Oracle® Health Immunization Management Cloud Service
User Guide

ORACLE®

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Preface

This preface contains the following sections:

- Documentation accessibility

Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Get started

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- **Sign in**
  After you receive your Welcome message from Oracle and activate your account, you can sign in with your email address and the password you created.

Introduction

Oracle Health Immunization Management Cloud Service (Oracle Health Immunization Management) helps your organization schedule appointments for vaccinations or diagnostic tests.

Through Oracle Health Immunization Management, you add vaccination or test locations, add users who work at the location, and do one or both of the following:

- Allow patients to schedule appointments themselves. They can then select the appointment type and find a date, time, and location that works for them.

- Allow walk-in appointments. A person can arrive at the location and a check-in agent can register the patient and schedule the appointment.

All patients get checked in by a check-in agent when they arrive at the location.

Oracle Health Immunization Management walks the check-in agent through each step of the process. For example, the agent follows prompts to check the schedule and check in patients (previously scheduled or not) to see a healthcare worker.

You can use the web app version of Oracle Health Immunization Management or the mobile version. To use the mobile version, an administrator must add the mobile device and user details. For more details on using the mobile app, see Manage mobile devices.

> **⚠ Caution:**
>
> Your implementation of Oracle Health Immunization Management may not be configured to include all of the features described in this document. For more information on accessing all the features, contact your Oracle Customer Success manager.

Oracle Health Immunization Management requirements

To use Oracle Health Immunization Management, administrators, check-in agents, Help Desk agent, and healthcare workers need a computer, tablet, or smartphone with Internet access.

Patients can also use their computer, tablet, or smartphone to register with the system, book appointments (if available), and receive information on their registration, appointment, and any follow-up details. But, if they do not own a computer or mobile device or they cannot access the Internet, they can arrive at the vaccination or test location to make a walk-in appointment with a check-in agent or contact a Help Desk agent with their request. The agents can supply them with details on their appointment.

For more details on the supported systems, see the following table.

Table 1-1   Oracle Health Immunization Management

Item	Description
Operating system	Windows, macOS
Phone or tablet	Android and iOS
Browser	Latest version of: • **Chrome**: Supported on Android, macOS, and Windows • **Firefox**: Supported on macOS and Windows • **Microsoft Edge**: Supported on Windows • **Safari**: Supported macOS and iOS

Oracle Health Immunization Management users

Oracle Health Immunization Management gets used by a variety of users. And, their role in the system determines what options they can access. For example, administrators can access all the options in the system, but check-in agents see a limited number of options.

You can assign the roles in the way that works for your organization. For example, if you have a large administrative team, you can assign each role to different people. Or, if you have a small and specialized core team responsible for everything, you can add everyone as system administrators. Then, they can access all the options in the system.

See the following table for details on the different users in Oracle Health Immunization Management. For details on permissions for each role, see Roles and permissions.

Type of user	Description
Administrator (system or location)	Works at a lab or testing location and performs administrative tasks, such as adding the locations that offer medical processes, adding users, and creating schedules for each location. System administrators can make updates to the entire system and work with the Oracle Customer Success manager to configure the system. Location administrators manage locations and their schedules.
Check-in agent	Checks in patients when they arrive for their appointments. These users verify the identity of the patient before they see a healthcare worker. They may also provide the patient with a specimen label.
Help Desk agent	Helps patients register for appointments and answer questions about their appointments.
Healthcare worker	Meets with the patient to administer the vaccine or test and process the medical record. They may also function as part of the check-in staff.
Patient	Registers themselves in the system for a medical appointment (if allowed). You do not assign a role to a patient. Once registered, patients manage limited data in Oracle Health Immunization Management. However, if your system sends the health check survey, patients can register for a health check survey after receiving a vaccination to send health updates to Oracle Health Immunization Management.

Roles and permissions

Your role determines what tasks you can perform in Oracle Health Immunization Management.

For more details on the permissions allowed for your role, see the following table. (See Oracle Health Immunization Management users for more details on the available roles.)

> **✎ Note:**
>
> Oracle Health Immunization Management works with an application used by patients called Oracle Health Immunization Management Patient Portal. Patients can only use Oracle Health Immunization Management Patient Portal to register their account, schedule their own appointments, update their profile details, and complete surveys (if available). They cannot use the main Oracle Health Immunization Management application used by administrators, Help Desk agents, check-in agents, and healthcare workers. But, if patients change their profile details or appointments in Patient Portal, it impacts the data in Oracle Health Immunization Management.

Table 1-2   Roles and permissions

Role	Register patients	Make or change appointments	Update patient data	Check in patients	Vaccinate or test patients	Manage users for a location	Manage schedules for a location	Upload bulk data	Manage registrant groups
Administrator (minimum two per organization)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Location administrator (minimum two per location)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Help Desk agent	Yes	Yes	Yes	No	No	No	No	No	No
Check-in agent	Yes	Yes	Yes	Yes	No	No	No	No	No
Healthcare worker	No	No	No	No	Yes	No	No	No	No

System configuration

Before you start using Oracle Health Immunization Management, administrators meet with their Oracle Customer Success manager to configure the system based on their requirements. These decisions impact what the users see in the application and what patients see when they register or view their profile.

For example, administrators can choose the name they want shown in the product banner, enable self-registration for patients, and include the ability to send surveys. If you want to make any changes after your Customer Success manager implements your requests, you must contact your Oracle Customer Success manager and request new changes.

Each system requires the following field information for your organization:

- Name
- Country code
- Country
- Time zone
- Welcome message (seen by patients when they begin the self-registration process, if allowed)
- Point of contact

For more details on what you can configure through your Oracle Customer Success manager, see the following table.

Table 1-3   Field Configurations through Oracle Customer Success

Oracle Health Immunization Management Configurable Fields or Features	Description with option to Configure, Activate, or Deactivate
Custom Names/Application Name	Application name displayed in banner (custom).
Custom Names/Rename Appointments	References to "Appointments" displayed throughout the application (customize).
Custom Names/Rename Procedures	Name of the medical procedure displayed when a healthcare worker processes a patient (customize). For example, a medical procedure may use the name of the vaccine.
Self Registration	Patients can use options to register for their own appointments (activate or deactivate).
Upload Data/Upload Users and Groups/Upload Patients	Administrators can upload data (such as locations), users and groups, and patient data in bulk (activate or deactivate).
Survey	System can send survey to patients on a daily, weekly, or monthly basis to gather health updates after vaccination (activate or deactivate).
Patient Profile Attributes/Gender	Patient registration form includes a drop-down field for gender (customize, activate, or deactivate).
Patient Profile Attributes/Ethnicity	Patient registration form includes a drop-down field for ethnicity (customize, activate, or deactivate).
Patient Profile Attributes/Biological Sex	Patient registration form includes a drop-down field for biological sex (customize, activate, or deactivate).
Patient Profile Attributes/Race	Patient registration form includes a drop-down field for race (customize, activate, or deactivate).
Patient Profile Attributes/Middle Name	Patient registration form includes a field for middle name (activate or deactivate).

Table 1-3   (Cont.) Field Configurations through Oracle Customer Success

Oracle Health Immunization Management Configurable Fields or Features	Description with option to Configure, Activate, or Deactivate
Groups	Administrators can create or manage groups (activate or deactivate). For example, you may add a group that belongs to a group type of **School** or **Vaccination Cohort**. A school group belongs to a particular school, such as a college. A vaccination cohort group consists of people with something in common. For example, the group consists of adults 16-49 years old, front line healthcare workers, or people at a correctional center.
Cohort	Patient registration form includes a drop-down field to select their group, if groups allowed (customize, activate, deactivate). For example, an administrator may create a cohort called Vaccination Cohort for healthcare workers.
Procedure Self Reporting	Patients can update past procedures in their profile (activate or deactivate).
Contact Methods/Contact via SMS	Patients see a field to enter their cell phone number when they register to use SMS (text message) as the preferred contact method (activate or deactivate).

> **Note:**
>
> If your organization uses Oracle Healthcare Notifications Cloud Service with a subscription for a specific number of SMS notification messages, you can track your subscription usage through a report in Oracle Analytics. For more information, see the *Oracle Health Immunization Management Analytics Guide*.

Contact Methods/Contact via Email	Patients sees a field to enter their email address when they register as the preferred contact method (activate or deactivate).
Contact Methods/Contact via Phone	Patients sees a field to enter their phone number when they register as the preferred contact method (activate or deactivate).
Contact Methods/No Contact Method	Patients see a field to select "no contact method" (activate or deactivate).

Table 1-3   (Cont.) Field Configurations through Oracle Customer Success

Oracle Health Immunization Management Configurable Fields or Features	Description with option to Configure, Activate, or Deactivate
Appointments/Walk-In Appointments	Users can schedule walk-in appointments for patients (activate or deactivate).
	✏ **Note:** If you deactivate this feature, you must rely on patient self-registration. Ensure that you activated Self Registration (if not done already).
Appointments/Appointment Scheduling	Users (or patients) can schedule appointments after selecting an active location (activate or deactivate).
Manufacturer	Administrator sees a field to specify the vaccine or test manufacturer (activate or deactivate). Check-in agents also see this field, if available.
Manufacturer Products	Administrator sees a field to associate vaccine or test product with the manufacturer with the ability to build a list (activate or deactivate). Check-in agents also see this field with a drop-down menu, if available.

> ✏ **Note:**
>
> This guides includes details on main tasks using the default settings. Your version of Oracle Health Immunization Management may not include some of the options or use different names, depending on what you deactivated or changed.

Importing data into Oracle Health Immunization Management

If you cannot connect to the Internet and you need to process an appointment for a patient, you can record all the details on a vaccination appointment (such as patient details, vaccine type, manufacturer, dose, amount, date and time administered) using an external source.

Later, when you can access the Internet, you can import the data to the main Oracle Health Immunization Management. For more details on processing an appointment and importing data from external sources, contact your Oracle Customer Success manager.

Welcome message and account activation

When an Oracle Customer Success manager or Oracle Health Immunization Management administrator adds a user to the system, that user receives a Welcome email message with account activation details.

> **Note:**
>
> Users include anyone who uses Oracle Health Immunization Management or Oracle Health Immunization Management Patient Portal.

You can also find a support email and phone number in the Welcome message if you need to contact a support representative with account questions.

The Welcome email is from `noreply@country.ohms.oracle.com`. For example, for the country of Germany, you see a Welcome email from `noreply@germany.ohms.oracle.com`. The email contains a link you use to set a password and activate your Oracle Health Immunization Management account. You must click this link within a set amount of time to activate your account or it expires.

If you cannot find the email or the link in the message expires, contact your Oracle Customer Success manager or Oracle Health Immunization Management administrator. That person can send the Welcome message to you again.

- Activate your account
  The first time you sign in, you specify your password. You can work on a smartphone, tablet, or computer.

Activate your account

The first time you sign in, you specify your password. You can work on a smartphone, tablet, or computer.

To activate your account:

1. Locate the Welcome message sent from `noreply@country.ohms.oracle.com`.

   > **Note:**
   >
   > If you cannot find the Welcome email message, check your Junk folder in your email application. If you still cannot locate it, reach out to your Oracle Customer Success manager or Oracle Health Immunization Management administrator and ask that person to send the message to you again.

2. Scroll to the bottom of the message and select **Sign In**.

   The Sign In link expires in approximately 36 hours. (Your message includes details on the exact expiration range.) If the link expires before you click it, contact the help desk using the phone number listed in the Welcome email message. Or, if you know the name of the administrator who added your account to the system,

contact that person. If Oracle added you as the first user of the system, contact your Oracle Customer Success manager and request another Welcome message.

3. Create a bookmark for the web site that opens in the browser. That way, you can save time when you need to sign in to Oracle Health Immunization Management in the future.

4. Enter your password. Then enter it again to confirm it and select **Set Password** to open Oracle Health Immunization Management.

Sign in

After you receive your Welcome message from Oracle and activate your account, you can sign in with your email address and the password you created.

If you did not set a password yet, see Activate your account.

To sign in to Oracle Health Immunization Management:

1. Navigate to the Oracle Health Immunization Management web site for your organization. (If you cannot locate the web site, check the link in your Welcome message or contact your administrator.)

2. Enter your email address and password.

> **✎ Note:**
>
> If you forgot your password, select **Forgot Password** and follow the prompts to reset it.

3. Select **Sign In**.

Part I

Administration tasks

Administration tasks include defining system settings (banners, country, time zone, survey language), setting up locations, adding users to Oracle Health Immunization Management, and creating schedules.

- Set up the application
  After you define settings and create locations, you can associate Oracle Health Immunization Management users with them. You can also add data on multiple patients, patient groups, locations, or system users in bulk by adding the data to a template file and uploading it.

- Manage patients
  A system administrator or location administrator can edit patient details after the patient registers, add patient groups, and edit patient groups.

- Manage schedules
  A system or location administrator can create schedules after creating locations. A schedule includes the start and end times and the number of concurrent appointments in each time slot. You (as an administrator) can then schedule appointments for patients, manage the schedule, and set up inventory details.

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Set up the application

After you define settings and create locations, you can associate Oracle Health Immunization Management users with them. You can also add data on multiple patients, patient groups, locations, or system users in bulk by adding the data to a template file and uploading it.

- **System setup**
  Administrators need to add system administrators and Help Desk agents for Oracle Health Immunization Management. They then need to set up locations and users for those locations. Administrators can also set up the schedule to book appointments.

- **Define system settings**
  Oracle Health Immunization Management comes with default settings (for example, product name and Welcome message text). You can change these settings, if necessary. For example, you can work with your Customer Success Manager to include another name in the product banner, change the country, time zone, or language for the patient health survey.

- **Add a system administrator or Help Desk agent**
  Only a system administrator can add other system administrators and Help Desk agents. You can add these types of users at any time.

