

color Color User Training: MDPH Vaccine Platform

January 24, 2024



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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

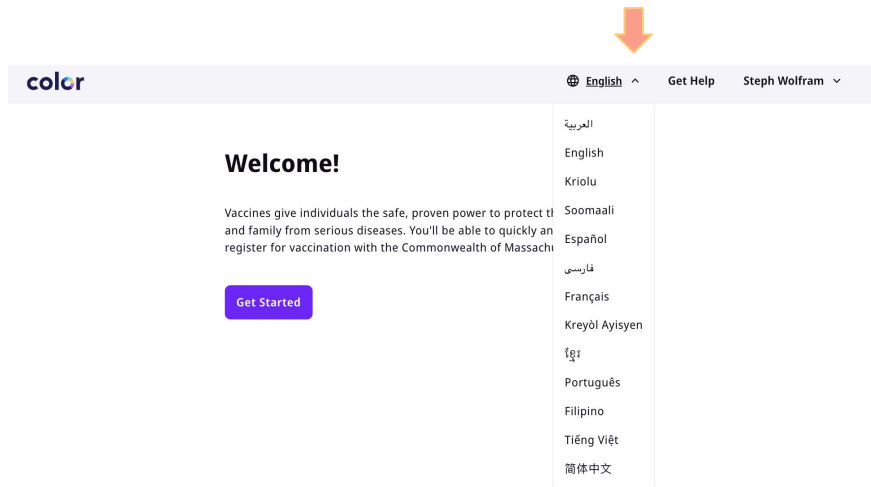
What is Color?

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13 Languages Available in Color

1. 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



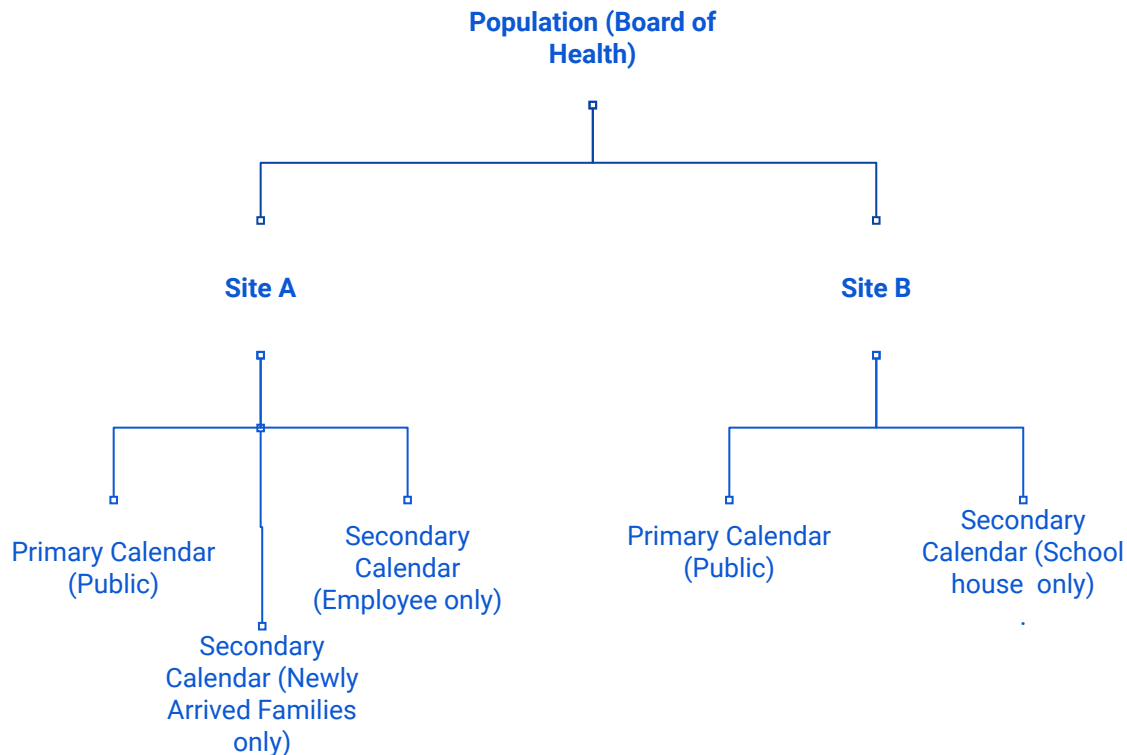
If you want to see which language patients registered in to understand what their preferred language might be, refer to [this slide](#) with instructions on how to pull this information in dashboards

Key Terms and Structure

- **Populations:** The Board of Health or Organization managing the vaccination clinics (all under the same MIIS)
- **Site:** The location or clinic where vaccines are occurring
- **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:** Paper templates for Color registration and vaccination (English, Spanish)



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.

Welcome, Steph

Select a site and tool to continue.

Select a site.

[Create New Site](#)

Site *

Fake Boston Site

Select a tool.

Select one *

- ☐ **Vaccination:** For checking in patients and administering vaccines
- ☐ **Inventory management:** For managing vaccine lots
- ☐ **Appointment management:** For adding and managing vaccination appointments
- ☐ **Staff management:** For managing staff and permissions
- ☐ **Site settings:** For managing site specific details and configurations

 Continue

Onsite Tool - Staff Management

Staff Management Tool

What you'll learn:

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

Navigation Bar

What is Color?

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 - c. Insurance Dashboard
8. **Resources**
 - a. Knowledge Base
 - b. Color Support
 - c. MDPH Best Practices

Staff Management Tool

- 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.**

Welcome,

Select a site and tool to continue.

Select a site.

[Create New Site](#)

Site
Fake Boston Site ▼

Select a tool.

- ☐ **Vaccination:** For checking in patients and administering vaccines
- ☐ **Inventory management:** For managing vaccine lots
- ☐ **Appointment management:** For adding and managing vaccination appointments
- ☒ **Staff management:** For managing staff and permissions

Staff Management Tool

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

[Site](#) > Fake Boston Site

Staff management

Add Staff

All

Active

Pending

Name or email

test

×

Name/Email ↑		Role(s)	
Test,	@color.com	Inventory manager	⋮
TestSiteOnly	@color.com	Site staff	⋮
Test,	@color.com	Site staff, Site scheduler, Inventory manager	⋮
	@color.com @color.com	Vaccinating clinician	⋮

Staff Management Tool

Add Staff Permissions

1. 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.
2. 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

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- ☐ **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

Staff Management Tool

Add Staff Permissions

1. 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/>
2. 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.



You've been invited to use the Color onsite tool at Fake Boston Site.

Your current role(s) are: Site staff, Site manager.

Please create a Color account to get started.

Create Account

Thank you,
The Color Team
support@color.com

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



Staff Management Tool

Edit/Remove Roles

1. 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

General

- ☐ **Site manager**
Site managers can manage permissions for additional staff.

Appointment man

- ☐ **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.

Cancel

Save

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.



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

Staff Management Tool

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".

