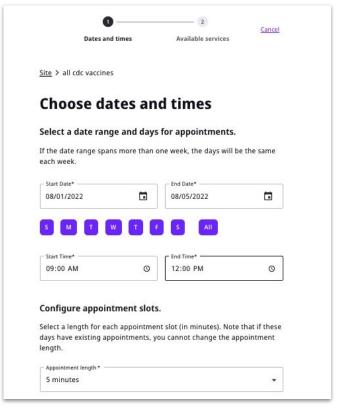
Navigation Bar

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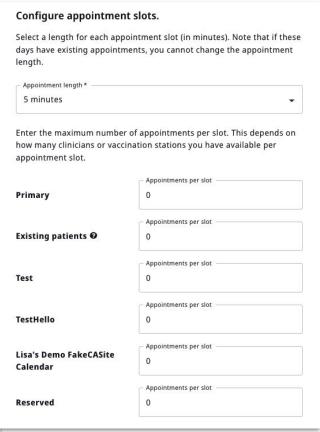




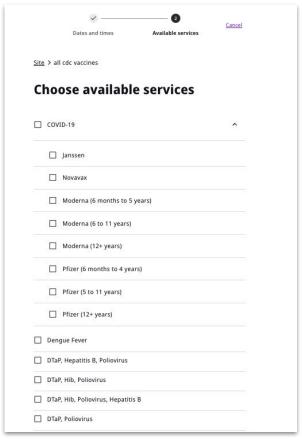


- Select the start and end date of the appointments you are creating.
- 2. Select the days of the week you want the appointments scheduled for.
- 3. Select the start and end time for each day.
- Choose an appointment length to configure each appointment slot for.





5. Choose what calendar(s) you'd like to put these appointments on and continue.

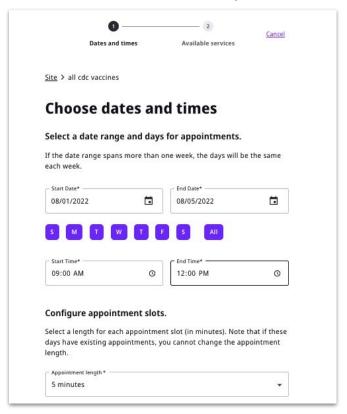


One appointment can now support multiple vaccine services. For experienced users, this means you'll no longer need to go through the "create appointment" flow for each vaccine type.

- 6. Select the specific vaccine(s) you would like these appointments to support.
 - Please note: For COVID-19, ensure you are choosing the correct manufacturer and age.



Pause for FAQs

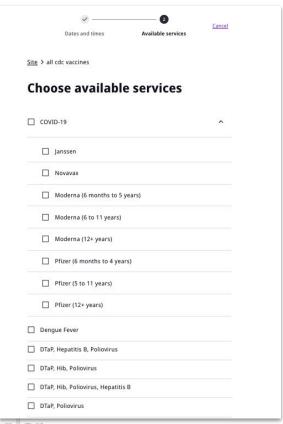


Q: How do I limit the appointments based off of inventory I have?

 Same as before, you control the number of appointments created when choosing appointment start/end times, intervals, and number of appointments per slot.



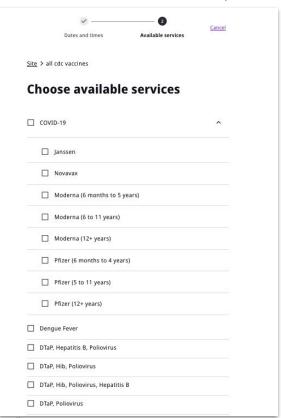
Pause for FAQs



Q: What if I have different amounts of COVID-19 Pfizer adult and Pfizer infants?

- Create as many multi-vax appointments as your limiting vaccine. Let's say you have 100 doses for COVID-19 Pfizer adults, and only 20 for COVID-19 Pfizer infants, and all the clinicians on site can administer them.
- You'd create 20 appointments with both COVID-19 Pfizer infants and Pfizer adult vaccines on the appointment. And then you'd create 80 appointments with just COVID-19 Pfizer adult vaccines on those appointments.

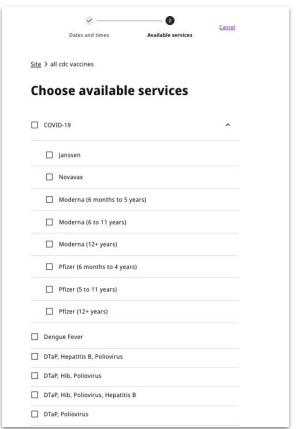
Pause for FAQs



Q: If a patient books an appointment with multiple vaccines services on it, are they registering for all the vaccines?

No, the patient is only registering for the vaccine they have selected. In the patient check-in, the clinician will not see any difference: only the vaccine selected will be shown.





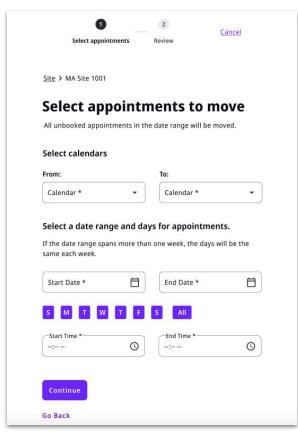
Make sure to create multi-vax appointments if you intend to allow patients to register for more than one appointment per slot.

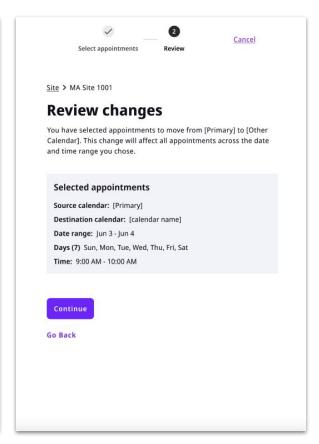
Otherwise, patients who select more than one vaccine will see a "no vaccines available error modal" when trying to register.

Moving appointments



Moving appointments



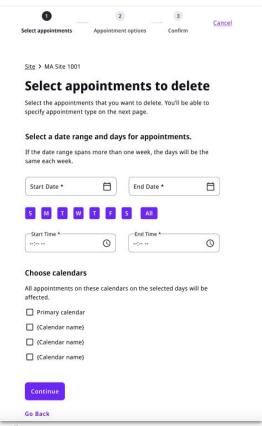


Whereas before a site scheduler had to move appointments per vaccine type, they can now move a block of appointments at once.

Deleting appointments



Deleting appointments



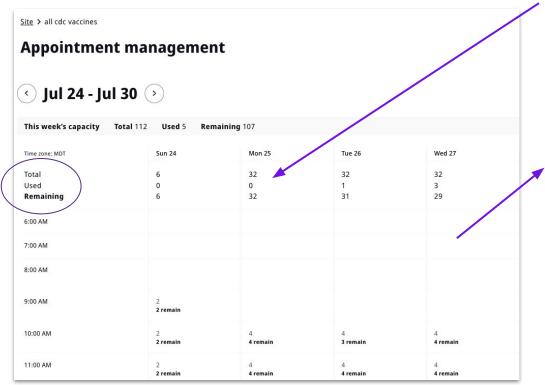
- *Note that this is for deleting a block of appointments. To modify an existing patient appointment, please refer to our cancel/reschedule a single appointment Knowledge Base doc HERE.
- Whereas before a site scheduler had to delete appointments per vaccine type, they can now delete a block of appointments at once.

Viewing created appointments



Viewing created appointments

Select the value in the row circled to view details regarding unbooked appointments



Total appointments	50
Booked appointments	20
Unbooked appointments	30
COVID-19 Pfizer-BioNTech (12+ years), COVID-19 Pfizer-BioNTech (5-11 years), Flu (influenza)	10
COVID-19 Pfizer-BioNTech (5-11 years)	5
Flu (influenza), Meningococcal B (MenB)	15

01

Onsite Tool -Creating a New Site



What you'll learn:

1. How to Create a New Site by Cloning an Existing Site

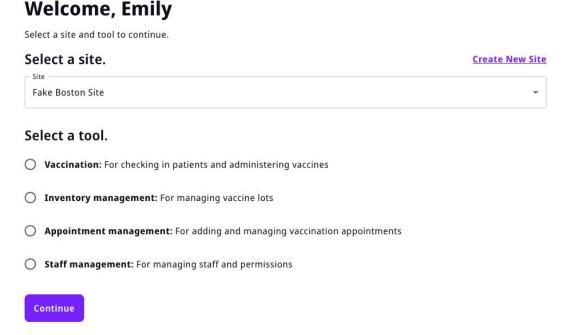
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- This allows you to create a new site by mirroring an existing site.
 - Click "Create New Site" on the right side.