- **Add a location**
  Location administrators can add one or more locations to Oracle Health Immunization Management, depending on the number of places you plan to use for appointments. A location is a physical place where patients go for their vaccination appointment.

- **Edit a location**
  Administrators and location administrators can edit the details of a location (or remove it) at any time. For example, you may need to edit a location to add external location mapping identifiers to transmit data through web service calls.

- **Add a location administrator, check-in agent, or healthcare worker**
  A system administrator or location administrator can add location administrators, check-in agents, and healthcare workers.

- **Bulk Upload**
  To save time adding data on multiple patients, groups, locations, or users, you can download a file, add the required details, and upload it to Oracle Health Immunization Management. You can also upload patient and their procedure data (for example, for patients who used a third-party system to originally record their procedures).

- **Manage mobile devices**
  Administrators can add details on supported mobile devices for users to access Oracle Health Immunization Management Mobile from a phone or tablet (Android devices only). Users cannot connect to Oracle Health Immunization Management through their device until it gets registered.

- **Add patient records through Oracle Health Immunization Management Mobile**
  If you cannot access Oracle Health Immunization Management from a web browser to add patient data, you can access it from your phone if an administrator previously registered your mobile device and you downloaded the Oracle Health Immunization Management Mobile application to your phone or tablet (Android devices only).

- Edit user details
  Administrators and Help Desk agents can edit the details of an Oracle Health Immunization Management user at any time. For example, you can fix a typographical error in a user's name, update the email address, or add or remove a role. For healthcare workers, you can update the profession.

- Create a schedule for a location
  You must create a schedule if you (as an administrator) want to schedule an appointment for a patient or you want to allow patients to schedule their own appointments. Otherwise, you do not need to create a schedule.

- Deactivate users
  After you add a user, that user receives a message with a link to activate the account. Once activated, that user can start using Oracle Health Immunization Management. If you no longer want that person to access Oracle Health Immunization Management, you can deactivate them from the system.

- Resend a Welcome message to a system administrator or Help Desk agent
  If a system administrator or Help Desk agent accidentally deletes the Welcome message or the link expires, a system administrator can resend the message.

- Resend a Welcome message to a location administrator, check-in agent, or healthcare worker
  If a location administrator, check-in agent, or healthcare worker (processing agent) accidentally deletes the Welcome email message or the account activation link in their messages expires, a system administrator or location administrator can resend the message.

System setup

Administrators need to add system administrators and Help Desk agents for Oracle Health Immunization Management. They then need to set up locations and users for those locations. Administrators can also set up the schedule to book appointments.

After you receive your Welcome message and activate your account, you can start setting up Oracle Health Immunization Management.

> **Note:**
>
> For assistance setting up surveys for Oracle Health Immunization Management Patient Portal, contact your Customer Success Manager.

To set up Oracle Health Immunization Management as an administrator:

1. Define system settings (product banner, welcome message, language).

2. Add system administrators and Help Desk agents to ensure people are available to troubleshoot issues and answer questions as described in Add a system administrator or Help Desk agent.

3. Add one or more locations where patients go for their vaccinations or tests as described in Add a location.

4. Add the different types of users for each locations as described in Add a location administrator, check-in agent, or healthcare worker.

5. (Optional) Create a schedule as described in Create a schedule for each location.

> **✎ Note:**
>
> You must create a schedule if you want to allow patients to schedule their own appointments. Otherwise, you do not need to create a schedule. You can just add patients to the schedule on a walk-in basis.

After you set up locations and users, check-in agents can create walk-in appointments.

Define system settings

Oracle Health Immunization Management comes with default settings (for example, product name and Welcome message text). You can change these settings, if necessary. For example, you can work with your Customer Success Manager to include another name in the product banner, change the country, time zone, or language for the patient health survey.

To define system settings:

1. Select the **Administration** tab from the banner.

2. Select **Settings** to open the Settings page.

3. In the Basics section, do the following:

    • **Display Name**: (Required) Leave the default name of the product or change it to another name. This name appears in the banner when users log in to the system.

    • **Code**: (Required) Leave the default code or enter a four-letter code that helps you identify the system.

    • **Default Country**: (Required) Leave the default country or select another one from the drop-down list.

    • **Default Time Zone**: (Required) Leave the default time zone or select another one from the drop-down menu.

    • **Default Language**: (Required) Leave the default language for the health check survey that patients get or select another language from the drop-down menu. You can select English, Spanish, Simplified Chinese, Vietnamese, or Korean.

    • **HPI-O**: (Required for Australia locations only) Enter the 16-digit Healthcare Provider Identifier-Organization (HPI-O) number for the location.

4. In the Welcome Message section, you see an HTML template with default text. This is the message the users see when they open the application. It contains a welcome message with details on what they can do (register and make an appointment). If necessary, make modifications to the text. For example, if you changed the product name, you may want to use the new name in the Welcome message.

5. (Optional). In the Point of Contact section, provide details on the following fields:

    • **Name**: Enter the name of person you want users to contact for support.

    • **Email**: Enter the email address of the contact person.

    • **Code**: Country code and number.

    • **Phone**: Enter the phone number of the contact person.

6. Select **Apply Changes**. You see a "Settings updated" message in the banner. The Administration tab now shows details on the settings you just reviewed or added.

Add a system administrator or Help Desk agent

Only a system administrator can add other system administrators and Help Desk agents. You can add these types of users at any time.

> **Note:**
>
> To upload user or location data in bulk, see Upload data on patients, groups, locations, or users in bulk instead of this procedure.

To add a system administrator or Help Desk agent:

1. Select the **Administration** tab from the banner.
2. Below the Administration heading, click **View All Users**.
3. Perform one of the following tasks:
   - If the person is a member of the Help Desk, select **Add Help Desk Agent**.
   - If the person is an administrator, select **Add System Administrator**.
4. In the Add User dialog box, enter the email address for the user and select **Next**.
5. Enter the first name (required), middle name, and last name (required) of the user in the appropriate fields.
6. From the **Language** drop-down menu, select the language you want the user to see when they sign in to Oracle Health Immunization Management (for example, English or French).

   > **Note:**
   >
   > After setting a language for a user, that user only sees Oracle Health Immunization Management in English or French after signing in (depending on what you selected). If you selected another language (for example, Spanish, Simplified Chinese, or Korean), the user only sees the Oracle Health Immunization Management Patient Portal interface and surveys in the language you selected. The Oracle Health Immunization Management interface remains in English (or French).

7. Select **Add User**. Within minutes, that user receives a Welcome email message with details to activate their Oracle Health Immunization Management account.

Add a location

Location administrators can add one or more locations to Oracle Health Immunization Management, depending on the number of places you plan to use for appointments. A location is a physical place where patients go for their vaccination appointment.

Administrators can set a location as hidden. Once hidden from patients, only staff members can access it to book appointments.

> **Note:**
>
> If you want to add multiple locations at once, see Upload data on patients, groups, locations, or users in bulk instead of this procedure.

To add a location where patients go for appointments:

1. Select **Locations** from the Home tab. This opens the Locations tab.

2. Select **Add Location** from the top-right of the tab. This opens the Add Location page. (Required fields show a red upper-left corner.)

3. Enter the field information for the location. For example:

   • **Name** (Required): Add a name for the location that helps you identify it.

   • **Location Code** (Required): Enter a 10-digit code that helps you identify the location. The system uses this code with a QR code to show proof of a booked appointment.

   • **Clinical Setting:** Select the appropriate setting for the location from the drop-down list (for example, Medical Practice).

   • **Consumer Visible**: Select **Yes** to make the location visible to Patient Portal users or **No** to hide it from them. If you hide the location, Patient Portal users cannot see the location as a place to book an appointment. (The Locations tab lists visible locations with a CONSUMER VISIBLE label for staff members to see that users can book appointments there.)

   • If you entered a location code and setting that requires external mapping to identify it when transmitting data through web service calls, select **Add Mapping** from the External Location Mapping Identifiers section. In the **Location Identifier Source** field, select the source from the drop-down menu (for example, Australia Immunization Registry [AIR] Service Provider ID). Enter the identifier (up to 20 characters) in the **Location Identifier** field and select **Add Mapping**.

   • **Address** (Required): Enter the full address of the location.

   • **Code** and **Location Phone**: Select the country code and enter the phone number for the location.

   • **Time Zone**: Select the time zone for the location from the drop-down list.

   • **Point of Contact**: Enter the name, email address, and phone of the contact person for the location.

   • **Appointment Types**: Leave the default selections or select the type of appointments held at your location (for example, COVID-19 and Influenza vaccines).

   > **Note:**
   >
   > Patients who register for a vaccine see the address details you entered in their appointment confirmation messages.

4. Select **Add Location**. You see a "Location added" message in the banner. The Location tab now shows details on the location you just added with the current calendar. Your locations list alphabetically.

> **✎ Note:**
>
> You also see an **Activate Location** option at the top of the location. You must activate the location for users to book appointments. But, you must first add location administrators, check-in agents, or healthcare workers to the location and create a schedule for the location. If you try to activate the location before you do this, you see an error message. For example, if the site you created requires external mapping to identify it when transmitting data, you see a message to edit the location. You may also see a message to set the advance number of booking days you want to allow before appointments and make it consumer visible or not. For more information on adding users to a location, adding a schedule, or editing a location, see Add a location administrator, check-in agent, or healthcare worker, Create a schedule for a location, or Edit a location.

The next time you view the list of locations, you see the location you added in the list or you can search for it. To search for the location, you can enter the location name (or part of the name) in the search field at the top of the list to filter for related location names.

Edit a location

Administrators and location administrators can edit the details of a location (or remove it) at any time. For example, you may need to edit a location to add external location mapping identifiers to transmit data through web service calls.

To edit a location where people get vaccinated:

1. Select **Locations** from the Home tab. This opens the Locations tab.

2. Select the name of the location you need to edit from the lists of locations (alphabetically listed). This opens the schedule for the location. (If necessary, you can search for the location by entering the location name or address in the **Search** field.)

> **✎ Note:**
>
> You can also select the filter Status of **Active** or **Inactive** locations to ensure you find it. If you need to activate an inactive location, select **Inactive** at the end of the row with the location you want to edit. This opens the location with an **Activate Location** option at the top of the page. If you did not add location administrators, check-in agents, or healthcare workers to the location and create a schedule, you see error messages and cannot activate the location. (See Add a location administrator, check-in agent, or healthcare worker and Create a schedule for a location for more details.)

3. Select **Edit Location** from the top-right of the page. This opens the locations details page.

4. Modify the necessary fields (for example, name, address, contact information, appointment types, or schedule settings).

5. Do one of the following at the **Consumer Visible** option:

- Select **Yes** to make the location visible to Patient Portal users. Once visible, patients can book appointments there. The Locations tab also lists the location with a CONSUMER VISIBLE label for administrators and staff workers to see that patients can see this location.

- Select **No** to hide the location from patients. If you hide the location, Patient Portal users cannot see the location as a place to book an appointment.

6. If the location includes external location mapping identifiers (to transmit data through web service calls), select the Edit pencil icon ✐ to open the Add/Edit Location Mapping dialog box. Make the necessary changes to the **Location Identifier Source** field, **Location Identifier** field, or both and select **Apply Changes**. If you want to remove the location mapping information for the location, select **Delete**. Then select **OK** to confirm.

7. Make any necessary changes to the fields in the Address, Point of Contact, Appointment Type, and Scheduling Settings sections.

8. Select **Apply Changes** to return to the location schedule page.

> **✐ Note:**
>
> If you need to delete the location from the system, select **Delete Location** instead. Select **OK** when prompted to confirm. This removes the location from the system and any schedules you created under it.

If you changed the location name, you see it at the top of the page. If you changed the address, contact information, or appointment types, you can see the changes in the left panels.

Add a location administrator, check-in agent, or healthcare worker

A system administrator or location administrator can add location administrators, check-in agents, and healthcare workers.

> **✐ Note:**
>
> To upload user or location data in bulk, see Upload data on patients, groups, locations, or users in bulk instead of this procedure.

You must add different types of users under an existing location in Oracle Health Immunization Management. For example, if the location administrator, check-in agent, and healthcare worker plan to work from a particular site you added to the system, you add those users to that location. To add a location to Oracle Health Immunization Management, see Add a location.

If you want to add multiple users at once, see Upload data on patients, groups, locations, or users in bulk instead of this procedure.

To add a location administrator, check-in agent, or healthcare worker to a location:

1. Select the **Locations** tab from the banner.

2. In the list of locations, select the name of the location that you want to associate with the user. For example, the user may support that location or work there.

3. Below the name of the location, select **Manage Users**.

4. Perform one of the following tasks:

   - If the person works as an administrator for the location, select **Add Location Administrator**.

   - If the person checks in patients when they arrive for appointments, select **Add Check-in Agent**.

   - If the person administers the vaccine or test, processes the patient record, or does both, select **Add Healthcare Worker**.

5. In the Add User dialog box, enter the email address for the user and select **Next**.

6. Enter the first name (required), middle name, and last name (required) of the user in the appropriate fields.

7. From the **Language** drop-down menu, select the language you want the user to see when they sign in to Oracle Health Immunization Management (for example, English or French).

   > **Note:**
   >
   > After setting a language for a user, that user only sees Oracle Health Immunization Management in English or French after signing in (depending on what you selected). If you selected another language (for example, Spanish, Simplified Chinese, or Korean), the user only sees the Oracle Health Immunization Management Patient Portal interface and surveys in the language you selected. The Oracle Health Immunization Management interface remains in English (or French).

8. Do one of the following:

   - If you selected **Add Location Administrator** or **Add Check-in Agent**, leave the **Healthcare Worker** checkbox clear and skip to step 9.

