Indiana Department of Health

ZOTEC Training 101

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3 Types of Users in Zotec

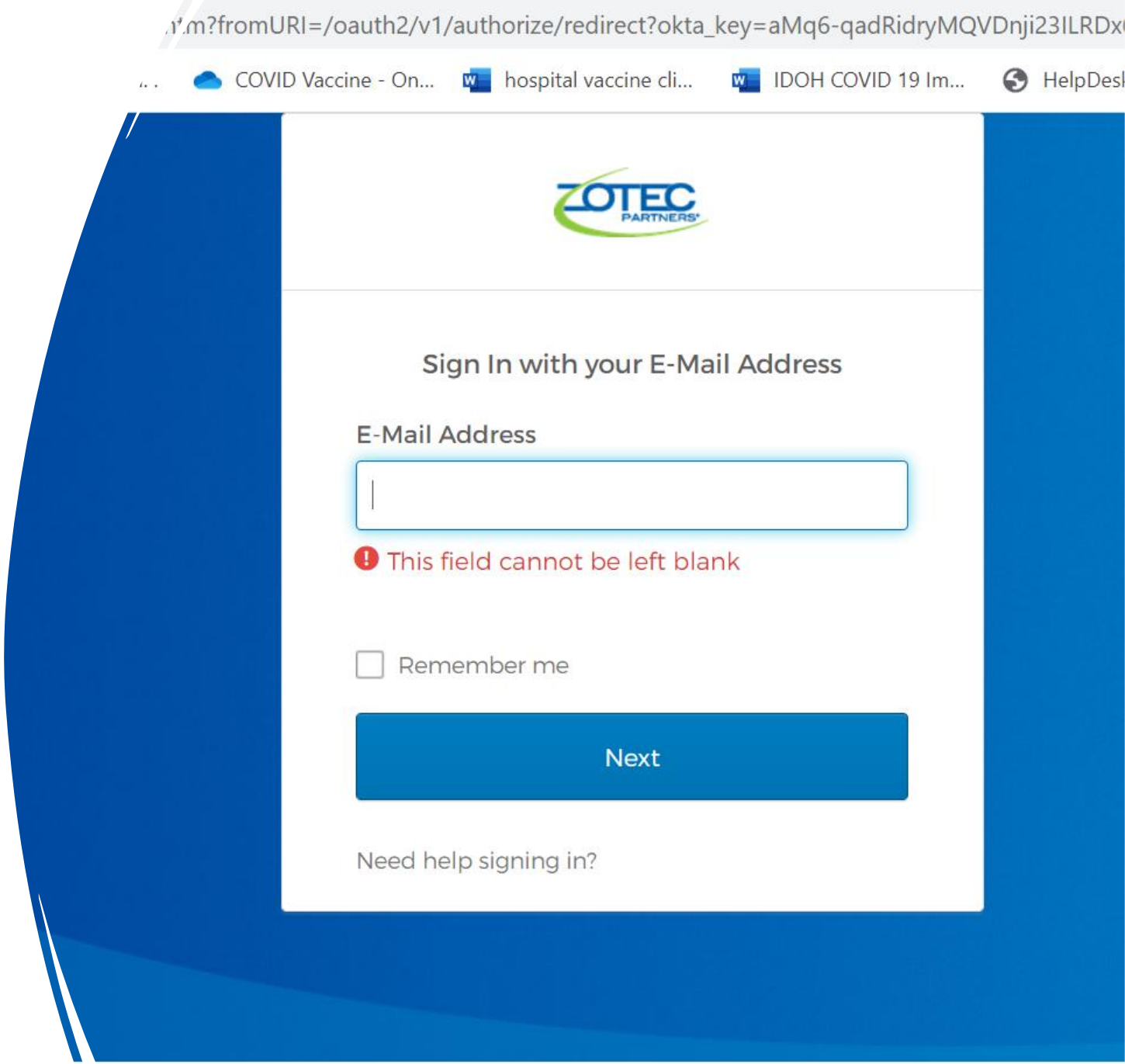
- Registration User – Can Check-in and Check-out a Patient. Cannot access the Vaccination Administration or Vaccine Documentation
- Vaccination Administrator – Can access the Vaccination Administration and Vaccine Documentation. (This is the medical professional delivering the vaccine)
- Dual Access User – Can access Check-in, Check out, Vaccine Administration and Vaccine Documentation.

- User type was assigned by your Hospital.

These following steps are for the Registration Admin user OR the Dual Access user.

Those that are only “Vaccine Administrators” will not be able to access the screens covered in this document.

Please review the document for Vaccine Administrators.



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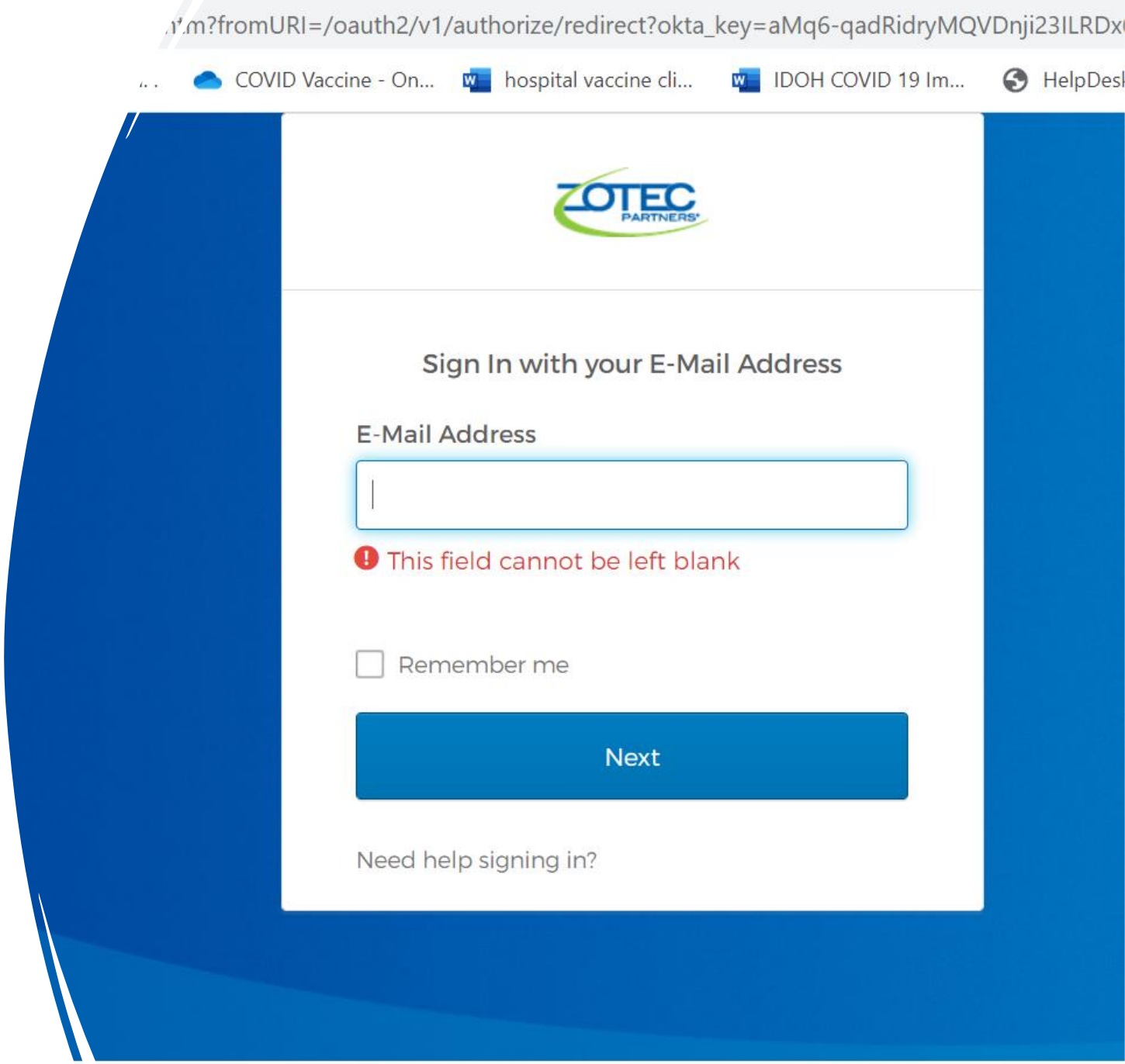
Login at
https://checkin.coronavirus.in.gov

If you do not have login access, your hospital can request it for you.

If your hospital did so, the email to create an account comes from.
reply@zotecpartners.com

User accounts take 1 hours to sync so please create your account before you start your work.



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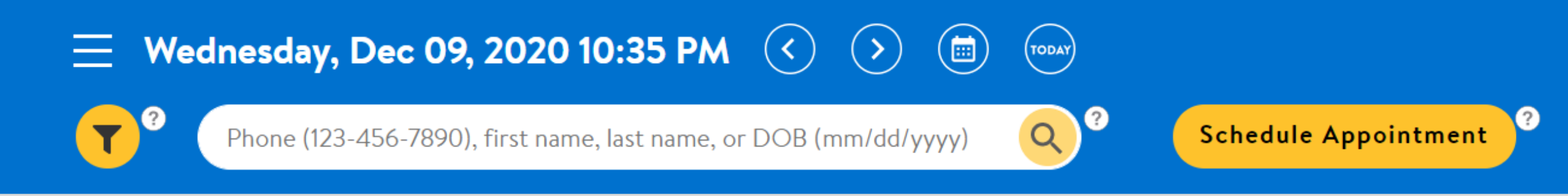

Your location appears here → HANCOCK REGIONAL

Time	First Name	Last Name	DOB	Service	Appointment Type	Status
8:10 AM	Mark	Training9	05/12/1983	Immunizations	COVID VACCINE	Checked Out

What to check before proceeding:

✓Location is correct

✓Date is correct

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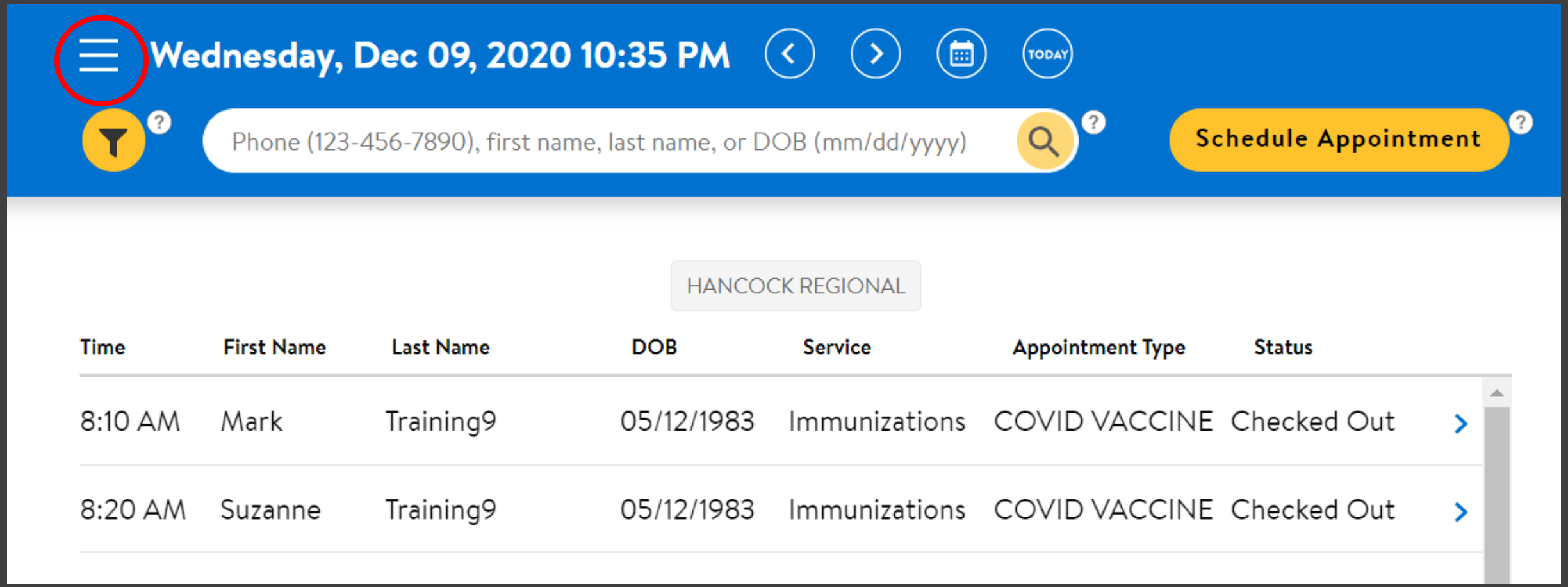

You can change your location here.

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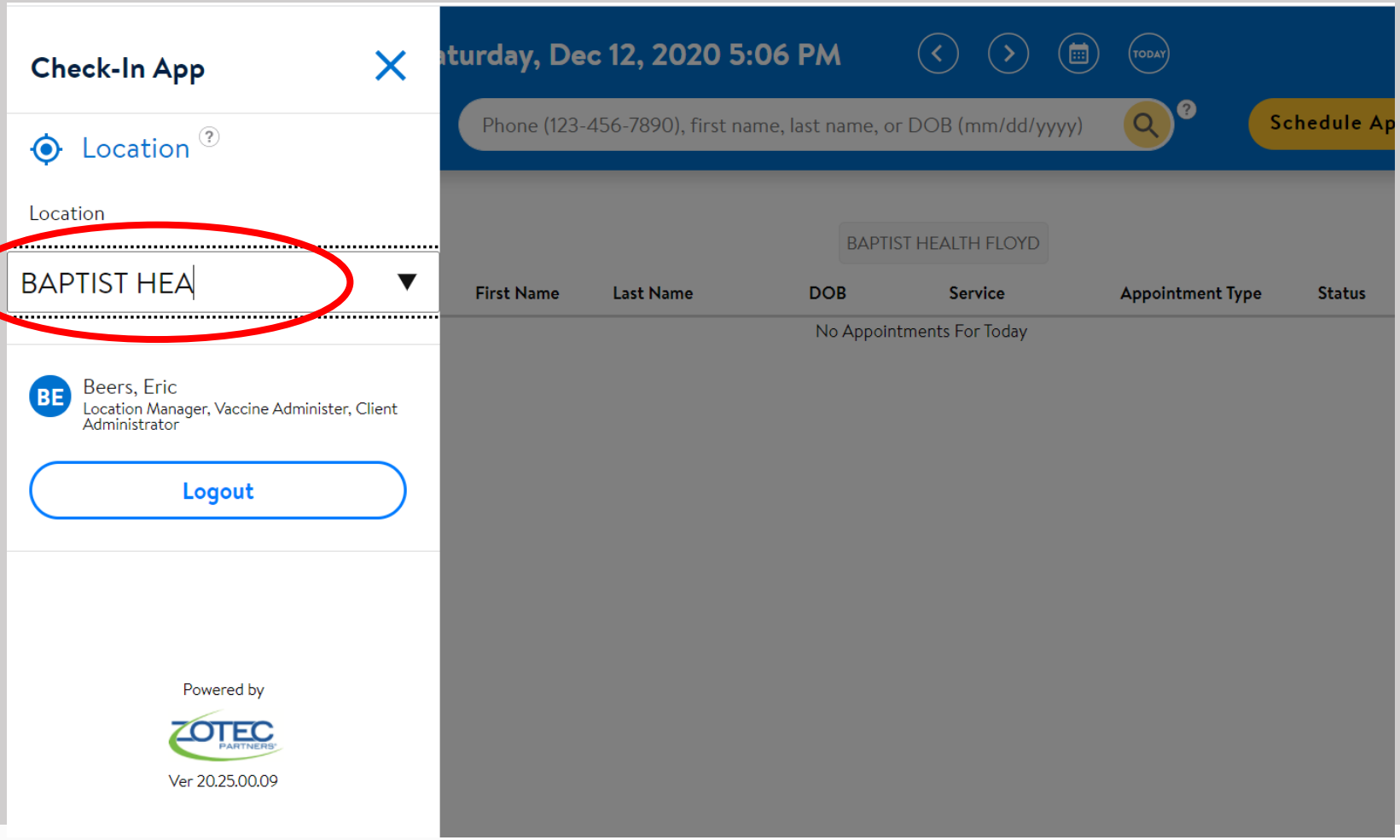

You can change your location here by typing! The drop-down function works with what it typed in this box!

