



FAQ's: Vaccine Clinic Management-Color Platform

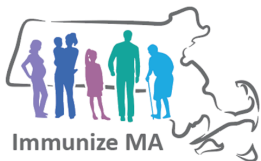
General

1. **What is a population in Color?**
 - a. A population is a governing body of the clinic sites, for example a local board of health, a regional public health collaborative, health department, VNA, mobile vaccinator or EMS etc. An example of a population is the *Happy Board of Health*.
2. **What is a site in Color?**
 - a. A site, often referred to as a clinic site is where vaccinations are occurring.
3. **What will mirror if I create a new site?**
 - a. Time zone, population, and MIIS pin. The site will have the option to select if they want to mirror the same permissions or add individuals separately.
4. **How do I decommission a site(s)?**
 - a. To de-commission a site, you need to email Color Tech Support (vaxsites@color.com) and CC colorhelp@mass.gov a list of all the site(s) you want decommissioned and why. Please keep in mind that once you decommission a site, it will no longer be available in the drop-down of your sites in the Onsite Tool, but all of the data and historical information will still be accessible in the Dashboards.
5. **Why decommission a site(s)?**
 - a. Sites that have created many physical clinic locations that they will no longer be using prefer to remove them from the list visible to patients at registration and clinic staff in the drop down of the Onsite Tool.
6. **How do I make my population inactive if we no longer plan on using Color?**
 - a. To inactive a population, all your sites must be decommissioned which at that time we would request Color to label your population inactive and that MIIS also inactivate your populations HL7 feed. If you would like to proceed with decommissioning all your sites and marking your population inactive, please email colorhelp@mass.gov.

Onsite Tool

Vaccination:

7. **How do you send (email/text) or print a vaccination history for a patient?**
 - a. If the patient has provided a cell phone number and or email the vaccination history will automatically be sent once their appointment has been completed.
 - i. If for some reason the patient did not receive a text message or email due to information entered being incorrect navigate to the three little dots on



the right side next to appointment status. First, select patient details and change the phone number or email if needed, then select continue. Then, select the three little dots on the right side again and select send or print vaccination history this will then prompt the user to either print or send history.

8. **Why don't I see certain vaccines surfacing when trying to add a vaccine on the fly?**
 - a. The only vaccines that will surface during on the fly are the vaccines that have active inventory in the inventory management tool. This also goes for walk up patients or patients that are doing an on-the-spot registration.
9. **Why is my name not showing up in the drop down for vaccinating clinician?**
 - a. The clinician must first confirm their credentials. Once they receive an email from Color saying they have access to new permissions they need to log into Color and select the *Vaccination Tool* and enter their credentials.
10. **How do I switch the appointment location to at home?**
 - a. In the appointment location it is always going to default to an *on-site clinic*. If the vaccine was given *at home* you will want to click on the three vertical dots next to the patient's appointment status, click edit patient details, and then select billing requirements.

Inventory:

11. **When adding vaccine inventory what does NDC, CVX, and MVX mean?**
 - a. NDC – National Drug Code is a unique number that identifies a drug and is assigned by the FDA (Federal Drug Administration). They indicate the product (FDA Product Code), the manufacturer or packager (FDA Labeler Code), and the packaging (e.g., 5 dose vial)
 - b. CVX – Codes that indicate the product used in a vaccination.
 - c. MVX – Codes that indicate the manufacturer of a vaccine.
12. **Do I use the NDC on the packaging or the vial?**
 - a. You're going to want to use the NDC on the box **NOT** the vial.
13. **When I add inventory do I have to make it active?**
 - a. No, when you add inventory, it will automatically default to active.
14. **What happens if the vaccine/lot was deactivated?**
 - a. The lot will no longer appear when clinicians use the onsite vaccination tool to administer vaccines.
 - b. Patients using the walk-up feature or clinics using the on-the-spot registration will be unable to register for vaccines that are deactivated.
15. **What's dependent on the inventory management tool?**
 - a. The inventory that you have controls the vaccine types that your patient will see during walk up/on the spot registration and adding a vaccine on the fly flow.



Appointment:

16. What does on the fly mean?

- a. On the fly means you can add additional or remove vaccines during the vaccine administer service process

17. What are the pre-registration links via the primary/secondary calendars?

- a. This allows patients to register in advance, including the following use cases:
 - i. Distributed through a school email blast.
 - ii. Post to a town page
 - iii. Create your own QR code and create pre-registration fliers.
 - 1. Share it with a senior center staff to either fully or partially register patients in-person/over the phone.

18. What is the walk-up URL?

- a. This URL allows patients to self-register for same-day appointments upon arrival, and it is time-stamped the minute of completion. Some of the use cases include:
 - i. Copy QR code from Color and post it at the clinic entrance.
 - ii. Print out walk-up URL and post at clinic entrance.

19. What is the on-the-spot feature?

- a. This means the patient did not pre-register, so they have to be added to the schedule upon arrival to the clinic by site staff. This permits same-day appointments.

Site Settings:

20. Where can I edit the site name, address, or change the custom directions?

- a. You are going to want to select the onsite tool tile then make sure the correct site is selected and then click on site settings. Then click on name and location and you will be able to edit any of those three fields.
 - i. Reminder: Site name and location cannot be updated/changed after a vaccine has been administered. The site would need to contact color support (vaxsites@color.com) for changes to be made.

21. If you create vaccine consults appointments, do you also have to create vaccine appointments as well if those patients who are scheduled for vaccine consults do in fact want vaccines?

- a. No, you would create vaccine consults only and if during the appointment the patient needed a vaccine such as TDAP and or flu you would then add those vaccines via on-the-fly feature (**the only vaccines/lots you can add on the fly are ones that have active inventory in the inventory management tool**)

22. If the patient comes in for a vaccine consultation and at this time, they decide they do not want a vaccine, does this get billed?

- a. At this time, vaccine consults do not get billed.

23. Is inventory per population or site?

- a. Inventory is per site, but you can **manage** it at the population level if you have population level permissions.

24. How do you cancel/reschedule one single appointment?



a. In your vaccination tool search the patient's name whose appointment you need to cancel. Select the three dots on the right side next to the patient's status then select change appointment.

i. A screen will appear, and the staff member can either select cancel or reschedule appointments. If a staff member chooses to cancel an appointment, they will have the option to allow the patient to reschedule on their own. If so, make sure to select which calendar the patient can reschedule their appointment on.

1. If the user selects to reschedule the appointment, they will be taken to the calendar the appointment had been scheduled and the staff can then select the day and time for the patient's rescheduled appointment. **(Only appointments where the patient hasn't been checked in can be modified and if the appointment was created on the spot via add patient or the QR code link the appointment cannot be canceled/rescheduled)**

Dashboard

26. How do I download more than 500 rows when pulling data from dashboards?

a. For Table charts, the default is to download the first 500 rows. Select *All results* under **Number of rows and columns to include a section** to bypass the limit and download all rows.

Staff Management

27. How do you add staff permissions?

a. Navigate to the *Staff Management* tool and select the "Add Staff" button in the top right. Enter the email address of the individual that will need access, choose the staff role(s), then click *Confirm*. Users who do not have a Color account will receive an email invitation to create an 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.

28. How do you edit/remove staff roles?

a. Navigate to the *Staff Management* tool and search the staff member by their name or email in the text box on the right-hand side. Once you have located the staff member, click the three vertical dots on the right side and you can either select "Edit Roles" or "Remove"

29. Who can assign, edit, remove staff roles?

a. Users with site manager permissions