   - If you selected **Add Healthcare Worker** to add a healthcare worker, select the **Healthcare Worker?** toggle button to activate it (white square moves to the right and background turns green). Then (if shown) select the appropriate title from the **Healthcare Profession** drop-down menu. For example, you can select **Authorized Nurse Immunizer**, **Medical Practitioner** or **Registered Nurse**. (The system flags anyone you label as a healthcare worker as a vaccinator. This helps users identify who can administer vaccines quickly.)

     > **Note:**
     >
     > For Australia users, you see the required **HPI-I** field. Enter the 16-digit Healthcare Provider Identifier-Individual (HPI-I) number for the healthcare worker.

9. Select **Add User**. Within minutes, that user receives a Welcome email message to activate their Oracle Health Immunization Management account.

> **Note:**
>
> If necessary, you can add the same user to another location. To do this, repeat the steps in this procedure. But, select the new location where you want to add the user.

Bulk Upload

To save time adding data on multiple patients, groups, locations, or users, you can download a file, add the required details, and upload it to Oracle Health Immunization Management. You can also upload patient and their procedure data (for example, for patients who used a third-party system to originally record their procedures).

Oracle Health Immunization Management provides a template CSV file that you can use. For each patient, you can supply details on the patient (for example, name, address, contact information) and guardian (for example, name, address, contact information). If you selected the option to upload procedures, you can enter those details (for example, up to four vaccines, product name, dose amount, location of administration, date of administration). When complete, you upload it to the system. The data must comply with the data required in the template or the system cannot load it.

> **Note:**
>
> To upload patient data to Oracle Health Immunization Management from a mobile device, see Manage mobile devices and Add patient records through Oracle Health Immunization Management Mobile.

When uploading patient data, the following occurs:

- If the system finds an exact duplicate of patient data that already exists in the system during the upload process, it disregards the duplicate without uploading it again.

- If the system finds patient data that is close (more than or equal to 75% similar) to patient data that already exists in the system, it uploads that data. But, it stores it as a possible duplicate. After the upload, you (as an administrator) can check for duplicate patient data and merge it into one record if necessary as described in Merge duplicate patient data.

- If your file contains more than 5,000 records, you see a warning and must reduce the number of records in the file to try the upload again. You cannot upload more than 5,000 records per file.

You can stop the upload process and delete your file if the system stops from warnings.

- Upload data on patients, groups, locations, or users in bulk
  Patients can register themselves through Oracle Health Immunization Management Patient Portal or an agent can register them when they arrive for walk-in appointments. In addition, administrators can upload data for multiple patients, patient groups, locations, or system users.

- Upload data on patients and procedures in bulk
  Patients can register themselves through Oracle Health Immunization Management Patient Portal or an agent can register them when they arrive for walk-in appointments. Healthcare workers can then enter their procedure data during the appointment. But,

administrators can also upload patient and procedure data (for example, from a third-party vendor) to get it into Oracle Health Immunization Management.

Upload data on patients, groups, locations, or users in bulk

Patients can register themselves through Oracle Health Immunization Management Patient Portal or an agent can register them when they arrive for walk-in appointments. In addition, administrators can upload data for multiple patients, patient groups, locations, or system users.

Oracle Health Immunization Management provides a template CSV file that you can use to provide the required field data. When complete, you can upload it to the system. For more information, see Bulk Upload.

To upload data for multiple patients, patient groups, locations, or system users at once:

1. Select the **Administration** tab from the banner.

2. Select **Load Data** to open the Load Data page. It lists names of the previously uploaded CSV files (if any). Each line item includes details on the file name and when the load started and completed.

3. Select **Upload New File** from the top of the page to open the Upload New File page.

4. Select one of the following:

   • **Patients** (default): Select this option to access the template file to add multiple patients at once. To use the template file, scroll down the page and select **Download Patients Sample** and open it in Excel. The top row includes the name of each field (for example, first, middle, and last name and contact method, address, and country). It also contains some sample data that you need to remove when you start adding your real data.

   • **Patient Groups**: Select this option to access the template file to add multiple patient groups at once. To use the template file, scroll down the page and select **Download Groups Sample** and open it in Excel. The top row includes the name of each field (for example, group code, name, type, contact name, contact phone and location). It also contains some sample data that you need to remove when you start adding your real data.

   • **Locations**: Select this option to access the template file to add multiple locations at once. To use the template file, scroll down the page and select **Download Locations Sample** and open it in Excel. The top row includes the name of each field (for example, location name, code, clinical setting, active or not, and address). It also contains some sample data that you need to remove when you start adding your real data.

   • **Users**: Select this option to access the template file to add multiple system users at once. To use the template file, scroll down the page and select **Download Users Sample** and open it in Excel. The top row includes the name of each field (for example, user name, first and last name, time zone, language code, role, and location). It also contains some sample data that you need to remove when you start adding your real data.

5. Enter the field information for the patient, patient group, location, or user one row at a time. For more information, select the **<data type> File Format** Information link to open the Data Load File Format dialog box. It describes what you need to enter for each column and lists the required fields, maximum characters allowed, and valid field entries.

> **Note:**
>
> To ensure optimum performance, do not exceed the limit of 5,000 records per file.

6. Save the file with an appropriate name.

7. Enter a short description of the file in the **File Description** field.

8. Select anywhere in the **Choose File** field to browse to the file you want to upload.

9. If you plan to upload patient data and you want the system to check for duplicates, select **Check for duplicates on upload**.

10. Select **Upload File**. You see a success message in the banner (for example, "Loaded 25 patients, created 1 group"). The Load Data tab now shows details on the file you just added at the top of the list. Select **Download** from the end of the row if you need to download the file for any reason.

> **Note:**
>
> - You can select **Refresh** as the file uploads to see the number of lines (rows) processed. If you selected Patients to upload a patient file and the file contains errors, you see a section that lists the rows with errors in red. The Error column lists details on the problem and stops uploading the data. If you see warnings instead of errors the rows show messages in blue and the system continues to upload the data.
>
> - The upload process opens to the **All Lines** tab to see the records in the file. But, you can also see an **Errors** tab to show the number of errors (if any) and a **Loaded** tab to the number of records loaded into the system.
>
> - If you see warnings during the upload (for example, missing required field information), you can select **Delete File** to stop the upload process if necessary. You can then correct the warnings in the file, save it, and try uploading the file again. You can also download the errors to a CSV file by selecting **Download Warnings**.
>
> - If your file contains errors, you can select the **Errors** tab to see more details. You can also download the errors to a CSV file by selecting **Download Errors**. You must fix the errors in the file, save it, and upload it again by repeating steps 7-9.
>
> - If your file contains duplicates (for patients only), the system shows a warning and continues the upload. But, it skips exact matches to patients already in the system. For close matches (more than or equal to 75%), it flags the patient data as a duplicate and continues uploading the file. You can resolve the duplicate data later as described in Merge duplicate patient data.

Upload data on patients and procedures in bulk

Patients can register themselves through Oracle Health Immunization Management Patient Portal or an agent can register them when they arrive for walk-in appointments. Healthcare workers can then enter their procedure data during the appointment. But, administrators can

also upload patient and procedure data (for example, from a third-party vendor) to get it into Oracle Health Immunization Management.

Oracle Health Immunization Management provides a CSV template file that you can use to provide the required field data for multiple patients. When complete, you can browse to the file to upload it to the system. For more information, see Bulk Upload.

To upload patient and procedure data for multiple patients:

1. Select the **Administration** tab from the banner.

2. Select **Load Patient Procedures** to open the Upload Patient Procedures page. It lists names of the previously uploaded CSV files (if any). Each line item includes details on the file name and when the load started and completed.

3. Select **Upload File** from the top of the page to open the Upload Patient Procedure page.

4. Scroll down the page and select **Download Patients Sample** and open it in Excel. The top row includes the name of each field (for example, first, middle, and last name and contact method, address, and country).

5. Enter the field information for the patient and procedures. Required fields appear in red. You can also see more details on the fields by selecting the **Procedure Required Fields** and **List of Values** tabs.

> **Note:**
>
> To ensure optimum performance, do not exceed the limit of 5,000 records per file.

6. Save the file with an appropriate name.

7. Enter a short description of the file in the **File Description** field.

8. Select anywhere in the **Choose File** field to browse to the file you want to upload.

9. Select **Upload File**. When done, you see a success message in the banner (for example, "Loaded 25 patients"). The Loaded tab now shows details on the file you just added at the top of the list. Select **Download** from the end of the row if you need to download the file for any reason.

> **✏ Note:**
>
> - You can select **Refresh** as the file uploads to see the number of lines (rows) processed. If you selected Patients to upload a patient file and the file contains errors, you see a section that lists the rows with errors in red. The Error column lists details on the problem and stops uploading the data. If you see warnings instead of errors the rows show messages in blue and the system continues to upload the data.
>
> - The upload process opens to the **All Lines** tab to see the records in the file. But, you can also see an **Errors** tab to show the number of errors (if any) and a **Loaded** tab to the number of records loaded into the system.
>
> - If you see warnings during the upload (for example, missing required field information), you can select **Delete File** to stop the upload process if necessary. You can then correct the warnings in the file, save it, and try uploading the file again. You can also download the errors to a CSV file by selecting **Download Warnings**.
>
> - If your file contains errors, you can select the **Errors** tab to see more details. You can also download the errors to a CSV file by selecting **Download Errors**. You must fix the errors in the file, save it, and upload it again by repeating steps 7-9.
>
> - If your file contains duplicates (for patients only), the system shows a warning and continues the upload. But, it skips exact matches to patients already in the system. For close matches (more than or equal to 75%), it flags the patient data as a duplicate and continues uploading the file. You can resolve the duplicate data later as described in Merge duplicate patient data.

Manage mobile devices

Administrators can add details on supported mobile devices for users to access Oracle Health Immunization Management Mobile from a phone or tablet (Android devices only). Users cannot connect to Oracle Health Immunization Management through their device until it gets registered.

Once an administrator registers a device, an administrator or healthcare worker can add details on patients in the mobile application to automatically upload it to Oracle Health Immunization Management as soon as the mobile device connects to the Internet. For more details on using the mobile application, see Add patient records through Oracle Health Immunization Management Mobile.

To add a mobile device:

1. Download the Oracle Health Immunization Management Mobile app from the Google Play Store and install it on the Android mobile device you want to use.

2. Open Oracle Health Immunization Management Mobile and select **Install ID** to generate the installation identification number.

3. Open the Oracle Health Immunization Management web application and select **Administration** from the Home page to open the Administration tab.

4. Select **Manage Offline Devices**.

5. Select **Add Device** to open the Register Device page.

6. In the **Install ID** field, enter the installation ID the app generated.

7. In **Device Type**, enter the type of device you want add (phone or tablet model).

8. Select the country code from the **Code** drop-down list and add the phone number of the device (if applicable).

9. Enter the remaining field information (for example, **User First Name**, **User Last Name**, **Date of Birth**, **Description**, **Active** user or not).

10. Select **Add Device**. The system displays a URL (web address) that you need to send to the mobile app user. Once the mobile app user enters the URL and selects Done, the Manage Devices page and lists the new device it supports.

The user can now add patient data in the Oracle Health Immunization Management Mobile app on the device you added to automatically upload it into the system.

Add patient records through Oracle Health Immunization Management Mobile

If you cannot access Oracle Health Immunization Management from a web browser to add patient data, you can access it from your phone if an administrator previously registered your mobile device and you downloaded the Oracle Health Immunization Management Mobile application to your phone or tablet (Android devices only).

A system administrator, location administrator, or healthcare worker can add patient data to the Oracle Health Immunization Management.

> **Note:**
>
> If you need to register your mobile device, see Manage mobile devices for more information.

To add patient details on a registered mobile device:

1. Open Oracle Health Immunization Management Mobile and select **Add Record** to generate the installation identification number.

2. Enter the required field information on the user. For example, enter the patient first and last name, data of birth, sex, address, and contact method.

3. Scroll down the page to enter the details on the patient procedures (one or more). For example, enter the procedure outcome (Administered, Self Reported, Unable to Administer), dose, dose manufacturer, dose amount, administration location, and any notes.

4. Review the details you just entered and select **Add Record** to save the data. The data automatically uploads to the main Oracle Health Immunization Management when the mobile device connects to the Internet. You can find the patient data listed under the **Patients** tab in Oracle Health Immunization Management.

> **✎ Note:**
>
> You can edit the patient as you would any patient data in Oracle Health Immunization Management once it uploads from the mobile app. For more information, see Edit patient registration details .

Edit user details

Administrators and Help Desk agents can edit the details of an Oracle Health Immunization Management user at any time. For example, you can fix a typographical error in a user's name, update the email address, or add or remove a role. For healthcare workers, you can update the profession.

> **✎ Note:**
>
> You cannot delete a user from the system. However, you can deactivate users if necessary. For more details, see Deactivate users.

To edit the details of a user:

1. Select **Administration** from the Home tab. This opens the Administration tab.

2. Select **View All Users** to open the lists of system users (alphabetically listed). (If necessary, you can search for a user by entering the name or email address in the **Search** field.)

3. Select the name of the user you need to edit to open the details on the user.

4. Do one of the following:

   - To edit the contact information or name, select **Edit User** from the top-right of the page. Make your changes to the name or contact details and select **Apply Changes** to return to the user details page.

   - To update the profession of a healthcare worker, select **Edit User** from the top-right of the page. Select the appropriate profession for the healthcare worker from the Healthcare Profession drop-down menu. For example, you can select Medical Practitioner, Registered Nurse, or Authorized Nurse Immunizer. Make your changes to the name or contact details and select **Apply Changes** to return to the user details page.

     > **✎ Note:**
     >
     > For Australia users, you see the required **HPI-I** field. Enter or update the 16-digit Healthcare Provider Identifier-Individual (HPI-I) number for the healthcare worker.