Site manager, Site staff



Resend Email

Edit Roles

Remove

Rows per page: 25 ▼

Staff Management Tool

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

[Add Staff](#)

All	Active	Pending	Name or email test	×
Name/Email ↑		Role(s)		
		Site manager, Site staff		
		Vaccinating clinician		
testing@color.com testing@color.com		Site staff, Site scheduler, Inventory manager		

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.

testing@color.com
testing@color.com

Site staff, Site scheduler, Inventory manager



Resend Email

Edit Roles

Remove

Rows per page: 25 ▾

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

Site Settings

Name and location	Name and location
Contact information	Site name Site name and location cannot be updated after a service has been administered. To update, contact Color support. Fake Boston Site
Patient registration	Website identifier ⓘ fake-boston-site
Insurance collection	Site location Site name and location cannot be updated after a service has been administered. To update, contact Color support. 1 Patriot Pl Foxborough, MA 02035
	Custom directions [PLACEHOLDER: Custom directions will appear here] Color Test Remove directions

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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Adding appointments

Adding appointments

The screenshot shows a two-step process for adding appointments. Step 1, 'Dates and times', is active. It includes a progress bar at the top with step 1 highlighted and step 2, 'Available services', in grey. A 'Cancel' link is in the top right. Below the progress bar, the breadcrumb 'Site > all cdc vaccines' is shown. The main heading is 'Choose dates and times'. Below it, the instruction 'Select a date range and days for appointments.' is followed by a note: 'If the date range spans more than one week, the days will be the same each week.' The form contains four input fields: 'Start Date*' with the value '08/01/2022', 'End Date*' with '08/05/2022', 'Start Time*' with '09:00 AM', and 'End Time*' with '12:00 PM'. Each date and time field has a calendar icon. Below the date fields is a row of day selection buttons: 'S', 'M', 'T', 'W', 'T', 'F', 'S', and 'All'. The 'All' button is highlighted. At the bottom, the section 'Configure appointment slots.' includes an instruction: 'Select a length for each appointment slot (in minutes). Note that if these days have existing appointments, you cannot change the appointment length.' Below this is a dropdown menu for 'Appointment length*' currently set to '5 minutes'.

1 ————— 2 [Cancel](#)

Dates and times Available services

[Site](#) > all cdc vaccines

Choose dates and times

Select a date range and days for appointments.

If the date range spans more than one week, the days will be the same each week.

Start Date* 08/01/2022 End Date* 08/05/2022

S M T W T F S All

Start Time* 09:00 AM End Time* 12:00 PM

Configure appointment slots.

Select a length for each appointment slot (in minutes). Note that if these days have existing appointments, you cannot change the appointment length.

Appointment length* 5 minutes

1. 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.
4. Choose an appointment length to configure each appointment slot for.

Adding appointments

Configure appointment slots.

Select a length for each appointment slot (in minutes). Note that if these days have existing appointments, you cannot change the appointment length.

Appointment length *

Enter the maximum number of appointments per slot. This depends on how many clinicians or vaccination stations you have available per appointment slot.

Primary

Appointments per slot

Existing patients ⓘ

Appointments per slot

Test

Appointments per slot

TestHello

Appointments per slot

**Lisa's Demo FakeCASite
Calendar**

Appointments per slot

Reserved

Appointments per slot

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

Adding appointments

The screenshot shows a two-step process for adding appointments. Step 1, 'Dates and times', is completed. Step 2, 'Available services', is the current step. At the top, there is a progress bar with a checkmark for step 1 and a circle with a question mark for step 2. A 'Cancel' link is in the top right. Below the progress bar, the text 'Site > all cdc vaccines' is displayed. The main heading is 'Choose available services'. A list of services is shown, each with a checkbox and a right-pointing arrow. The services are: COVID-19, Janssen, Novavax, Moderna (6 months to 5 years), Moderna (6 to 11 years), Moderna (12+ years), Pfizer (6 months to 4 years), Pfizer (5 to 11 years), Pfizer (12+ years), Dengue Fever, DTaP, Hepatitis B, Poliovirus, DTaP, Hib, Poliovirus, DTaP, Hib, Poliovirus, Hepatitis B, and DTaP, Poliovirus.

Site > all cdc vaccines

Choose available services

- ☐ COVID-19
- ☐ Janssen
- ☐ Novavax
- ☐ Moderna (6 months to 5 years)
- ☐ Moderna (6 to 11 years)
- ☐ Moderna (12+ years)
- ☐ Pfizer (6 months to 4 years)
- ☐ Pfizer (5 to 11 years)
- ☐ Pfizer (12+ years)
- ☐ Dengue Fever
- ☐ DTaP, Hepatitis B, Poliovirus
- ☐ DTaP, Hib, Poliovirus
- ☐ DTaP, Hib, Poliovirus, Hepatitis B
- ☐ DTaP, Poliovirus

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

1

2

Dates and timesAvailable services

[Cancel](#)

[Site](#) > all cdc vaccines

Choose dates and times

Select a date range and days for appointments.

If the date range spans more than one week, the days will be the same each week.

Start Date*

08/01/2022

End Date*

08/05/2022

S

M

T

W

T

F

S

All

Start Time*

09:00 AM

End Time*

12:00 PM

Configure appointment slots.

Select a length for each appointment slot (in minutes). Note that if these days have existing appointments, you cannot change the appointment length.

Appointment length *

5 minutes

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

✓ — 2

Dates and times Available services [Cancel](#)

[Site](#) > all cdc vaccines

Choose available services

- ☐ COVID-19 ^
- ☐ Janssen
- ☐ Novavax
- ☐ Moderna (6 months to 5 years)
- ☐ Moderna (6 to 11 years)
- ☐ Moderna (12+ years)
- ☐ Pfizer (6 months to 4 years)
- ☐ Pfizer (5 to 11 years)
- ☐ Pfizer (12+ years)
- ☐ Dengue Fever
- ☐ DTaP, Hepatitis B, Poliovirus
- ☐ DTaP, Hib, Poliovirus
- ☐ DTaP, Hib, Poliovirus, Hepatitis B
- ☐ DTaP, Poliovirus

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

The screenshot shows a web interface for selecting vaccine services. At the top, a progress bar indicates two steps: 'Dates and times' (completed, marked with a checkmark) and 'Available services' (current step, marked with a '2'). A 'Cancel' link is visible in the top right. Below the progress bar, the breadcrumb 'Site > all cdc vaccines' is shown. The main heading is 'Choose available services'. A list of vaccine options follows, each with an unchecked checkbox and a label. The options are: COVID-19 (with an expand/collapse arrow), Janssen, Novavax, Moderna (6 months to 5 years), Moderna (6 to 11 years), Moderna (12+ years), Pfizer (6 months to 4 years), Pfizer (5 to 11 years), Pfizer (12+ years), Dengue Fever, DTaP, Hepatitis B, Poliovirus, DTaP, Hib, Poliovirus, DTaP, Hib, Poliovirus, Hepatitis B, and DTaP, Poliovirus.

✓ — 2 [Cancel](#)

Dates and times Available services

[Site](#) > all cdc vaccines

Choose available services

☐ COVID-19 ^

☐ Janssen

☐ Novavax

☐ Moderna (6 months to 5 years)

☐ Moderna (6 to 11 years)

☐ Moderna (12+ years)

☐ Pfizer (6 months to 4 years)

☐ Pfizer (5 to 11 years)

☐ Pfizer (12+ years)

☐ Dengue Fever

☐ DTaP, Hepatitis B, Poliovirus

☐ DTaP, Hib, Poliovirus

☐ DTaP, Hib, Poliovirus, Hepatitis B

☐ DTaP, Poliovirus

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.



Call-out

1 ☒ 2 ☐ [Cancel](#)

Dates and times Available services

[Site](#) > all cdc vaccines

Choose available services

- ☐ COVID-19
 - ☐ Janssen
 - ☐ Novavax
 - ☐ Moderna (6 months to 5 years)
 - ☐ Moderna (6 to 11 years)
 - ☐ Moderna (12+ years)
 - ☐ Pfizer (6 months to 4 years)
 - ☐ Pfizer (5 to 11 years)
 - ☐ Pfizer (12+ years)
- ☐ Dengue Fever
- ☐ DTaP, Hepatitis B, Poliovirus
- ☐ DTaP, Hib, Poliovirus
- ☐ DTaP, Hib, Poliovirus, Hepatitis B
- ☐ DTaP, Poliovirus

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

1

Select appointments

2

Review

[Cancel](#)

[Site](#) > MA Site 1001

Select appointments to move

All unbooked appointments in the date range will be moved.

Select calendars

From:

To:

Select a date range and days for appointments.

If the date range spans more than one week, the days will be the same each week.