This will create a new site location with the properties of the existing site you choose to mirror. Inventory and appointments need to be created

Create a new site.

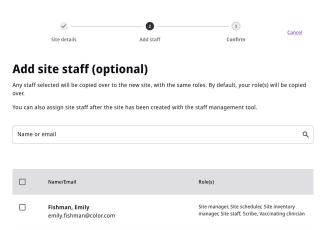
 Choose the site that you want to mirror. Please note: the new site will be mirroring the time zone, population, and MIIS pin as the

site you choose to mirror.

- Enter the new site's name, address, and any custom directions.
- The site will have the option to select if they want to mirror the same permissions or add individuals separately.

fou will only be able to ch permissions for. The new : zone, population(s), and I permissions.	site will be given	the same s	ervice(s), time
Site			
Enter site name.			
Name			
Enter site location. Street address *			
City*	Sta	nte* +	ZIP code *

Character limit 0/150





- Confirm the new site details.
 Make sure this information is correct.
- Before finalizing the new site, please check to make sure you are mirroring the correct site.
- Once information is confirmed, select "Create Site" at the bottom.



Confirm site details.

Once you create the site and add inventory and appointments, patients will be able to book. Please make sure that the address information is correct.

Mirrored site: Fake Boston Site



Create Site

Go Back



01

Onsite Tool -Inventory Management



What you'll learn:

- 1. How to add inventory
- 2. How to activate/deactivate inventory
- 3. How to delete inventory
- 4. How to view inventory

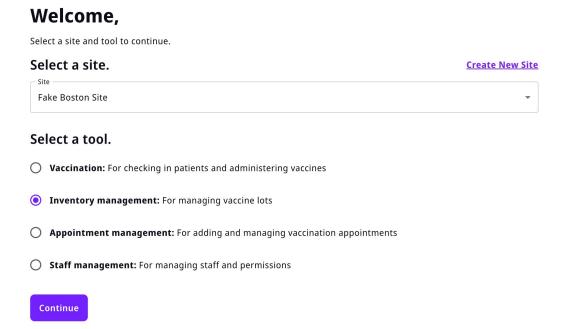
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- This tool allows onsite personnel to add, deactivate/activate, or delete vaccine inventory to ensure that the manufacturers/lot numbers being used by clinicians are up-to-date and accurate.
- To enter inventory, staff will need the following information:
 - Vaccine Category
 - NDC unit of sale
 - funding source (state or private)





- Gives an overview of current Inventory on your specific site
- Type of vaccine, funding source, NDC #, CVX, MVX, Lot #, Expiration date, and Lot Status displayed





Adding Inventory

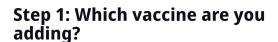
Vaccine info

Site > Fake Boston Site

Inventory management (102)

 Click "Add Inventory" to add a new lot of vaccines. Add Inventory

Confirmation

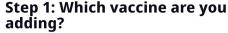


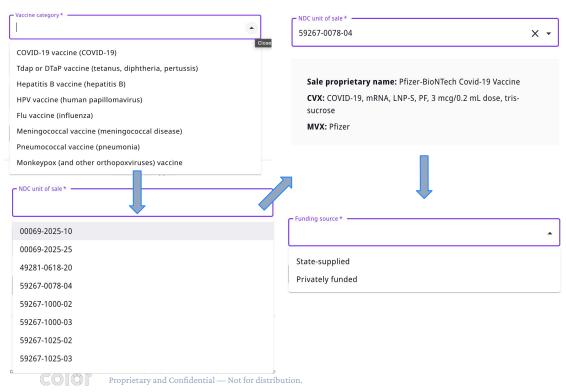
Lot info





Adding Inventory





- The staff member can select from a list of vaccine types that are available in the Color platform. (If enabled for your clinic). If you need to add a vaccine outside of the adult and pediatric schedules reach out to the ColorHelp inbox (colorhelp@mass.gov)
- 2. The NDC can be selected from the list of of preloaded NDC #s, after selecting will confirm Sale proprietary name, CVX, and MVX. Please ensure you are choosing the correct NDC. Incorrect NDC codes will have billing implications. If Color identifies that an incorrect NDC has been used, we will notify you to correct your vaccinations records. If you do not update the record, Color will need to do it.
- Once an NDC unit (on box) of sale has been selected, the staff member will be provided with additional information about the vaccine. They can choose a vaccine funding source and click "Continue"

Adding Inventory

Step 2: Add lot information.

Vaccine category: COVID-19 vaccine (COVID-19) (Pfizer-

BioNTech)

NDC unit of sale: 59267-0078-04

Sale proprietary name: Pfizer-BioNTech Covid-19 Vaccine

CVX: COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-

sucrose

MVX: Pfizer

Lot # *

Expiration date*

This is the manufacturer's expiration date.

- Staff will then be asked to enter lot information and the expiry date for the new vaccine lot.
- Staff will re-enter the inventory information (manufacturer, lot number and expiration date) to confirm that no data entry errors were made. If no errors "Add Lot" can be selected and the Lot will be added to inventory
- If the information does not match the original entry, an error will be displayed. If the initial entry was incorrect, please click "Go Back" and re-enter the correct information.
- Note: Once inventory is submitted, you will need to contact Color support to change lot number or expiration.

Lot #* ABC4320 The lot number must match.

Step 3: Confirm lot information.

Please re-enter the lot information to confirm it was entered correctly.

Vaccine category: COVID-19 vaccine (COVID-19) (Pfizer-BioNTech)

NDC unit of sale: 59267-0078-04

Sale proprietary name: Pfizer-BioNTech Covid-19 Vaccine

CVX: COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, trissucrose

MVX: Pfizer

ABC4321

Expiration date

This is the manufacturer's expiration date.

Add Lot



Adding Inventory

 The new inventory will be displayed as "Active" and can be used by clinicians in the Onsite Tool.

Site > Fake Boston Site th **Add Inventory Inventory management (1)** Search for lot # Sale proprietary name × ABC4321 Active Inactive Sale proprietary Funding source NDC unit of sale CVX MVX Lot# Status ↓ Expiration name Pfizer-BioNTech State-supplied 59267-0078-04 COVID-19, mRNA, Pfizer ABC4321 Aug 3, 2023 Active Covid-19 Vaccine LNP-S, PF, 3 mcg/0.2 mL dose, trissucrose

Deactivate Inventory

- Inventory Managers can deactivate a vaccine lot to remove it from available inventory and make the lot inactive. It will no longer be available at the site.
 Deactivated vaccine lots can be reactivated.
- To avoid confusion and errors, when a vaccine lot is no longer available, onsite staff can deactivate it from active use by selecting the appropriate vaccine and/or lot number and clicking the three dots on the right side of the row. They can select "Deactivate Lot".





Deactivate Inventory

 Review the information of the lot you have selected and check the box to confirm this is the correct lot for deactivation. Click "Deactivate Lot"

Deactivate this lot.

X

Deactivating this lot will remove it from available inventory and make it inactive. It will not be available at Fake Boston Site.

Vaccine information

Vaccine category: COVID-19
Funding source: State-supplied
NDC unit of sale: 59267-0078-04

Sale proprietary name: Pfizer-BioNTech Covid-19 Vaccine

CVX: SARS-COV-2 (COVID-19) vaccine, mRNA, spike protein, LNP, preservative free, 3 mcg/0.2mL dose, tris-sucrose formulation

MVX: Pfizer

Lot information

Lot #: ABC4321

Expiration: Aug 3, 2023

I confirm that this lot should be deactivated in Fake Boston Site inventory.

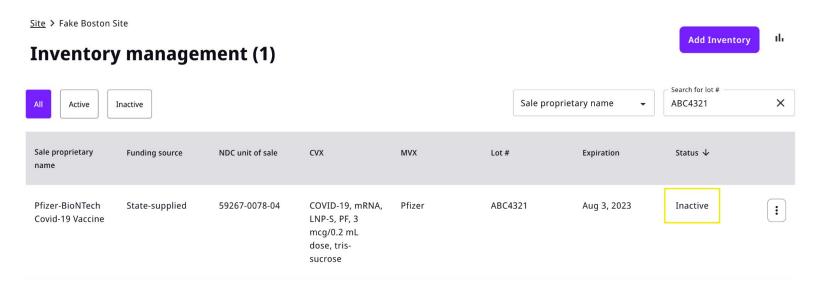


Cancel

Deactivate Lot

Deactivate Inventory

 The vaccine/lot will now be displayed as "Inactive" and will not appear to clinicians using the onsite vaccination tool to administer vaccines.