   - To add a role, select **Add User Role** from the right of the Roles section and select the new role for the user from the **Roles** drop-down menu. If you select **Location Administrator**, **Check In Agent**, or **Healthcare Worker**, you must also select the location from the **Location** drop-down menu. Select **Add Role** when done.

- To remove a role, locate the role you want to remove and select **Remove Role** from the end of the row. Select **Remove Role** when prompted to confirm.

Create a schedule for a location

You must create a schedule if you (as an administrator) want to schedule an appointment for a patient or you want to allow patients to schedule their own appointments. Otherwise, you do not need to create a schedule.

You can create as many schedules as you need. For instance, you may create one schedule for weekdays and another for weekends. Or, you may create one schedule for Mondays and Wednesdays, another schedule for Tuesdays and Thursdays, and another for Fridays. Just make sure that one schedule does not overlap with another.

> **Note:**
>
> If you allow walk-in appointments, you do not need to create a schedule ahead of time. You (or a check-in agent) can add appointments to a schedule as you receive walk-in patients and register them. For more information, see Create a walk-in appointment.

To create a schedule for a location:

1. Select the **Locations** tab from the banner.

2. In the list of locations, select the name of the location where you want to create a schedule.

> **Tip:**
>
> Use the filters on the left and the search box above the list of locations to find a location quickly.

3. Select **Manage Schedule** under the name of the location.

4. Select **Create a Schedule**.

5. Enter a name for the schedule (for example, Weekday Schedule).

6. Choose the type of schedule:

   - **This is a single-day schedule**: For a single-day (non-repeating) schedule.

   - **This is a repeating schedule**: For a repeating schedule of one or more days.

   - **This schedule has fixed start and end dates**: For a schedule with start and end dates that you specify.

7. Do one of the following:

   - For a single-day schedule, choose the date for the schedule.

   - For a repeating schedule, choose the first day of the schedule.

   - For a schedule with start and end dates, choose the first and last days of the schedule. These dates are inclusive; that is, if the end date is on a Friday, the schedule will run until the close of business on the Friday.

8. In the Duration and Daily Availability section, complete the following fields:

   • **Appointment Duration**: Enter the amount of time that the location requires for each appointment.

   • **Schedule Days**: Select the day or days that the schedule applies to.

9. In the Hourly Availability section, enter the shift information:

   • For **Timing 1**, enter the **Start Time** and **End Time** of the first shift using the times in the drop-down menu. (For 24-hour availability, select 12:00 am for the **Start Time** and **End Time**.) In **Concurrent Appointments**, enter the number of concurrent appointments that the location can support during the shift. For example, if the location has three nurses or technicians working during the shift and they can conduct appointments simultaneously, you can enter 3.

   • For **Timing 2**, enter the appropriate field information for the second shift (if needed). If you enter values for **Timing 2**, the system automatically adds a row for **Timing 3**. You can add the details for the next shift, if needed. (Or select **X** at the end of the row to delete the shift.) You must fill in the shift details in order because the end time of a shift determines the start times that you see for the next shift.

   • You can complete the shift details for up to four shifts (**Timing 4**).

10. Select **Preview Schedule** to open the Preview Schedule page.

> **Note:**
>
> If the schedule overlaps with any other schedules, a warning appears at the top of the page. If you skipped a required field, you see an error message. Scroll up and make any necessary corrections to the appropriate field. Then select **Preview Schedule** again.

11. Review the schedule on the calendar.

12. Do one of the following:

   • If the schedule appears correct, select **Create Schedule**.

   • If you need to make changes to the schedule, select **Back** from the top left of the page and make the necessary edits.

Deactivate users

After you add a user, that user receives a message with a link to activate the account. Once activated, that user can start using Oracle Health Immunization Management. If you no longer want that person to access Oracle Health Immunization Management, you can deactivate them from the system.

> **Note:**
>
> Once you add a user to the system, you cannot delete them from the system. You can only deactivate them (and reactivate if necessary).

To deactivate a user:

1. Select **View All Users** from the Administrator tab.

2. Search for the user you need to deactivate and select the user name from the list of users.

3. Select **Deactivate User** from the bottom of the User Details section.

4. Select **OK** to confirm. You see a "User deactivated" message at the top of the page.

> **✎ Note:**
>
> To allow the user to access the system again, repeat these steps and select **Activate User**.

Resend a Welcome message to a system administrator or Help Desk agent

If a system administrator or Help Desk agent accidentally deletes the Welcome message or the link expires, a system administrator can resend the message.

If you need to resend a Welcome message to other types of users, see Resend a Welcome message to a location administrator, check-in agent, or healthcare worker instead of this procedure.

To send another Welcome message to a system administrator or Help Desk agent:

1. Select the **Administration** tab from the banner.

2. Select **View All Users**.

3. Locate the name of the user who needs a new Welcome message and select it.

4. Select **Resend Registration Email** from under the user name to send the message with the account activation information.

Resend a Welcome message to a location administrator, check-in agent, or healthcare worker

If a location administrator, check-in agent, or healthcare worker (processing agent) accidentally deletes the Welcome email message or the account activation link in their messages expires, a system administrator or location administrator can resend the message.

If you need to resend a Welcome message to other types of users, see Resend a Welcome message to a system administrator or Help Desk agent instead of this procedure.

To send another Welcome message to a location administrator, check-in agent, or healthcare worker:

1. Select the **Locations** tab from the banner.

2. In the list of locations, select the name of the location where that user works.

3. Select **Manage Users** under the name of the location.

4. Locate the name of the user who needs a new Welcome message and select it.

5. Select **Resend Registration Email** from under the user name to send the message with the account activation information.

3

Manage patients

A system administrator or location administrator can edit patient details after the patient registers, add patient groups, and edit patient groups.

> **Note:**
>
> To upload patient or group data in bulk, see Upload data on patients, groups, locations, or users in bulk.

- Edit patient registration details
  After patients register, you may need to modify patient details to ensure that Oracle Health Immunization Management users have all the details they need. For example, you may need change the contact email, add notes about providing certain accommodations, or add a guardian.

- Merge duplicate patient data
  After you register a patient or they register themselves, you may want to check for duplicate accounts. For example, if patients add themselves twice and many fields look similar (same name, email address, and birthday), the system registers it as a possible duplicate.

- Separate merged duplicate patient data
  If you review merged duplicate account information for patients and need to separate (unmerge) it, you can. For example, if you merged the patient data and later learned the data belongs to two different patients, you can separate the merged data.

- Add a patient group
  Administrators can add a patient group to Oracle Health Immunization Management. That way, you can sort patients in the system by placing them in the appropriate group.

- Edit a patient group
  Administrators and location administrators can edit the details of a patient group (or remove the group) at any time.

- Manage patients in a group
  Administrators can add one or more patients to a particular group or remove patients from a group.

Edit patient registration details

After patients register, you may need to modify patient details to ensure that Oracle Health Immunization Management users have all the details they need. For example, you may need change the contact email, add notes about providing certain accommodations, or add a guardian.

Some patient details can include vaccine details from previous procedures. As long as that information did not come from an outside source (for example, Australian Immunization Registry [AIR] for an Australian patient), you can edit the Previous Procedure details. If you

see a previous procedure with a source of EXTERNAL - SENT BY AIR, you cannot edit those details.

> **Note:**
>
> Only administrators (system) can modify patient details at any time. Location administrators and other types of users can only edit the details of patients in the locations assigned to them. For details on modifying patient details when booking a walk-in appointment (when talking to the patient and confirming information), see Create a walk-in appointment.

To edit patient details:

1. Select the **Patients** tab.

2. Select the patient with the details you need to modify from the list.

   If necessary, use the filters to the left or enter the name, email, or phone number of the patient in the Search field to locate the right patient. You can also sort the list by selecting the First Name, Last Name, Registration Date, or Birth Date to see an alphabetical or date listing.

3. To edit the patient details, select **Edit Patient** from the top-right of the Patients tab to open the Patient Details.

   > **Note:**
   >
   > For the patient to edit their own details, including booking, changing, or cancelling appointments, select **Send Account Information** from the top-right of the Registrant Details section. This sends the user a link to access the account in Patient Portal. Then the user can make the necessary changes. If you do this, skip the remaining steps unless you need to make changes.

4. Modify the necessary fields. For example, you can modify the name, contact method, date of birth, sex, gender, race, ethnicity, group, contact method, and address.

   > **Note:**
   >
   > If you need to change the group for a patient, use the drop-down menu to see the list of available groups. To remove the patient, set the group field (for example, Vaccination Cohort or School) to empty. To add or remove one or more patients in a group, see Manage patients in a group.

5. Select **Apply Changes** to update the patient details and return to the main patient details.

6. If you need to add notes, scroll down the page. From the **Notes** section, select **Patient** or **Internal**. For example, select Patient to see health history details (such as certain medications the healthcare worker needs to know about before vaccinating). Select Internal to see general details (such as needs a wheelchair).

> **Note:**
>
> Oracle Health Immunization Management users who can access patient registration details (administrators, check-in agents, healthcare workers, and Help Desk agents) can view notes you add.

7. To add a note, select **Add Note** from the right of the page to open the Add Note dialog box.

8. In the **Note Category** field, select **Patient** or **Internal**.

9. In the **Note Title** field, enter a title that summarizes the note.

10. Select **Add Note**. You see the category and title of your note. But, you cannot see the details. (Select **Edit Note** if you need to make changes to the note details.)

11. Scroll down to Relationships. If you need to add a parent or guardian, select **Relationship** to open the Add a Relationship dialog box. Enter the name, date of birth, gender, insurance (for example, Individual Healthcare Identification [IHI] number), contact information, and address. Select **Next**, review the details, and select **Add Relationship**. The parent or guardian can confirm the details for the dependent.

12. Scroll down the page to view any surveys, upcoming appointment details, procedure details, or information on past or canceled appointments. If you need to edit any details in the Previous Procedures section, see the next step.

13. If the procedure did not come from an outside source (no EXTERNAL label), select **Edit** and do one or all of the following:

    • From the **Outcome** tab, make any necessary changes to the fields. For example, you may see **Procedure Outcome** or **Notes** fields. Select **Save Procedure** when done.

    • From the **Product** tab, make any necessary changes to the fields. For example, you may see **Procedure Type**, **Manufacturer Name**, **Manufacturer MVX**, **Product Name**, **Disease Name**, **Dose Number**, **Dose**, **Lot Number** (up to 15 alphanumeric characters), **Lot Expiration Date**, or **Constitution Date** fields. Select **Save Procedure** when done.

    > **Note:**
    >
    > The system checks for valid lot numbers. If you added or changed a lot number, you must enter a valid one or you cannot save your changes.

    • From the **Administration** tab, make any necessary changes to the fields. For example, you may see **Administered Route** or **Administered Date** fields. Select **Save Procedure** when done.

> **✎ Note:**
>
> The system automatically sends the updated information to AIR. For example, if you change the procedure outcome (administered), administered on date, product or disease name, vaccine code, or lot or batch number, Oracle Health Immunization Management sends the details to AIR. But, if you experienced network issues or need to manually send the changes, select **Resend to AIR**. You see a success message at the top of the page after the system sends the updated information.

You see the changes to the patient details the next time you access that patient.

Merge duplicate patient data

After you register a patient or they register themselves, you may want to check for duplicate accounts. For example, if patients add themselves twice and many fields look similar (same name, email address, and birthday), the system registers it as a possible duplicate.

> **✎ Note:**
>
> The system can also check for duplicate patient when you upload a file with account details on multiple patients. For more information on checking for duplicates during bulk upload, see Upload data on patients, groups, locations, or users in bulk.

You can review the duplicate data side-by-side and determine if you want to keep it, delete the duplicate, or merge the accounts into one.

To review duplicate patient data in the system:

1. Select the **Administration** tab.

2. Select **Possible Duplicate Registrants** to open the Duplicate Registrants page. You see a list of duplicate patient accounts listed (if any).

> **✎ Note:**
>
> If necessary, enter a first name, last name, or both in the **Search** field to locate an account.

3. Select the arrow next to the name of the account you want to review. You see the target patient details with a list of one or more accounts that look like duplicates.

4. From the Please select a source patient to compare section, select the arrow next to the name of the duplicate account that you want to compare with the target account.

5. Scroll down the page to view the matched areas of the account. For example, you see the same phone number and email address. You also see areas where the information differs.

6. Do one of the following:

   - If the accounts are not duplicates, select **Patients are Different**. When prompted, select **OK** for the system to no longer see the accounts as duplicates. You completed the procedure.

   - If the account looks like a true duplicate, select the correct information in the different listed areas. For example, if you see two dates of birth, select the correct one. Then select **Next**.

7. Review the Merge From Source Patient and Into Target Patient information. For example, you can compare the relationships, upcoming appointments, procedures, and past and canceled appointments.

8. Select **Next**. When ready, select **Merge Patients**. Then select **OK** to confirm that you want to merge the data into one account. The system returns to the Duplicate Registrants page and you see a "Patient successfully merged" message at the top of the page.

> **Note:**
>
> If you want to reverse the merge of the accounts, select the **Patient Merge History** tab. You can select the account you want to separate from the Merged list by selecting the arrow next to the account name and selecting **Unmerge**. Select **OK** to confirm that you want the accounts separated. Unmerged accounts appear listed in the Unmerged section of the Patient Merge History tab.

If the system found more than one duplicate for an account, repeat steps 2-8 to continue merging the duplicate information into one account.

Separate merged duplicate patient data

If you review merged duplicate account information for patients and need to separate (unmerge) it, you can. For example, if you merged the patient data and later learned the data belongs to two different patients, you can separate the merged data.