- You should see the list of patients that have started their registration to be test that day.
- Some will be in the STATUS ”Registered” which means they filled out all the registration questions and consents before-hand and will just need their information verified and to be checked in.
- If they are “Unregistered,” then you will need to see what questions were missed and complete the process.

BAPTIST HEALTH FLOYD

Time	First Name	Last Name	DOB	Service	Appointment Type	Status
2:00 PM	Kerry	Test	12/31/1980	Immunizations	COVID VACCINE	Unregistered
2:30 PM	Darla	Test	01/01/1980	Immunizations	COVID VACCINE	Registered
2:40 PM	C	Tincher	04/18/1969	Immunizations	COVID VACCINE	Registered
2:50 PM	Test	Test	11/05/1960	Immunizations	COVID VACCINE	Unregistered
2:50 PM	Test	Test	11/05/1960	Immunizations	COVID VACCINE	Unregistered
3:00 PM	BROOKLYN	TEST	04/21/2001	Immunizations	COVID VACCINE	Unregistered
3:10 PM	BRIAR	TEST	04/21/2001	Immunizations	COVID VACCINE	Unregistered

- Click on the patient that you want to CHECK-IN to access the PATIENT INFORMATION SCREEN

BAPTIST HEALTH FLOYD

Time	First Name	Last Name	DOB	Service	Appointment Type	Status
2:00 PM	Kerry	Test	12/31/1980	Immunizations	COVID VACCINE	Unregistered
2:30 PM	Darla	Test	01/01/1980	Immunizations	COVID VACCINE	Registered
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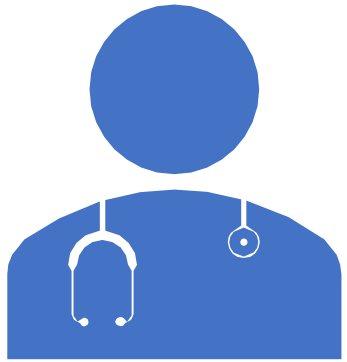
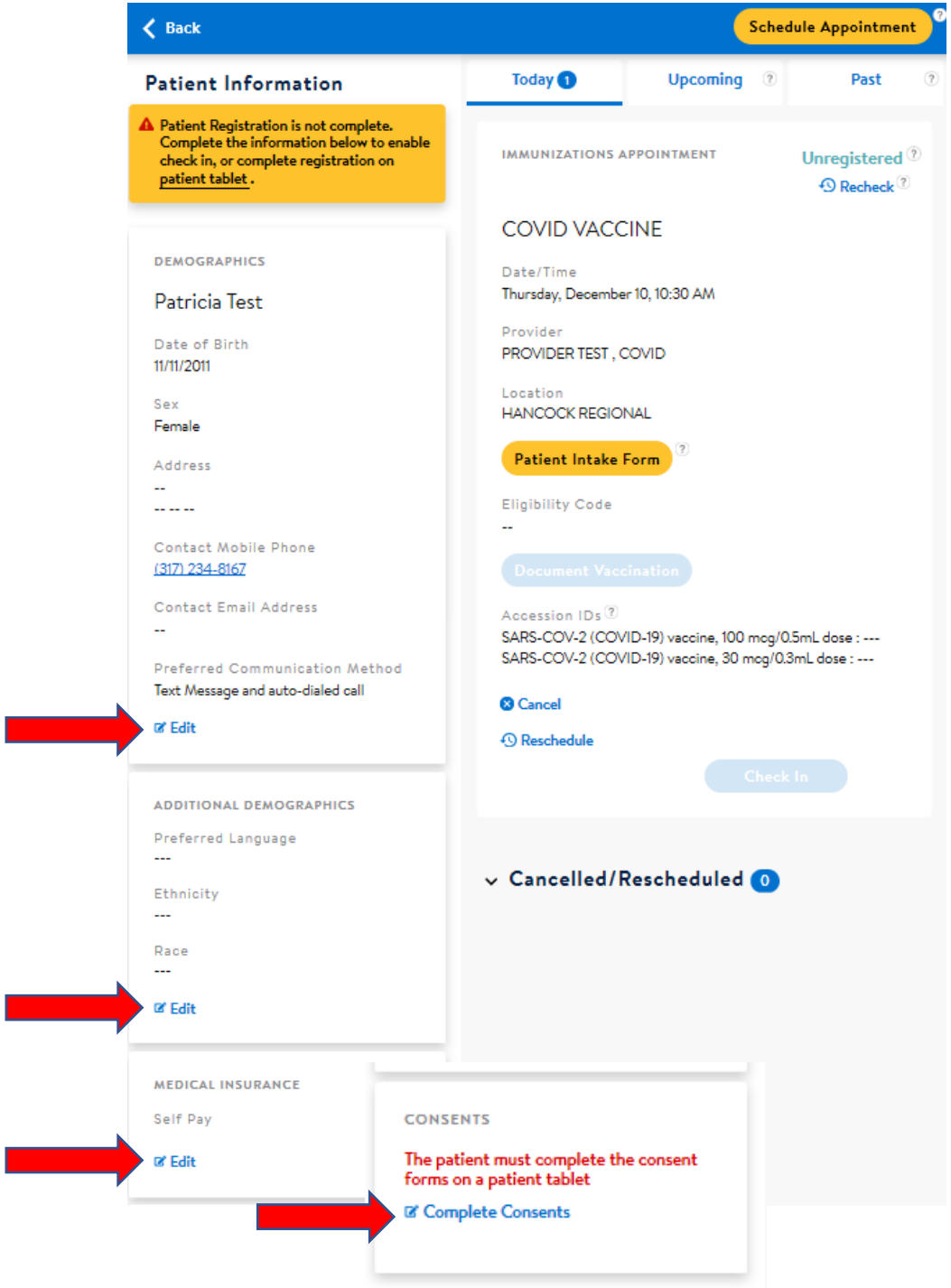
2:50 PM	Test	Test	11/05/1960	Immunizations	COVID VACCINE	Unregistered
2:50 PM	Test	Test	11/05/1960	Immunizations	COVID VACCINE	Unregistered
3:00 PM	BROOKLYN	TEST	04/21/2001	Immunizations	COVID VACCINE	Unregistered
3:10 PM	BRIAR	TEST	04/21/2001	Immunizations	COVID VACCINE	Unregistered

A new screen will open and will show you the "Patient Information"

Complete the following by selecting “Edit”:

- ✓ Demographics
- ✓ Additional Demographics
- ✓ Medical Insurance Information
- ✓ Consents





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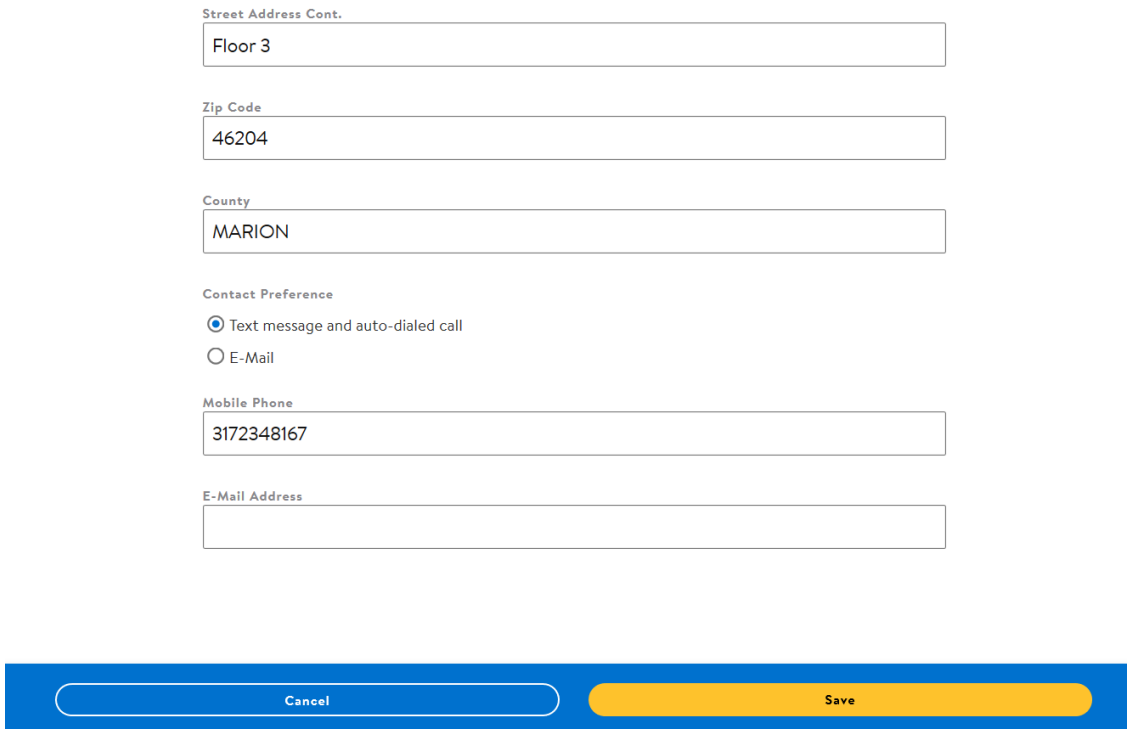
Address

- **Type street address on “Street Address”**
- **For apartment, building, suite, or floor numbers use line “Street Address Cont.”**
- **Type zip code in “Zip Code”**
- **County will auto populate – If it does not please verify zip code. Some zip codes that share a city/town may need to be manually entered**



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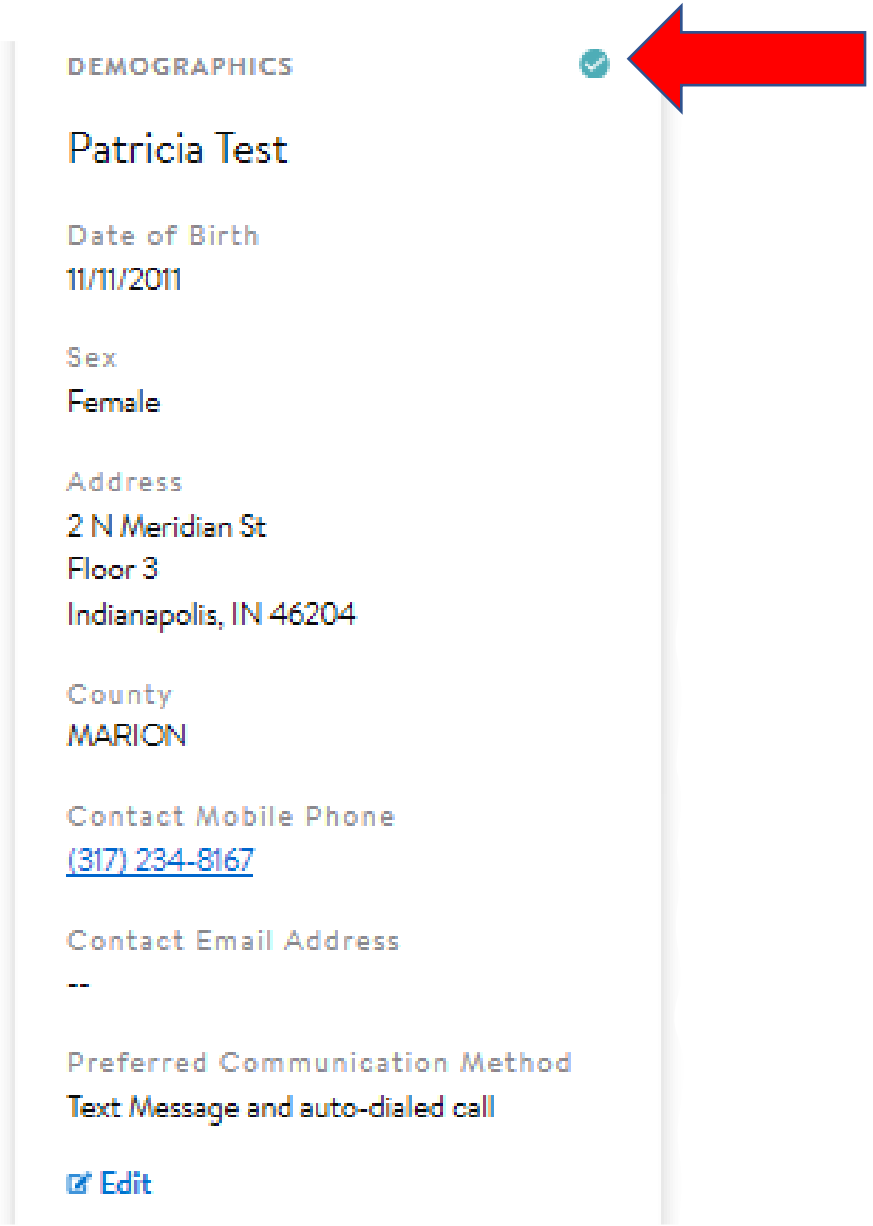