Deactivate Inventory

 If a lot was deactivated by mistake, you can go to "Inactive" click the three dots to the right of the vaccine and select "Activate Lot". Confirm that the lot should be added back by selecting "Add Lot" in the pop-up box. This will move the lot back into an "Active" state.

Activate this lot.

X

Activating this lot will add it to available inventory. It will be available at Fake Boston Site again.

Vaccine information

Vaccine category: COVID-19
Funding source: State-supplied
NDC unit of sale: 59267-0078-04

Sale proprietary name: Pfizer-BioNTech Covid-19 Vaccine **CVX:** SARS-COV-2 (COVID-19) vaccine, mRNA, spike protein, LNP, preservative free, 3 mcg/0.2mL dose, tris-sucrose formulation

MVX: Pfizer

Lot information

Lot #: ABC4321

Expiration: Aug 3, 2023

I confirm that this lot should be activated in Fake Boston Site inventory.

Cancel

Activate Lot

Delete Inventory

- Inventory Managers can delete an active or inactive vaccine lot to permanently remove it from inventory. Deleted vaccine lots cannot be reactivated.
- When a vaccine lot should be permanently removed from inventory, onsite staff
 can delete it by selecting the appropriate vaccine and/or lot number and clicking
 the three dots on the right side of the row. They can select "Delete Lot". This can
 be done in under "Active" or "Inactive" Inventory.



Delete Inventory

- Review the information of the lot you have selected and check the box to confirm this is the correct lot for deactivation. Click "Delete lot"
- The vaccine/lot will then be removed from the Inventory Management view.
- A lot cannot be deleted if associated vaccination records have been completed with this lot #

Delete this

Lot cannot be deleted, because it has associated vaccination records.



If there are no vaccination records associated with it, deleting this lot will permanently remove it from inventory and you will not be able to reactivate it. Instead, add a new lot.

Delete this lot from inventory.



If there are no vaccination records associated with it, deleting this lot will permanently remove it from inventory and you will not be able to reactivate it. Instead, add a new lot.

Vaccine information

Vaccine category: COVID-19
Funding source: State-supplied
NDC unit of sale: 59267-0078-04

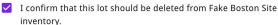
Sale proprietary name: Pfizer-BioNTech Covid-19 Vaccine **CVX:** SARS-COV-2 (COVID-19) vaccine, mRNA, spike protein, LNP, preservative free, 3 mcg/0.2mL dose, tris-sucrose formulation

MVX: Pfizer

Lot information

Lot #: ABC4321

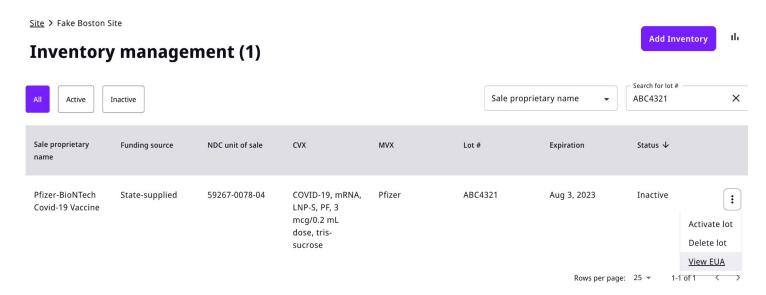
Expiration: Aug 3, 2023



Cancel

Delete Lot

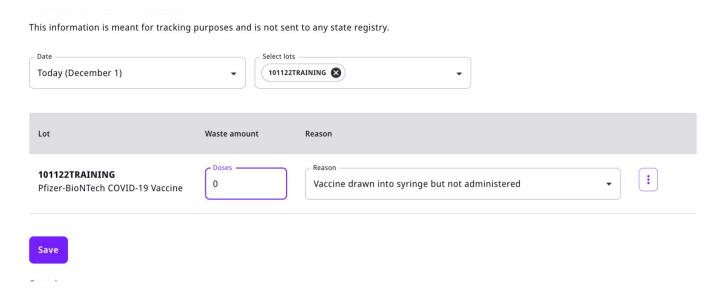
 The most up to date EUA/VIS statement associated with the vaccine group is linked for reference under the three dots section on the right. Clicking it will take you to a CDC page with the most recent EUA/VIS statement.





Record Wastage

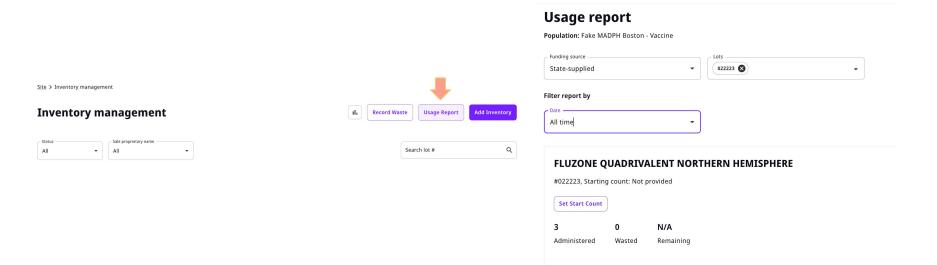
 You can record any wastage within the inventory management tool. Select "Record Wastage" in the top right corner, and then select the date and lot, fill out the doses, and select a reason.





Usage Report

• Select Usage Report to see a summary of a selected Lot and the timeframe (today, yesterday, last 7 days, all time).





01

Onsite Tool - Vaccination



What you'll learn:

- 1. How to vaccinate a patient who has pre-registered
- 2. How to vaccinate an on-the-spot patient
- 3. How to edit a vaccination record
- How to confirm patient details/check for VFC eligibility
- 5. Appointment and Vaccination Roster Upload

Navigation Bar

What is Color?

- 1. Staff Management Tool
- 2. Appointment Management Tool
- 3. <u>Creating a new site</u>
- 4. <u>Inventory Management Tool</u>
- 5. <u>Vaccination Tool</u>
- 6. <u>Population Management Tools</u>
- 7. <u>Dashboard Overview</u>
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 - o. <u>Vaccines Dashboard</u>
 - Insurance Dashboard
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 - b. Color Support
 - c. MDPH Best Practices



There are three *digital* ways for a patient to enter the vaccination flow. Here is a breakdown of each and things to consider.

Appointment Pre-Registration

Sites can set up appointments for patients to pre-register for.

Appointments can be created for any vaccine type you select, regardless of inventory, so make sure to only select appointment types of vaccines you will have ready the day of the clinic and update inventory prior to the clinic to perform the vaccines.

URL and QR code for patients to access this page can be found in the Appointment Management tool.

Walk-up Registration

Patients can register themselves the day of the clinic.

The vaccine options shown to the patients will be based on active vaccines you have in your inventory for that site.

Make sure inventory is updated prior to the clinic with only the vaccines you plan on administering that day.

Inactivate any vaccine you might have in your inventory but are not planning on administering at that clinic if you plan on utilizing your Walk-up URL.

URL and QR code for patients to access the Walk-up flow can be found in the Appointment Management tool.

On the Spot Registration

Clinicians/Scribes/Staff with access to the Vaccination tool can register patients for a vaccine.

The vaccine options shown will be based on active vaccines you have in your inventory for that site. Make sure inventory is updated prior to the clinic so the site staff can select the correct vaccines for the patients.

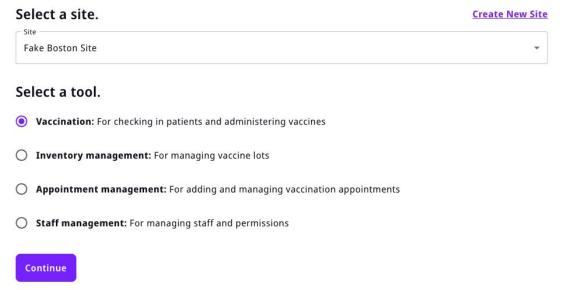
This feature is found in the Vacation tool, the **Add Patient** in the top right of the screen



 This tool allows onsite personnel to go through the vaccination flow with a patient who has pre-registered or is showing up as a walk-up appointment.

Welcome, Emily

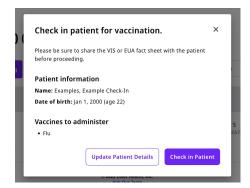
Select a site and tool to continue.