Start Date *

End Date *

Start Time *

End Time *

Continue

Go Back

✓

Select appointments

2

Review

[Cancel](#)

[Site](#) > MA Site 1001

Review changes

You have selected appointments to move from [Primary] to [Other Calendar]. This change will affect all appointments across the date and time range you chose.

Selected appointments

Source calendar: [Primary]

Destination calendar: [calendar name]

Date range: Jun 3 - Jun 4

Days (7) Sun, Mon, Tue, Wed, Thu, Fri, Sat

Time: 9:00 AM - 10:00 AM

Continue

Go Back

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

1

2

3

Cancel

Select appointmentsAppointment optionsConfirm

Site > MA Site 1001

Select appointments to delete

Select the appointments that you want to delete. You'll be able to specify appointment type on the next page.

Select a date range and days for appointments.

If the date range spans more than one week, the days will be the same each week.

Start Date *

End Date *

S

M

T

W

T

F

S

All

Start Time *

End Time *

Choose calendars

All appointments on these calendars on the selected days will be affected.

☐ Primary calendar

☐ {Calendar name}

☐ {Calendar name}

☐ {Calendar name}

Continue

Go Back

- *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

Site > all cdc vaccines

Appointment management

< Jul 24 - Jul 30 >

This week's capacity Total 112 Used 5 Remaining 107

Time zone: MDT

Total
Used
Remaining

Sun 24

6
0
6

Mon 25

32
0
32

Tue 26

32
1
31

Wed 27

32
3
29

6:00 AM

7:00 AM

8:00 AM

9:00 AM

2
2 remain

10:00 AM

2
2 remain

4
4 remain

4
3 remain

4
4 remain

11:00 AM

2
2 remain

4
4 remain

4
4 remain

4
4 remain

Aug 15, 2022

×

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

OK

color

Proprietary and Confidential — Not for distribution.

Onsite Tool - Creating a New Site

Creating a New Site

What you'll learn:

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

Navigation Bar

What is Color?

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Creating a New Site

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

Welcome, Emily

Select a site and tool to continue.

Select a site.

[Create New Site](#)

Site
Fake Boston Site

Select a tool.

- ☐ **Vaccination:** For checking in patients and administering vaccines
- ☐ **Inventory management:** For managing vaccine lots
- ☐ **Appointment management:** For adding and managing vaccination appointments
- ☐ **Staff management:** For managing staff and permissions

Continue

Creating a New Site

Create a new site.

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 separately.

- 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.

Choose an existing site that you want to mirror.

You will only be able to choose from sites that you have site manager permissions for. The new site will be given the same service(s), time zone, population(s), and IIS PIN as this site. The same staff will have permissions.

Site

Enter site name.

Name

Enter site location.

Street address *

City *State *ZIP code *

Custom directions (optional)

Ex. Street parking is available; parking lot located on McKennon St. Please enter through the door on Lewis St.

Character limit 0/150

Preview



Add site staff (optional)

Any staff selected will be copied over to the new site, with the same roles. By default, your role(s) will be copied over.

You can also assign site staff after the site has been created with the staff management tool.

Name or email

☐	Name/Email	Role(s)
☐	Fishman, Emily emily.fishman@color.com	Site manager, Site scheduler, Site inventory manager, Site staff, Scribe, Vaccinating clinician

Creating a New Site

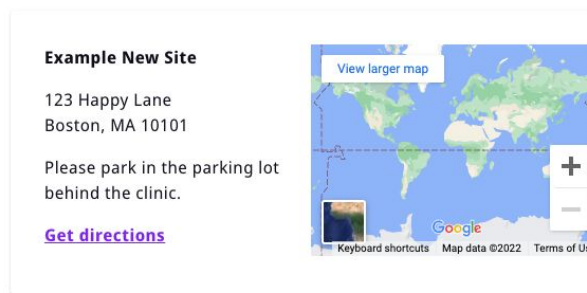
- Confirm the new site details. Make sure this information is correct.
- Before finalizing the new site, please check to make sure you are mirroring the correct site.
- Once information is confirmed, select “Create Site” at the bottom.



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](#)

Onsite Tool - Inventory Management

Inventory Management Tool

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

Navigation Bar

What is Color?

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

Inventory Management Tool

- 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)

Welcome,

Select a site and tool to continue.

Select a site.

[Create New Site](#)

Site

Fake Boston Site



Select a tool.

- ☐ **Vaccination:** For checking in patients and administering vaccines
- ☒ **Inventory management:** For managing vaccine lots
- ☐ **Appointment management:** For adding and managing vaccination appointments
- ☐ **Staff management:** For managing staff and permissions

Continue

Inventory Management Tool

Site > Fake Boston Site

Add Inventory



Inventory management (102)

All Active Inactive

Sale proprietary name

Search for lot #



Sale proprietary name	Funding source	NDC unit of sale	CVX	MX	Lot #	Expiration	Status ↓	
Pfizer-BioNTech COVID-19 Vaccine	State-supplied	59267-1055-04	COVID-19, mRNA, LNP-S, PF, 10 mcg/0.2 mL dose, tris-sucrose	Pfizer	COLOR123	Dec 31, 2022	Active	⋮
Moderna COVID-19 Vaccine	State-supplied	80777-0275-99	COVID-19, mRNA, LNP-S, PF, 50 mcg/0.5 mL dose	Moderna	AR4504B	Nov 13, 2022	Active	⋮
Flulaval Quadrivalent	State-supplied	19515-0818-52	influenza, injectable, quadrivalent, preservative free	ID Biomedical	flu111	Jun 14, 2023	Active	⋮

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

Inventory Management Tool

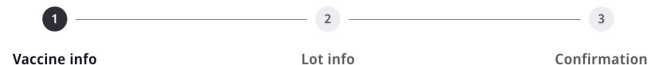
Adding Inventory

[Site](#) > Fake Boston Site

Inventory management (102)

Add Inventory

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



Step 1: Which vaccine are you adding?

Vaccine category *



NDC unit of sale *



Funding source *



Continue

[Go Back](#)

Inventory Management Tool

Adding Inventory

Step 1: Which vaccine are you adding?

Vaccine category *

- COVID-19 vaccine (COVID-19)
- Tdap or DTaP vaccine (tetanus, diphtheria, pertussis)
- Hepatitis B vaccine (hepatitis B)
- HPV vaccine (human papillomavirus)
- Flu vaccine (influenza)
- Meningococcal vaccine (meningococcal disease)
- Pneumococcal vaccine (pneumonia)
- Monkeypox (and other orthopoxviruses) vaccine

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

Funding source *

- State-supplied
- Privately funded

1. 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.**
3. 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"

Inventory Management Tool

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.

1. Staff will then be asked to enter lot information and the expiry date for the new vaccine lot.
2. 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
3. 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.
4. 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, tris-sucrose

MVX: Pfizer

Lot # *

ABC4321

Expiration date*

08/03/2023



This is the manufacturer's expiration date.

Add Lot



Proprietary and Confidential — Not for distribution.

Inventory Management Tool

Adding Inventory

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

[Site](#) > Fake Boston Site

Inventory management (1)

Add Inventory



All

Active

Inactive

Sale proprietary name

Search for lot #

ABC4321



Sale proprietary name	Funding source	NDC unit of sale	CVX	MVX	Lot #	Expiration	Status ↓
Pfizer-BioNTech Covid-19 Vaccine	State-supplied	59267-0078-04	COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-sucrose	Pfizer	ABC4321	Aug 3, 2023	Active



Inventory Management Tool

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".