When you are complete you will see the green check mark in the corner

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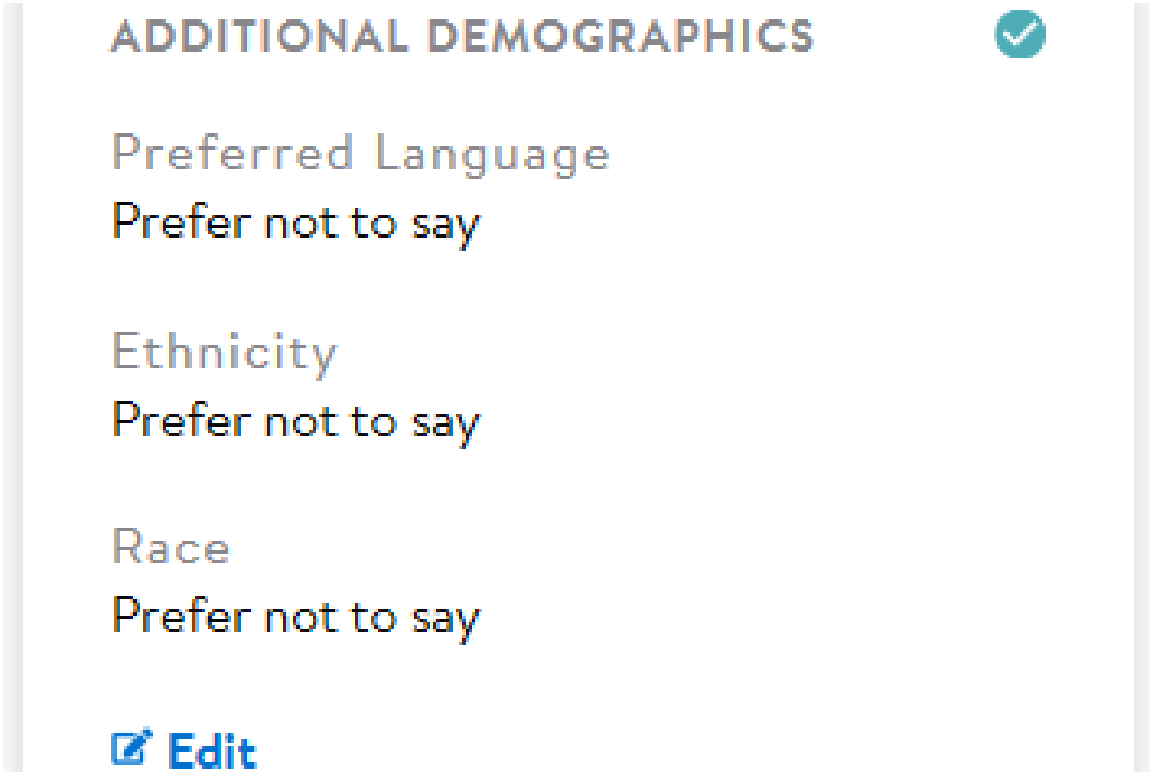
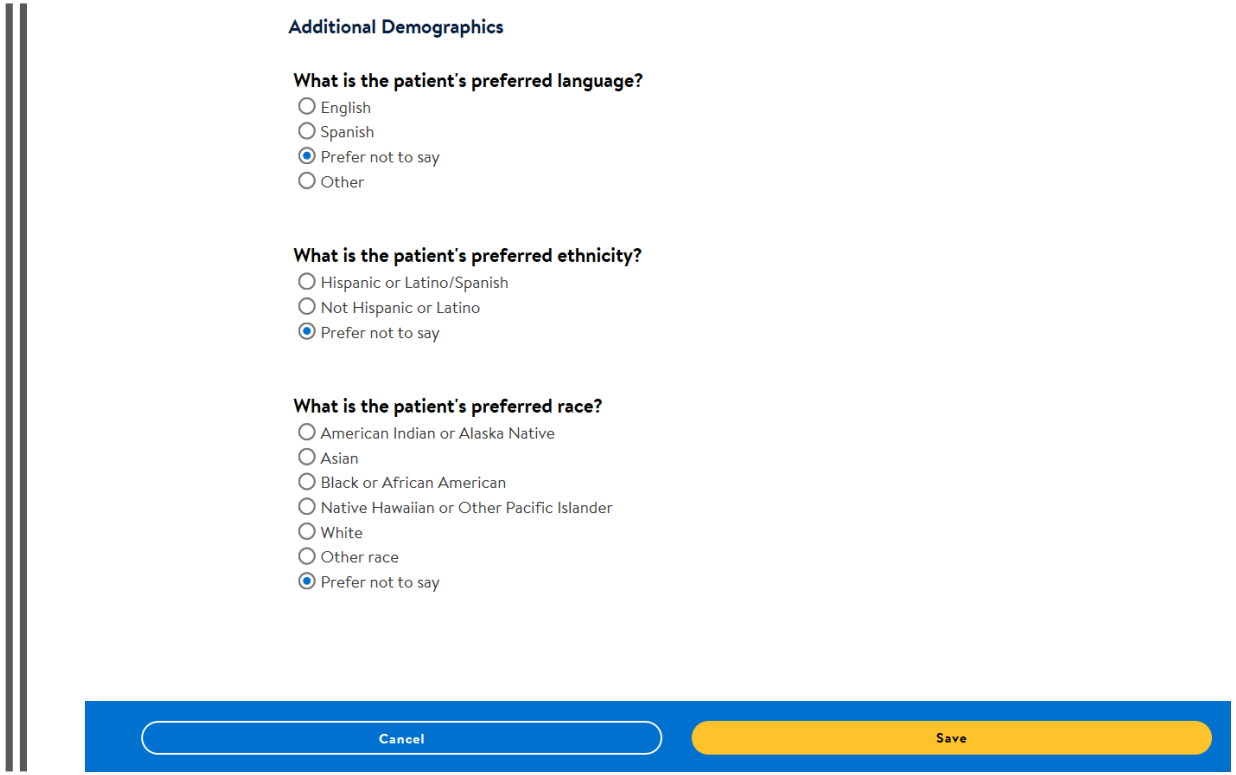
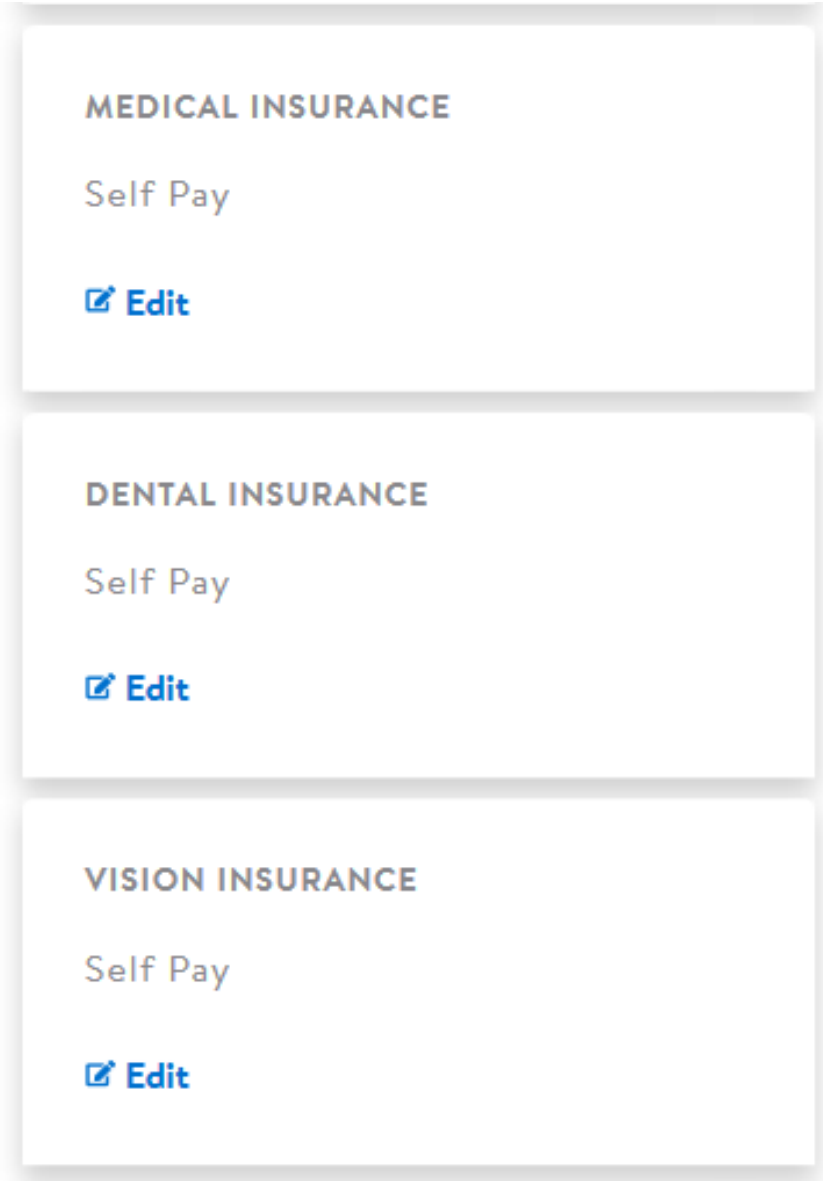
Complete “Additional Demographics”







Select “Edit” for Medical Insurance. By law, no patient will be billed for a vaccine.

There is no need to complete the DENTAL or VISION INSURANCE

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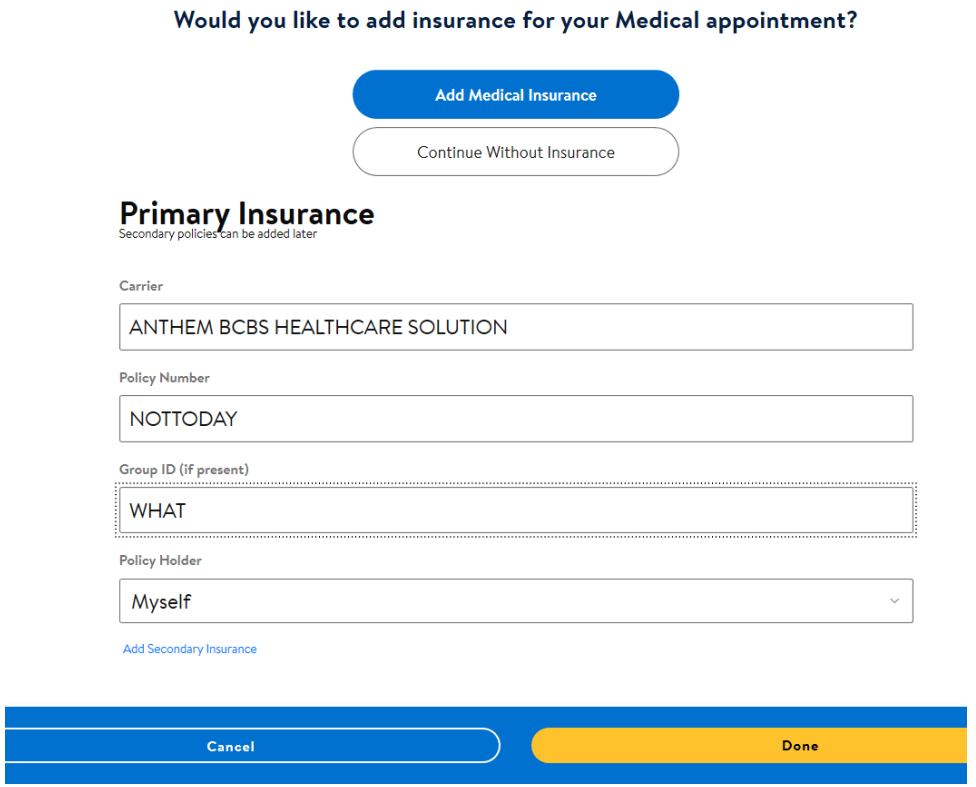
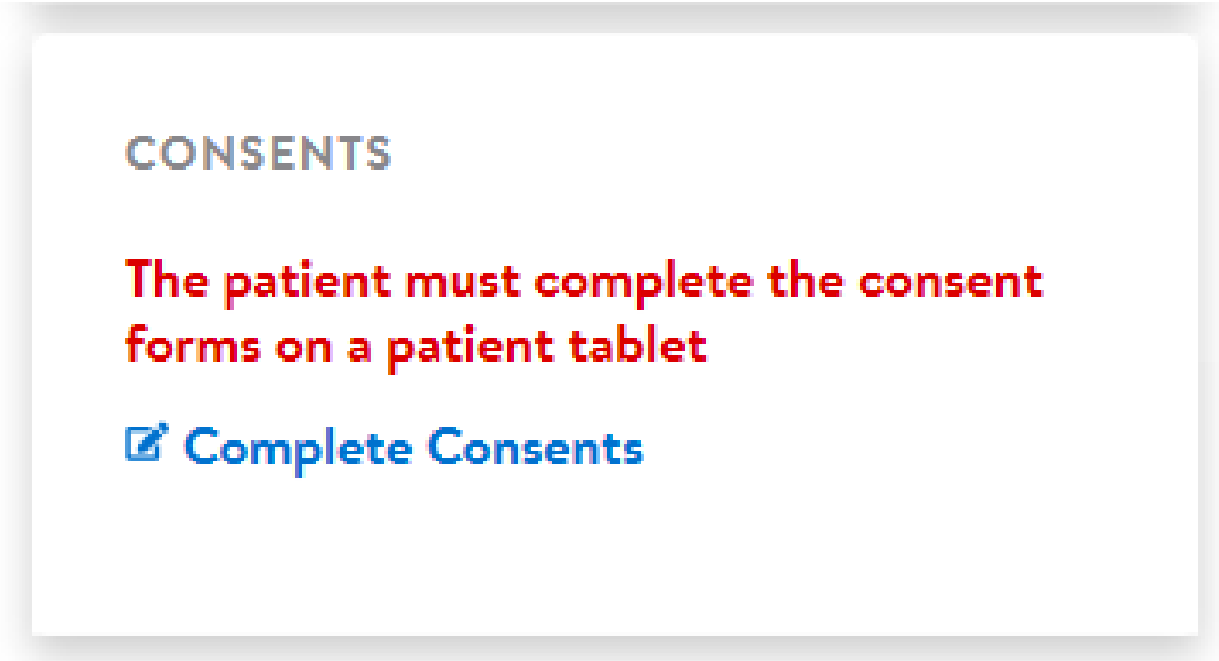
Complete fields or select Continue Without Insurance No patient will be billed for a COVID Vaccine.

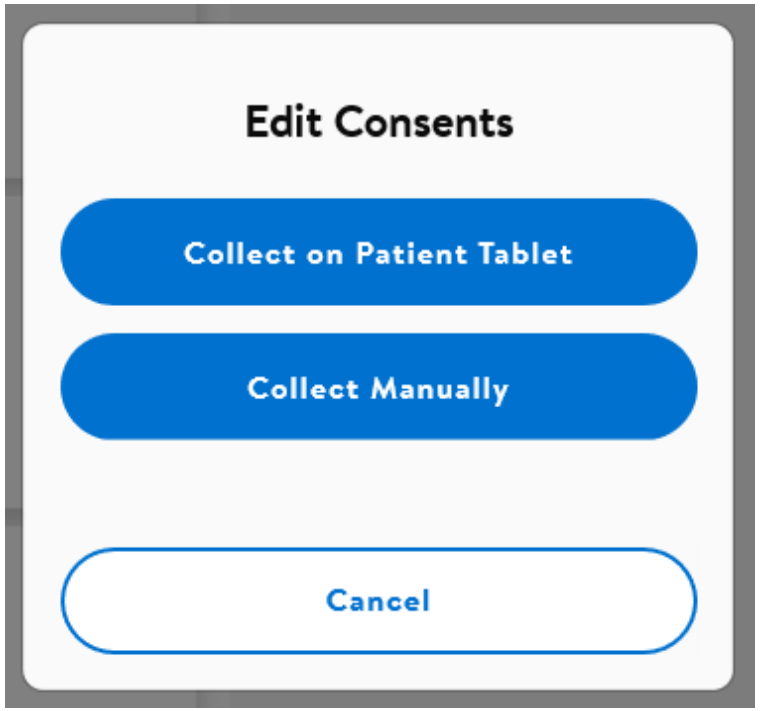
- You will see optional carriers once you start typing
- Leave Dental and Vision Insurance as self-pay
- Collect the patients Medical Insurance is available
- Patients **WILL NOT** be charged
- IDOH will bill insurance and reimburse vaccination locations on the back end.