To separate merged duplicate patient data:

1. Select the **Administration** tab.

2. Select **Patient Merge History** to open the Merged Patient Data page.

> **Note:**
>
> If necessary, enter a first name, last name, or both in the **Search** field to locate an account.

3. Select the account you want to separate from the Merged list by selecting the arrow next to the account name and selecting **Unmerge**.

4. Select **OK** to confirm that you want the accounts separated. Unmerged accounts appear listed in the Unmerged section of the **Patient Merge History** tab.

Add a patient group

Administrators can add a patient group to Oracle Health Immunization Management. That way, you can sort patients in the system by placing them in the appropriate group.

If you want to add multiple patient groups at once, see Upload data on patients, groups, locations, or users in bulk instead of this procedure.

To add a patient group and add patients to it:

1. Select **Administration** tab from the banner.

2. Select **Manage Patient Groups** to open the Manage Patient Groups page. It lists names of the previously added groups (if any) and includes details on the creation date and number of patients in the group.

3. Select **Add Patient Group** from the top of the page to open the Create Patient Group page.

4. Enter data in the following fields:

   • **Group Name** (required): Enter a name that helps you identify the group (up to 100 characters).

   • **Code** (required): Enter a code in uppercase letters that identifies the group (up to 60 characters).

   • **Description**: Enter a detailed description of the group (up to 255 characters).

   • **Group Type**: Select the group type that helps you identify the type of group. For example, you may see the choice of **School** or **Vaccination Cohort** in the drop-down list. A school indicates the group belongs to a particular school, such as a college. A vaccination cohort is a group of people with something in common. For example, the group consists of adults 16-49 years old, front line healthcare workers, or people at a correctional center.

   • **Parent Group**: Select the parent group from the drop-down list. For example, you may see the name of a school or a type of vaccination cohort.

   • **Contact Name**: Enter the name of the person you want to use as the contact (up to 255 characters).

   • **Contact Phone**: Enter the phone number of the contact person.

   • **Contact Email**: Enter the email of the contact person.

   • **Parent Location**: Select the name of the location from the drop-down list.

   • **Public Group**: Enter **Y** for Yes if the group is public or **N** for No.

   • **Physical Location**: Enter **Y** for Yes if the group is a physical location or **N** for No.

5. Select **Add Patient Group**. You see a success message in the banner. The Manage Patient Groups page lists the name of the recently added group to the top. It includes details on the creation date and number of patients in the group.

6. To add group members, select **Patients** at the end of the row to open the Add Patients page.

7. Search for the patients you want to add and select the check box next to the patient name.

8. Select **Add Select Patients** and select **OK** to confirm. You see a success message that indicates how many patients you added.

The next time you access the Patient Groups list, you see the group includes the number of patients you added at the end of the row.

Edit a patient group

Administrators and location administrators can edit the details of a patient group (or remove the group) at any time.

To edit a patient group:

1. Select **Administration** tab from the banner.

2. Select **Manage Patient Groups** to open the Manage Patient Groups page. It lists names of the previously added groups (if any) and includes details on the creation date and number of patients in the group.

3. Select the name of the group you need to edit from the lists of groups (alphabetically listed). This opens a page with details on the group. (If necessary, you can search for the group by entering the group name or creation date. You can select the way you want to sort the list by selecting **Create Date** or **Group Name** from the **Sort By** field.)

4. Modify the necessary fields (for example, name, code, type, parent group, contact information, public group, and address for a physical location). (You cannot change the details on who created or updated the group or the associated date.)

5. Select **Apply Changes** to return to the Manage Patient Group page.

> ✎ **Note:**
>
> If you need to delete the patient group from the system, select **Delete Patient Group** instead. Select **OK** when prompted to confirm.

If you changed the group name, description, or type, you see the changes in the group list.

Manage patients in a group

Administrators can add one or more patients to a particular group or remove patients from a group.

You can also add or remove a single patient from a group while editing the details of an existing patient. For more information, see Edit patient registration details .

To add or remove patients in a group:

1. Select **Administration** tab from the banner.

2. Select **Manage Patient Groups** to open the Manage Patient Groups page. It lists names of the previously added groups (if any) and includes details on the creation date and number of patients in the group.

3. Locate the name of group with the patients you need to add or remove in the list. Then select the **Patients** link at the end of the row.

> **✎ Note:**
>
> You can specify the group name or creation date to search for a group. Or, use the filters on the left to specify the group type (for example, Vaccination Cohort or School), city, public or private, physical location, parent location, or parent group.

4. Do one of the following:

   - To add a patient to a group, select **Add Group Member** from the top of the page. Select the checkbox next to the name of the patient you want to add and select **Add Selected Patients**. Select **OK** when prompted to confirm.

   - To remove a patient from a group, select the checkbox next to the name of the patient you want to remove and select **Remove Selected Patients**. Select **OK** when prompted to confirm.

> **✎ Note:**
>
> You can select the top checkbox to select all the patients listed on the page. If the list contains more than 15 patients, you can select **Next** from the bottom of the page to see more patients. But, you lose your current patient selections after selecting **Next**. To avoid losing your selections, select patients on the page and select **Add Selected Patients** before you open the next page.

The next time you access the details on a patient, you see the group name in the patient details (if added to the group) or removed from the patient details (if removed).

4

Manage schedules

A system or location administrator can create schedules after creating locations. A schedule includes the start and end times and the number of concurrent appointments in each time slot. You (as an administrator) can then schedule appointments for patients, manage the schedule, and set up inventory details.

> **✎ Note:**
>
> For details on creating a schedule, see Create a schedule for a location. For details on scheduling walk-in appointments, see Create a walk-in appointment.

- Schedule an appointment for a patient
  If individuals want appointments scheduled for them, administrator or Help desk agents can schedule them. But, the location chosen for the appointment must already include a schedule.

- Schedule a closed period for a location
  You may need to close the schedule at a location for a holiday or another event. To do this, you create a closing schedule for the amount of time you need the location closed. The closing schedule overrides your existing schedule.

- Clear the schedule for a location
  If a location needs to close unexpectedly or cannot fulfill the scheduled appointments, you can clear a schedule without updating the regular day-to-day schedule that the location uses. You can clear a schedule for a few hours, an entire day, multiple days, or the same time period for multiple days.

- Reduce the appointment capacity of a location
  If a staff member is out for a period of time, such as due to illness or vacation, you can reduce the number of concurrent appointment slots. You can reduce the capacity for a single day without updating the regular day-to-day schedule that the location uses.

- View appointment statistics for a location
  Administrators can check on the status of appointments at a location by accessing the dashboard. The dashboard includes statistics on the percentage of patients checked in for their appointments, appointments completed (processed), and percentage late for their appointments. You can also view statistics on upcoming and past appointments.

- Hide or show locations to book appointments
  If you need to restrict the number of appointments patients can book at a location, you can hide the location from Patient Portal users when you create or edit a location. Administrators and check-in agents can still see the location, but Patient Portal users cannot access it for appointments.

- Manage inventory details
  Administrators can add details on the manufacturer, product, and lot number before patients arrive for appointments to ensure the accuracy of vaccine details that healthcare workers record. For example, after setting up these details, healthcare workers see the Lot Number, Lot Expiration Date, and Dose ML fields automatically populate.

Schedule an appointment for a patient

If individuals want appointments scheduled for them, administrator or Help desk agents can schedule them. But, the location chosen for the appointment must already include a schedule.

For COVID-19 vaccines, you must wait until a patient receives dose 1 of the vaccine to book an appointment for dose 2.

For more information on creating a schedule, see Create a schedule for a location.

To schedule an appointment for a patient:

1. Select **Make Appointment** from the Home tab. This opens the Make Appointment page.

2. Select the appointment type needed. For example, select **COVID-19 Vaccination Dose #1** or **COVID-19 Vaccination Dose #2**.

3. Select the best location for the patient. For example, you can select **Distance** to search for a location by entering the postal code or **Keywords** to search by the location name. This brings up a list of locations that match your search criteria. The locations also indicate the next available opening.

4. Scroll down the page to the calendar. Leave the default date selected or select another date.

5. Select **Morning** or **Afternoon** and then select a time slot for the appointment.

6. Select **Next**. You see the appointment details you just entered (appointment type, location, and date and time).

7. In the **Patient Details** section, enter the appropriate field information. (The fields you see may vary from the ones listed.) For example:

   - **First**, **Middle** (optional), and **Last Name**

   - **Date of Birth** (MM/DD/YYYY format). You can also click the calendar icon to select the birth date from a calendar. Select the month and year from the drop-down menu or use the arrow icons to scroll forward or backwards in months and years. After entering a birth date, you see the patient age to the right of the date.

   - **Contact Method** (**Email**, **Text Message**, **Phone Call**, or **No Contact**)

   - **Email**, **Mobile Phone**, or **Phone** (depending on contact method selected)

   - **Insurance Type**

   - **Insurance Number**

   - **Birth Sex**

   - **Gender**

   - **Race**

   - **Ethnicity**

   - **Indigenous Status**

   - **Residential Address**

   - **Town/Suburb**

- **City**

- **Postal/ZIP Code**

8. Select **Make Appointment**. You see an "Appointment made" message in the banner.

A patient with contact details receives an email or text to get a verification code. The patient uses this code to verify the registration in the system. After entering the code, they can access surveys (if available), profile details, a QR code, and appointment details.
The next time you list the appointments, you can search on the patient you entered and see the appointment. (Patients who did not verify their account appear in the list with an UNVERIFIED label.)

Schedule a closed period for a location

You may need to close the schedule at a location for a holiday or another event. To do this, you create a closing schedule for the amount of time you need the location closed. The closing schedule overrides your existing schedule.

A system administrator or location administrator performs this task.

To create a closed period for a schedule:

1. Select the **Locations** from the Home tab.

2. In the list of locations, select the name of the location that needs the closed period.

> 💡 **Tip:**
>
> To find a location, use the filters on the left and the search box above the list of locations.

3. Select **Manage Schedule**.

4. Select **Schedule a Closing**.

5. Enter a name for the closing.

   For example, New Year's Day.

6. Choose whether the closing is for one day or more than one day.

7. Perform one of the following tasks:

   - For a single-day closing, select the date.

   - For a multi-day closing, select the start and end dates. These dates are inclusive; that is, if the end date is on a Friday, the closing remains in effect until the close of business on that Friday.

8. Select **Preview Schedule**.

9. Review the schedule on the calendar.

10. Perform one of the following steps:

   - If the schedule looks correct, select **Create Schedule**.

   - If you need to make changes to the schedule, select **Back** from the top of the page and make the changes.

Clear the schedule for a location

If a location needs to close unexpectedly or cannot fulfill the scheduled appointments, you can clear a schedule without updating the regular day-to-day schedule that the location uses. You can clear a schedule for a few hours, an entire day, multiple days, or the same time period for multiple days.

A system administrator or location administrator performs this task.

To clear time periods within a schedule:

1. Select the **Locations** from the Home tab.

2. In the list of locations, click the name of the location that needs time cleared from s schedule.

> 💡 **Tip:**
>
> To find the location more easily, use the filters on the left and the search box above the list of locations.

3. Select **Manage Schedule**.

4. Select **Clear Schedule or Reduce Capacity**.

5. In the Extra Schedule Options dialog box, select **Clear Appointments**.

6. Do one of the following:

   • If you select **Single Day**, select the calendar icon and select the date.

   • If you select **Multiple Days**, select the calendar icons to set the start and end dates. These dates are inclusive. If the end date is on a Friday, the cleared schedule is in effect until the close of business on that Friday.

7. Select the start and end times for the cleared schedule using the **Start Time** and **End Time** drop-down menu.

8. Click **Clear Appointments**. The system clears the schedule of the appointments for the date or dates you selected.

Reduce the appointment capacity of a location

If a staff member is out for a period of time, such as due to illness or vacation, you can reduce the number of concurrent appointment slots. You can reduce the capacity for a single day without updating the regular day-to-day schedule that the location uses.

A system administrator or location administrator performs this task.

To reduce the appointment capacity:

1. Select the **Locations** from the Home tab.

2. In the list of locations, click the name of the location that needs time cleared from a schedule.

> 💡 **Tip:**
>
> To find the location more easily, use the filters on the left and the search box above the list of locations.

3. Select **Clear Schedule or Reduce Capacity**.

4. In the Extra Schedule Options dialog box, select **Reduce Concurrent Appointments**.

5. Select the calendar icon to select the date for the reduced capacity.

6. Select **Reduce Capacity**. The system reduces the capacity of the schedule for the date you selected.

View appointment statistics for a location

Administrators can check on the status of appointments at a location by accessing the dashboard. The dashboard includes statistics on the percentage of patients checked in for their appointments, appointments completed (processed), and percentage late for their appointments. You can also view statistics on upcoming and past appointments.

The dashboard defaults to the status of appointments for the current day. But, you can select the calendar icon to select another date.

> ✏️ **Note:**
>
> You must sign in as an Oracle Health Immunization Management administrator or as an administrator for the location you want to view to access details on the dashboard.

To view appointment statistics for a location:

1. Select **Locations** from the Home tab. This opens the Locations tab.

2. Select the location you want to view from the list of locations to open the schedule details for the location.

> ✏️ **Note:**
>
> If necessary, use the filter options in the left panel or enter the name or address of location in the Search field at the top of the list to find the location you want to view.

3. In the Today panel on the left, select **View Dashboard**. This opens the Dashboard page for the location.

4. Leave the current date or select the calendar icon to select another date (or year). You can select any past or future month or year.

5. In the first panel, you can see the following details on the left:

   • **Capacity**: Maximum number of appointments that day.

- **Checked In**: Number of patients checked in verses the number of patients booked for an appointment. For example, if you have 30 patients booked for appointments that day and only one person checked in, you see 1/30.

- **Processed**: Number of patients processed (completed their appointments) verses the number of patients you booked for appointments that day.