[Site](#) > Fake Boston Site

Inventory management (1)

Add Inventory



All	Active	Inactive	Sale proprietary name ▾		Search for lot # ABC4321 ✕		
Sale proprietary name	Funding source	NDC unit of sale	CVX	MXV	Lot #	Expiration	Status ▾
Pfizer-BioNTech Covid-19 Vaccine	State-supplied	59267-0078-04	COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-sucrose	Pfizer	ABC4321	Aug 3, 2023	Active
							⋮ Deactivate lot Delete lot View EUA

Rows per page: 25 ▾

1-1 of 1 < >

Inventory Management Tool

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. ✕

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

MX: Pfizer

Lot information

Lot #: ABC4321

Expiration: Aug 3, 2023

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

Inventory Management Tool

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.

[Site](#) > Fake Boston Site

Inventory management (1)

Add Inventory



All

Active

Inactive

Sale proprietary name

Search for lot #

ABC4321



Sale proprietary name	Funding source	NDC unit of sale	CVX	MX	Lot #	Expiration	Status ↓	
Pfizer-BioNTech Covid-19 Vaccine	State-supplied	59267-0078-04	COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-sucrose	Pfizer	ABC4321	Aug 3, 2023	Inactive	

Inventory Management Tool

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. ×

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

MX: 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

Inventory Management Tool

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.

[Site](#) > Fake Boston Site

Inventory management (1)

Add Inventory



All	Active	Inactive	Sale proprietary name ▾			Search for lot # ABC4321 ✕	
Sale proprietary name	Funding source	NDC unit of sale	CVX	MVX	Lot #	Expiration	Status ▾
Pfizer-BioTech Covid-19 Vaccine	State-supplied	59267-0078-04	COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-sucrose	Pfizer	ABC4321	Aug 3, 2023	Inactive
							⋮ Activate lot Delete lot View EUA
Rows per page: 25 ▾							1-1 of 1

Inventory Management Tool

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

MX: Pfizer

Lot information

Lot #: ABC4321

Expiration: Aug 3, 2023

☒ I confirm that this lot should be deleted from Fake Boston Site inventory.

Cancel

Delete Lot

Inventory Management Tool

View EUA

- 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.

[Site](#) > Fake Boston Site

Inventory management (1)

Add Inventory



All	Active	Inactive	Sale proprietary name ▾		Search for lot # ABC4321 ✕		
Sale proprietary name	Funding source	NDC unit of sale	CVX	MXV	Lot #	Expiration	Status ▾
Pfizer-BioNTech Covid-19 Vaccine	State-supplied	59267-0078-04	COVID-19, mRNA, LNP-S, PF, 3 mcg/0.2 mL dose, tris-sucrose	Pfizer	ABC4321	Aug 3, 2023	Inactive
							⋮ Activate lot Delete lot View EUA
						Rows per page: 25 ▾	1-1 of 1 < >

Inventory Management Tool

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.

This information is meant for tracking purposes and is not sent to any state registry.

Date
Today (December 1) ▼

Select lots
101122TRAINING ✕ ▼

Lot	Waste amount	Reason
101122TRAINING Pfizer-BioNTech COVID-19 Vaccine	Doses 0	Reason Vaccine drawn into syringe but not administered ▼ ⋮

Save

Inventory Management Tool

Usage Report

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

Site > Inventory management

Inventory management

Status
All

Sale proprietary name
All

il.

Record Waste

Usage Report

Add Inventory

Search lot #

Usage report

Population: Fake MADPH Boston - Vaccine

Funding source
State-supplied

Lots
022223

Filter report by

Date
All time

FLUZONE QUADRIVALENT NORTHERN HEMISPHERE

#022223, Starting count: Not provided

Set Start Count

3	0	N/A
Administered	Wasted	Remaining

Onsite Tool - Vaccination

Vaccination Tool

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
4. 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. Creating a new site
4. Inventory Management Tool
5. Vaccination Tool
6. Population Management Tools
7. Dashboard Overview
 - a. Appointments Dashboard
 - b. Vaccines Dashboard
 - c. Insurance Dashboard
8. Resources
 - a. Knowledge Base
 - b. Color Support
 - c. MDPH Best Practices

Vaccination Tool

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 Vaccination tool, the **Add Patient** in the top right of the screen.

Vaccination Tool

- 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 a site.

[Create New Site](#)

Site

Fake Boston Site

▼

Select a tool.

- ☒ **Vaccination:** For checking in patients and administering vaccines
- ☐ **Inventory management:** For managing vaccine lots
- ☐ **Appointment management:** For adding and managing vaccination appointments
- ☐ **Staff management:** For managing staff and permissions

Continue

Vaccination Tool

- 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.

[Site](#) > Fake Boston Site

Checked In Patients (1) (Jul 28) [Add Patient](#)

Last name ↑	First name	DOB	Vaccines	Appt. Time	Status
Vax	Nova	Jan 1, 1980	COVID-19	6:37 PM, Jul 28 Appt. #273685720477	Checked in Undo check in

Rows per page: 25 1-1 of 1

Check in patient for vaccination.

Please be sure to share the VIS or EUA fact sheet with the patient before proceeding.

Patient information

Name: Examples, Example Check-In

Date of birth: Jan 1, 2000 (age 22)

Vaccines to administer

• Flu

Update Patient Details

Check in Patient

Vaccination Tool

- 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

Site > Fake Boston Site

Today's Patients (2) (Aug 10)

[Add Patient](#)

[All](#) [Checked in](#) [Vaccinated](#) [Remaining](#)

Vaccine Name Date

Last name ↑	First name	DOB	Vaccines	Appt. Time	Status	
Jones	Child	Jan 1, 2020	Flu	12:11 PM, Aug 10 Appt. #273011668098	Checked in Undo check in	Vaccinate patient Edit patient details
Kong	Angela	Oct 3, 1996	COVID-19	7:00 AM, Aug 10 Appt. #312601340279	Vaccinated	

What details do you want to edit? ×

555, 555, date of birth: Jan 1, 2007 (age 16)

- ☐ Patient information
- ☐ Health insurance
- ☐ Billing requirements
- ☐ Vaccines for Children (VFC) Program Eligibility

Continue

Patient: Child Jones; Jan 1, 2020 (age 2)

VFC Program eligibility

Is the patient eligible for the VFC program?

The Vaccines for Children (VFC) Program helps provide vaccines to children whose parents or guardians may not be able to afford them.
[Learn more](#)

Select only one *

- ☐ The patient is enrolled in Medicaid. (This includes Medicaid HMOs).
- ☒ The patient does not have health insurance.
- ☐ The patient is underinsured. (This means they have health insurance that does not pay for vaccines.)
- ☐ The patient is American Indian (Native American) or Alaska Native.
- ☐ The patient has private health insurance - Not VFC eligible.

Confirm

[Cancel](#)

Vaccination Tool

- 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.

1 Patient info 2 Checklist 3 Consent 4 Administer vaccine 5 Confirmation [Cancel](#)

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

Confirm patient information.

[Update Patient Information](#)

Vaccines to administer

- Flu

[+ Add or Remove Vaccines](#)

First name
Example Check-In

Last name

[Add or remove vaccines](#)

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

Add or remove vaccines for this appointment

Please be sure to share the VIS or EUA fact sheet with the patient before proceeding.

Vaccines scheduled for this appointment

Flu [Remove](#)

Add other vaccines available at this site

☐ COVID-19

☐ Hepatitis B

☐ Shingles

Vaccination Tool

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

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

Review prevaccination checklist.

Vaccines to administer

- COVID-19 (first dose)

[+ Add or Remove Vaccines](#)

Please review the prevaccination checklist with the patient to determine if they require monitoring after vaccination, or if there is any reason they should not get the vaccine(s) they requested today.

Checklist for COVID-19 contraindications

- The patient previously answered "yes" to the following questions:
 - Have you ever had an allergic reaction to another vaccine (other than the COVID-19 vaccine) or an injectable medication?

☐ I have reviewed the prevaccination checklist with the patient and conveyed any information necessary based on their answers.