Select “Complete Consents”

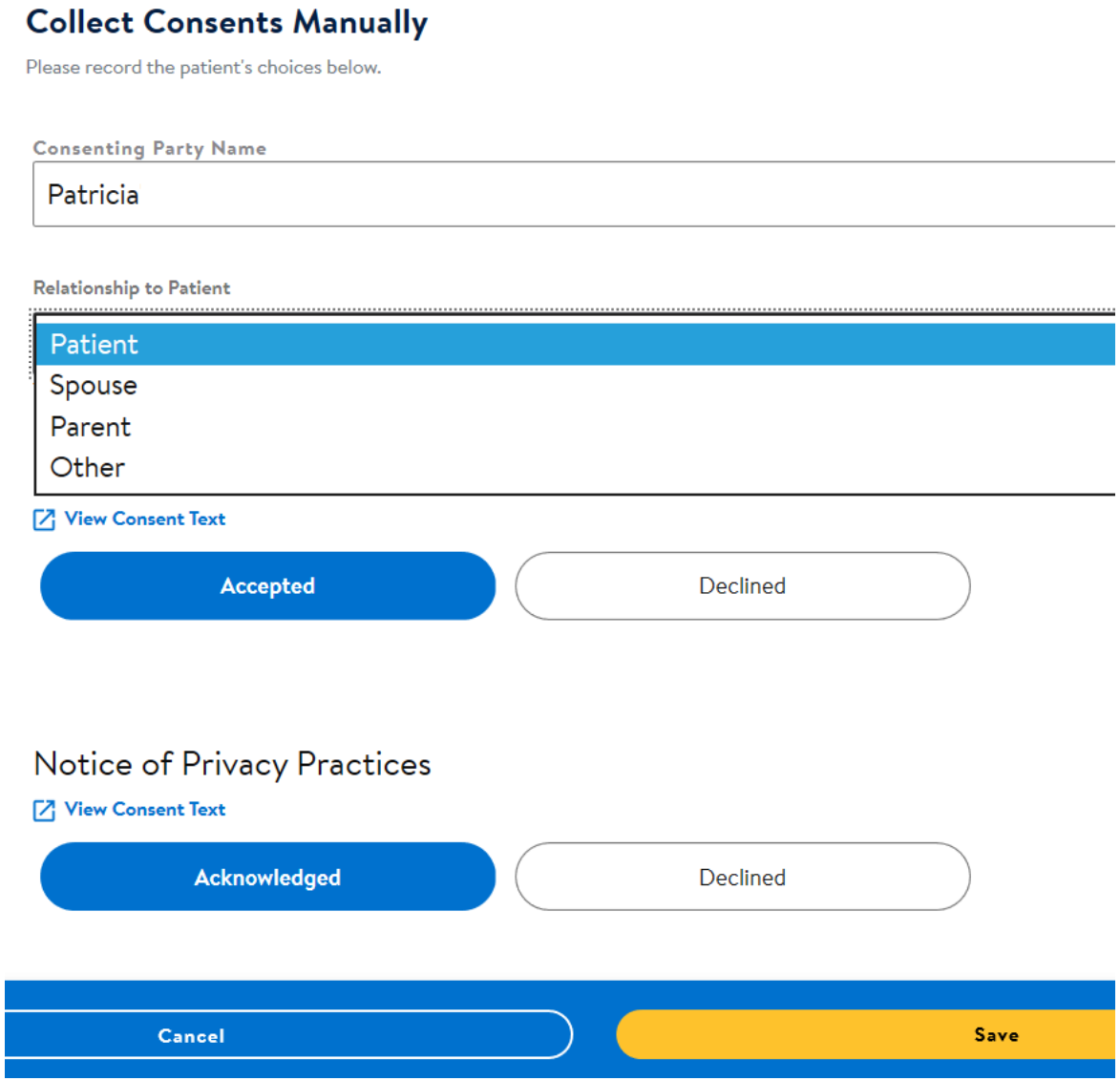


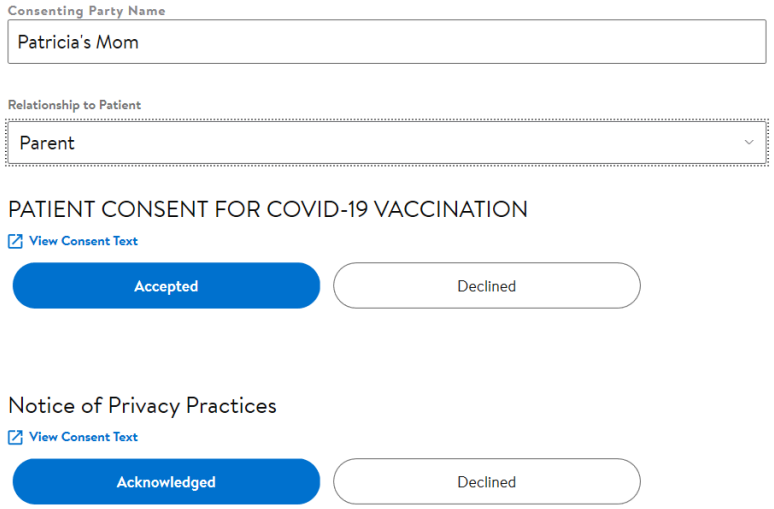
Select “Collect Manually”



What you need:

- ✓ Patient's Name
- ✓ Relationship
- ✓ Accepted Consent for vaccination
- ✓ Acknowledgement of Privacy Practices





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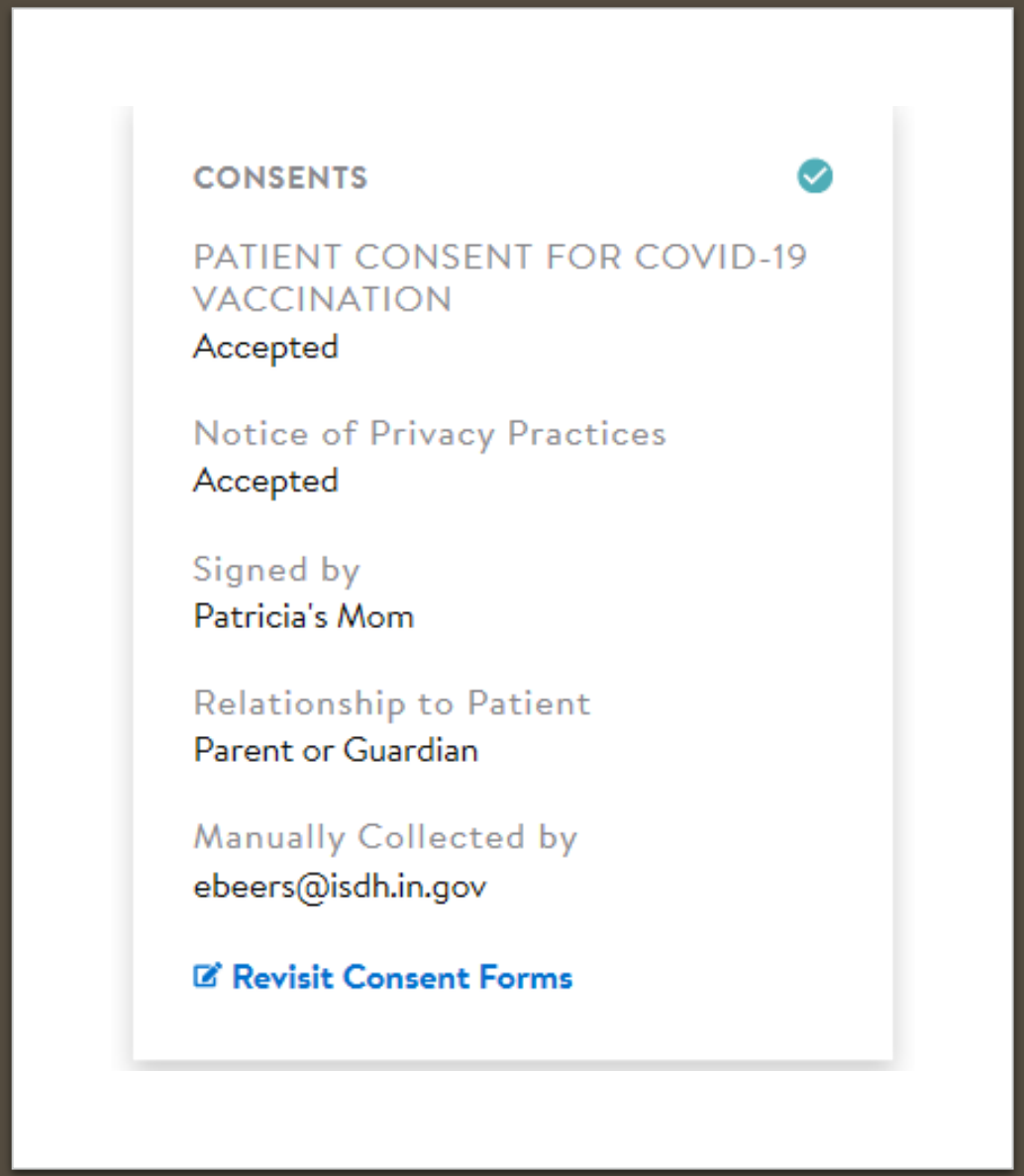

A check mark will be visible once completed.

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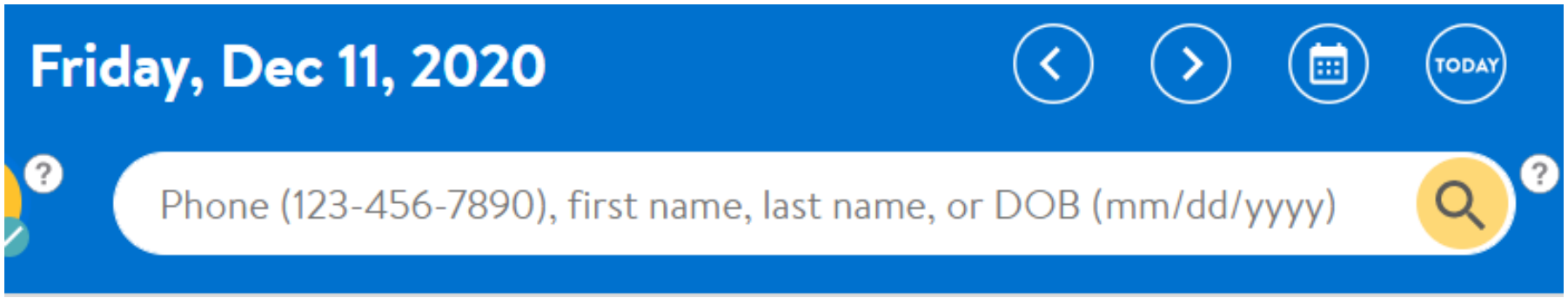
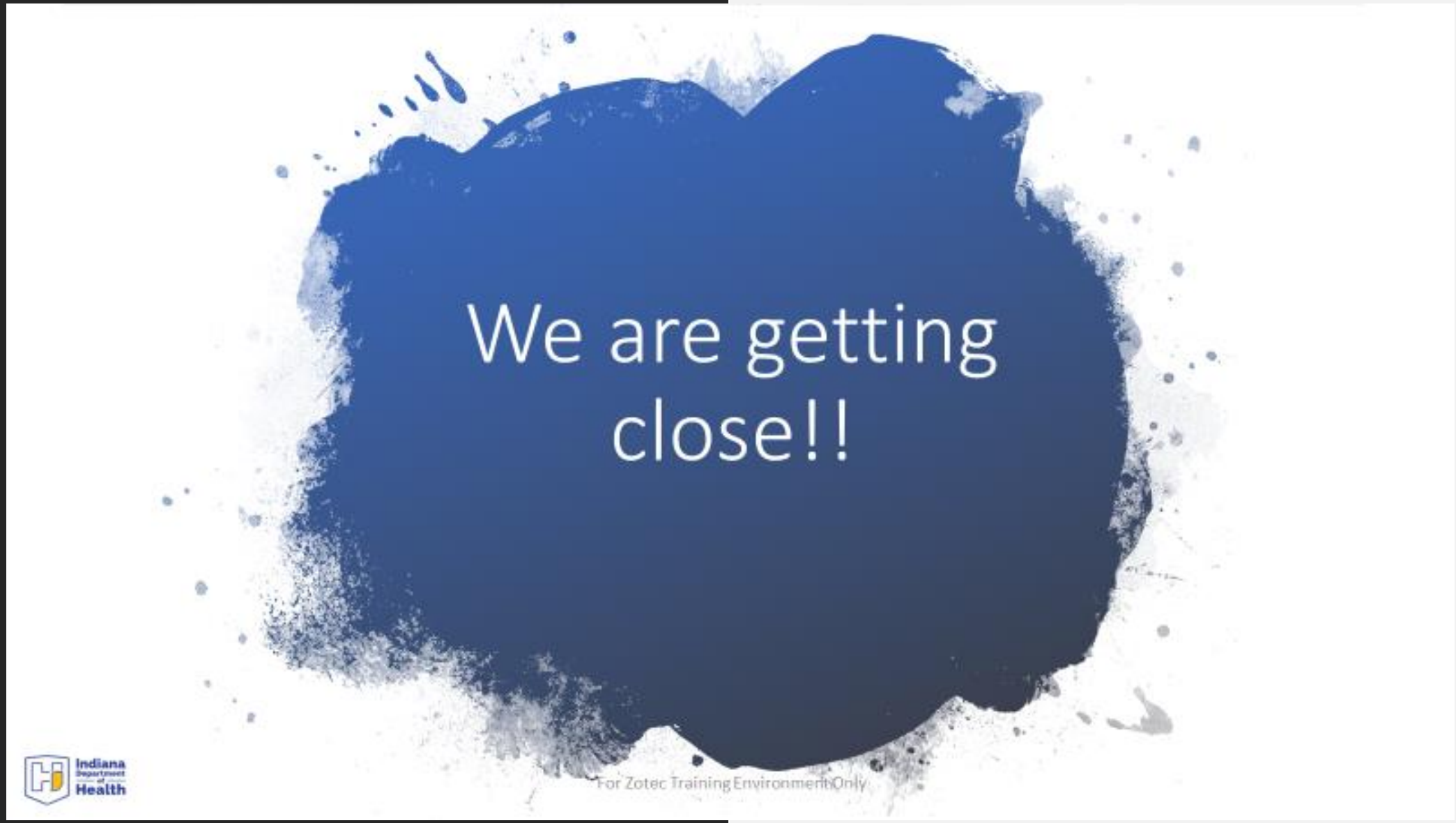


- If you do not see the patient use the search bar at the top to find them in the system.
- They may have scheduled at the wrong location or a different date.
- Exhaust the search options to be sure to not create 2 of the same user in the system
- Search by:
  - Phone number
  - First name
  - Last name (Ask for the correct spelling)
  - DOB



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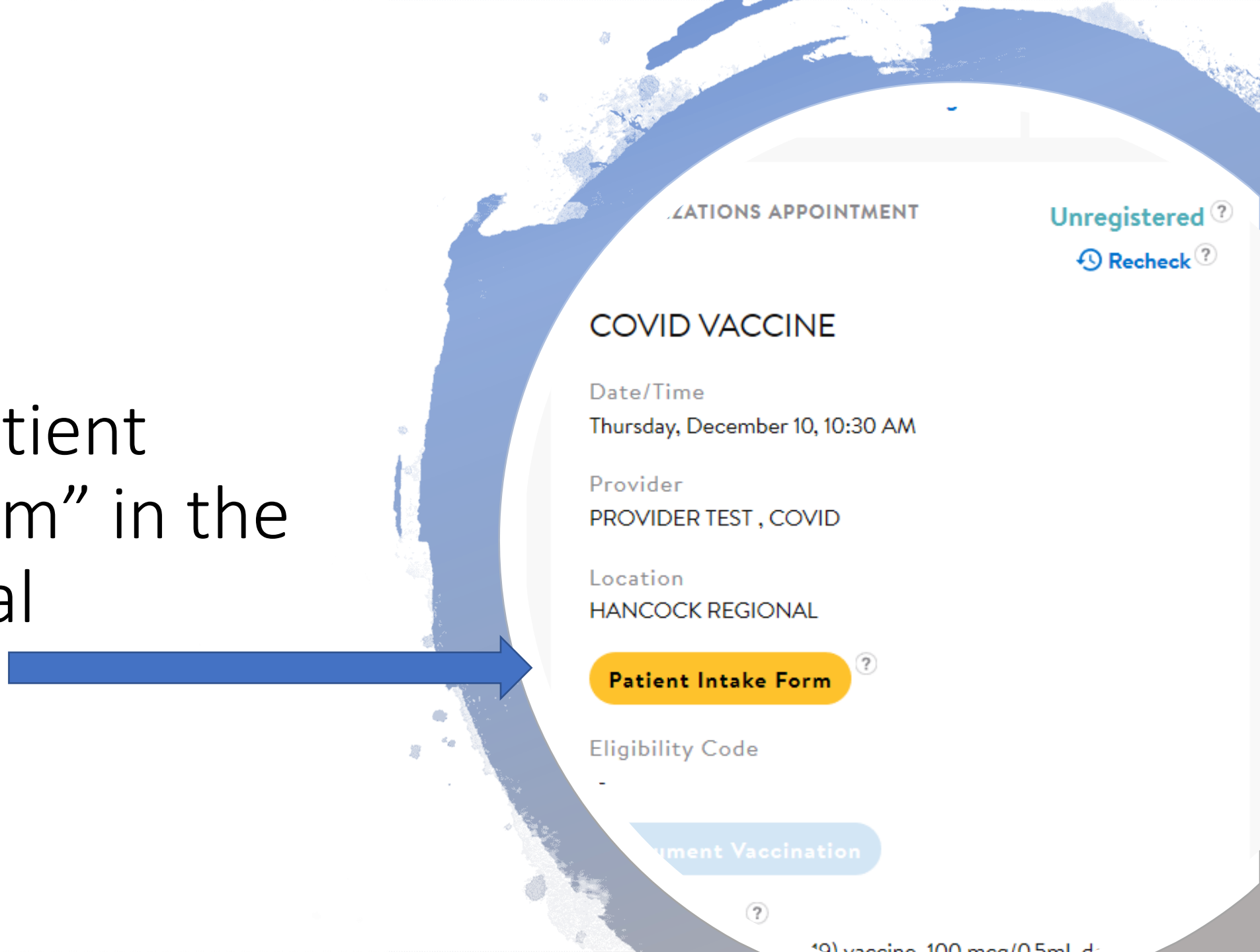
Select “Patient Intake Form” in the yellow oval