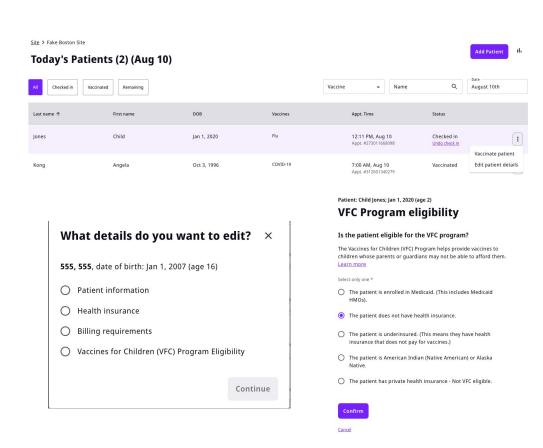


 Select the patient you would like to vaccinate. If they are not checked-in yet, click on their name, and select "Check-in patient," and then select their name again to vaccinate.

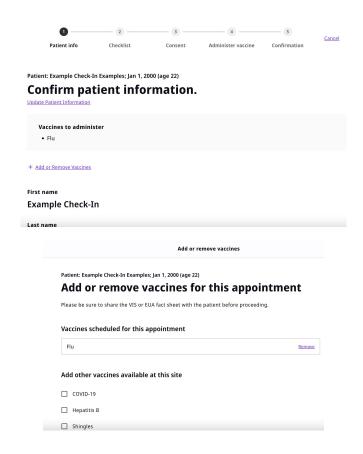




- Please note: you must verify demographics and insurance information and make any corrections/updates as needed.
 Additionally, you must verify that the VFC eligibility question was answered correctly by parents. If answered incorrectly, please make sure to edit the response.
- To edit the patient's information, select the three dots icon to the right of the patient's name and select "Edit Patient Details."
- Next, select the details you would like to review/edit.
- Review the information and make any necessary edits.
- You can go to Billing requirements to mark if the appointment was at home, or if the appointment was self-paid



- Confirm the patient's information and the vaccine(s) they are there to receive.
- To add or remove a vaccine, check "Add or Remove vaccines." This allows you to add any new vaccines to the patient's appointment, or remove previously scheduled vaccinations that the patient no longer wants to receive.





Once the patient's information has been confirmed, select "Continue."

Go Back

- Please screen your patient again at the time of administration with the appropriate pre-screening checklist.
- Confirm patient consent and continue.
- You can access the VIS and EUA that the patient was provided with at pre-registration by looking in the Inventory
 Management Tool. Color maintains up to date versions and you should have the link available to present to the patient
 at time of administration.
- If a patient selects "Yes" or "I don't know" to a pre-vaccination checklist question, you will see that information below.

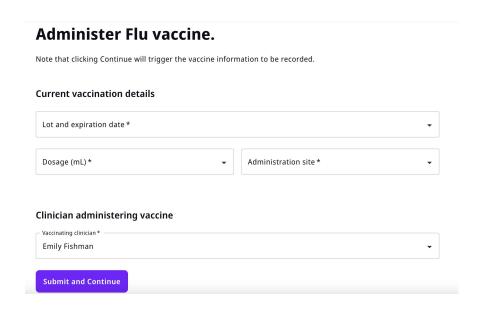
Vaccines to administer Please review the prevaccination checklist with the patient to determine if they require monitoring after vaccination, or · COVID-19 (first dose) Patient: Example Check-In Examples; Jan 1, 2000 (age 22) if there is any reason they should not get the vaccine(s) they requested today. Confirm patient consent. + Add or Remove Vaccine Checklist for non-COVID-19 contraindications Please review the prevaccination checklist with the patient to determine if they require monitoring after vaccination, or The patient has been provided the applicable Vaccine Information Sheet if there is any reason they should not get the vaccine(s) they requested today. (VIS) or EUA fact sheet for each vaccine they will be receiving. The patient Walk the patient through the appropriate prevaccination checklist to ensure that there are no contraindications. has had the opportunity to ask a medical professional their questions about each vaccine they will be receiving. I have obtained consent from the Checklist for COVID-19 contraindications patient, or their healthcare proxy, or their legal guardian to receive the · The patient previously answered "yes" to the following questions: vaccine(s). I have reviewed the prevaccination checklist with the patient and conveyed any information necessary based on · Have you ever had an allergic reaction to another vaccine (other than the COVID-19 vaccine) or an injectable their answers. ☐ I have reviewed the prevaccination checklist with the patient and conveyed any information necessary based on their answers. Continue



Patient: Patient Smith; Jan 1, 2000 (age 22)

Review prevaccination checklist.

- Administer vaccination. Make sure to record the lot#, dosage, and administration site. Please note: It is important to make sure that the dosage is correct when completing this vaccination record. If incorrect, an insurance claim may be denied.
- Make sure to select the correct name of the Clinician who is administering the vaccine.
- Select "Submit and Continue"
- Please note: Clinicians must first confirm their credentials by logging into Color and entering the Vaccination Tool. If credentials are not confirmed, the clinician's name will not be displayed as an option.



 Review the confirmation information and select "Finish"



Patient: Example Check-In Examples; Jan 1, 2000 (age 22)

Confirmation

You've administered the following vaccinations for this patient:

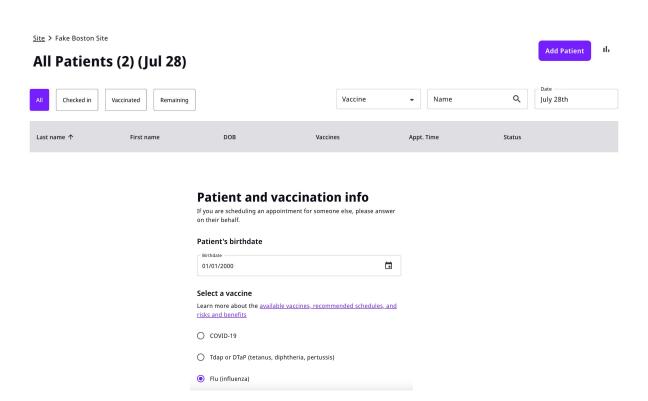
Flu

Information for the patient

Direct the patient to the waiting area. Let them know that they should wait for 15 minutes before leaving the site.

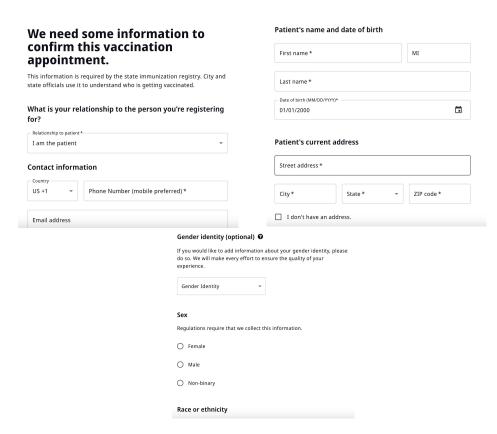


- To add a walk up patient, select the "Add Patient" option in the top right hand corner.
- Add patient information and the vaccine they would like to receive.
- If your site is offering the full immunization schedule, most of those vaccinations will only be available by using on-the-spot or on-the-fly registration.

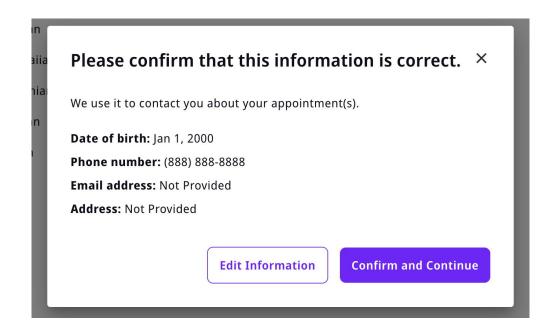




Enter additional patient information and select "Continue"



 Confirm information is correct and select "Confirm and Continue"



- Add additional patient information and health insurance
- If patient has more than one insurance, they should report all plans.

Prevaccination checklist

These questions are required by the CDC. 1. Are you feeling sick today? O Yes O No O I don't know 2. Do you have a health condition or are you undergoing treatment that makes you moderately or severely immunocompromised? This would include, but not limited to, treatment for cancer, HIV, receipt of organ transplant, immunosuppressive therapy or high-dose corticosteroids, CAR-T-cell therapy, hematopoietic cell transplant [HCT], or moderate or severe primary immunodeficiency. O Yes No O I don't know 3. Have you received a hematopoietic cell transplant (HCT) or CAR-Tcell therapy since receiving COVID-19 vaccine? O Yes O No O I don't know 4. Have you ever had an allergic reaction to another vaccine (other than the COVID-19 vaccine) or an injectable medication? O Yes O No

Why are you asking me these questions?

The CDC requires answers to these questions in order to determine if there is any reason you should not get the COVID-19 vaccine. On the day of your appointment the clinician will confirm that nothing has changed.

If you answer "yes" to any question, it does not mean you should not be vaccinated. On the day of the appointment, the clinician will check that nothing has changed. They may ask more questions about your allergies or health.

Please share health insurance information.