Continue

Please review the prevaccination checklist with the patient to determine if they require monitoring after vaccination, or if there is any reason they should not get the vaccine(s) they requested today.

Checklist for non-COVID-19 contraindications

Walk the patient through the appropriate prevaccination checklist to ensure that there are no contraindications.

- ☒ I have reviewed the prevaccination checklist with the patient and conveyed any information necessary based on their answers.

Continue

[Go Back](#)

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

Confirm patient consent.

- ☒ The patient has been provided the applicable Vaccine Information Sheet (VIS) or EUA fact sheet for each vaccine they will be receiving. The patient has had the opportunity to ask a medical professional their questions about each vaccine they will be receiving. I have obtained consent from the patient, or their healthcare proxy, or their legal guardian to receive the vaccine(s).

Continue

color

Proprietary and Confidential — Not for distribution.

Vaccination Tool

- 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.**

Administer Flu vaccine.

Note that clicking Continue will trigger the vaccine information to be recorded.

Current vaccination details

Lot and expiration date *

Dosage (mL) *

Administration site *

Clinician administering vaccine

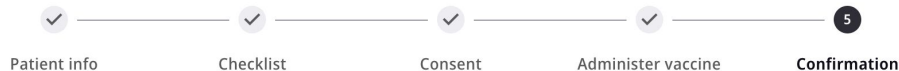
Vaccinating clinician *

Emily Fishman

Submit and Continue

Vaccination Tool

- 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.

Finish

Vaccination Tool

- 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.

[Site](#) > Fake Boston Site

All Patients (2) (Jul 28)

Add Patient

All

Checked in

Vaccinated

Remaining

Vaccine

Name

Q

Date

July 28th

Last name ↑	First name	DOB	Vaccines	Appt. Time	Status
-------------	------------	-----	----------	------------	--------

Patient and vaccination info

If you are scheduling an appointment for someone else, please answer on their behalf.

Patient's birthdate

Birthdate
01/01/2000

Select a vaccine

Learn more about the [available vaccines, recommended schedules, and risks and benefits](#)

☐ COVID-19

☐ Tdap or DTaP (tetanus, diphtheria, pertussis)

☒ Flu (influenza)

Vaccination Tool

- Enter additional patient information and select “Continue”

We need some information to confirm this vaccination appointment.

This information is required by the state immunization registry. City and state officials use it to understand who is getting vaccinated.

What is your relationship to the person you're registering for?

Relationship to patient *
I am the patient

Contact information

Country
US +1

Phone Number (mobile preferred) *

Email address

Patient's name and date of birth

First name *

MI

Last name *

Date of birth (MM/DD/YYYY) *
01/01/2000

Patient's current address

Street address *

City *

State *

ZIP code *

☐ I don't have an address.

Gender identity (optional) ⓘ

If you would like to add information about your gender identity, please do so. We will make every effort to ensure the quality of your experience.

Gender Identity

Sex

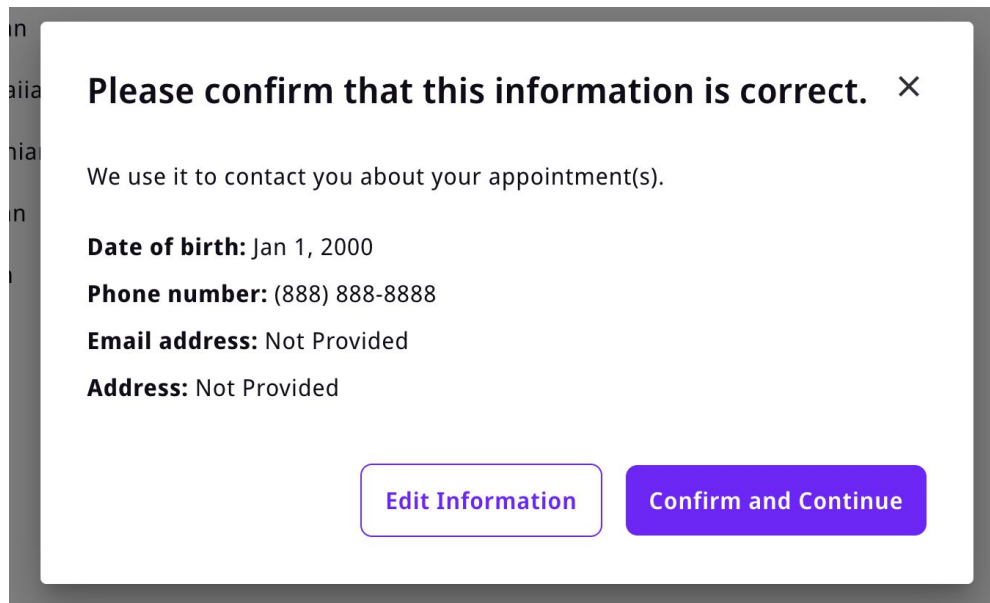
Regulations require that we collect this information.

- ☐ Female
- ☐ Male
- ☐ Non-binary

Race or ethnicity

Vaccination Tool

- Confirm information is correct and select “Confirm and Continue”



The screenshot shows a confirmation dialog box with a white background and a grey border. At the top, it says "Please confirm that this information is correct." followed by a close icon (X). Below this, it states "We use it to contact you about your appointment(s)." and lists the following information: "Date of birth: Jan 1, 2000", "Phone number: (888) 888-8888", "Email address: Not Provided", and "Address: Not Provided". At the bottom right, there are two buttons: "Edit Information" (a white button with a purple border) and "Confirm and Continue" (a solid purple button).

Please confirm that this information is correct. ✕

We use it to contact you about your appointment(s).

Date of birth: Jan 1, 2000

Phone number: (888) 888-8888

Email address: Not Provided

Address: Not Provided

[Edit Information](#) [Confirm and Continue](#)

Vaccination Tool

Prevaccination checklist

These questions are required by the CDC.

1. Are you feeling sick today?

- ☐ Yes
- ☐ No
- ☐ 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.

- ☐ Yes
- ☒ No
- ☐ I don't know

3. Have you received a hematopoietic cell transplant (HCT) or CAR-T-cell therapy since receiving COVID-19 vaccine?

- ☐ Yes
- ☐ No
- ☐ 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?

- ☐ Yes
- ☐ 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

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

Vaccination Tool

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.

Vaccination Tool

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.

Today's Patients (3) (Aug 10)

ALL Checked in Vaccinated Remaining Vaccine Name Date August 10th					
Last name ↑	First name	DOB	Vaccines	Appt. Time	Status
Jones	Child	Jan 1, 2020	Flu	12:11 PM, Aug 10 Appt. #27301168098	Checked in View check in
Kong	Angela	Oct 3, 1996	COVID-19	7:00 AM, Aug 10 Appt. #312601340279	Vaccinated
Smith	Patient	Jan 1, 2000	COVID-19	12:19 PM, Aug 10 Appt. #638976241058	

Patient: Angela Kong; Oct 3, 1996 (age 25)

Edit vaccination record

Updating information here will automatically update the state registry. Their official vaccination record will change. Don't forget to confirm the patient's identity and the details that are changing.

COVID-19 vaccination record

View dose record: [First dose](#)

Dose
Second dose

Date* 08/10/2022 Time* 12:32 PM

Time zone: EDT

Lot and expiration date *

Lots shown here match the originally recorded vaccine category.

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

Dosage (mL) * 0.5 mL Administration site * Left arm

Vaccinating clinician * Emily Fishman

Name of person making this change: Emily Fishman

Confirm Changes

This patient has received two doses of
NOVAVAX COVID-19 Vaccine, Adjuvanted.

Patient information

Name: Kong, Angela

Date of birth: Oct 3, 1996 (age 25)

Vaccines administered

- COVID-19 (Novavax, second dose)

OK

Vaccination Tool

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](#)

Population Level Tools

Population Level Tool

What you'll learn:

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

Navigation Bar

What is Color?