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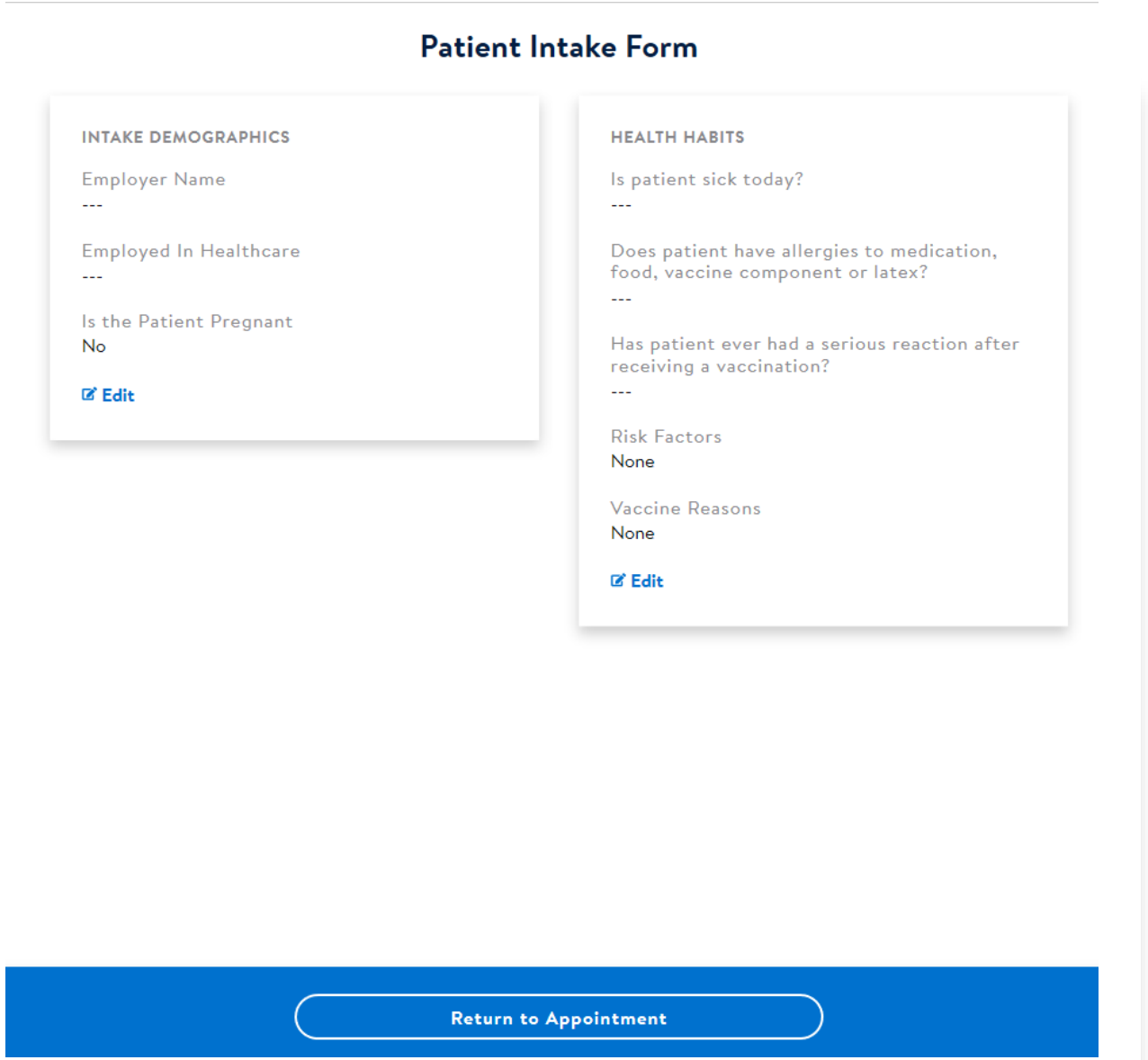
Continue to complete fields using the “Edit” Button

- Select “Edit”
- Complete Fields
- Select “Save”



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Intake Form Demographics

Please enter the following patient demographics

Employer Name

N/A

Is the patient employed in the healthcare industry?

- Yes
- **No**
- Unsure

Is the patient pregnant?

- ○ Yes
- ◉ No

Cancel | Save

Health Habits

The information provided will help us better understand the virus and how it affects people.

Is the patient sick today?

- **Yes**
- No

Does the patient have allergies to medications, food, a vaccine component, or latex?

- Yes
- **No**

Has the patient ever had a serious reaction after receiving a vaccination?

- Yes
- **No**

Risk Factors (Check all that apply)

- ☐ Obesity
- ☐ Over the age 65
- ☑ Diabetes
- ☐ Chronic Kidney Disease
- ☐ COPD
- ☐ Serious Heart Condition
- ☑ Sickle Cell Disease
- ☐ Other

Cancel | Save

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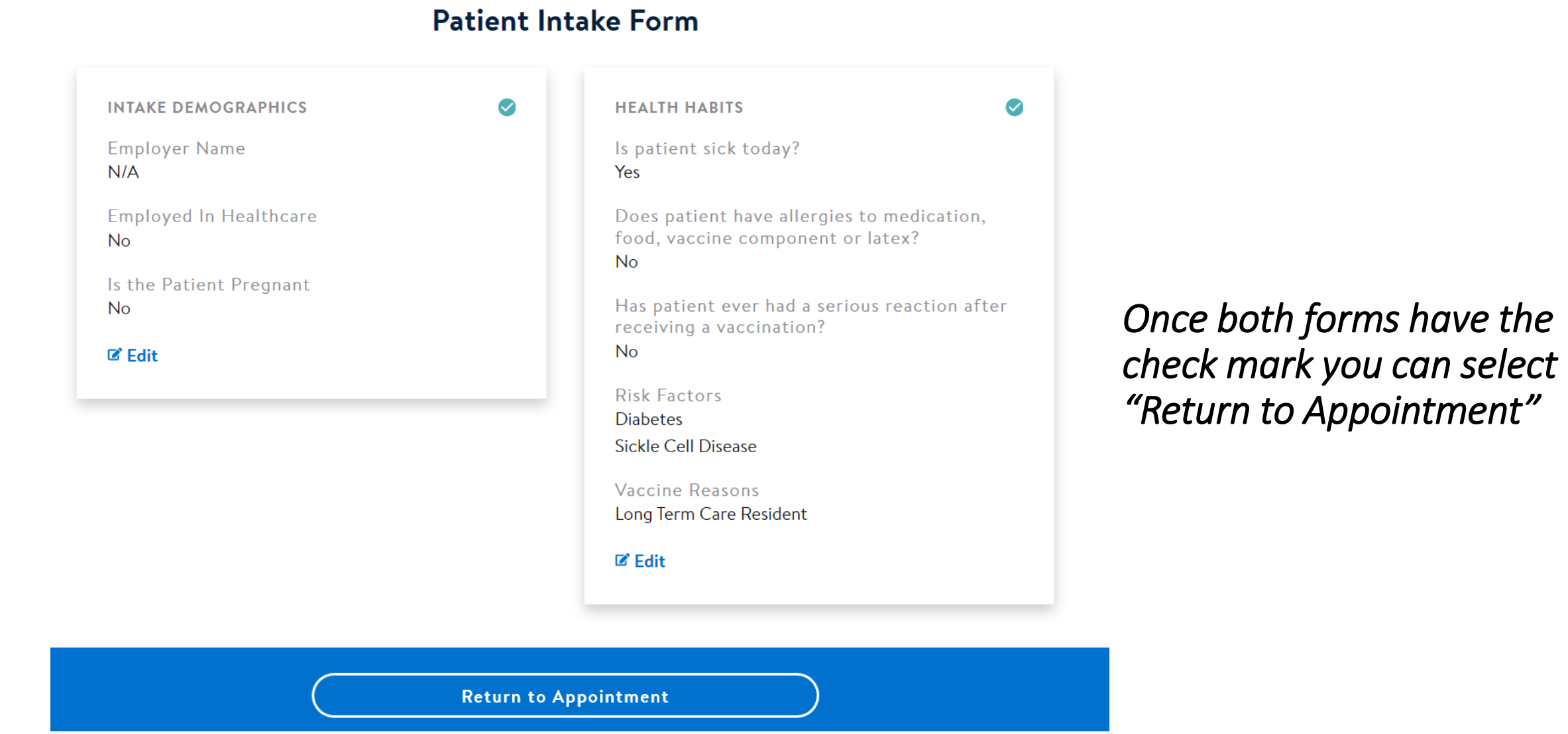

Once both forms have the check mark you can select "Return to Appointment"

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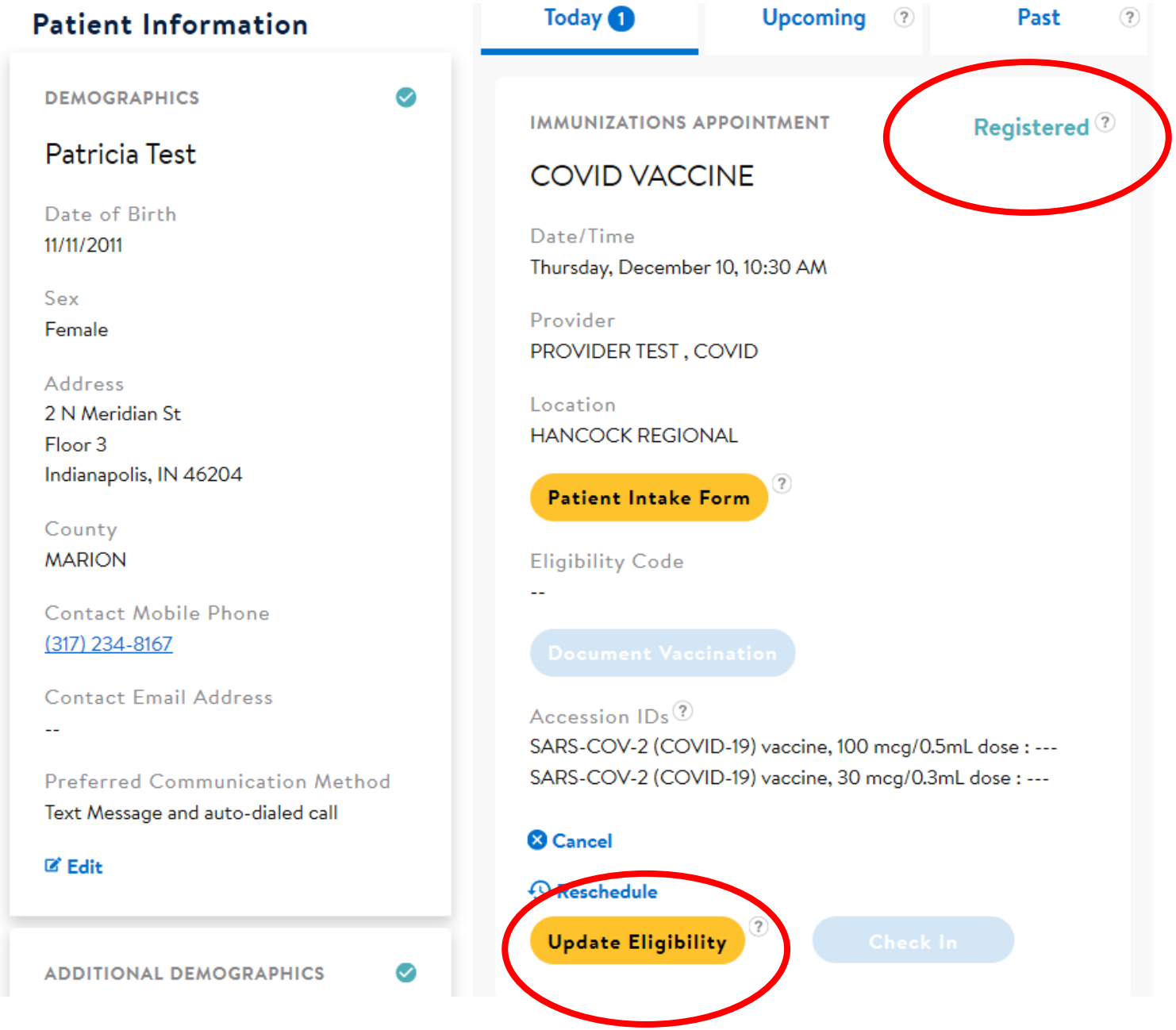
Though the patient is now **Registered.**

Before we are able to “Check-in” the patient, we need to Update Eligibility.



