

# Indiana Department of Health and ZOTEC - Quick Reference Guide

## Registering and Checking In Patients in Zotec

### What is ZOTEC?

The Indiana Department of Health (IDOH) has partnered with Zotec during Phase 1A of COVID-19 vaccination efforts. Zotec has the available features needed to collect important data on patient demographics. You will document vaccine administration for your facility's patients using Zotec.




**Questions?** Please Contact our IDOH Help Desk Portal (<https://eportal.isdh.in.gov/C19VaxHelpDeskCustomer>)



**Tip:** Do not use Internet Explorer. Please use Chrome or Firefox.

### Registering Patients

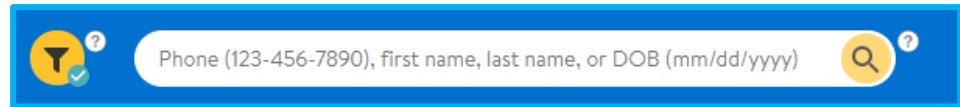
1. Login on <https://checkin.coronavirus.in.gov> using your credentials. If you do not have user access to Zotec, please refer to the **Gaining Access to Zotec (for Facilities)** Quick Reference Guide.
2. Once you have logged in you will need to confirm your location and current date is correct. If the location is incorrect you can change the location by clicking on the icon  shown below.

The screenshot shows the main interface of the Zotec application. At the top, there is a navigation bar with a menu icon, the date and time "Monday, Dec 07, 2020 8:23 AM", and a "Date" field. Below the navigation bar is a search bar with a placeholder "Phone (123-456-7890), first name, last name, or DOB (mm/dd/yyyy)" and a "Schedule Appointment" button. The main content area features a dropdown menu for "DEMO LOCATION 1" and a table of patient records. A red arrow points to the "Date" field, and another red arrow points to the "DEMO LOCATION 1" dropdown menu.

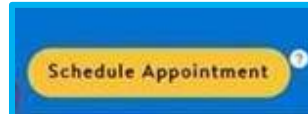
Time	First Name	Last Name	DOB	Service	Appointment type	Status	
9:00 AM	Test	Test	12/12/1990	Immunizations	COVID VACCINE	Checked In	>
9:00 AM	John	Test	01/01/1990	Immunizations	COVID VACCINE	Unregistered	>

The screenshot shows the "Check-In App" interface. It features a "Location" dropdown menu with "DEMO LOCATION 1" selected. Below the dropdown menu, there is a user profile section for "Kruse, Kaitlin" with the role "Client Administrator" and a "Logout" button.

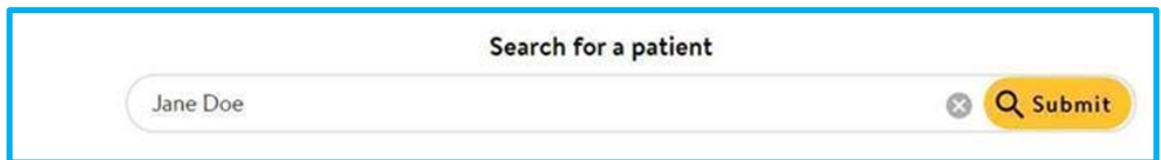
3. Start by searching for the patient on the main screen or typing in their first and last name in the search bar. (If the patient has already started the registration process please go to Step 12)



4. If you cannot find the patient, you can create a new patient by clicking the yellow **Scheduling Appointment** button on the upper right-hand corner.



5. Enter the patient's first and last name and click the **Submit** button.



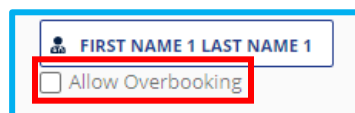
6. Click the **Continue as New** button on the bottom of the page.