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

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.

[Back](#)

Manage roles and access

Organization: Fake MADPH Vaccine Org

Add Staff

For Organizations For Populations **For Sites**

Population

All populations

Site

All sites

Role

All roles

Name or email

steph.wolfr

×

☐	Email/Name	Roles	Sites	Status	
☐	steph.wolfram@color.com Steph Wolfram	Scribe Site inventory manager Site manager +3 more	Fake Boston Site	Active	Edit roles Edit sites Edit email

Rows per page: 25 1-1

Edit sites

Staff will be assigned their current roles to all selected sites.

Select sites +

All sites × +1

Save

[Go back](#)

Remove emily.fishman@color.com across all your populations

This will remove all their access across all populations you manage.

Cancel

Remove

Inventory 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.**

Population inventory

[Set Dose Count](#)[Usage Report](#)[Add Inventory](#)

Population

Fake MADPH Boston - Vaccine ▼

Site

All sites ▼

Search lot #



Inventory Management

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.

Population inventory

[Set Dose Count](#)[Usage Report](#)[Add Inventory](#)

Population		Site		Search lot #			
Fake MADPH Boston - Vaccine		All sites					
Lot #	Name	NDC #	Vaccine description	Manufacturer	Sites	Expires	Updated
COVIDTEST123 State-supplied	Comirnaty	00069-2025-10	COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose, tris-sucrose	Pfizer	DO NOT USE Flu 11/6/23 DO NOT USE Flu clinic 11/8/2023 Fake Boston Site	Dec 31, 2023	Nov 17, 2023
COVIDTEST123 Privately funded	Comirnaty	00069-2025-10	COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose, tris-sucrose	Pfizer	DO NOT USE Flu 11/6/23	Dec 31, 2023	Nov 17, 2023

Edit assigned sites

Lot number: COVIDTEST123

Name: Comirnaty

Select sites

All sites in madph-test Fake Boston Site

☒ All sites in madph-test

☒ Fake Boston Site

[Go Back](#)

Inventory Management

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.



Lot	Start count ⓘ	Alert threshold ⓘ
COVIDTEST123 State-supplied Comirnaty	Start dose count 0	Alert dose count
COVIDTEST123 Privately funded Comirnaty	Start dose count 0	Alert dose count

Inventory Management

Usage Report

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

Usage report

Population: Fake MADPH Boston - Vaccine

Funding source	Lots
State-supplied	022223

Filter report by

Date

All time

FLUZONE QUADRIVALENT NORTHERN HEMISPHERE

#022223, Starting count: Not provided

Set Start Count

3	0	N/A
Administered	Wasted	Remaining

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

[Back](#)

Contacts

[Patient support contacts](#)

[Lead site managers](#)

This contact is the head or lead who is contacted if there are any administrative requests or concerns at an individual site.

Add Contact

Name / Email

Phone number

Population

Dashboards - Overview

Site Administration & Overview Dashboards

Dashboards - Brief Overview Video

What you'll learn:

1. Types of information available in the Site Administration dashboard
2. 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
3. Creating a new site
4. Inventory Management Tool
5. Vaccination Tool
6. Population Management Tools
7. Dashboard Overview
 - a. Appointments Dashboard
 - b. Vaccines Dashboard
 - c. Insurance Dashboard
8. Resources
 - a. Knowledge Base
 - b. Color Support
 - c. MDPH Best Practices

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

What is Color?

1. **Staff Management Tool**
2. **Appointment Management Tool**
3. **Creating a new site**
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Vaccine Appointments Dashboards

- 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?

Dashboards

Data for population health programs



Vaccines

[Appointments Overview](#)

Vaccine Appointments Dashboards

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

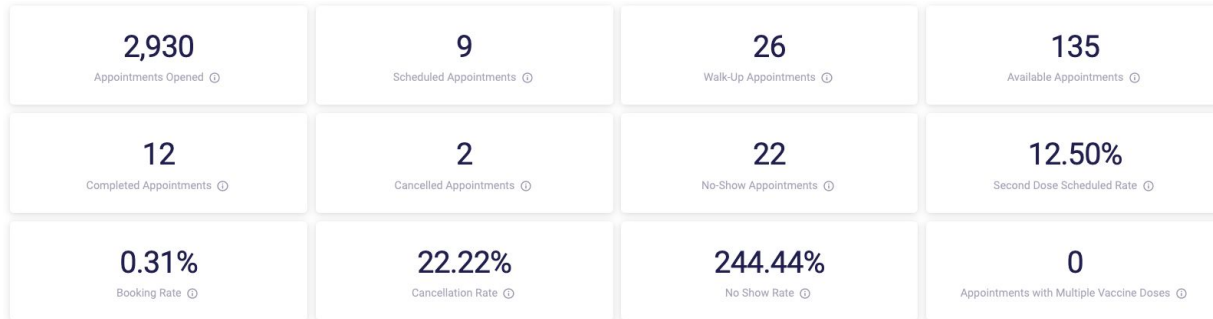
- Site Summary
- Second Dose Scheduled by Site

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.*



Vaccine Appointments Dashboards

Trends

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).

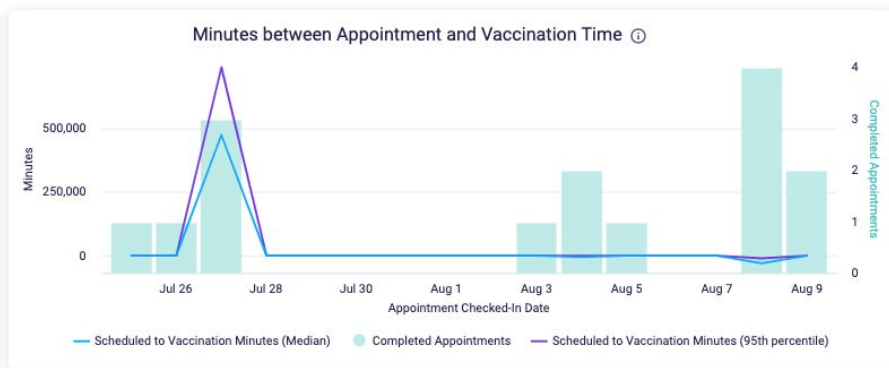


Vaccine Appointments Dashboards

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*

	Appointment Date	Completed Appointments	Median	95th Percentile
1	2022-07-25	1	4	4
2	2022-07-26	1	5	5
3	2022-07-27	3	474,701	740,635
4	2022-07-28	0		
5	2022-07-29			
6	2022-07-30			
7	2022-07-31			
8	2022-08-01			
9	2022-08-02			
10	2022-08-03	1	1	1
11	2022-08-04	2	-5,700	2
12	2022-08-05	1	4	4
13	2022-08-06			
Totals		15	0	740,635



Vaccine Appointments Dashboards

Sites

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.*

Site Summary ⓘ											
Collection Site Name	Total Opened	Total Scheduled	Total Walk-Up Count	Total Cancelled	Total Completed	No Show Rate	Cancellation Rate	Completion Rate	Booking Rate	Total Available	
1 Fake Boston Site	56	9	0	2	4	44.44%	22.22%	44.44%	16.07%	0	

Appointments Scheduled by Age Group				Appointments Scheduled by Type					
Age Group	18 and under	19-64		Vaccine Type	COVID-19	Influenza	Al	Monkeypox	Tdap or DTaP
Collection Site Name	Appt Scheduled Count	Appt Scheduled Count		Collection Site Name	Appt Schedule Count	Appt Scheduled Count	Appt Scheduled Count	Appt Scheduled Count	Appt Scheduled Count
1 Fake Boston Site	0	0		1 Fake Boston Site	5	2	0	1	1
2 Fake Boston Site	9	0		2 Fake Boston Site	0	0	0	0	0
				3 Fake Boston Site	0	0	0	0	0

Second Doses Scheduled by Site ⓘ			
Collection Site Name	Second Dose Scheduled Rate	Minutes Between First Vx and Second Scheduled Median	Second Dose Completed Rate
1 Fake Boston Site	22.22%	2	0.00%

Vaccine Appointments Dashboards

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?