Most health insurance plans cover recommended vaccines and testing for both children and adults at little or no cost.

Do you have health insurance?

- Yes, I have one insurance plan.
- Yes, I have multiple insurance plans.
- No, I do not have health insurance.

Continue

Provide your consent.

Ask the patient for their consent.

Once the patient's consent is received, you can submit the walk-up registration and go through the vaccination process as you would typically.

Please note: patients registered by a staff member will be automatically marked as Checked-In with a timestamp of the completed registration.

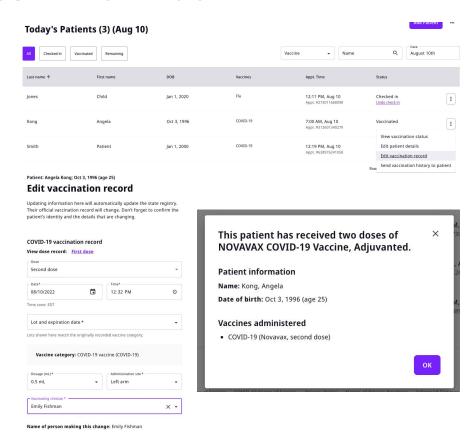
I agree that:

- 1. The information I provided is correct.
- 2. I have been provided the vaccine information statement(s) and/or the EUA Fact Sheet (typically for COVID-19 vaccines) for Recipients and Caregivers which has information about the side effects, risks and benefits of the vaccine or vaccines I am registering for. I will be able to ask questions at the time I receive my immunization.
- 3. I understand and agree that certain vaccines may not be appropriate for certain populations or people with certain conditions or symptoms. Prior to receiving the vaccine, I have had the opportunity to consult with a healthcare provider. I attest that I have been advised of the risks of receiving the vaccine. I understand that I will have the opportunity to ask further questions of a clinician when I am at the vaccination site and will be able to refuse the vaccine if it is not appropriate for me.



Editing a Vaccination Record:

- If necessary, you have the option to edit a vaccination record once completed.
- Return to the Vaccination Tool, and select the 3 dots icon to the right of the patient's name. Select "Edit vaccination record"
- Change and confirm the information you are editing. Select "Confirm Changes"
- To confirm a patient's vaccination status, select "View vaccination status" and you will be able to review the vaccine(s) they received.
- If a record is updated in Color, it will automatically send that update to the MIIS





Appointment and Vaccination Roster Upload

Color now has the ability for you to upload appointments or vaccinations from a provided spreadsheet. For example, this is helpful for times

Vaccination Roster

- When you might be performing vaccinations without internet connection to utilize the platform
- If you are retroactively entering vaccination information

Appointment Roster.

 If you are working on scheduling patients that are not able to book appointments through the registration link and instead have a roster of patients they'd like to vaccinate.

For comprehensive instructions for these two capabilities, please refer to the video below:

- Roster Upload for Vaccine Appointments
- Roster Upload for Completed Vaccinations



Upload patient roster

Bulk create appointments by uploading a roster. If your site has already vaccinated these patients, upload vaccinated records instead.

Download Excel Template

Drag & drop your file here, or browse files

Continue

Go back

Proprietary and Confidential — Not for distribution.

01

Population Level Tools



Population Level Tool

What you'll learn:

- 1. Staff Management
- 2. Inventory Management
- 3. Contact Management

Navigation Bar

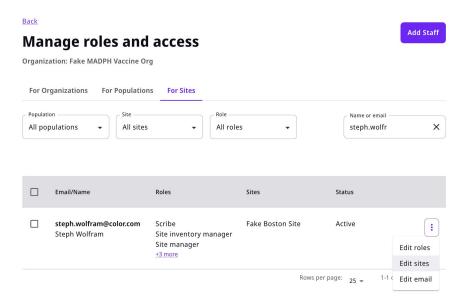
What is Color?

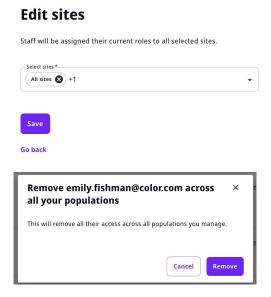
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Staff Management

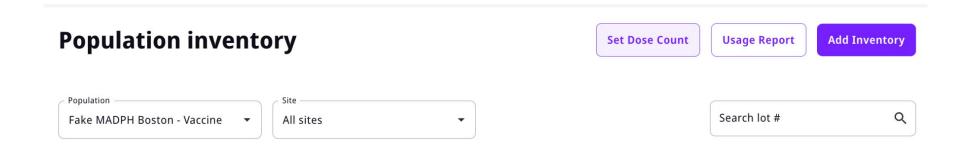
Individuals with Population Level permissions can assign and remove permissions across their population. Here you can easily add an individual to all or multiple sites across your population, or you can remove an individual from all sites in your population for easy staff management.





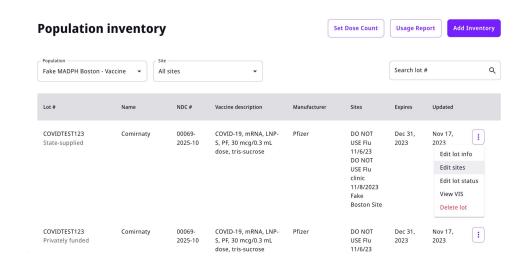


With Population management role, you can better manage inventory that is shared across your population. Similar to the site inventory tool, you can add inventory directly here. You are also able to set Dose Counts to help manage your inventory, as well as view the Usage Report.



Adding and Removing across sites

With Population management role you can add inventory across your entity population or multiple sites. This helps you more efficiently add or remove inventory that is shared between sites.



Edit assigned sites



Set Dose Count

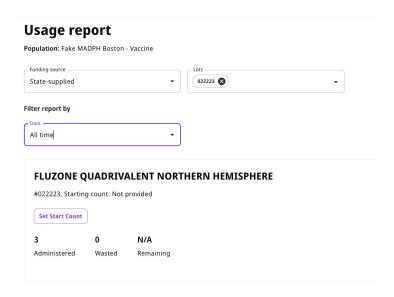
Clicking Set Dose Count will allow you to add in the starting amount of inventory which will be tracked based on the vaccines administered as well as any wastage that is reported. You can set an Alert threshold too if you'd like to see an alert banner when the amount gets too low.

Set start count and alerting Population: Fake MADPH Boston - Vaccine Setting a start count helps provide a more accurate usage report, and is required to set an alert. Only active lots are displayed. This information is meant for tracking purposes and is not sent to any state registry. Search lot # Q Start count ① Lot Alert threshold ① Start dose count COVIDTEST123 Alert dose count State-supplied Comirnaty Start dose count COVIDTEST123 Alert dose count Privately funded Comirnaty



Usage Report

Clicking Usage Report to see a summary of a selected Lot and the timeframe (today, yesterday, last 7 days, all time).



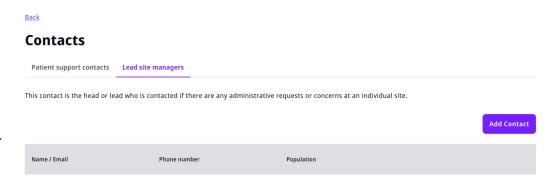


Contact Management

Here is where you can update the contact information for your Population. You can either add a new contact (click Add Contact) or edit an existing contact to replace the contact information (click three dots by the existing contact and select edit contact)

Patient Support Contacts: This is the contact information that our support team can give patients who call us with questions about the clinic (often a general support line vs an individual)

Lead Site Managers: This is the contact who our support team can reach out to for site issues



01

Dashboards -Overview



Site Administration & Overview Dashboards

Dashboards - Brief Overview Video

What you'll learn:

- Types of information available in the Site Administration dashboard
- The steps on how to run a simple query to figure out how many vaccines were administered at a site and or population

Navigation Bar

What is Color?

- 1. Staff Management Tool
- 2. Appointment Management Tool
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 - c. MDPH Best Practices



01

Dashboards -Appointments



Appointments Dashboards

What you'll learn:

- 1. How to view an overview of Appointments data
- 2. How to view Appointments PHI

Navigation Bar

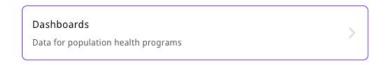
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- The Appointments dashboard provides useful metrics to measure the appointment-scheduling performance across vaccination sites.
- Access
 - Access to the Appointments is granted to all staff that have Overview-level permissions.

Which Color product do you need today?





Appointments Overview

What data is included?

No Identifiable Data Included

 This dashboard is meant for an overview of the appointments of a site. It does not include PHI such as patients' names, contact information, etc.