7. Select **Immunization** as the type of appointment.



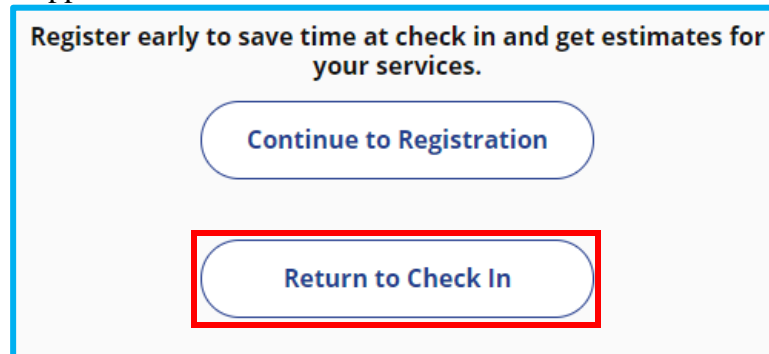
8. Select the date and time the vaccination visit will occur. If there are no time slots available check the **Allow Overbooking** box.



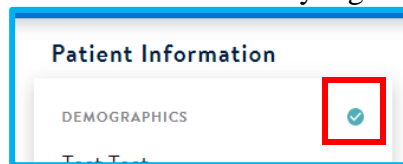
9. The next page will ask for recipient information (First name, last name, date of birth, sex, contact information) **For residents, please enter your facility email and phone number.**
10. After you have verified that all the information is correct, click **Confirm Appointment.**

## Checking In Patients

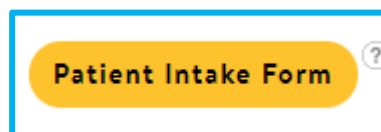
11. Once the appointment is confirmed: Select **Return to Check In**



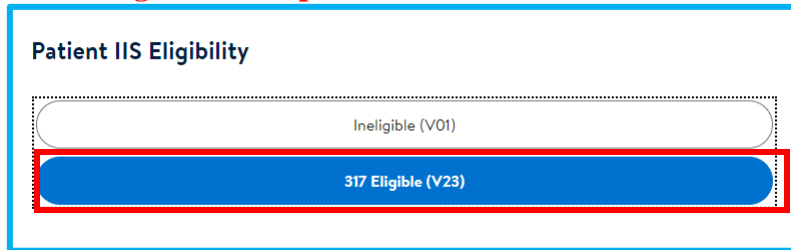
12. You will be redirected to the main screen main screen where you should see the patient listed next to their time lot. Select that patient and **EDIT the demographic areas until you have a green check mark** to successfully register a patient for testing.



13. Make sure you edit each section on the main screen
  - a. Demographics
  - b. Additional Demographics
  - c. Fill out the insurance information so the facility can bill insurance for the administration. (The patient will not be charged for this visit)
  - d. Consents - choose **Collect Manually** and enter patient name & relationship to Patient. (If the Patient is under 18 then you will have to have parental consent and can change the drop down to Parent).
14. You will also need to complete the **Patient Intake Form** before you can check the patient in and select **Return to Appointment** when complete.
  - Intake Demographics
  - Health Habits

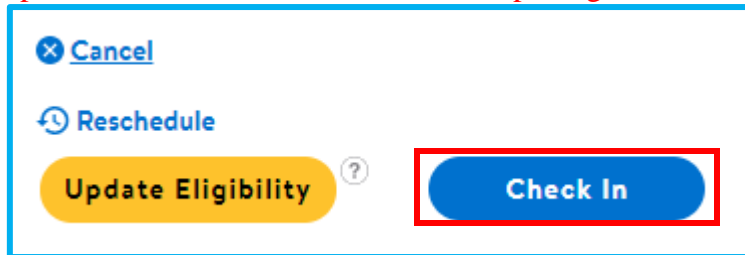


15. The last thing to complete is to **Update Eligibility**. **You will choose 317 for all patients receiving a dose for phase 1A.**



The screenshot shows a form titled "Patient IIS Eligibility". It contains two radio button options. The top option is "Ineligible (V01)" and is currently selected, indicated by a dotted border. The bottom option is "317 Eligible (V23)" and is highlighted with a blue background and a red border, indicating it is the correct selection for phase 1A.

16. Once you have completed all the sections and received all green check marks the **Check In** button will be able to be selected. **Make sure you verify all the demographic information is correct before completing the check-in.**



The screenshot shows a set of action buttons. From top to bottom: a blue "Cancel" button with a close icon, a blue "Reschedule" button with a clock icon, a yellow "Update Eligibility" button with a question mark icon, and a blue "Check In" button which is highlighted with a red border, indicating it is the next step.