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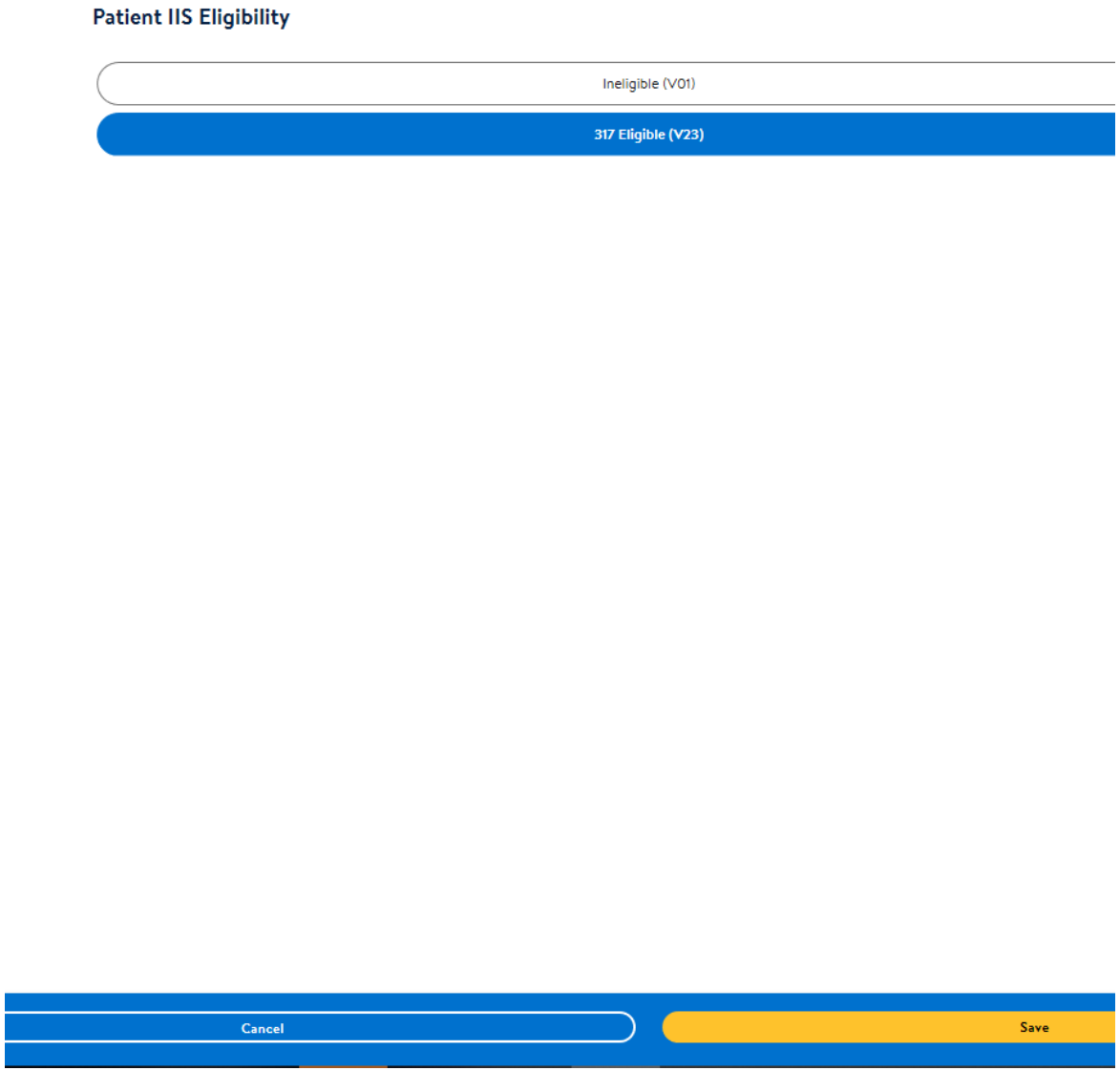
Select the patient’s IIS eligibility status

All Adults are "317 Eligible“ regardless of their insurance status



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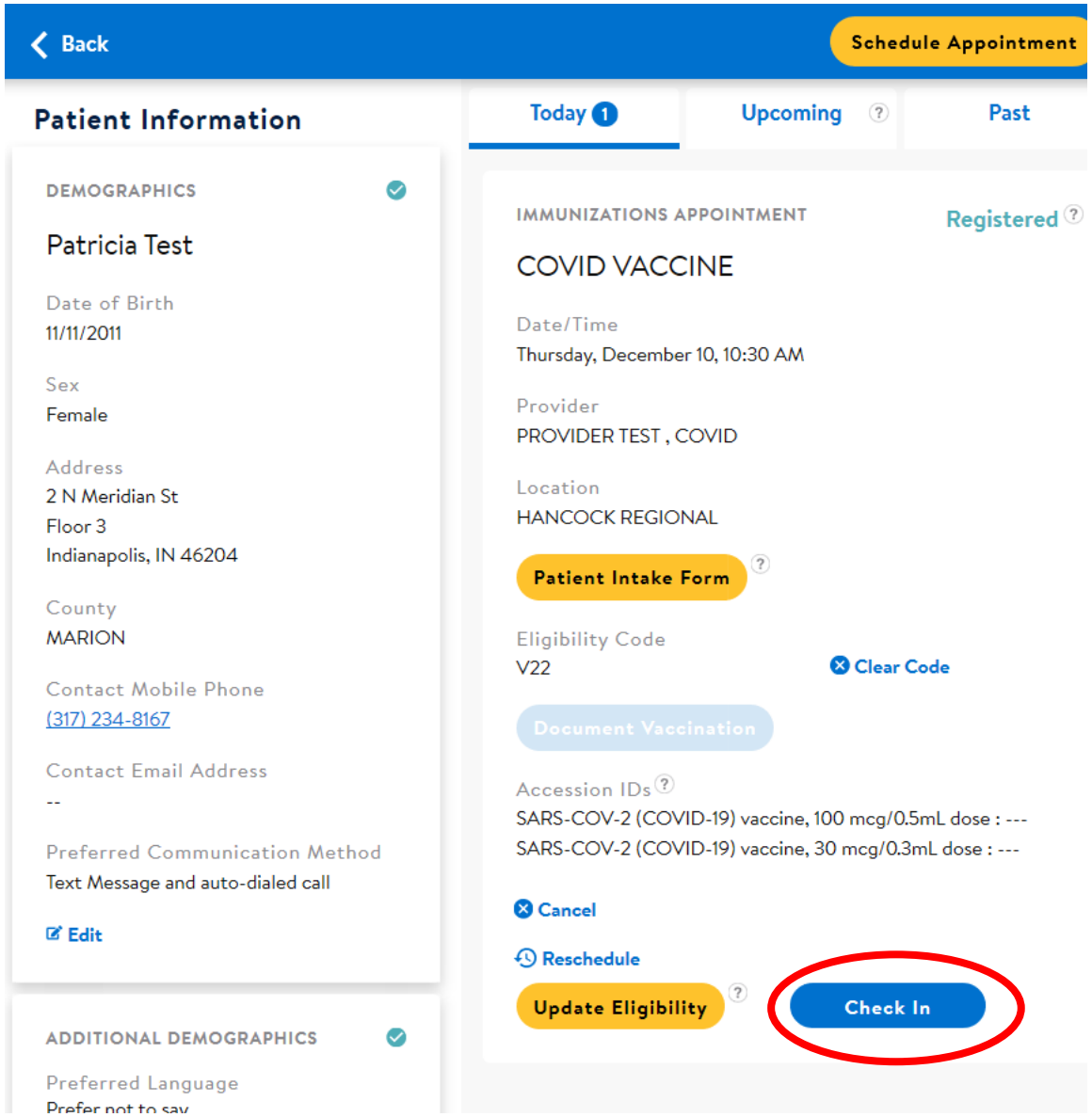

WE DID IT!!!

We have what we need when the “Check In” option is available

Select Check In and verify information before completing

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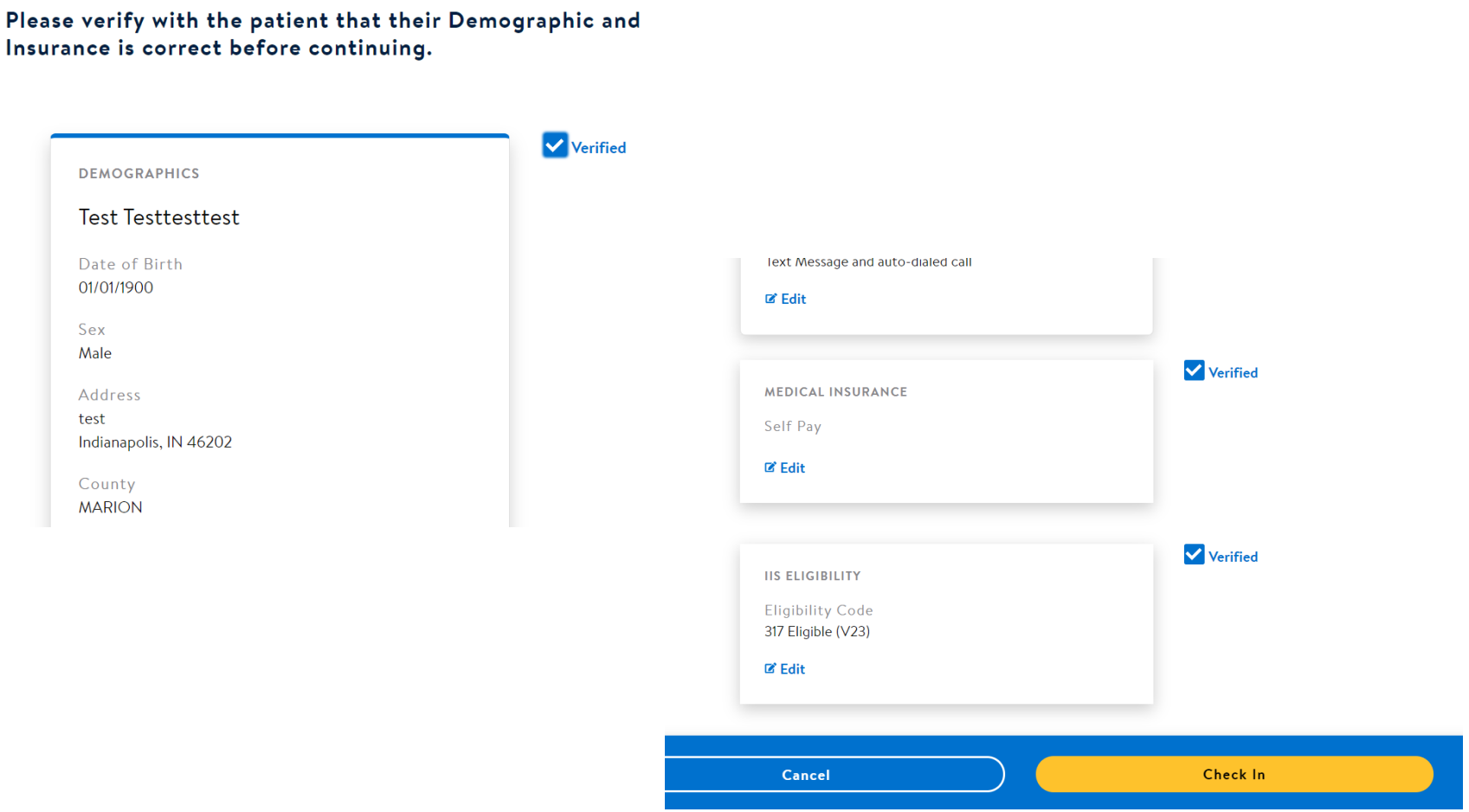
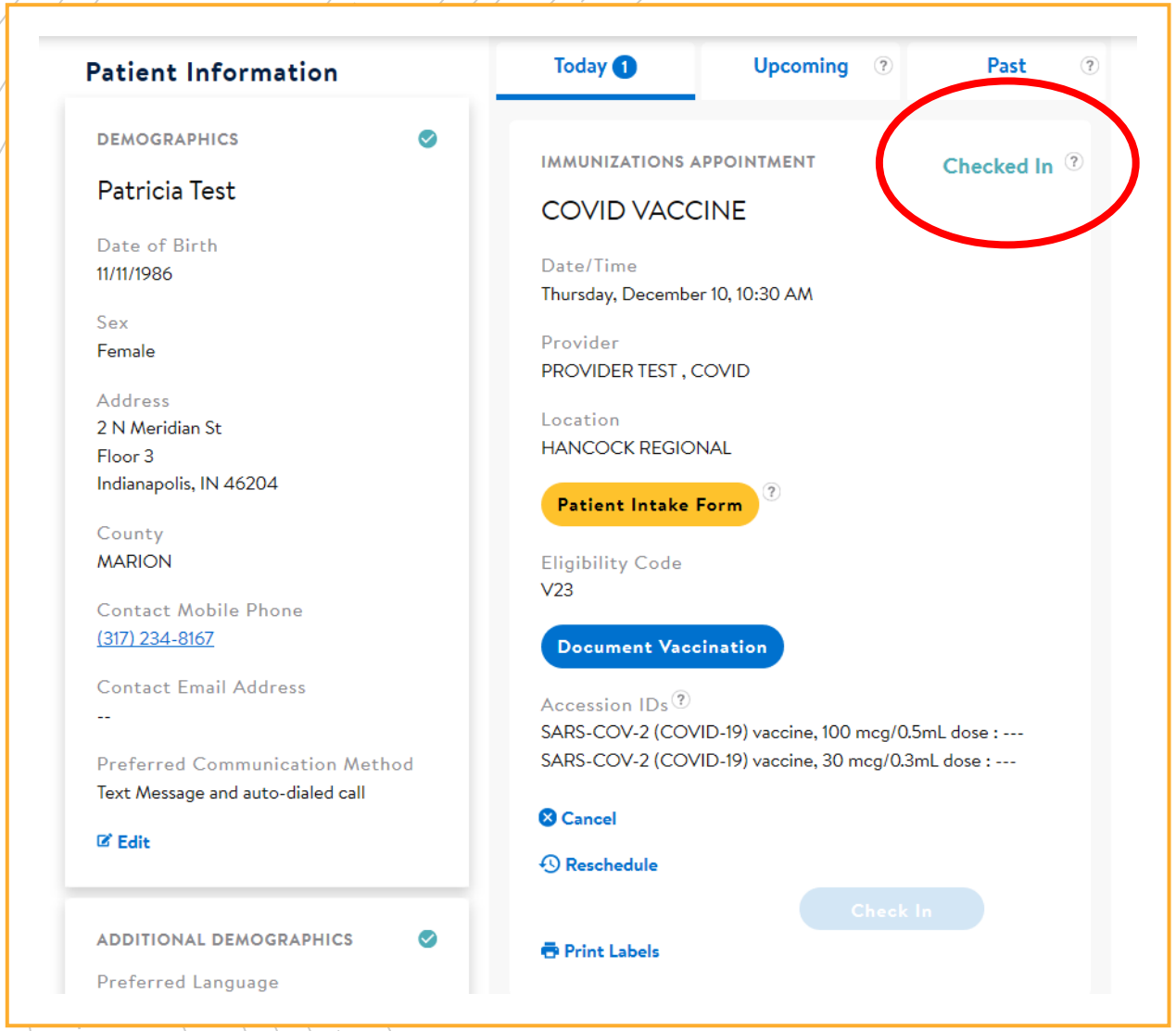
Verify with the information with the Patient and check the boxes.





NEXT: The patient will move to the vaccination station to receive the vaccine and the Vaccine Administrator will complete the "Document Vaccination" Steps. All document vaccination steps MUST BE completed by the person administering the vaccine.

REGISTRATION IS DONE!!

- Those individuals who are DUAL Users will see a "Document Vaccination". Those that are not will not be allowed to select this option.

- "Document Vaccination" will be selected once the vaccine has been administered.

- If the vaccinator only has vaccination access the patient will only appear on their screen once the patient has been checked in on the registration side.

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What if You Could NOT find the Patient?