Dashboards

Data for population health programs



Vaccinations
PHI

Appointments
PHI

Vaccine Appointments Dashboards

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

Vaccine Appointments Dashboards

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 Email*
- Patient Name*
- Vaccine Appointment Type*

Scheduled for Date	Population	Site Name	Patient Full Name	Email	Appointment Status	Vaccine Type	COVID Booked Manufacturer	Age Group At Appointment	Lot Number	Is VFC Eligible?	
<button>This Week</button>	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	4m ago   
Vaccination Appointments PHI ⓘ											
	Appointment Number	Appointment Scheduled for Time	Appointment Status	Is Walk-Up Appt (Yes / No)	Vaccine Type	COVID Booked Manufacturer	Booked Dose Number	Booked Dose Series	Patient Full Name	Phone Number	Email
1		2022-08-10 08:00:00	no-show	No	COVID-19	Novavax COVID-19	2	Primary			
2		2022-08-09 19:10:23	no-show	Yes	COVID-19	ⓘ	2	Booster			
3		2022-08-09 18:58:04	no-show	Yes	COVID-19	ⓘ	1	Primary			
4		2022-08-09 01:36:19	no-show	Yes	COVID-19	ⓘ	1	Booster			
5		2022-08-08 18:26:05	no-show	Yes	Meningococcal	ⓘ		Primary			
6		2022-08-08 11:00:00	cancelled	No	COVID-19	Pfizer-BioNTech COVID-19	2	Primary			

Vaccine Appointments Dashboards

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.

1. 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"
2. 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.
3. Once the column has been added, click run and you will see that field populate for all of the appointments.

The screenshot shows the 'Vaccination Appointments PHI' table. At the top, there are filter buttons for 'Scheduled for Date' (set to 'is on 2023/11/15'), 'Population', 'Site Name', 'Patient Full Name', 'Email', 'Appointment Status', 'Vaccine Type', and 'COVID Booked Manufacturer'. Below the table, there are more filters for 'Preferred Flu Subtype', 'Age Group At Appointment', 'Lot Number', and 'Is VFC Eligible?'. The table has columns: Appointment Number, Appointment Scheduled for Time, Appointment Status, Double registration (Yes / No), Vaccine Type, and COVID Booked Manufacturer. A dropdown menu is open on the right side of the table, showing options: 'Explore from here', 'Download data', 'Autosize all columns', 'Reset all column widths', and 'View'. An orange arrow points to the 'Explore from here' option.

The screenshot shows the 'Explore' interface. On the left, there is a search bar with 'prefer' entered. Below it, a list of fields is shown, including 'Vaccines PHI', 'Patient', 'Preferred Language', 'Intend Preferred Manufacturer', 'Preferred Flu Subtype', and 'Preferred Manufacturer'. The 'Preferred Language' field is highlighted with an orange arrow. On the right, there is a table with columns: Appointment Number, Appointment Scheduled for Time, Appointment Status, Double registration (Yes / No), Vaccine Type, and COVID Booked Manufacturer. The table shows three rows of data. At the bottom right, there is a 'Run' button. An orange arrow points to the 'Run' button.

The screenshot shows the final report. At the top, there are filters for 'Vaccines PHI Appointment Scheduled for Date is on 2023/11/15 AND Vaccines PHI Population is any value AND Vaccines PHI Site Name is any value AND Vaccines PHI Patient Full ...'. Below the filters, there is a table with columns: Secondary Insurance Policy Holder Birthday, Was Consent Provided (Yes/No), Consensor Relationship, Consensor First Name, Consensor Last Name, and Preferred Language. The table shows three rows of data. An orange arrow points to the 'Preferred Language' column.

	Secondary Insurance Policy Holder Birthday	Was Consent Provided (Yes/No)	Consensor Relationship	Consensor First Name	Consensor Last Name	Preferred Language
1		Yes	self	Michaele	Destinoble	en
2		Yes	self	Michaele	Destinoble	en
3		Yes	self	Michaele	Destinoble	en

Dashboards - Vaccines

Vaccine Dashboards

What you'll learn:

1. How to view an overview of Vaccines data
2. How to view Vaccines PHI

Navigation Bar

What is Color?

1. **Staff Management Tool**
2. **Appointment Management Tool**
3. **Creating a new site**
4. **Inventory Management Tool**
5. **Vaccination Tool**
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Vaccine Dashboards

Vaccine Overview

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

Which Color product do you need today?

Dashboards

Data for population health programs



Vaccines

Appointments Overview

Overview

Vaccine Dashboards

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:

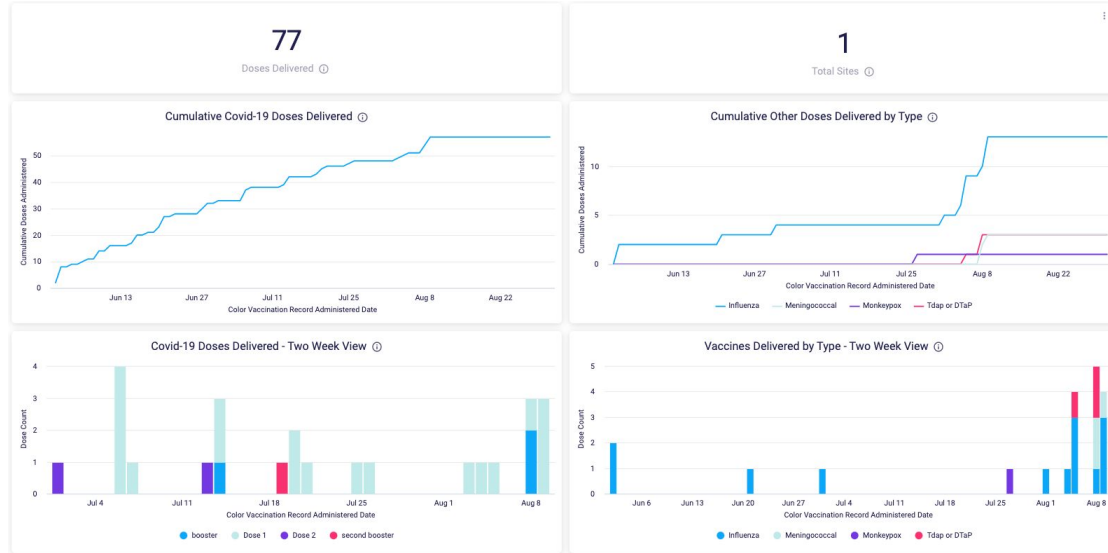
- *Breakdown by Ethnicity - COVID-19 Doses Delivered*
- *Breakdown by Ethnicity - Doses Delivered*
- *Breakdown by Ethnicity - Appointments*
- *Breakdown by Sex - Doses Delivered*
- *Breakdown by Sex - Appointments*
- *Breakdown by Age Group - Doses Delivered*
- *Breakdown by Age Group - Appointments*
- *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.