- **Upcoming**: Number of upcoming appointments booked for that day.

- **In Queue**: Number of patients checked in and waiting to be seen that day.

- **Late**: Number of patients late for their appointments that day.

- **No Show**: Number of patients who did not show up for their appointments.

  You can also see the percentage of checked-in, processed, or late patients for the day in three donut charts that appear above a graph of minutes for the day. You can use the slider to move the bar across the graph and see the percentages in the donuts change depending on the time you select.

6. Scroll down the page to see panels with details on the upcoming appointments and past appointments.

   For example, for Upcoming Appointments, you can see details on the upcoming day and time, patient name, confirmation number, date appointment booked, date checked in, and current status (for example, late, checked in). For the Past Appointments panel, you can details on past day and time, patient name, confirmation number, and date the patient checked in for the appointment.

7. Select the name of the location at the top of the page to return to the schedule page for the location.

Hide or show locations to book appointments

If you need to restrict the number of appointments patients can book at a location, you can hide the location from Patient Portal users when you create or edit a location. Administrators and check-in agents can still see the location, but Patient Portal users cannot access it for appointments.

A system administrator or location administrator performs this task.

To reduce the appointment capacity:

1. Select the **Locations** from the Home tab.

2. Do one of the following:

   - If you want to add a location, select **Add Location** from the top-right of the tab. This opens the Add Location page. (Required fields show a red upper-left corner.)

   - If you want to edit a location, select the name of the location you need to edit from the lists of locations (alphabetically listed). This opens the schedule for the location. (If necessary, you can search for the location by entering the location name or address in the **Search** field.) Then select **Edit Location** from the top-right of the page to open the locations details page.

3. Do one of the following at the **Consumer Visible** option:

   - Select **Yes** to make the location visible to Patient Portal users. Once visible, patients can book appointments there. The Locations tab also lists the location

with a CONSUMER VISIBLE label for administrators and staff workers to see that patients can see this location.

- Select **No** to hide the location from patients. If you hide the location, Patient Portal users cannot see the location as a place to book an appointment.

4. Make any other necessary changes.

5. Do one of the following:

   - If you added a location, select **Add Location**. You see a "Location added" message in the banner. The Location tab now shows details on the location you just added with the current calendar.

   - If you made changes to a location, select **Apply Changes** to return to the location schedule page.

Manage inventory details

Administrators can add details on the manufacturer, product, and lot number before patients arrive for appointments to ensure the accuracy of vaccine details that healthcare workers record. For example, after setting up these details, healthcare workers see the Lot Number, Lot Expiration Date, and Dose ML fields automatically populate.

A system administrator or location administrator performs this task.

To set up the inventory details:

1. Select the **Administration** from the Home tab.

2. Select **Inventory Management** to open the Inventory Management page. The left panel shows current manufacturers, product categories, primary diseases, and active or inactive status (if any entered). You can select the check boxes to search for what you want to review.

   > **Note:**
   >
   > You can also select **View Manufacturers** from the right to see the current list in the system. From there, you can select **View Products** to see the current products.

3. To add a manufacturer, select **Add Manufacturer** to open the Manufacturer page. Enter the name in the **Manufacturer Name** field. Then enter the MVX code in the **MVX** field and select **Create**. The system returns to the Inventory Management page and you see a "Manufacturer Processed" message at the top of the tab.

   > **Note:**
   >
   > See the following steps if you need to add the product and lot number. Otherwise, you completed the procedure.

4. To add a product, select **Add Product** to open the Product Details page. Enter at least the required information in the Product Details, Dosage, and Disease Coverage fields. For example, you can select the Administered Route you want to use for the product in the **Administered Route** drop-down menu. This shows the recommended route you want used when healthcare workers administer this product. Select **Create**. The system

returns to the Inventory Management page and you see a "Product Processed" message at the top of the tab. See the following step if you need to add the lot number. Otherwise, you completed the procedure.

5. To add the lot number, select **Add Lot Number** to open the Add lot details page. Enter the name in the Product Name field. All the remaining fields populate (if you chose an existing manufacturer and product). Enter the lot number (up to 15 alphanumeric characters), use the calendar icon to enter the expiration date, and select **Add Lot**. You see a "Lot added successfully" message at the top of the page.

> **Note:**
>
> The system checks for valid lot numbers. You must enter a valid one or you cannot save your inventory details.

6. If you need to add another lot number for another product, select **Add Lot** again and repeat step 5. Otherwise, select **Next**. You see the lot details with all the information on the manufacturer and product. Select **Active** to activate the product.

7. Select **Done**.

Part II
Check-in tasks

Check-in tasks include creating walk-in appointments and checking in patients when they arrive for their appointments.

- Manage appointments
  Administrators and check-in agents can view all appointments, create a walk-in appointment, and cancel an appointment. All Oracle Health Immunization Management users can edit patient details.

5

Manage appointments

Administrators and check-in agents can view all appointments, create a walk-in appointment, and cancel an appointment. All Oracle Health Immunization Management users can edit patient details.

- Patient information
  When patients register with Oracle Health Immunization Management themselves or through a walk-in appointment, they provide basic personal information such as their name, residential address, and email address. They may also provide details on language, gender at birth, and race. In addition, you can choose to collect their demographic information for public health reasons.

- View the schedule of appointments
  Administrators, check-in agents, and healthcare workers can review the schedule of appointments for the same day or in the future.

- Check in a patient
  When a patient arrives for an appointment, a check-in agent (or healthcare worker) verifies that person's identity by asking to see the appointment confirmation message. Patients can show the confirmation message in their email application from their smartphones or with a printed copy of the appointment details.

- Edit patient details at check-in
  When a patient arrives for an appointment, check-in agents, healthcare workers, or Help Desk agents may need to edit some of the patient details. For example, you may need to update an email address or correct the spelling of a patient name before that person officially checks in.

- Create a walk-in appointment
  If an individual arrives for a walk-in appointment, an administrator or check-in agent can register the patient and get that person an appointment for that day (if available).

- Cancel an appointment
  If patients cannot make their appointments, they can cancel it themselves using the message they received when they booked the appointments. Or, a check-in agent or administrator can cancel the appointments for them.

Patient information

When patients register with Oracle Health Immunization Management themselves or through a walk-in appointment, they provide basic personal information such as their name, residential address, and email address. They may also provide details on language, gender at birth, and race. In addition, you can choose to collect their demographic information for public health reasons.

For example, all patients must provide the following:

- First Name

- Last Name

- Contact information (email address, SMS [number for text messages], or no contact)

- Home/Residential Address

They can optionally provide the following additional information:

- Middle Name
- Language
- Time Zone

Each organization can make the following fields required or optional:

- Biological Sex
- Gender
- Race
- Ethnicity

View the schedule of appointments

Administrators, check-in agents, and healthcare workers can review the schedule of appointments for the same day or in the future.

To view the schedule of appointments:

1. Select the **Schedule** tab from the banner.
2. Perform one of the following tasks:
   - In the Today's Appointments section, review the list of appointments for that day.
   - In the Process Today section, review the list of patients who completed their appointments today.
   - In the Upcoming Appointments section, review the list of upcoming appointments for your location.
3. When done, select the **Home** tab to open the Home page.

Check in a patient

When a patient arrives for an appointment, a check-in agent (or healthcare worker) verifies that person's identity by asking to see the appointment confirmation message. Patients can show the confirmation message in their email application from their smartphones or with a printed copy of the appointment details.

If the patient does not have an appointment, consider that person a walk-in patient. If patients did not register yet, you need to register them. For more information, see Create a walk-in appointment.

To check in a patient:

1. Select **Check in Appointment** from the Home tab.

> **✎ Note:**
>
> If your system includes more than one location, select the location where you want to check in the patient by selecting the name of the current location at the top of the screen. You see a list of available locations. Select the location you want use for check-in and select **Set Location**.

2. Ask the patient to show you the confirmation message. They may show you this information by opening the confirmation email from a smart phone or by showing you a printed copy of the confirmation message. After you see the confirmation message, do one of the following:

   • Enter the code shown in the confirmation email and select **Find Appointment**.

   • Select **Scan Code**, select the camera to use, and select **Allow** to allow access to the camera. Scan the QR code shown in the patient message.

3. Select **Complete Check In** to check in the patient and add that person to the queue.

> **✎ Note:**
>
> Select **Check In Someone Else** to check in the next person.

Healthcare workers use the queue to call patients one by one when ready to administer the vaccine or test. For more details, see Process an appointment.

Edit patient details at check-in

When a patient arrives for an appointment, check-in agents, healthcare workers, or Help Desk agents may need to edit some of the patient details. For example, you may need to update an email address or correct the spelling of a patient name before that person officially checks in.

> **✎ Note:**
>
> You can only edit the details of patients in the locations assigned to you.

To edit patient details:

1. If your system includes more than one location, select the location where you want to check in the patient by selecting the name of the current location at the top of the screen. You see a list of available locations. Select the location you want use for check-in and select **Set Location**.

2. Select **Check in Appointment** from the Home tab.

3. Ask the patient to show you the confirmation message. They may show you this information by opening the confirmation email from a smart phone or by showing you a printed copy of the confirmation message. After you see the confirmation message, do one of the following:

   • Enter the code shown in the confirmation message and select **Find Appointment**.

- • Select **Scan Code**, select the camera to use, and select **Allow** to allow access to the camera. Scan the QR code shown in the patient message.

4. Select **View All Appointments** from the bottom of the page. This opens the patient details and any upcoming and past appointment details.

5. Select **Edit** from the right of the Patient Details section.

6. Modify the necessary fields. For example, you can modify the name, date of birth, type of insurance, insurance number, sex, gender, race, ethnicity, group, contact method, and address. (Oracle Health Immunization Management validates the format of Australian Medicare insurance numbers. But, it does not validate that the number belongs to a specific patient.)

7. Select **Apply Changes** to update the patient details.

8. To continue checking in the patient, select the appointment from the Upcoming Appointments section and select **Complete Check In**.

Healthcare workers use the queue to call patients one by one when ready to administer the vaccine or test. For more details, see Process an appointment.

Create a walk-in appointment

If an individual arrives for a walk-in appointment, an administrator or check-in agent can register the patient and get that person an appointment for that day (if available).

> ⚠️ **Caution:**
>
> To ensure patients provide consent for their procedures, verbally review the registration information with each patient and confirm the reason for the appointment. For example, before you set up an appointment, confirm the patient name, birth date, and the type of appointment (vaccination or test). If available, provide patients (or caregivers) with written details on any medications they may receive.

To create a walk-in appointment (for existing or new patients):

1. On the Home page, select **Add Walk-In Appointment**.

2. Select the type of appointment you want to make. (If you try to book a previously booked appointment type [for example, dose 1 of a vaccine], you see a prompt indicating that the patient already has that type of appointment booked.)

3. Do one of the following:

   - • Select **Now** to book the appointment right away.

   - • Select **Scheduled** to view a list of available times for that day. Select an open time from the list.

4. Do one of the following:

   - • If you need to register the patient, select **Add new patient** (if not selected already) and enter the appropriate field information (for example, patient name, contact method, email address, date of birth, insurance ID, and birth sex). Oracle Health Immunization Management validates the format of Australian Medicare insurance numbers. But, it does not validate that the number belongs to a specific patient.

- If the patient already registered, select **Select existing patient**. Then select **Select Patient** to select the patient from a list of registered patients. You can search for a patient by name, birth date, or a unique identifier (assigned through a QR code scan). If you select the wrong patient, select **Change Patient** to select another one.

> **Note:**
>
> When adding a new patient or adding an existing one, you see the unique identifier number of the patient. For patients that do not use smart phones or email, you can tell the patient the unique identifier. They can use this number when booking future appointments. (To edit the details of an existing patient, select **Edit Patient** from the patient details section. Make the necessary changes to the fields in the Edit Patient page and select **Update Patient**.)

5. To view details on any past procedures of an existing patient, scroll down to the Previous Procedures for Appointment Type Selected section. If the system received these details from an outside system (such as Australian Immunization Registry [AIR] for an Australian patient), you see an EXTERNAL - SENT BY AIR label as the source and you cannot edit the content. You may also see product details such as "different manufacturer for doses." Select **View Details** to open the View Procedure Details dialog box. It includes tabs for **Outcome** (with details on the status and any notes), **Product** (with details on product, manufacturer, disease, dosage, lot number, and expiration), and **Administration** (with details on the administration route and date). Select **Close** when done.

6. To ensure the patient gives consent for the procedures, verbally review their registration information and confirm the reason for the appointment. For example, confirm the patient name, birth date, and the type of appointment (vaccination or test). If available, provide the patient (or caregiver) with written details on the medication planned for the appointment.

> **Note:**
>
> Give the patient time to review the information and answer any questions.

7. In the Use and Disclosure of Information section, let the patient review this section and confirm that they understand how we use the information collected in this system. (You can also distribute leaflets on this information.) When ready, select **I confirm that I have read the use and disclosure of information section above**.

8. In the **Consent Given by** field, select **Patient** or **Parent/Guardian** depending on who verbally gave the consent.

9. Select **Check In** to register the patient, create the appointment, and add them to the patient queue.

To see the list of patients in the queue, scroll to the bottom of the page and select **View Patient Queue**.

Cancel an appointment

If patients cannot make their appointments, they can cancel it themselves using the message they received when they booked the appointments. Or, a check-in agent or administrator can cancel the appointments for them.

To cancel an appointment:

1. Select the **Schedule** tab from the banner.

2. In the Today's Appointments section, location the name of the person with the appointment you need to cancel. To the right of their name, select **Check In**.

3. Scroll to the bottom of the page and select **Cancel Appointment**.

4. Review the details on the page and choose a reason for cancellation.

5. Select **Cancel Appointment** to cancel the appointment.

Part III

Healthcare tasks

Healthcare tasks involve calling patients from the queue, giving patients their vaccine or test, and processing their records.