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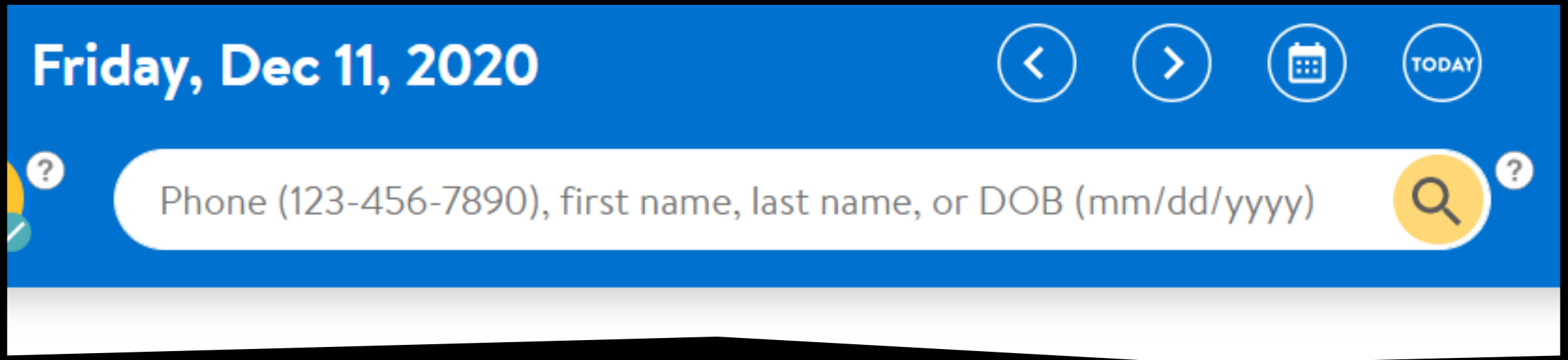

- If you do not see the patient uses the search bar at the top to find them in the system.
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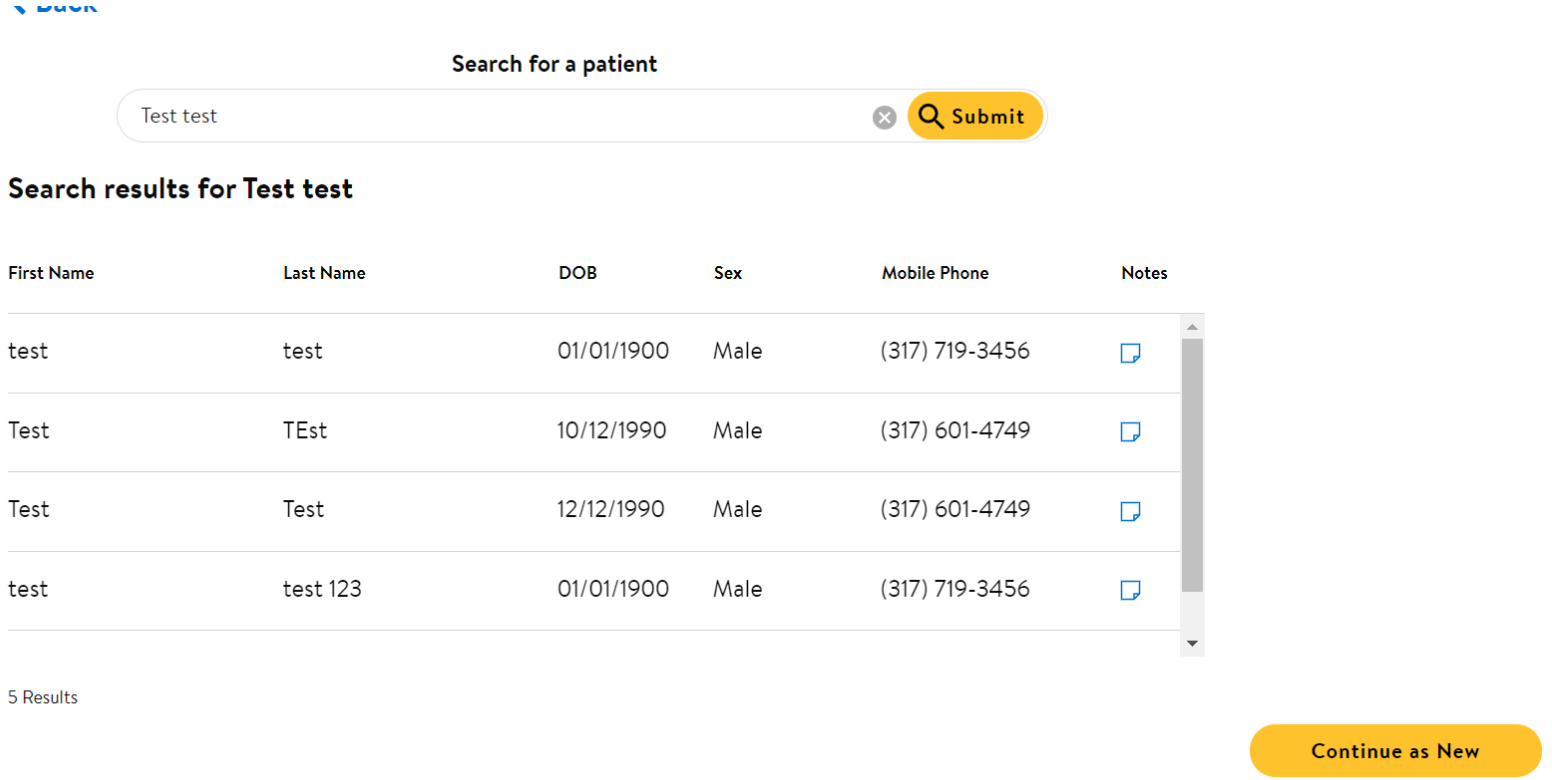
  - First name
  - Last name (Ask for the correct spelling that was entered)
  - DOB



Duplicate records cannot be merged

- Click on the patient you want to use.

OR

- If you cannot find them use the “Continue as New”

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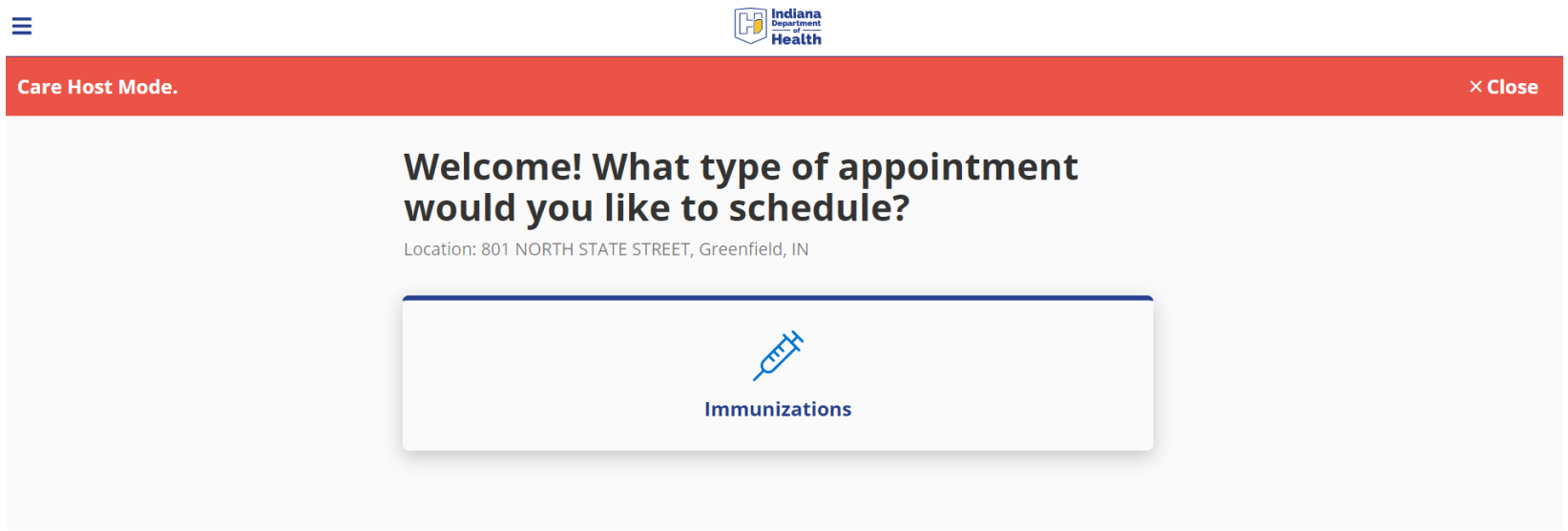
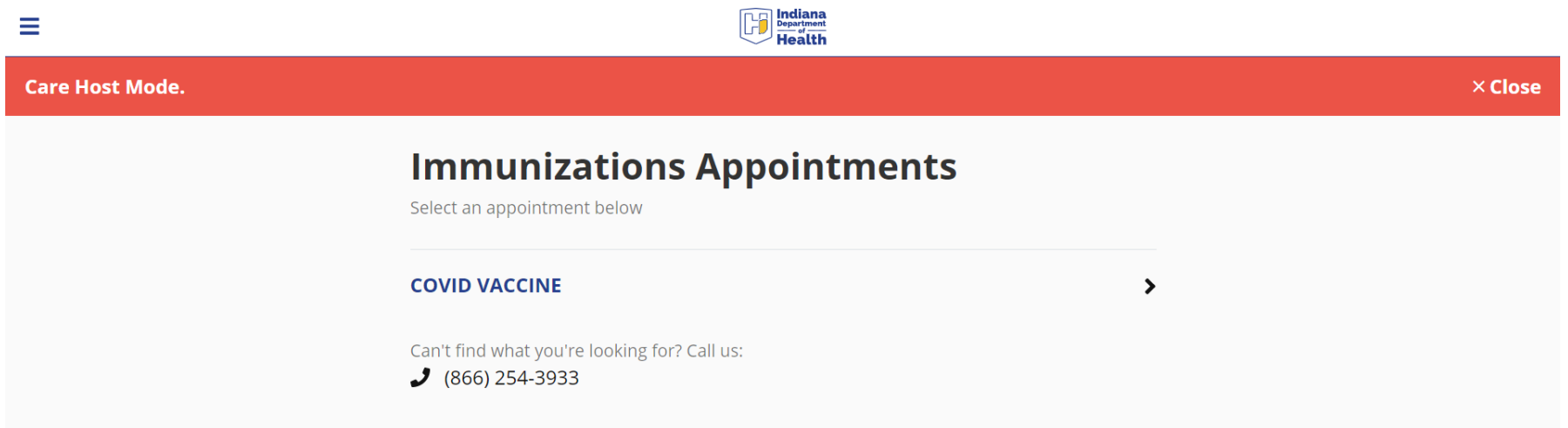
Click “Immunizations”



Next click “COVID Vaccine”



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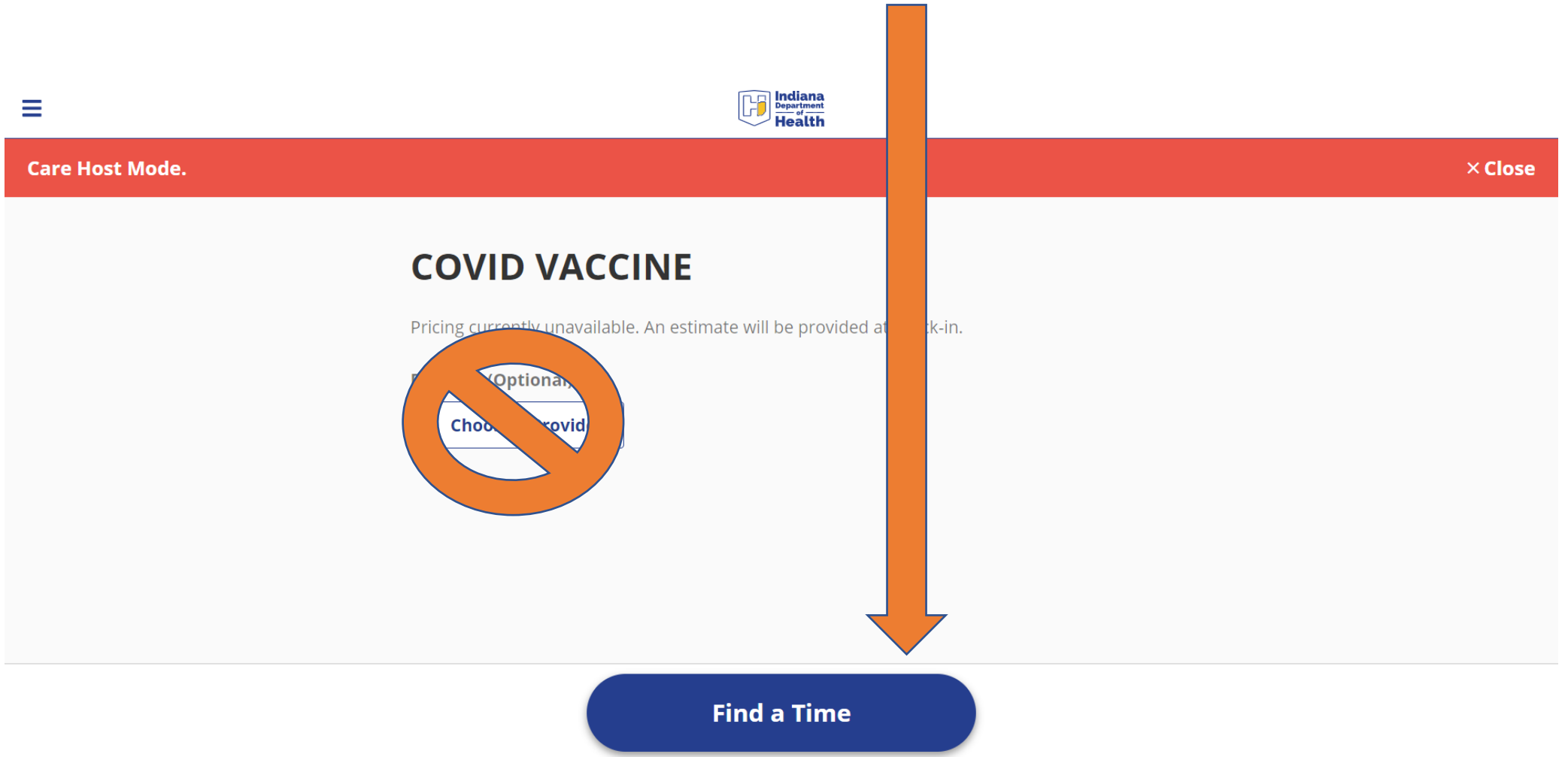
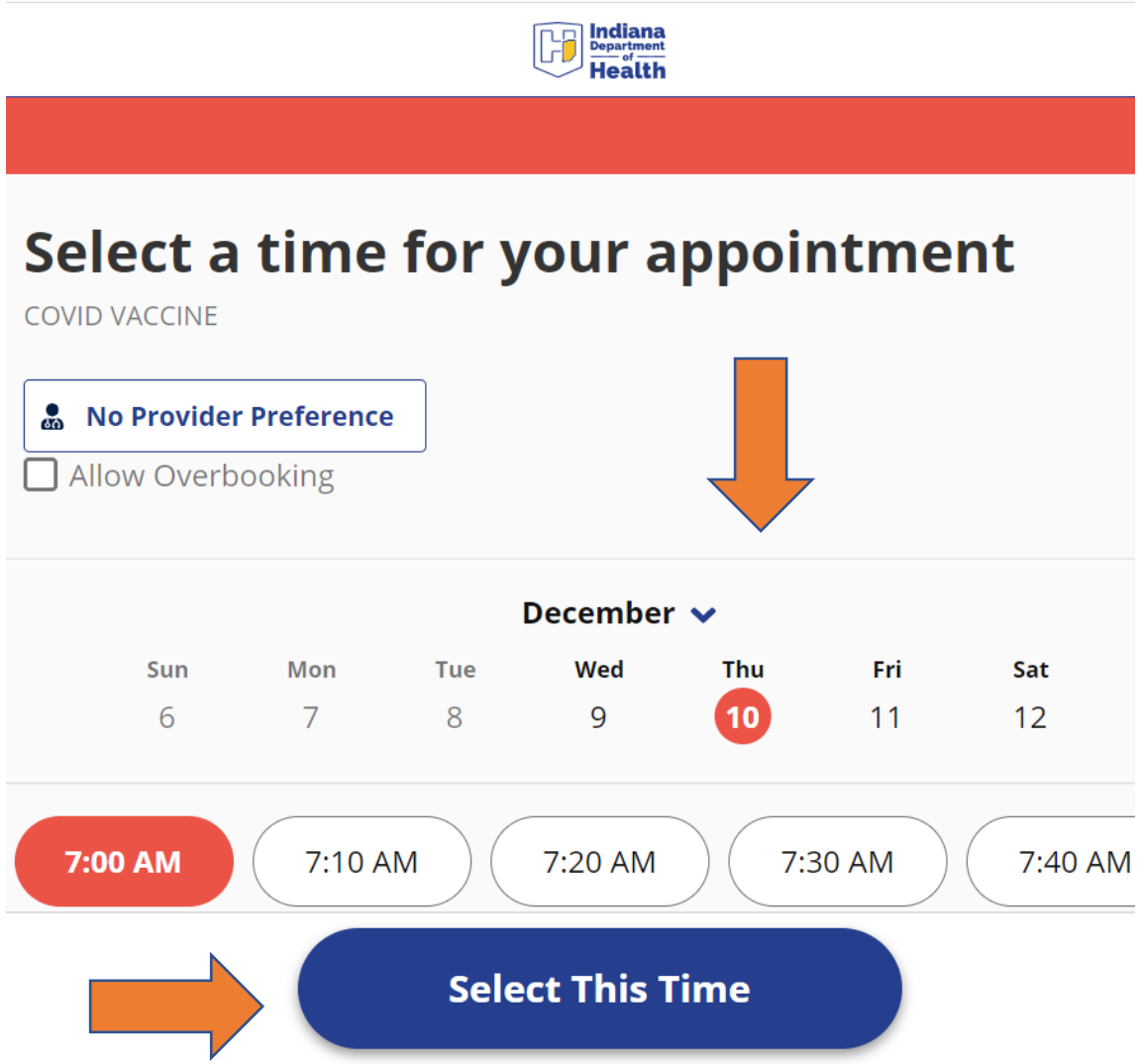
Do not choose a provider. Click find a time.