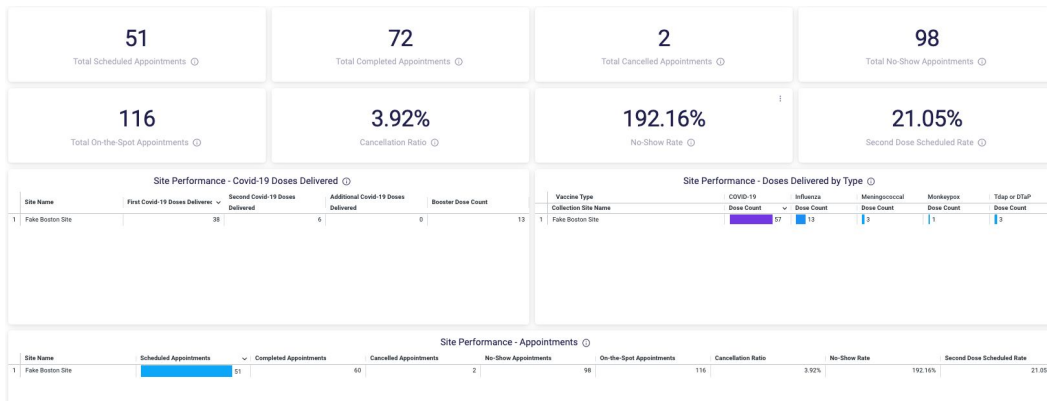
Vaccine Dashboards

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.



Vaccine Dashboards

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:

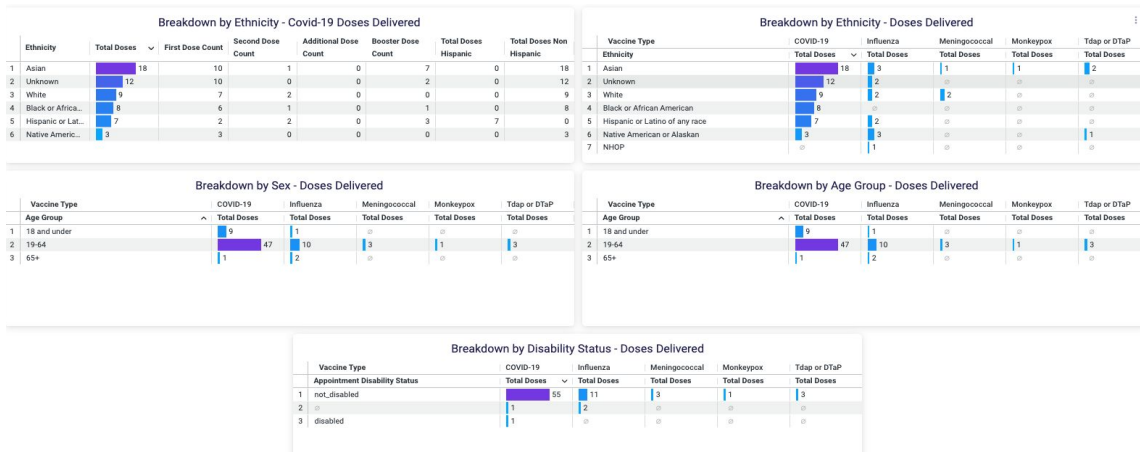
- Doses Delivered: The total number of completed vaccinations broken down by patients' sex.
- Appointments: Appointment-related statistics broken down by patients' sex.

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.



Vaccine Dashboards

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?

Dashboards

Data for population health programs



Vaccinations

PHI

Appointments

PHI

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
 - Email
 - 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*

Dose Provided Date	Population	Site Name	Patient Full Name	Patient Email	Manufacturer	Vaccine Type	Administered Amount in mL	Multiple Doses Delivered?	Lot Number	Is VFC Eligible?	
is any time	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	is any value	🔄 ☰ ⋮

Vaccinations Delivered PHI												⋮
	Dose Provided Date	Appointment Number	Patient Full Name	Phone Number	Email	Patient Profile Address Line1	Patient Profile Address Line2	Patient Profile City	Patient Profile State	Postal Code	Birthday	Age
1	2021-02-07 14:39:07								MA	02043		
2	2021-02-07 14:44:02								MA	02043		
3	2021-02-07 18:11:26								MA	02043		
4	2021-02-07 18:15:16								MA	02043		
5	2021-02-08 14:31:56								CA	94110		
6	2021-02-08 15:25:00								CA	94110		
7	2021-02-09 15:06:28								MA	02118		
8	2021-02-09 23:22:36								MA	02446		
9	2021-02-10 00:02:19								MA	02116		
10	2021-02-10 13:32:30								MD	21046		
11	2021-02-10 22:51:56								CA	02139		
12	2021-02-12 09:42:08								CA	94110		

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 before (Appointment Dashboard) and after a clinic visit (Vaccination Dashboard), watch this video: [HERE](#).

Organization	Population	Site Name	Patient Name	Patient Email	Insurance ID	Insurance Payer	Insurance Type	Funding Source
is any value	is Fake MADPH Boston - Vaccine	is any value	is any value	is any value	is any value	is any value	is any value	is any value

Insurance PHI													
Name	Phone Number	Email	Address 1	Address 2	City	State	Zip Code	Birthday	Age	Age Group	Sex	Us Census Ethnicity	Organization
1 Lady Luck	(999) 999-9990		123 heaha		ite	IL	64563	2001-01-01	20	19-64	M	Asian	Fake MADPH Vaccine Org
2 Jeta	(222) 222-2222	2222@22.com	xy		andover	MA	01810	1922-02-22	90	65+	F	Asian	Fake MADPH Vaccine Org
3 55	(555) 555-5555		5		5	IL	55555	1987-01-01	36	19-64	F	Asian	Fake MADPH Vaccine Org
4 55	(555) 555-5555		5		5	IL	55555	1987-01-01		19-64	F	Asian	Fake MADPH Vaccine Org
5 55	(555) 555-5555		5		5	IL	55555	1987-01-01	35	19-64	F	Asian	Fake MADPH Vaccine Org
6 55 55	(555) 555-5555		55		5	AK	55555	1954-01-01	68	65+	M	NHOP	Fake MADPH Vaccine Org
7 555 555	(555) 555-5555		5		5555	AZ	12345	2007-01-01	15	18 and under	F	White	Fake MADPH Vaccine Org
8 555 555	(555) 555-5555		5		5555	AZ	12345	2007-01-01		18 and under	F	White	Fake MADPH Vaccine Org
9 A B	(200) 000-0000						00000	1987-04-22	35	19-64	F	Native American or Alaskan	Fake MADPH Vaccine Org
10 A BB	(200) 000-0000						20200	2005-04-27	17	18 and under	F	Native American or Alaskan	Fake MADPH Vaccine Org
11 A BC	(999) 999-9999		123 maple street		seattle	AS	98115	1957-04-04		65+	M	Asian	Fake MADPH Vaccine Org
12 A C	(319) 936-6898	elizabethlarsen121@gmail.com	123 Tribby St		Boston	MA	02116	1979-03-13	42	19-64	F	White	Fake MADPH Vaccine Org
13 A Child	(555) 555-5555	test@gmail.com	123 Test Cir		Boston	MA	02159	2015-12-25	5	18 and under	M	Black or African American	Fake MADPH Vaccine Org
14 A Child	(555) 555-5555		123 Circle St		Worcester	MA	01588	2007-12-19	14	18 and under	M	White	Fake MADPH Vaccine Org
15 A Child	(555) 555-5555		123 Circle St		Worcester	MA	01588	2007-12-19	14	18 and under	M	White	Fake MADPH Vaccine Org

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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

<https://docs.color.com/docs/onsite-tool-overview-1>

✓ 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 [Vaccine Resource Document](#)
- Color [Vaccine Support Page](#)
- 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](#)
 - [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 [CDC Interim Clinical Considerations Use of COVID-19 Vaccines in the United States](#) and [U.S. COVID-19 Vaccine Product Information](#).
- For detailed, clinical best practices immunization guidance, please refer to the [General Best Practice Guidelines for Immunization: Best Practices Guidance of the Advisory Committee on Immunization Practices \(ACIP\)](#).
- [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 [Patients Vaccinated Report Mini Guide](#) 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 [this video](#) 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:
 - [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 [CDC Interim Clinical Considerations Use of COVID-19 Vaccines in the United States](#)
- 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 [Vaccine Information](#)
- 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 [Multilingual COVID-19 Materials](#). 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>



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