- See the registered patient
  When ready to see a patient, a healthcare worker checks the patient queue, calls the patient in, administers the vaccine or test, and provides the necessary data to process the appointment.

6
See the registered patient

When ready to see a patient, a healthcare worker checks the patient queue, calls the patient in, administers the vaccine or test, and provides the necessary data to process the appointment.

- View the patient queue
  The queue lists all the patient who checked in with an agent. When ready, the healthcare worker can call the patient in for the vaccine or test.

- Process an appointment
  A healthcare worker processes an appointment by giving the vaccination or test to the patient and recording the appointment details. An Oracle Health Immunization Management administrator or healthcare worker can record the details. But, only a healthcare worker can administer the vaccine or test.

- Edit procedure details
  An Oracle Health Immunization Management administrator or healthcare worker can edit the recorded details of a procedure if necessary. For example, you may realize you made a mistake and need to change the lot number you originally entered for a vaccine.

- View appointment details
  An Oracle Health Immunization Management administrator or healthcare worker can view the recorded details of a patient appointment. For example, you can see the details on the type of vaccine, the procedure outcome, and see a record of any previously changed or cancelled appointments and the name of the person who made those changes.

View the patient queue

The queue lists all the patient who checked in with an agent. When ready, the healthcare worker can call the patient in for the vaccine or test.

To see a list of checked-in patients:

1. Do one of the following, depending on your role:

   - If signed in as a healthcare worker, select the **Patient Queue** tab from the banner or **View Patient Queue** from the Home tab.

   - If signed in as an administrator, select the **Locations** tab from the banner. Select a location, select **Check in Patient**, and then select the **Patient Queue** tab or **View Patient Queue** from the Home tab.

2. Select **Refresh Now** to ensure that you see the latest list in the queue.

3. If necessary, enter the name or confirmation code of the patient in the Search field to locate the patient in the list.

For information about fulfilling an appointment, see Process an appointment.

Process an appointment

A healthcare worker processes an appointment by giving the vaccination or test to the patient and recording the appointment details. An Oracle Health Immunization Management administrator or healthcare worker can record the details. But, only a healthcare worker can administer the vaccine or test.

While processing an appointment, the healthcare worker may see vaccine details from previous appointments, including details on vaccines due.

> **Note:**
>
> If Oracle Health Immunization Management receives patient immunization history from an outside system (for example, Australian Immunization Registry [AIR] for an Australian patient), you (as a healthcare worker) can see a message with details that it found. For example, you see an AIR Updates message that may include details on the vaccines due. You can select a View Vaccine Due Details link to get more information on the vaccine (for example, disease, dosage, and due date). You can also see a message that the patient needs no new vaccines or one that indicates that it did not locate the patient data in AIR. The AIR Updates message also includes details on the date of the last update. For example, you may see an update message with the last update done minutes, hours, weeks, months, or years ago.

To process an appointment:

1. Select the **Patient Queue** tab from the banner.

   If your location includes multiple healthcare workers, select **Refresh Now** to ensure you do not call in a patient already seen by another healthcare worker.

2. Select **Call Patient** for the first person listed in the queue and call the patient in from the waiting room.

3. In the Call Patient dialog box, confirm the patient name and select **Call Patient**.

4. Confirm the patient name and reason for the appointment.

5. If you see additional patient details, you can do one or more of the following:

   - If due for a vaccine, a Vaccines Due dialog box automatically open that includes the patient name, date of birth, address, and a list of with the name of the disease, vaccine dose, and due date. Make a note of any vaccines due to discuss with the patient and select **Close** when done.

   - If the Previous Medical History section includes a number of items, select the plus (+) sign to expand the list and view details on any past medical notes on the patient.

   - If the Previous Procedures section includes a number of items, expand it or select **View All Previous Procedures**. You can see the vaccine name, dose, manufacturer, date given, and status (such as Administered). For more information on the vaccine, select **View Details** to open the Procedure Details dialog box with Outcome, Product, and Administration tabs. Select the tabs with details you need to review. If available, you can select **Edit** and make any

necessary changes. For example, the Outcome tab may show details on the procedure outcome and any notes. The Product tab shows details on the type of product, manufacturer, product name, disease, dosage, lot number, and lot expiration. And, the Administration tab shows details on the administration route and administered date. If you make changes, select **Save Procedure** when done.

> **Note:**
>
> If the system received these details from an outside system (such as AIR), you see an EXTERNAL - SENT BY AIR label as the source and you cannot edit the content. You may also see product details such as "different manufacturer for doses."

- If the Surveys section includes a number of items, expand it to view details on any surveys the patient submitted.

6. Select the **Consent to Treat** check box after confirming that the patient or guardian agrees to getting the vaccine or test.

7. Select **Next**.

8. In the **Consent Given By** field, select **Patient** or **Guardian** from the drop-down menu.

9. Ask the patient or guardian to confirm that none of the health conditions on the consent form apply to the person getting the procedure, the patient or guardian received information about the vaccine or test, and the patient agrees to receive a course of treatment (if multiple doses apply). Select the appropriate check box as you get consent from the patient or guardian or select **Select All** after getting consent.

10. Select **Next** to process the appointment.

11. As the healthcare worker, administer the vaccine or test to the patient.

12. Provide details in the fields you see to record the procedure. (Fields change depending on your system configuration.) For example, you may see fields similar to the following to administer a vaccine:

    - **Procedure Outcome** (required): Select **Administered** (record details on vaccination or test done), **Administered with Wastage** (record details on reason for extra vaccine not used), **Self Reported** (record any related procedures that occurred before the appointment), **Unable to Administer**. (If you select **Unable to Administer**, select the reason why the patient did not receive the vaccine or test).

    > **Note:**
    >
    > If you want to record the first procedure as one where you asked for proof of prior vaccination before giving another vaccination, select **Proof of Prior Vaccination** and skip to step 13 to add another procedure.

    - **Administered by**: If you logged in as an administrator (system or location), select the name and profession of the person giving the vaccination from the **Administered by** drop-down menu if not already populated. (Users logged in as healthcare workers do not see this field.)

    - **Notes**: Add any notes about the patient or appointment. If you selected **Unable to Administer** as the outcome, you must provide a reason in the notes. Then skip to step 13.

- **Procedure Type**: Select **Vaccine** or **Test** if not already populated.

- **Manufacturer Name**: Select the name of the manufacturer for the product and the disease it prevents. This choice automatically populates the **Product Name** and **Disease Name** fields.

> **Note:**
>
> If your administrator previously added details on the manufacturer, product, and lot number, the **Manufacturer MVX**, **Product Name**, **Disease Name**, **Lot Number**, **Lot Expiration Date**, and **Dose (in ML)** fields automatically populate. Otherwise, you must manually add these details. For more details on automatically populating these details, see Manage inventory details.

- **Lot Number** (required): Enter the vaccine lot number if not already populated.

- **Lot Expiration Date** (required): Select the calender icon to select the expiration month, day, and year for the vaccine if not already populated. Use the left and right arrows at the top of the calendar to move backward or forward in months and years.

- **Dose Number**: Select **Dose 1**, **Dose 2**, or **Dose 3**.

- **Dose** (required): Enter the dosage amount in milliliters (ML) if not already populated.

- **Constitution Date**: Select the calender icon to select the constitution month, day, and year for the vaccine.

- **Administered Route**: Select the way you delivered the vaccine or test. You can select **Intramuscular route**, **Intranasal route**, **Subcutaneous route**, **Oral route**, or **Intradermal route**.

- **Injection Site** (required--only for Intramuscular, Subcutaneous, or Intradermal route): Select the right or left location on the body where you inoculated the patient.

- **Change Date and Time Administered**: Select the check box to confirm that you want to change the date and time the patient received the vaccine or test. Otherwise, the system defaults to the current date and time.

- **Date and Time Administered**: If you selected the **Change Date and Time Administered** checkbox, you see this field. Select the calendar icon to record the month, day, and year the patient received the vaccine or test. Under the calendar, select the hour and minute of the procedure from the drop-down menus. Then select **AM** or **PM**. (To enter the current date and time, click **Today** instead of selecting a date and time.) Select **Close** when done.

- **Vaccination Information Sheet Provided**: Select the checkbox to confirm that you gave the patient a sheet with information on the vaccine or test. It may contain details on the contents of a vaccine and what (if any) side effects to look for.

13. Select **Add Procedure** to review the details on the recorded procedure for the patient.

14. If necessary, record any additional procedures by selecting **Add Another Procedure** and repeat steps 11 and 12 for that procedure.

15. Select **Next** when done.

16. Review the details you recorded for one or more procedures.

17. Select **Process Patient** to complete the appointment.

> ✏️ **Note:**
>
> Patients or guardians receive a verification code using their contact information to access the Patient Portal where they can complete a post-procedure survey about the vaccine they received. They can also access their account and appointment information.

To call the next individual or to see the queue, select **Call Another Patient**.

Edit procedure details

An Oracle Health Immunization Management administrator or healthcare worker can edit the recorded details of a procedure if necessary. For example, you may realize you made a mistake and need to change the lot number you originally entered for a vaccine.

> ✏️ **Note:**
>
> You can only edit the details of patients seen in the locations assigned to you. Some patient details can include vaccine details from previous procedures. As long as that information did not come from an outside source (for example, Australian Immunization Registry [AIR] for an Australian patient), you can edit the Previous Procedure details. If you see a previous procedure with a source of EXTERNAL - SENT BY AIR, you cannot edit those details.

To edit procedure details:

1. Select the **Patient** tab from the banner.

2. Locate the patient you need to find and select the name from the list.

3. To edit the patient details, for example, name, date of birth, gender, insurance (including the Individual Healthcare Identification [IHI] number), contact information, address, or notes, select **Edit Patient** from the top of the page and make the necessary changes.

> ✏️ **Note:**
>
> If you need to add or edit the patient insurance or IHI number, select **Add** to open the Add Insurance/IHI dialog box. For **Type**, select **Medicare** or **Individual Healthcare Identifier** from the drop-down list. For **Identification Number**, enter the 16-digit IHI number or the Medicare number. Select **Add** to add it to the patient details. You can select **Edit** from the Insurance/IHI row to edit these details at any time. (Oracle Health Immunization Management validates that you did not enter a number that ends in 0 [zero].)

4. Select **Apply Changes** when done editing those patient details. The system returns to all the details for the patient.

5. Scroll down to the Notes section. If necessary, select **Add Note** to open the Add Note dialog box. Select **Internal** or **Patient** from the **Note Category** drop-down menu. Enter a note title, details on the note, and select **Add Note**.

6. Scroll down to the Relationships section. If you need to add details on a relationship to the patient (for example, a parent or guardian), select **Add Relationship** to open the Add a Relationship dialog box. Enter the name, date of birth, gender, insurance (for example, Individual Healthcare Identification [IHI] number), contact information, and address. Select **Next**, review the details, and select **Add Relationship**.

7. Scroll down to the Upcoming Appointments section. If necessary, select the **Actions** (ellipsis) icon and select **Reschedule**, **Send Confirmation**, or **Cancel**, depending on what you need to do for the patient appointment. For more details on scheduling an appointment, see Schedule an appointment for a patient.

8. Scroll down to review any upcoming appointments or surveys.

9. Scroll down to the Previous Procedures section to see a list of previously performed procedures. If necessary, use the Search field to search for a particular procedure. For example, select the vaccine, disease, and date range from the appropriate fields. The table lists the vaccine, disease, dose, manufacturer, date administered, and source. Select **View Details** from the row with the vaccine details you need to view. This opens the Procedure Details dialog box with tabs for the Outcome, Product, and Administration.

10. If the procedure did not come from an outside source (no EXTERNAL label), select **Edit** and do one or all of the following:

    - From the **Outcome** tab, make any necessary changes to the fields. For example, you may see **Procedure Outcome** or **Notes** fields. Select **Save Procedure** when done.

    - From the **Product** tab, make any necessary changes to the fields. For example, you may see **Procedure Type**, **Manufacturer Name**, **Manufacturer MVX**, **Product Name**, **Disease Name**, **Dose Number**, **Dose**, **Lot Number** (up to 15 alphanumeric characters), **Lot Expiration Date**, or **Constitution Date** fields. Select **Save Procedure** when done.

        > **Note:**
        >
        > The system checks for valid lot numbers. If you added or changed a lot number, you must enter a valid one or you cannot save your changes.

    - From the **Administration** tab, make any necessary changes to the fields. For example, you may see **Administered Route** or **Administered Date** fields. Select **Save Procedure** when done.

> **✎ Note:**
>
> The system automatically sends the updated information to AIR. For example, if you change the procedure outcome (administered), administered on date, product or disease name, vaccine code, or lot or batch number, Oracle Health Immunization Management sends the details to AIR. But, if you experienced network issues or need to manually send the changes, select **Resend to AIR**. You see a success message at the top of the page.

11. Review any past or canceled appointments.

View appointment details

An Oracle Health Immunization Management administrator or healthcare worker can view the recorded details of a patient appointment. For example, you can see the details on the type of vaccine, the procedure outcome, and see a record of any previously changed or cancelled appointments and the name of the person who made those changes.

To view appointment details:

1. Select the **Patient** tab from the banner.

2. Select **View Appointments** from the top of the tab to open a list of patients who had previously scheduled appointments.

3. Locate the patient with the appointment details you want to review and select the name from the list.

4. Scroll down to the Past and Cancelled Appointments section and select the appointment you want to view. The Appointment Details dialog box opens with information about the appointment. For example, you see details on the location, appointment type, date and time of appointment, status (Processed, Results Received, Called from Queue, No Show, Cancelled, Rescheduled), appointment creation date and time, and the name (email address) of the person who created it. If anyone made changed to the appointment, the Appointment Changes section shows the status, email address of the person who made the changes, and the date and time of the changes.