Select Your Appointment

- Verify Date
- Select “Allow Overbooking” if time is not available (happens when multiple patients are being seen at the same time)
- Select time
- Should be in the hour in which the vaccine is provided
- Click “Select This Time” to proceed



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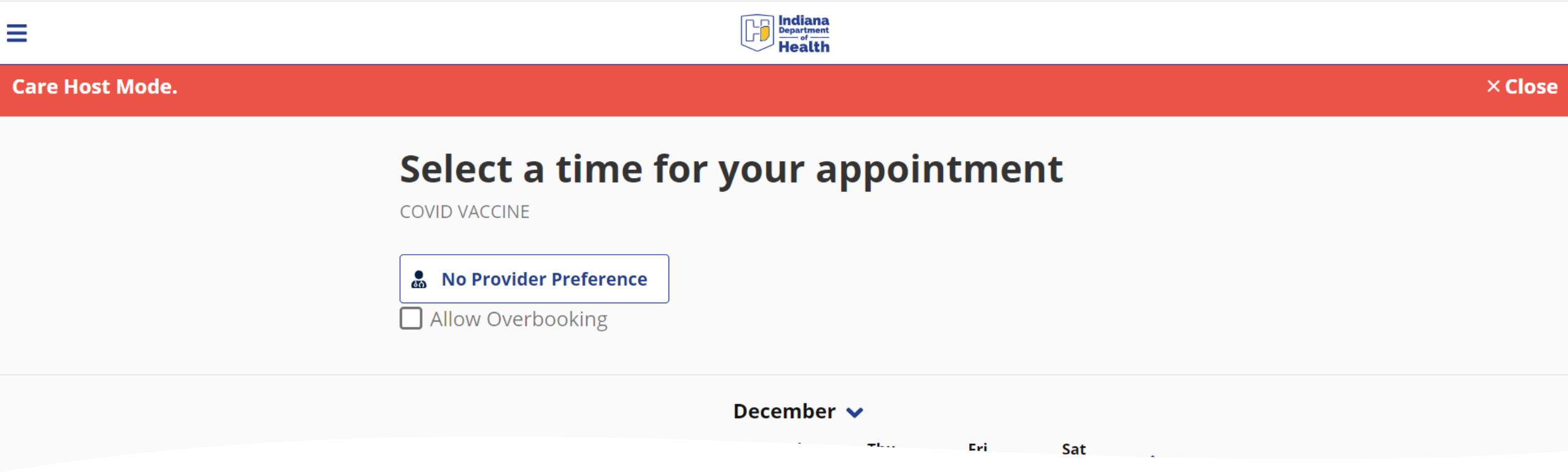

When to use "Allow Overbooking"

- The time slot is NOW and is not listed AND you know you have enough vaccine available

When NOT to use "Allow Overbooking"

- When the date is in the past
- When the time is in the future and you aren't sure you will have enough vaccine

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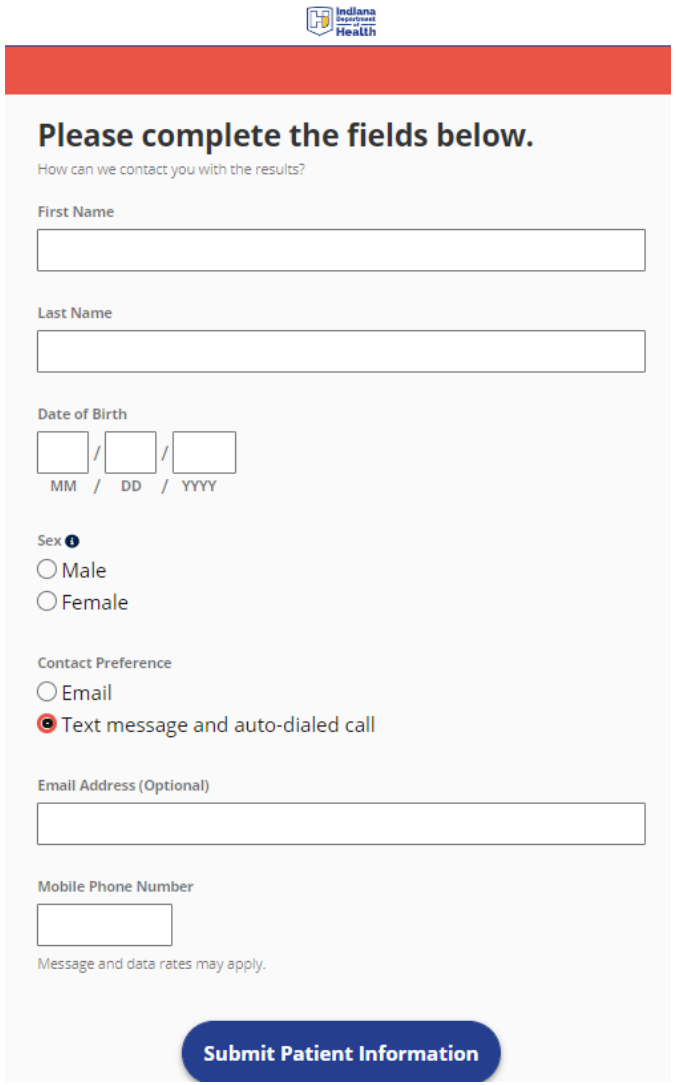

- Input patient information

- Careful to correctly input:
  - Name
  - DOB
  - Contact Information

- If patient is a “female” an additional question on if the patient is currently pregnant will appear

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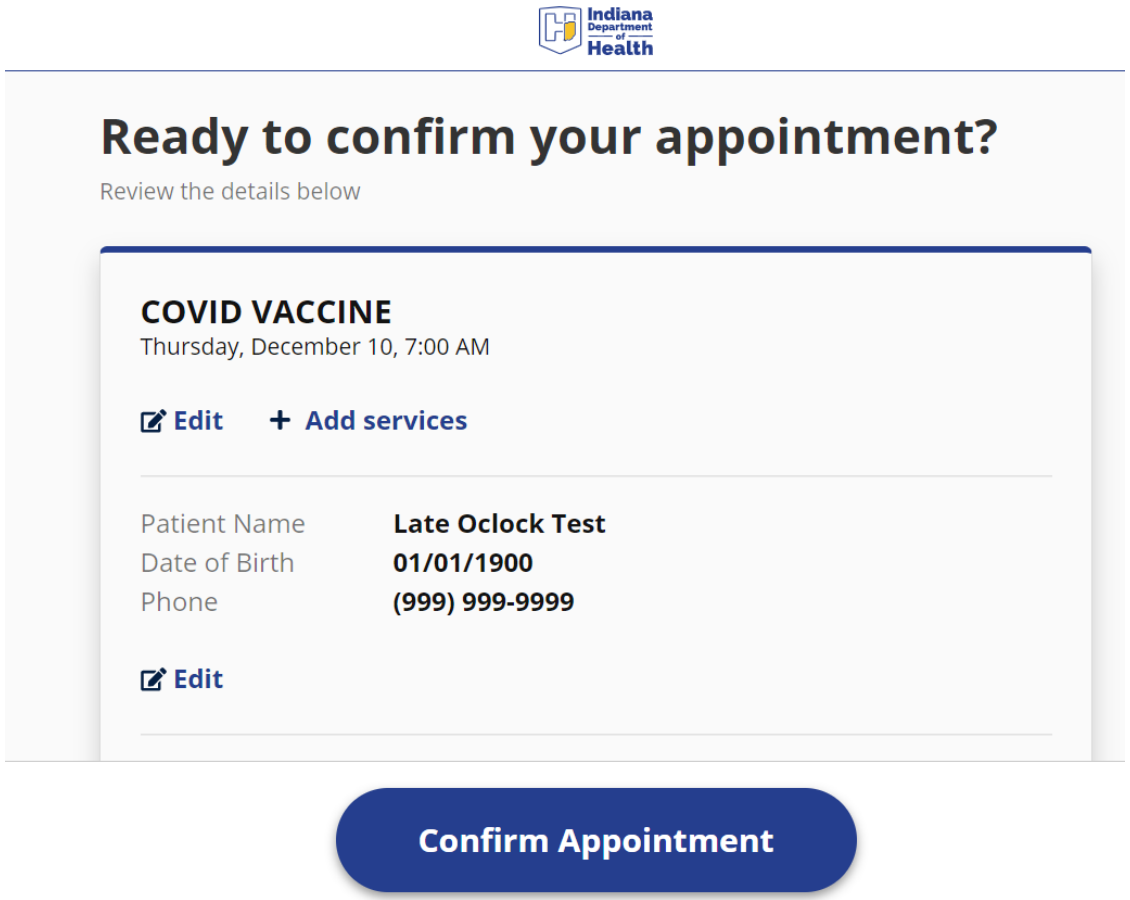
*****Verify the information is correct BEFORE proceeding**

Click “Confirm Appointment”

NOTE: A link will be sent to the patient prompting them to complete their registration.
Link will be sent either to the email or phone number provided.
If you are completing the information you will need to ask them to disregard.



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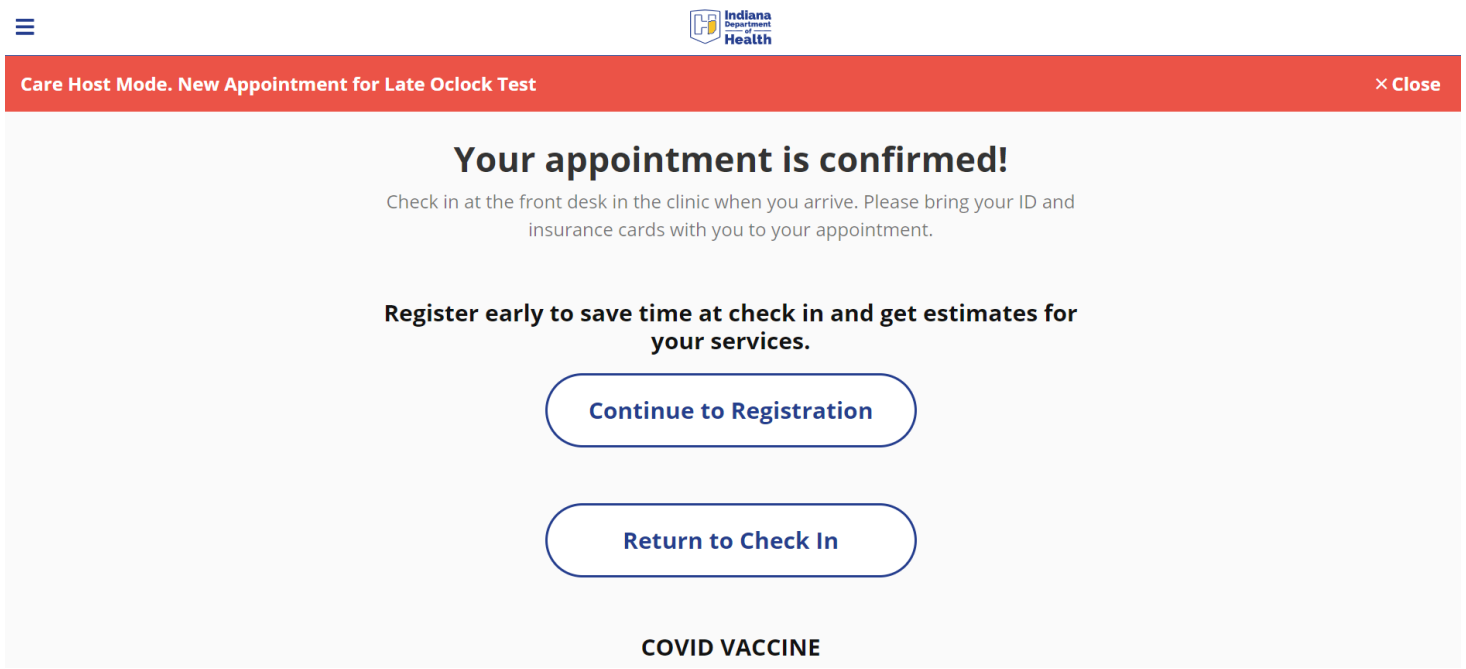
Once you've arrived at this screen you have two choices:

1. RECOMMENDED: Return to Check in – The Patient will have automatically received a Text or email from ZOTEC with a unique registration link. They patient can complete the registration on their own.
2. Continue to Registration – This will allow you to manually complete the next steps in the registration process. However, some questions may not appear, and the registration may need to be reviewed for completeness prior to checking the patient in.



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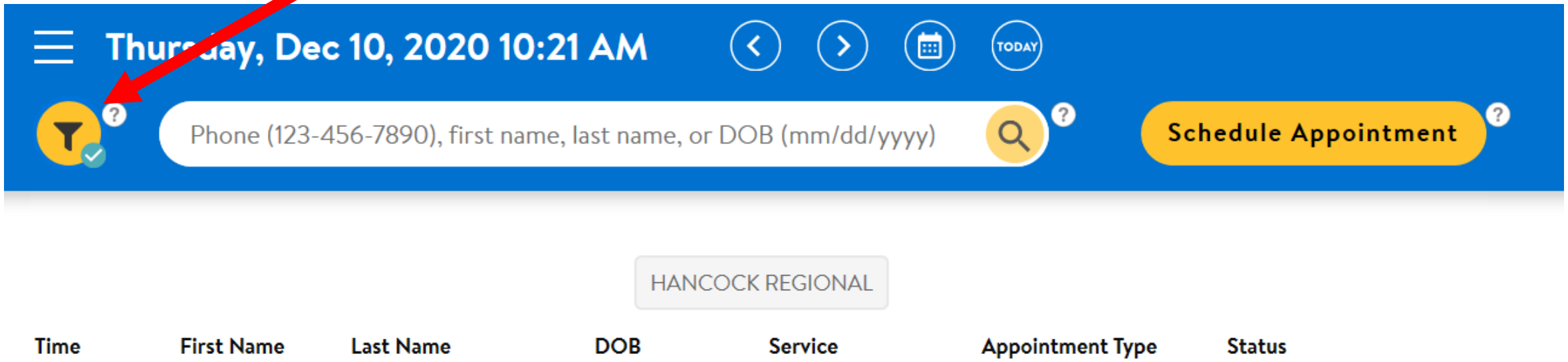
Go back the main screen and find your patient.

- If you have are experiencing high volume of patients, you may want to filter to show the status of your preference
- Patients will be placed in order of their appointment time



Indiana Department of Health