Overall Numbers

- Available Appointments
- Appointments Opened
- Scheduled Appointments
- On-the-Spot Appointments
- Completed Appointments
- Booking Rate
- Cancelled Appointments
- Cancellation Ratio
- No-Show Appointments
- No Show Rate
- Second Dose Scheduled Rate

Breakdown by Day

- Appointments by Day Two Week View
- Appointments Created
- Booking Rate by Day Two Week View
- Completion Rate by Day Two Week View
- Cancellation Ratio by Day Two Week View
- No-Show Rate by Day Two Week View

Performance

 Minutes between Appointment and Vaccination Time

Sites

- Site Summary
- Second Dose Scheduled by Site



Vaccine Appointments Dashboards Overview

Provides aggregate numbers of various appointment statistics including:

- Available Appointments: appointment slots that are open and have not been reserved.
- Scheduled Appointments: appointments booked using the URL-based registration flow.
- On-the-Spot Appointments: not scheduled using the URL-based registration flow These are created by the staff at the site.
- Completed Appointments: appointments where a vaccination has been administered.
- Booking Rate: total scheduled appointments / total open appointments (open appointment are appointment slots that have not been booked).
- Cancelled Appointments: appointments that have been cancelled by the participant.

- Cancellation Ratio: total cancelled appointments/total scheduled appointments. Scheduled appointments do not include the on-the-spot appointments.
- No-Show Appointments: appointments that were reserved but not moved to a checked-in state or rescheduled.
- No Show Rate total no-show appointments/total scheduled appointments.
- Second Dose Scheduled Rate for patients who are eligible for a 2nd dose, they have completed their first vaccine appointment and scheduled their second appointment. This only applies to individuals that had their first dose at a site using Color software.

2,930 Appointments Opened ①	9 Scheduled Appointments ①	26 Walk-Up Appointments ①	135 Available Appointments ①
12 Completed Appointments ⊙	2 Cancelled Appointments ⊙	22 No-Show Appointments ①	12.50% Second Dose Scheduled Rate ①
0.31% Booking Rate ①	22.22% Cancellation Rate ⊙	244.44% No Show Rate ⊙	O Appointments with Multiple Vaccine Doses ⊙

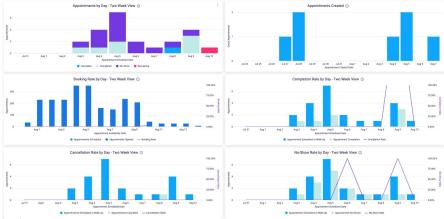


Trends

Provides a two-week view of key appointment trends:

- Appointments by Day: the number of appointments in 4 categories -Cancelled, Completed, No Show and Remaining.
- Appointments Created: the total number of appointments scheduled. Includes all appointments, even if later cancelled. Does not include on-the-spot appointments.
- Booking Rate by Day: the number of appointment slots that were scheduled / number of appointment slots that were available.

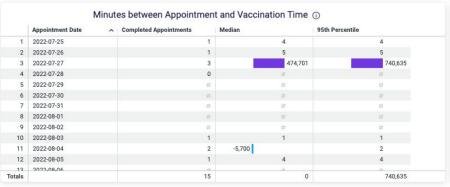
- Completion Rate by Day: the number of appointments completed / (number of scheduled appointments + number of on the spot appointments).
- Cancellation Rate By Day: the number of cancelled appointments / (appointments scheduled = on-the-spot appointments).
- No Show Rate by Day: the number of appointment no-shows/(appointments scheduled + on the spot appointments).

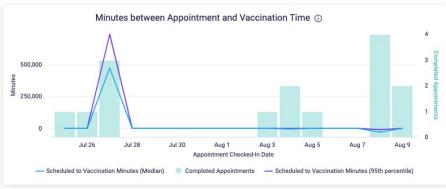




Vaccine Appointments Dashboards Performance

- Tracks the time (in minutes) from a patient's scheduled appointment time to completion of their vaccination on a median and 95th percentile basis.
- A negative value indicates that patients showed up prior to the scheduled appointment time and were vaccinated. Example: patient is scheduled for 1PM, but is vaccinated at 12:30 PM after they showed up early for their appointment







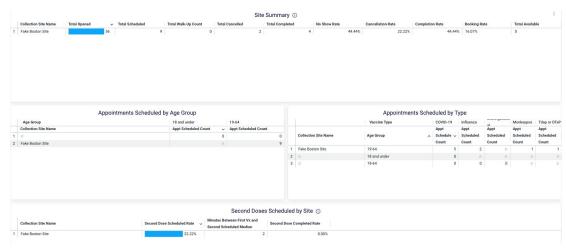
Provides a breakdown of appointment performance by site. The information included such as:

Site Summary

- Collection Site
- Total Available Appointments
- Total Scheduled
- Total On the Spot appointments
- Total Cancelled Appointments
- Total No Show Appointments
- Total First Dose Scheduled
- Total Second Dose Scheduled: count of second-dose appointments scheduled
- Total First Dose Delivered
- Total Second Dose Delivered
- Booking Rate
- Cancellation Ratio
- Completion Rate
- No Show Rate

Second Doses Scheduled by Site

- Second Dose Scheduled Rate: second dose vaccine appointments created after completing first vaccine at a site using Color software.
- Median Minutes Between First Vaccine and Scheduling Second Dose.
- Second Dose Completed Rate: first and second dose completed at a site utilizing Color software.

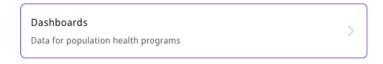


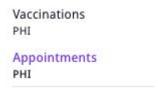


Appointments (PHI)

 Patient (PHI) dashboards provide row-level information. This dashboard provides patient information based on appointment information. Each row includes patient contact and demographic information, as well as information about the dose and the appointment.

Which Color product do you need today?







Appointments (PHI): What data is included?

PHI Dashboards are not intended to be used for clinical decision-making.

 PHI dashboards do not contain a CLIA-approved report to inform medical management. They are an overview of patient information and results.

PHI dashboards include protected health information in addition to information about the vaccination history of an individual. Fields included are:

- Insurance (both Primary and Secondary, if applicable)
 - Insurance ID
 - Payer
 - Type
 - Policy Holder Birthday
 - Policy Holder First and Last Name
 - Relationship to Policy Holder
- Organization
 - Organization Name
 - Population Name
 - Population ID
 - Site Name

- Patient
 - Address
 - Birthday
 - Age at Vaccination
 - City
 - Disability Status
 - Email
 - Ethnicity
 - First and Last Name
 - Has Representative (yes / no)
 - Phone Number
 - Postal Code
 - Sex
 - State

- Vaccine
 - Vaccine Appointment Type
 - Vaccine Category
 - Dose Name
 - Dose Number
 - Vaccine Product Display Name
 - Lot Number
 - Manufacturer
 - Appointment Scheduled For Time
 - Appointment Status
 - Appointment External ID
 - Is First Dose (Yes/No)
 - Appointment Disability Status
 - Vaccination Record Funding
 - Vaccine product Ndc Code
 - Vaccine cvx Code
 - Vaccine Manufacturer Mvx Code
 - Vfc Eligibility Response



Appointments (PHI): Dashboard View

Each row contains the information for 1
 vaccination, including the patient's name and
 contact information, the dose information and the
 date/time the vaccine was administered. The filter
 controls can be used to create specific views
 based on population, site name, dose provided
 date, manufacturer and dose number.

You can utilize the filters to show data for specific date ranges or other segments. Filters that are included are:

- Population
- Site Name
- Appointment Scheduled for Date
- Manufacturer
- Patient Fmail
- Patient Name
- Vaccine Appointment Type

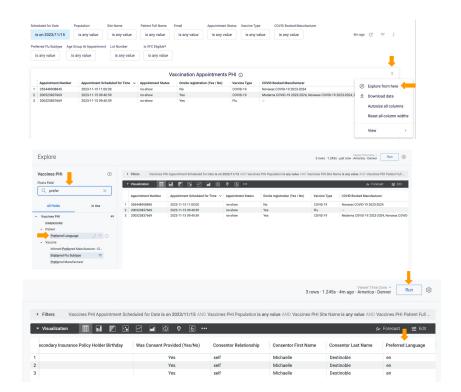




Pulling Patient Preferred Language

Prior to a clinic, you can use this dashboard to pull a report of what languages users went through the appointment flow in to know what languages patients might prefer to use during the appointment.

- Filter by the date of you clinic and click the three dots on the Vaccine Appointments PHI table, and from that drop down menu select "Explore from Here"
- Search for the field, Preferred Language in the search bar to the left and select that field. It will show up as a new column in the data table if you scroll all the way the right.
- Once the column has been added, click run and you will see that field populate for all of the appointments.





