TRACK by Novir-

Organization Administrator (Org Admin) User Guide

The following instructions will guide an Organization Administration user through managing an existing vaccination clinic event within TRACK.

Introduction

The TRACK system is Novir's proprietary technology platform used to manage the entire end-to-end lifecycle of vaccination clinics in a single digital source of truth. Novir's services to do pre-clinic vaccine eligibility verification and validation, along with insurance confirmation, can all be viewed well in advance of clinics to ensure the highest levels of participation. Awareness will be raised significantly of any risks in completing registrations, collecting consents, or any other required information that would prevent vaccinations being administered to a resident, staff, or community member. Individual patient status the day of the clinic can be monitored from check-in to administration details of what shots were given, details about the vaccine administered, and by who. Post clinic details can be viewed at will and as needed, as all events will remain cataloged and accessible in perpetuity of your access to the TRACK platform.

As a customer of Novir, you will have a role in the system designated as an "Organization Administrator". The following guide will give you instructions on how to perform some of the various functions within the system to maximize your ability to monitor and assist clinical operations for each vaccination clinic Novir partners with you through.

Viewing a Vaccination Clinic Event

When you first login, you will land on a "Vaccine Clinics" tab that will provide a list of vaccination clinic events scheduled and/or already executed for your organization. To view the details for a specific vaccination clinic event, follow these instructions:

1. From the VACCINE CLINICS tab that you land on after logging in, find your event in the event list.
   a. By default the list is sorted by clinic "Start Date" descending, or the latest date first.
2. Click on the underlined EVENT NAME to open the details view for that event:

3. The details for the event you have clicked on will pop-up in a modal for display for you to review:

   a. All of the details pertaining to the event will be visible here, including the unique registration URL that was created for this event under the Registration URL value.

Obtaining a registration link for a Vaccination Clinic Event

From the same read-only view of an event detailed in the previous section, you will be able to see the auto-generated Registration URL link for an event. This link is unique to the event it was created for. It is auto generated systematically, so you cannot customize this link. Note that you can minify and/or generate QR codes at will, however.

EVENT DETAILS

|	
Event Location	**Microsoft** 1 Microsoft Way Redmond, WA, 98052 Room 716
Event Name	**Winter Vaccine Clinic**
Event Description	Winter Vaccine Clinic for Microsoft employees and families. Register online and make sure you reserve your spot to get your vaccines updated. Free coffee and donuts!
Date	12/31/2024
Time	1:00 PM - 4:00 PM
Registration Close Date	12/28/2024
Vaccine List	Flu, Pneumococcal, RSV, Hepatitis B, Shingles, Tdap, DTaP, IPV, MMR, Varicella, COVID-19
Success Page URL Link	
Success Page URL Text	
Roster File	[Download Template] [Import Roster]
Registered Patients	[View List] [Download CSV] [Clinic Wrap Up Report]
Registration URL	https://dev.trackbynovir.com/vaccine-clinics/register/52700158-7af1-4986-aa0b-5345c440af0c
Event Status	**Draft**

[Edit]   [Close]

Clicking this link will take you to that event's *unique* patient registration page. This registration page is what the patient, or patient's legal representative, would use to register for that specific vaccination event.

You can copy this link and share it out directly as needed.

Creating a QR code for a Vaccination Clinic Event link

A quick, free, and common method to create a QR code from a link is to generate the code using the GOOGLE CHROME BROWSER. To generate a QR code for the registration link so you can share it with a customer or make marketing materials for a specific event, simply follow these instructions:

1. Using the CHROME browser, open the registration link you wish to generate the QR code for.
    a. Chrome has a built-in capability to create QR codes that you can download and share.
        i. It is not a requirement to use Chrome if you have a different way to generate a QR code. This is just a recommendation based on ease of use and tool access.
    b. Reminder that you get the registration link URL from the event details view.
2. When on that link, click on the "share" icon in the Chrome address bar:
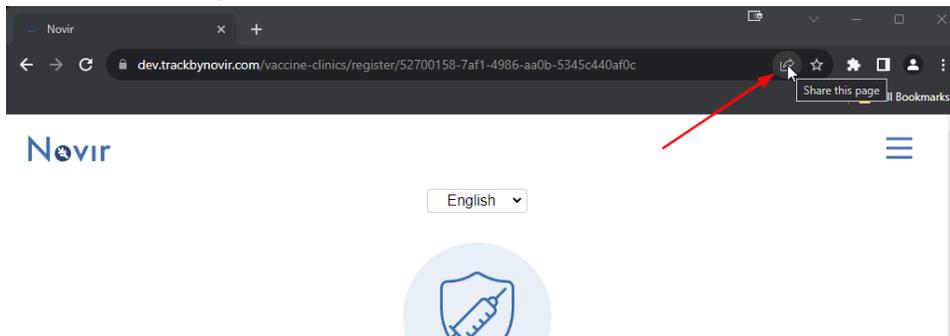
3. Select the "Create QR Code" option in the menu that's dropped down:
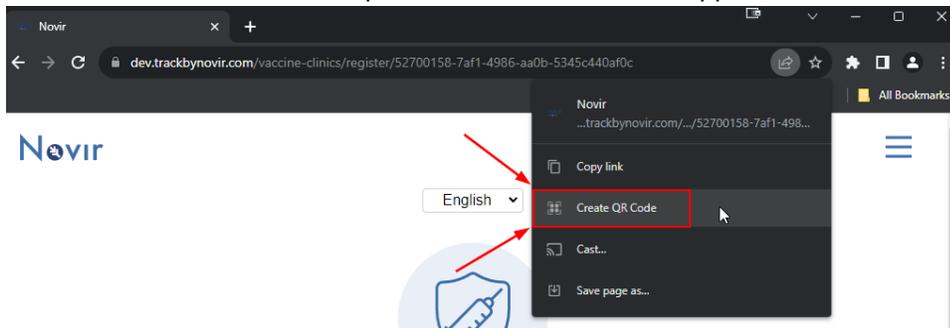
4. Click on the "Copy" or "Download" button, depending on which serves your purpose, to create a copy of the QR code you can use in other documentation:
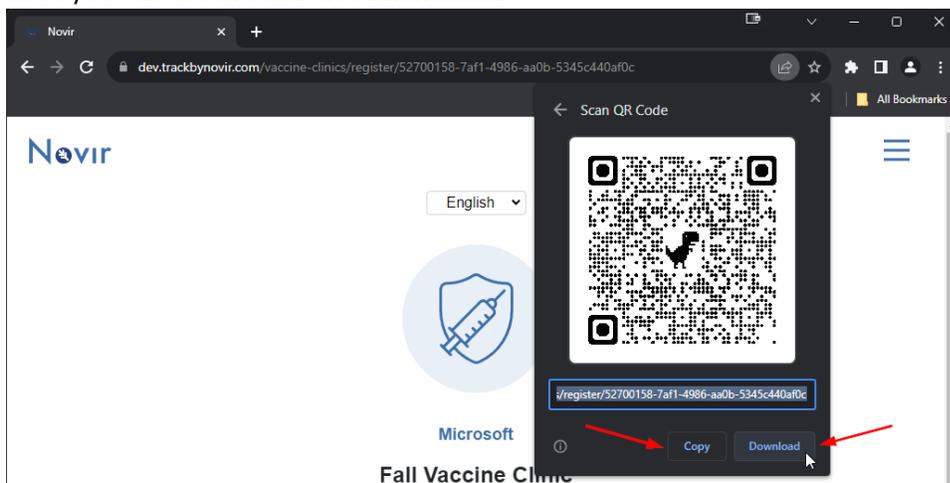
    a. Clicking "Copy" will just put the QR code on your computer's clipboard. You can immediately paste it into any document you are actively working on, be it an email or Word doc or something else.
    b. Clicking "Download" will create an image file in your downloads directory that you can insert into documents.

