



Stepwise Approach to Utilizing the Templated COVID-19 Vaccine Online Consent Form within JotForm

- 1. Login to your JotForm account (needs to be HIPAA Compliant version for collecting patient info)**
 - If you are still looking for an online tool for surveys or an appointment scheduler, JotForm HIPAA Compliant is available to healthcare workers for FREE through March 2021.
 - View the infrastructure tab at the top for more options for appointment schedulers.
- 2. Click the templates tab at the top and search for CPESN. All the available templates will appear that have been saved with CPESN in the form name.**
 - You may also click [here](#) to view the "COVID-19 Vaccine Consent Form" or the one with "Appointment Scheduling"
 - Click to "use" this template in your own JotForm HIPAA Compliant Survey Tool.
- 3. Edit the form for your community pharmacy**
 - Replace the CPESN logo with your community pharmacy's logo.
 - Become familiar with the form and its functions because you can edit much of it.
 - Example: This form is designed to not allow anyone under 16 y/o to complete the form due to that being the minimum age for one of the COVID-19 vaccines. You may edit this as more vaccines are available and when in another phase.
 - Note: The "Don't Know" option is not active for selection as displayed in the PDF.
 - If utilizing the one for appointment scheduling, adjust your appointment scheduling preferences.
 - Continue to edit your scheduling preferences based on experience.
 - Customize the messaging at the top to be specific to a certain phase.
 - Consider adding an extra layer of questioning and conditioning to your survey to ensure the patient is in the appropriate vaccine rollout phase based on ACIP and/or your State's phased approach.
 - You may edit the "conditions" of the JotForm tool so if a patient doesn't select for example "essential worker," or other criteria that falls within the appropriate phase, then it can block the patient from moving forward with completing the survey.
- 4. Test out the online form to get familiar with it, including other staff members that are involved with the vaccine rollout at your pharmacy.**
- 5. Launch the survey utilizing the link when you publish the online consent form**
 - Educate your staff prior to launching.
 - Post on Facebook or your website with guidance.
 - Update your phone systems to point people to the website and be sure to include the appropriate phase and which patients are allowed to be involved.
 - Click [here](#) to view the latest phase recommendations but your State may be providing you the most up-to-date information.