> **✎ Note:**
>
> You can also view the patient details, relationships to the patient, surveys, and upcoming appointments.
>
> • To edit the patient details, **Edit Patient** from the top of the page and making the necessary changes. For more details, see Edit patient registration details .
>
> • To add a guardian (for example, parent, guardian, next of kin, power of attorney) to the patient, select **Add Relationship** and enter the details in the required fields.
>
> • To review survey responses, select the name of the survey.
>
> • To edit the procedure details, select the type of procedure and modify the necessary fields in each tab. For more details, see Edit procedure details.

Part IV

Patient tasks

After patients receives their vaccines, they can participate in surveys (daily, weekly, or monthly) to report their health and any adverse effects.

- Register for appointments
  Once you register with Oracle Health Immunization Management Patient Portal, you can schedule your own appointments. You may also participate in surveys after getting your vaccine to report any adverse effects (if available).

- Participate in surveys
  If your version of Oracle Health Immunization Management uses surveys, patients receive a form with details on how to access the Patient Portal to register for a survey after getting their vaccine. Once registered, they can receive reminders to provide health updates and report any adverse effects.

7

Register for appointments

Once you register with Oracle Health Immunization Management Patient Portal, you can schedule your own appointments. You may also participate in surveys after getting your vaccine to report any adverse effects (if available).

> ✎ **Note:**
>
> If you cannot access the option to schedule an appointment, your system may not include the feature. It depends how your administrator configured the Oracle Health Immunization Management system.

- Register with Oracle Health Immunization Management Patient Portal
  When registering for the Patient Portal, you must use an email address or mobile phone number that you can access. To verify your account details, you receive an email or text message with a code. Once verified, you can book appointments for yourself (and participate in surveys if available).

- Schedule an appointment
  Once you sign up and register with Oracle Health Immunization Management, you can schedule an appointment for yourself through the Oracle Health Management Patient Portal.

- Access your proof of vaccination in CommonPass
  After completing an appointment with an Oracle Health Immunization Management healthcare worker, you can now access proof of your vaccination in CommonPass (also known as SMART Health Card). CommonPass is a digital health app used to show that you received a vaccination when asked to prove it.

Register with Oracle Health Immunization Management Patient Portal

When registering for the Patient Portal, you must use an email address or mobile phone number that you can access. To verify your account details, you receive an email or text message with a code. Once verified, you can book appointments for yourself (and participate in surveys if available).

To register for Oracle Health Immunization Management Patient Portal:

1. In web browser, navigate to the web site for Oracle Health Immunization Management.

2. Review the information on the page and click **Continue**.

3. Enter the appropriate field information. For example, depending on how your administrator configured your system, you may see:

   - **First Name** and **Last Name** (required). (**Middle Name** is optional.)

- **Contact me via**: Select **Email** to receive messages through your email or **Text Message** to receive messages through a text.

- **Email** or **Mobile Phone**: Enter your email address or mobile phone number (depending on what you chose for the contact preference). If you enter a mobile number, you must first select the county code from the **Code** drop-down list.

- **Yes, I agree to receive notifications from this system (messaging and data rates may apply)**: Select the check box to receive notifications from Patient Portal.

- **Date of birth**: Use the drop-down menus to select the **Day**, **Month**, and **Year**.

- **Type** and **Identification Number**. Oracle Health Immunization Management validates the format of Australian Medicare insurance identification numbers. But, it does not validate that the number belongs to a specific patient.

  > **Note:**
  >
  > If do not see these fields, but need to add them, select **Add** to open an Add Insurance/IHI (Individual Healthcare Identifier) dialog box with the fields. Select **Add** when done.

- **Biological Sex**: Use the drop-down menu to select **Female** or **Male**.

- **Gender**: Use the drop-down menu to select **Female**, **Male**, or **Other**.

- **Ethnicity**: Select your ethnicity (for example, African American or Black) from the drop-down menu.

- **Indigenous Status**: (Required if shown) Select your indigenous status from the drop-down menu.

- **Address Line 1** , **Suburb/Town**, **State/Territory**, **Postcode** (Required).

- **Post code**: Enter the postal code for your city or town (or equivalent).

4. In the **Notes** section, enter any details on any accommodations you may require for your appointments.

5. Read the Use and Disclosure of Information section carefully and download any additional information if necessary. If you agree to the terms, select the **I confirm that I have read the use and disclosure of information section above** checkbox.

6. Select **Register**. Patient Portal sends a verification code to the email address or mobile phone number you entered.

7. Enter the code Patient Portal sent you within 15 minutes and select **Verify** to open the Welcome page.

> **✎ Note:**
>
> The code expires after 15 minutes. If it expires or you exceed the limit of three attempts at entering the code, select **Send code again**. If you continue to enter invalid codes and you get locked out of the system, wait approximately four hours to try again. (The locked period varies depending on your system settings.)

8. Select **Verify**.

A welcome page opens with details on your profile, your QR code, and a list of any past or upcoming appointments (if any made). To send your details with the QR code to your email or text, select **Send To Me** under the code. You can use this information to identify yourself when you check-in for any upcoming appointments. To schedule an appointment in Patient Portal, see Schedule an appointment.

Schedule an appointment

Once you sign up and register with Oracle Health Immunization Management, you can schedule an appointment for yourself through the Oracle Health Management Patient Portal.

> **✎ Note:**
>
> If you cannot access the option to schedule an appointment, your system may not include the feature. It depends how your administrator configured the system.

For COVID-19 vaccines, you need to wait until you receive dose 1 of a vaccine to book an appointment for dose 2.

To schedule an appointment for yourself:

1. Sign in to the Patient Portal and select **Schedule Appointment** from the Home tab.

2. Select the appointment type needed. For example, select **COVID-19 Vaccination Dose #1** or **COVID-19 Vaccination Dose #2**.

3. In the **Keywords** search field, enter the full or partial name or address of the location where you want the appointment. This brings up a list of locations that match your keyword. The locations also indicate the next available opening. Select the location that works best for you.

4. On the calendar, leave the default date selected or select another date for the appointment.

5. Select **Morning** or **Afternoon** and then select a time slot for the appointment. You see the appointment details you just entered (appointment type, location, and date and time).

6. Select **Confirm Appointment**. You see an "Appointment made" message in the banner.

If you provided contact information, you receive an email or text to get a verification code. You use this code to verify the registration in the system. After entering the code, you can access surveys, profile details, a QR code, and appointment details. You may also receive an email that you can print or save to verify the appointment when you arrive at the location. To cancel an appointment, select **Cancel Appointment** in your confirmation message.

Access your proof of vaccination in CommonPass

After completing an appointment with an Oracle Health Immunization Management healthcare worker, you can now access proof of your vaccination in CommonPass (also known as SMART Health Card). CommonPass is a digital health app used to show that you received a vaccination when asked to prove it.

For example, after you receive your vaccine, you can download the CommonPass app from the Apple App Store (for iPhones or iPads) or Google Play Store (for Android devices). You can then register with CommonPass and select the Oracle Health Immunization Management application from the list of providers in CommonPass. The app can then pull the results of your processed appointment from Oracle Health Immunization Management into CommonPass. Once uploaded, you can access your data in the CommonPass app when you need to show proof of your vaccination (or negative test results).

For more information on using CommonPass options, see the CommonPass application.

> **✐ Note:**
>
> The organization that uses Oracle Health Immunization Management must have a separate partnership with CommonPass for you to access vaccine results from Oracle Health Immunization Management in CommonPass.

8

Participate in surveys

If your version of Oracle Health Immunization Management uses surveys, patients receive a form with details on how to access the Patient Portal to register for a survey after getting their vaccine. Once registered, they can receive reminders to provide health updates and report any adverse effects.

> **Note:**
>
> If you cannot access the option to register for a survey, your system may not include the feature. It depends how your administrator configured the Oracle Health Immunization Management system.

- Health check survey
  After a patient receives a vaccination, a healthcare worker provides a form with instructions on how to register with Oracle Health Immunization Management Patient Portal to take a health check survey. The survey helps healthcare workers know about any adverse effects the patient experiences.

- Register with Patient Portal for the health check survey
  To take the health check survey, patients need to register with the Oracle Health Immunization Management Patient Portal (if not done already).

- Stop receiving reminders for surveys
  You receive reminders for surveys on a set schedule using the contact method you chose (email or text). To stop receiving reminders and opt out of the health check surveys, send a reply of STOP when you receive the reminder.

Health check survey

After a patient receives a vaccination, a healthcare worker provides a form with instructions on how to register with Oracle Health Immunization Management Patient Portal to take a health check survey. The survey helps healthcare workers know about any adverse effects the patient experiences.

> **Note:**
>
> If your administrator excluded the survey feature when configuring the system with their Oracle Customer Success manager, patients do not register through the Patient Portal or complete health check surveys. For more details, see System configuration.

When patients register for the survey through Oracle Health Immunization Management Patient Portal, they provide personal information to identify and contact them (for example, their name, contact information [email or smartphone], date of birth, and sex).

Patient Portal then uses the contact information to send the patient a message with an authentication code. This process uses two-factor authentication to verify the patient identity by using something patients know (authentication code) and something they have (smartphone). Once patients enter their approved code, they can complete the registration process by identifying the vaccine manufacturer and the date of their vaccination.

Patients can immediately take a health check survey after they register or wait until they receive a reminder message (in a text or email).

The patient can receive a survey for a number of days, weeks, or months. The frequency depends on how your administrator set up your system. For example, the standard survey schedule uses the frequency listed in the following table.

Table 8-1   Survey Frequency

Day	Description
Vaccination day	Survey sent if the patient registers on the day of the vaccination.
1 through 6	Survey sent once a day for the first week after the vaccination.
7 (first week)	Survey sent the seventh day after the vaccination with up to two days to complete it (day 7-9).
14, 21, 28, 35, and 42 (second through sixth week)	Survey sent once a week on the days listed after the vaccination with up to six days to respond to a survey. Patients receive a reminder (text message) if they do not respond to a weekly survey after two days.
91 (three months)	Survey sent three months after the vaccination with up to seven days to respond. Patients receive a reminder (text message) if they do not respond to the survey after two days.
182 (six months)	Survey sent six months after the vaccination with up to seven days to respond. Patients receive a reminder (text message) if they do not respond to the survey after two days.
365 (one year)	Survey sent 12 months after the vaccination with up to seven days to respond. Patients receive a reminder (text message) if they do not respond to the survey after two days.

Register with Patient Portal for the health check survey

To take the health check survey, patients need to register with the Oracle Health Immunization Management Patient Portal (if not done already).

> **✐ Note:**
>
> Patients must register within 42 days of getting a vaccine to participate in a health check survey. Patients must be 18 years or older to register with Patient Portal and take the survey.

To register with Patient Portal for the survey:

1. Locate the form given to you when you received your vaccination. It includes the web address for Oracle Health Immunization Management Patient Portal.

2. Enter the Patient Portal web address in your browser to open the application and select **Get Started**.

3. Enter the appropriate field information. For example, depending on how your administrator configured your system, you may see:

   • **First Name** and **Last Name**.

   • **Contact me via**: Select **Email** to receive messages through your email or **Text Message** to receive messages through a text.

   • **Email** or **Mobile Phone**: Enter your email address or mobile phone number (depending on what you chose for the contact preference).

   • **Yes, I agree to receive notifications from this system (messaging and data rates may apply)**: Select the check box to receive notifications from Patient Portal.

   • **Date of birth**: Use the drop-down menus to select the **Month**, **Day**, and **Year**.

   • **Sex**: Use the drop-down menu to select **Female**, **Male**, **Other**, or **Prefer not to say**.

   • **Postal code**: Enter the postal code for your city or town (or equivalent).

4. Select **Register**. Patient Portal sends a verification code to the email address or mobile phone number you entered.

5. Enter the code Patient Portal sends you within 15 minutes and select **Verify** to open the Welcome page.

> **Note:**
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> The code expires after 15 minutes. If it expires or you exceed the limit of three attempts at entering the code, select **Send code again**. If you continue to enter invalid codes and you get locked out of the system, wait approximately four hours to try again. (The locked period varies depending on your system settings.)

6. Select **Enter Vaccine Information** to open a page with a list of vaccine manufacturers.

7. Select the name of the manufacturer for the first vaccine you received. If you received more than one vaccine, enter the details for the first one. When you receive your survey, you can specify the first or second dose and follow additional prompts if necessary.

   If you do not know the name of the vaccine manufacturer, check the information you received from the healthcare worker when you received the vaccine. It includes details on what you received. Or, contact your healthcare provider.

8. Enter the date you received the vaccination. Use the drop-down menus to enter the month, day, and year. The system defaults to today's date.

9. Select **Next** to review details on the vaccine information you entered.

> ✏ **Note:**
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> The system uses the city or town postal code you entered to determine your time zone and calculate when to send you survey reminders (between 2:00 p.m. and midnight). To change the postal code, select **View My Profile** and enter a new code.

10. Select **Submit**. You see a thank you message at the top of the page with details on when to expect your health check survey.

The frequency of how often you receive reminders depends on the Oracle Health Immunization Management configuration settings. Your survey includes a question on the number of doses you received if you specified certain vaccine manufacturers. If you received more than one dose, you see prompts to provide details on the second dose.
Your survey questions can also vary depending on the information you provided when you registered. For example, if you did not specify your sex at registration or you received a second dose of a vaccine as a registered female, your survey may check for pregnancy.

Stop receiving reminders for surveys

You receive reminders for surveys on a set schedule using the contact method you chose (email or text). To stop receiving reminders and opt out of the health check surveys, send a reply of STOP when you receive the reminder.