Viewing patient list and registration details

You will be able to view a patient registration list, or roster, per event directly within TRACK and drill down into that patient detail. To do so, follow these steps:

1. Open the event you wish to view the patient registration list for from the Vaccine Clinics tab.
2. From the Event Details read-only view, click the "View List" button in the row titled "Registered Patients":

3. Clicking that button will navigate you to the patient list for that event:

4. The list will have a header that contains the Organization Name, the Event Name, the date of the event, and the patient count. The sub-header will contain all the vaccines configured for the event and their requested (R) and eligible (E) counts
    a. Requested counts are the total number of patient requests for that vaccine across all registrations for that event.
    b. Eligible counts are the total number of vaccination requests for that vaccine that were verified eligible per the state's immunization registry as validated by Novir staff.
5. The list itself currently contains the following columns:
    a. **Name**
        i. Patient name in the format and order of <last name>, <first name>.
            1. Clicking the patient's name will launch the patient detail view and load the Patient Detail window.
    b. **DOB (Date of Birth)**
        i. Patient date of birth provided in the registration.
    c. **Vaccines**
        i. Vaccines requested by the patient or proxy during registration.
    d. **Eligible**
        i. Immunization registry eligibility status based on Novir staff lookup validation.
            1. Clicking the icon will launch the patient detail view and load the Vaccines tab displaying the vaccinations the patient requested.
            2. Icon definitions:
                a. ? = *Unverified* – Staff haven't verified the eligibility status for requested vaccine(s) through the corresponding state's immunization registry.
                b. ✔ = *Eligible* – Staff have verified the patient IS eligible to receive the requested vaccine(s) through the corresponding state's immunization registry.
                c. ✖ = *Ineligible* – Staff have verified the patient IS NOT eligible to receive the requested vaccine(s) through the corresponding state's immunization registry.
                d. ⚑ = *Mixed* – Staff have verified the patient is eligible to receive SOME of the requested vaccines through the corresponding state's immunization registry and not others.
    e. **INS**
        i. Insurance eligibility status based on Novir staff lookup validation.
            1. Clicking the icon will launch the patient detail view and load the Payment Type tab displaying the payment info the patient registered with.
            2. Icon definitions:
                a. ? = *Unverified* – Staff HAVE NOT verified that the insurance information provided is valid and active.
                b. ✔ = *Valid* – Staff HAVE verified that the insurance information provided IS valid and active.
                c. ✖ = *Invalid* – Staff HAVE verified that the insurance information provided IS NOT valid or active.
                d. ⚑ = *Mixed* – Staff have verified that either the primary or secondary insurance information provided is valid while the other is not.
                e. ▬ = *None* – The patient selected a different payment type other than insurance.
    f. **Check In**
        i. Check in status during clinic execution.

1. This is a sortable column so users can group checked in users on the day of the clinic as needed.

   g. **Admin**

      i. Status of the administration record.

         1. Novir staff will record the details of vaccinations administered for the patient. When administration is completed, a green checkmark will appear here.

6. You can sort the list by clicking on any of the column headers that have the sort "icon" next to their header title. The icon looks like a stacked up and down arrow. The criteria the list is sorted by will show a bolded up OR down arrow in the same color as the header font. Clicking the sort icon will sort ascending or descending based on the column values.