01

Dashboards - Vaccines



What you'll learn:

- How to view an overview of Vaccines data
- How to view Vaccines PHI

Navigation Bar

What is Color?

- 1. Staff Management Tool
- 2. Appointment Management Tool
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- 4. <u>Inventory Management Tool</u>
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Vaccine Overview

 The Vaccine Overview dashboard provides information on the overall statistics of a vaccination program.

Which Color product do you need today?





What data is included?

No Identifiable Data Included

 This dashboard is meant for an overview of the statistics of a site. It does not include information such as patients' names, contact information, etc.

Summary

- Doses Delivered
- Total Sites
- Cumulative Doses Delivered
- Cumulative Other Vaccines Delivered by Type
- COVID-19 Doses Delivered Two Week View
- Vaccines Delivered by Type Two Week View

Appointment Performance

- Total Scheduled Appointments
- Total Completed Appointments
- Total Cancelled Appointments
- Total No-Show Appointments
- Total On-the-Spot Appointments
- Cancellation Ratio
- No-Show Rate
- Second Dose Scheduled Rate
- Doses Delivered and Appointments -Breakdown by Site
- Site Performance COVID-19 Doses
 Delivered
- Site Performance Doses Delivered by Type

Demographics

A summary of the previous metrics broken down by:

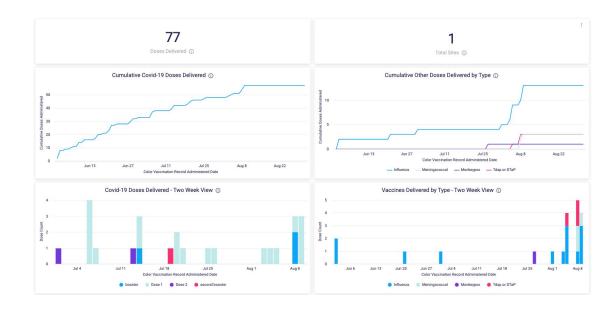
- Breakdown by Ethnicity COVID-19
 Doses Delivered
- Breakdown by Ethnicity Doses
 Delivered
- Breakdown by Ethnicity -Appointments
- Breakdown by Sex Doses Delivered
- Breakdown by Sex Appointments
- Breakdown by Age Group Doses Delivered
- Breakdown by Age Group -Appointments
- Breakdown by Disability Status -Doses Delivered
- Breakdown by Disability Status -Appointments



Vaccine Dashboards Summary

Provides aggregate statistics about the delivered vaccine doses, including:

- Doses Delivered: The total number of completed vaccinations that have been scheduled with Color. Includes first and second dose vaccinations.
- Cumulative Doses Delivered: The cumulative completed vaccinations that have been scheduled with Color. Includes first and second dose vaccinations for COVID-19 vaccinations.
- Doses Delivered Two Week View: A
 two-week view of the total number of
 completed vaccinations broken down by
 dose or vaccine type. If the selected date
 range is over two weeks, only the data for
 the last two weeks is shown.





Performance

Provides performance metrics related to appointments:

- Total Scheduled Appointments: The total number of scheduled vaccination appointments. Excludes cancelled appointments and on-the-spot appointments.
- Total Completed Appointments: The total number of completed vaccination appointments.
- Total Cancelled Appointments: The total number of cancelled appointments. Excludes rescheduled appointments.
- Total No-Show Appointments: The total number of no-show appointments. A no-show is
 defined as a non-completed, non-cancelled appointment where 60 minutes or more have
 elapsed since the scheduled appointment time. If a no-show appointment is eventually
 marked as completed, it will be excluded from this calculation after a subsequent data
 refresh.

- Total On-the-Spot Appointments: The total number of vaccination appointments that were not scheduled using appointment capacity.
- Cancellation Ratio: The percent of cancelled appointments over total scheduled appointments.
- No-Show Rate: The percent of no-show appointments over total scheduled appointments.
- Second Dose Scheduled Rate: The percent of first dose appointments delivered that have a second dose appointment scheduled. Excludes cancelled appointments. Currently, only applies to COVID-19 vaccines.
- Site Performance Doses Delivered: The total number of completed vaccinations broken down by vaccination site.
- Site Performance Appointments: Appointment-related statistics broken down by vaccination site.





Demographics

By Ethnicity:

- Doses Delivered: The total number of completed vaccinations broken down by patients' ethnicity.
- Appointments: Appointment-related statistics broken down by patients' ethnicity.

By Sex:

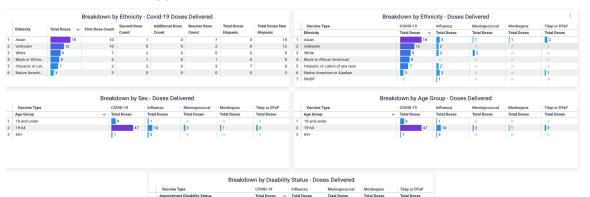
- Doses Delivered: The total number of completed vaccinations broken down by patients' sex.
- Appointments: Appointment-related statistics broken down by patients' sex.

By Age Group:

- Doses Delivered: The total number of completed vaccinations broken down by patients' age.
- Appointments: Appointment-related statistics broken down by patients' age.

By Disability Status:

- Doses Delivered: The total number of completed vaccinations broken down by patients' disability status.
- Appointments: Appointment-related statistics broken down by patients' disability status.



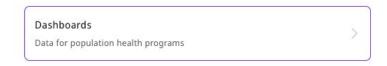
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Vaccination (PHI)

 Patient (PHI) dashboards provide row-level information. Each row includes patient contact and demographic information, as well as information about the dose and the appointment.

Which Color product do you need today?







Vaccine Dashboards

Vaccination (PHI): What data is included?

PHI Dashboards are not intended to be used for clinical decision-making.

 PHI dashboards do not contain a CLIA-approved report to inform medical management. They are an overview of patient information and results.

PHI dashboards include protected health information in addition to information about the vaccination history of an individual. Fields included are:

- Clinician
 - Credential Type
 - Email
 - First and Last Name
- Insurance (both Primary and Secondary, if applicable)
 - Insurance ID
 - Payer
 - Type
 - Policy Holder Birthday
 - Policy Holder First and Last Name
 - Relationship to Policy Holder

- Organization
 - Organization Name
 - Population Name
 - Population ID
 - Site Name
- Patient
 - Address
 - Birthday
 - Age at Vaccination
 - City
 - Disability Status
 - Fmail
 - Ethnicity
 - First and Last Name
 - Has Representative (yes / no)
 - Phone Number
 - Postal Code
 - Sex
 - State

- Patient Representative
 - Email
 - First and Last Name
 - Phone Number
 - Relationship to Patient
- Vaccine
 - Vaccine Appointment Type
 - Vaccine Category
 - Dose Name
 - Dose Number
 - Vaccine Product Display Name
 - Lot Number
 - Manufacturer
 - Dose Provided Date
 - Appointment Disability Status
 - Vaccination Record Funding
 - Vaccine product Ndc Code
 - Vaccine cvx Code
 - Vaccine Manufacturer Mvx Code
 - Vfc Eligibility Response



Vaccine Dashboards

Vaccinations (PHI): Dashboard View

Each row contains the information for 1 vaccination, including the patient's name and contact information, the dose information and the date/time the vaccine was administered. The filter controls can be used to create specific views based on population, site name, dose provided date, manufacturer and dose number. You can utilize the filters to show data for specific date ranges or other segments. Filters that are included are:

- Population
- Site Name
- Dose Provided Date
- Manufacturer
- Patient Email
- Patient Name
- Vaccine Appointment Type





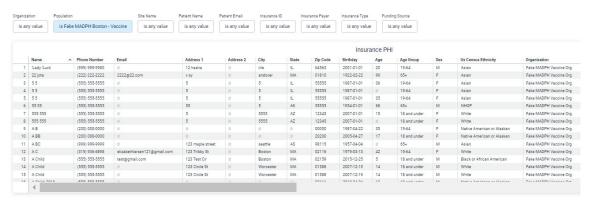
Dashboards -Insurance



Insurance Dashboard

- View collected insurance data
 - Patient information, including contact methods, address, and demographics, along with details about the funding source and primary/secondary information.

*To learn how to verify a patient's health insurance information <u>before</u> (<u>Appointment Dashboard</u>) and <u>after a clinic visit</u> (<u>Vaccination</u> <u>Dashboard</u>), **watch this video:** <u>HERE.</u>



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 - b. Color Support
 - c. MDPH Best Practices



Resources: Knowledge Base



Knowledge Base

Color Documentation Hub

- You'll find comprehensive guides and documentation to help you start working with Color's products and services as quickly as possible, and find support resources if you get stuck
- Update Color Resource Document

VACCINE PRODUCT

Participant Experience - Overview

Participant Registration

COVID-19 Second/Booster/Additional Shot - Participant Registration

Scheduling a 2nd Dose Appointment

Proof of COVID-19 Vaccination

https://docs.color.com/docs/participant-experience-1

Clinic Management - Overview Patient Check-In Add/Remove Vaccines to Appointment Administering Vaccination Modify or Re-Send Vaccination Record Create Scheduling Calendar Appointment Management Tool On-The-Spot Registration On-The-Spot COVID-19 2nd Dose Scheduling Inventory Management Staff Management Cancel / Reschedule a Single Patient Appointment Create New Site

Vaccine Dashboards

COVID-19 Vaccine Overview

Dashboard

COVID-19 Vaccination (PHI)

Dashboard

COVID-19 Vaccine Appointments

Dashboard

Vaccination Status Overview

Vaccination Status Participants

Vaccine Overview Dashboard

Vaccination (PHI) Dashboard

Vaccine Appointments Dashboard

Vaccine Appointments (PHI)

https://docs.color.com/docs/vaccine-dashboards

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Resources: Color Support



Color Support and Resources

Contacting Color Support

- Color's site support team can be directly reached at 844-531-0545 or vaxsites@color.com. This team is staffed 7 days a week, from 7am to 7pm ET Mon - Fri and from 8:30am to 7pm ET on Sat - Sun.
- Please call the Helpline for time-sensitive requests; for non-urgent matters, use vaxsites@color.com

Resources

- Color <u>Vaccine Resource Document</u>
- Color <u>Vaccine Support Page</u>
- Color office hours are held on Thursdays from 10am-11am at this Zoom link.
- Official Vaccine Clinic Management DPH Webpages:
 - Information on Vaccine Clinic
 Management Platform
 - How to apply to use Vaccine
 Clinic Management Platform
 - Color Training and Help Desk Resources
 - o Guide for Color Site Managers

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MDPH Best Practices:



DPH Best Practices: Clinical

Clinical Best Practices:

- (Re)screening a patient at the time of vaccine administration, the patient standardized screening form can be found at https://www.immunize.org/handouts/screening-vaccines.asp.
- Immunize.org's popular screening checklists for contraindications to vaccines for both children and adults have been updated to incorporate COVID-19-specific contraindications and precautions. The checklists may also be used for RSV vaccine.
 - Screening Checklist for Contraindications to Vaccines for Children and Teens
 - Screening Checklist for Contraindications to Vaccines for Adults
- Note: Checking/verifying the information a patient reported during registration
- It is important to verify that the vaccine type and dose the patient registered for matches what you are administering or making the correct change(s).
- The time interval between the date of the prior shot and the date of the planned shot is important
- Clinicians can edit the patient dose number based on this verification.
- For the most up to date COVID-19 vaccine information, please refer to the <u>CDC Interim Clinical Considerations Use of COVID-19 Vaccines in the United States and U.S. COVID-19 Vaccine Product Information.</u>
- For detailed, clinical best practices immunization guidance, please refer to the <u>General Best Practice Guidelines for Immunization: Best Practices Guidance of the Advisory Committee on Immunization Practices (ACIP)</u>.
- Vaccine Administration and Clinical Guidance Resources



DPH Best Practices: Clinic & Data Quality

Guidance on Reconciling your Vaccination Data in Color to the MIIS & Other Best Practices:

We recommend reconciling data on a per-clinic basis as it is easier to identify any discrepancies when comparing as opposed to over several months.

- In the MIIS: Any provider can get the number of shots administered by running the patients vaccinated report and exporting it. Pages 3 and 4 of the <u>Patients Vaccinated Report Mini Guide</u> show users how to export the patients vaccinated report to Excel. Once the downloaded report is opened in Excel, the second tab, called "Detailed Report", will enable providers to run a tally of how many shots were administered. This will provide the shot count versus the patient count given on the "Input Parameters" page (first Excel tab).
- In Color: In the Vaccinations PHI Dashboard, providers can run a query of all vaccinations administered or by certain dates and/or clinic sites. Once certain parameters are selected, the results can be downloaded in Excel by selecting download, advanced options (show all results). You can then compare this data to the number of shots administered in the MIIS Patient Report.
- **Inventory Decrementing:** Watch <u>this video</u> on how to resolve inventory discrepancies.
- MIIS Resource Center for additional resources and how-to guides.

DPH Best Practices: Clinic & Data Quality

Each site is responsible for VERIFYING and UPDATING all information patients entered during registration at check-in:

- You must verify address and race/ethnicity and make any necessary updates.
- You must verify insurance information and make any required updates.
 - This is especially important for VFC eligibility screening and Federal and State Compliance
- See all 2024 Guidelines for Compliance with Federal and State Vaccine Administration Requirements
- Color flags individuals as VFC-eligible based on the criteria they enter during registration.
- In case an individual does not select the appropriate criteria while registering, the check-in person should be re-screening for VFC eligibility at the time of check-in and making any updates.
- You can see all your VFC-eligible patients and the reason for eligibility in both your Appointment Dashboard and Vaccination Dashboard, and you can edit VFC eligibility directly in the Vaccination Tool at check-in.

Staffing Changes:

It is the responsibility of the Site Manager to remove all Color users who no longer need access to certain clinics or to Color. Users should be removed as soon as they no longer need access.

- **Site Agreements**: Please be aware that any staffing changes at your clinic, including those users who signed the original Color site agreement, must be reflected through an updated site agreement.
- **User Agreements:** Any new user with access to Color must sign an individual user agreement that is kept on file locally and can be requested by DPH at any time.
- Regularly remove Color users who no longer need access to clinics.

DPH Best Practices: Helpful Resources

Resources

- Color Vaccine Resource Page
 - This document contains previous product launches and short training videos
- Color Knowledge Base
 - This document includes links to Color video tutorials, as well as links to recorded trainings.
- Color office hours are held weekly on Thursdays from 10am-11am at this Zoom link.
- Official Vaccine Clinic Management DPH Webpages:
 - o Information on Vaccine Clinic Management Platform
 - How to apply to use Vaccine Clinic Management Platform
 - Color Training and Help Desk Resources
 - Guide for Color Site Managers

COVID-19 Resources

- The <u>CDC Interim Clinical Considerations Use of COVID-19 Vaccines in the United States</u>
- Search for Vaccine locations: https://www.vaccines.gov/
- COVID-19 Vaccine Resource Line/2-1-1 is available for individuals who need further assistance or have difficulty accessing the internet. The line is available in English and Spanish and has translators available in approximately 100 additional languages.
- MDPH COVID-19 <u>Vaccine Information</u>
- MDPH COVID-19 Vaccine Training and Education Resources for Providers: https://www.mass.gov/info-details/covid-19-vaccine-training-and-education-resources-for-providers
- MDPH <u>Multilingual COVID-19 Materials</u>. Resources related to Coronavirus Disease 2019 (COVID-19) in multiple languages. Includes videos and printables on topics like vaccine safety, pregnancy and the vaccine, and FAQs.

Influenza Resources (watch for 2023/2024 information)

- Influenza | Mass.gov
- MMWR 2023-24 Summary of Recommendations
- MMWR 2023–24 Influenza Season
- Standing Orders templates can be found on Immunize.Org's website, https://www.immunize.org/standing-orders/
- CDC's Frequently Asked Influenza (Flu) Questions
- CDC's Seasonal Influenza gateway page for Health Professionals: https://www.cdc.gov/flu/professionals/index.htm
- Immunize.Org's Ask the Experts/Influenza https://www.immunize.org/askexperts/experts_inf.asp



DPH Best Practices: Helpful Resources

Color Help (DPH)

For questions regarding the platform, onboarding, etc.

Phone: (617)-259-4984

Email questions to: colorhelp@mass.gov

Website: https://www.mass.gov/info-details/vaccine-clinic-management-platform

Immunization Division Main Number

For questions about immunization recommendations, disease reporting, etc.

Phone: 617-983-6800 (24/7 MDPH Epi line)

Fax: 617-983-6840

Website: https://www.mass.gov/topics/immunization

MIIS Help Desk

Phone: 617-983-4335 Fax: 857-323-8321

Email questions to: miishelpdesk@mass.gov

Website: https://www.mass.gov/massachusetts-immunization-information-system-miis

MDPH Vaccine Unit

Phone: 617-983-6828

Email questions to: dph-vaccine-management@mass.gov

Website: https://www.mass.gov/service-details/vaccine-management

color

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