7. To drill into a patient record deeper, click on the PATIENT'S NAME. It will appear underlined, like a link:

8. A new modal window will appear that will display the patient's details including tab for Patient Info, Proxy Info (if available), Payment Type, Vaccines (requested), Health Screening, Consent, and Administration:
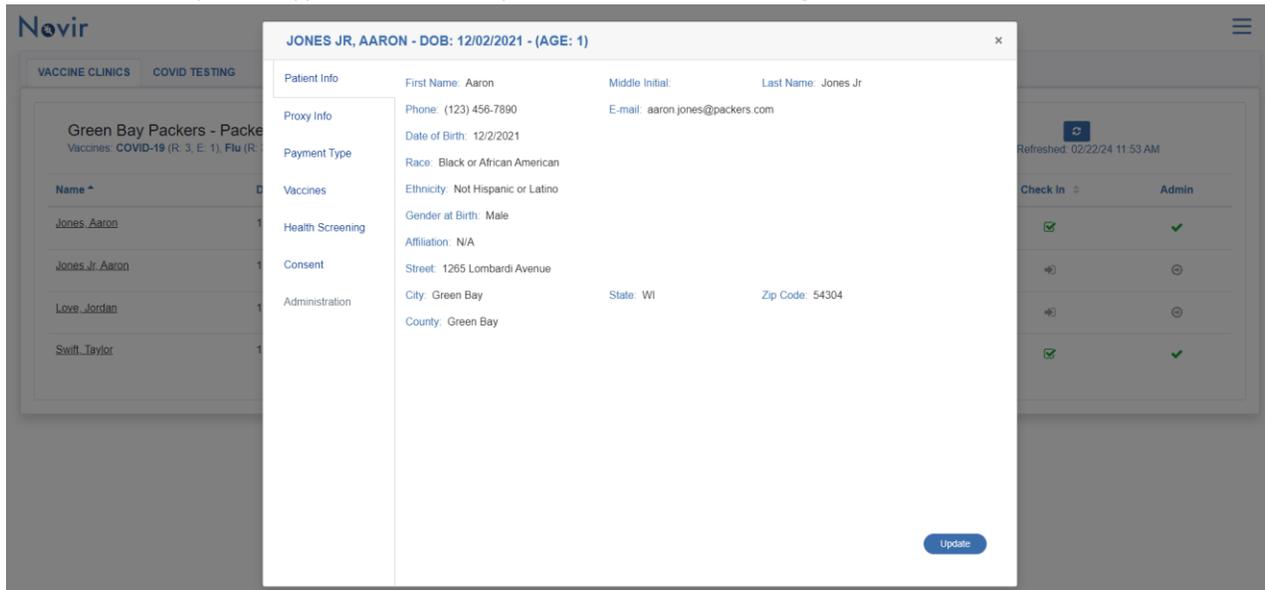
9. All the registration information supplied through the event registration process for each of the tabs will be presented to review and update as needed (and where available). Novir Staff and Super Admins will have the following capabilities in each tab:
    a. Patient Info   -   VIEW and UPDATE
    b. Proxy Info   -   VIEW
    c. Payment Type   -   VIEW and UPDATE
    d. Vaccines   -   VIEW and UPDATE
        i. Update is only available for Vaccines until Administration is complete. When Administration has been recorded and completed, users will NOT be able to update Vaccines any longer. It will become a "read-only" view.
    e. Health Screening   -   VIEW and UPDATE
    f. Consent   -   VIEW and UPDATE
    g. Administration   -   VIEW
        i. Users will NOT be able to view Administration tab until it has been recorded. The tab will remain disabled until there is something to view or update.

Updating patient information for a Vaccination Clinic Event

Almost every tab in the patient's registration detail view will allow for updates. The only tab a user CANNOT update information on will be the Proxy Info tab currently. For all other tabs, there will be a degree of updating capability that will be available, but some conditional. Here are the rules:

Patient Info - Users CAN update patient PII and demographic info with no restrictions.

Proxy Info - Users CANNOT update any proxy information at this time.

Payment Type - Users CAN update patient payment type information.

- Insurance information can be updated or added.
- Payment types can be entirely changed.
- NOTE: Insurance validation is explicitly confirmed and updated by Novir Staff users, however.

Vaccines – Users CAN update vaccines REQUESTED. Eligibility and payment validation, however, is confirmed and set explicitly by Novir Staff users.

Health Screening - Users CAN update patient health screening questions.

- NOTE: If information changed in other tabs that would display new questions that need to be answered, (e.g. female patient's DoB change that presented a pregnancy question), it will display with a blank answer and can be supplied and saved by the user as required.

Consent - Users CAN update consent information and document consent was received, by who, and on what date.

Administration – Only Novir Staff users can update administration information. This will be read-only to Org Admin users.