



covidbestpractices.com/vaccines | #COVIDRx | CDC@cpesn.com

## Scheduling Platforms



CPESEN USA is providing a comparison chart of scheduling platforms. This chart was created using survey responses from NCPA | CPESEN Fellows, CPESEN Pharmacy Staff Members who have been involved with COVID-19 Test Scheduling, and Technology Partners.

The comparison can be viewed on the Best Practices website and will be updated as CPESEN USA receives more results.



Note the Community Pharmacy Fellowship logo in the chart below. Anywhere the logo is listed, a Fellow, who is a practicing pharmacist, completed the information within a survey after implementing or researching the scheduling platform. We appreciate all of the Fellows who have made this document possible.

- Paula Boettler, Mitchell's Drug Stores on the Boulevard
- Audrey Butler, Alwan Pharmacy & Compounding Center
- Patrice Clifford, Phoenix Drugstore and Medical Supplies
- Matthew Mitchell, Northside Pharmacy
- Karami Reed, Shaver Pharmacy and Compounding Center
- Dean Stone, IHS Pharmacy & Gifts
- Dayna Wong-Otis, KTA Puainako Pharmacy




Also, a special thanks to Steve Moore, Owner of Condo Pharmacy and CPESEN Upstate NY Luminary.

Disclaimer: The information listed is from user experience, the truest source of information is available on the platform's website.







*Scheduling Platforms listed without a logo was completed by a scheduling platform's representatives*


Last updated: 04.16.2021

| Name & Sign-up Link  | Description   | Features   | Compatibility / Integrations  | HIPAA Compliant?  | Cost   | Additional Notes/ Helpful Links:  |
|--|---|--|---|---|--|---|
| Acuity Scheduling<br>Click <a href="#">here</a><br>    | Say goodbye to phone tag. With your customized scheduling page, clients can easily view your real-time availability and self-schedule their own appointments.<br>Manage multiple locations and employees, only show your clients the calendar you want them to see and harness all the flexibility to make scheduling work for you. (Control your availability)<br>Auto-adjust for time zones, let clients easily cancel & reschedule themselves, and send automated reminders to keep clients prompt.<br>Ask clients to fill out intake forms at the point of booking, so you'll have everything you need to know about them in one place. | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ No integration with pharmacy management systems</li> <li>■ Allows for ability to collect payment (PayPal, Square, or Stripe) for other services that aren't covid-19 vaccines</li> </ul>  | Desktop, Laptop, Mobile App for Apple iOS and Android; Supported browsers: chrome, Firefox, Microsoft edge, safari<br><br>Integrations: Click <a href="#">here</a> to view. | Yes<br><br>More info by clicking <a href="#">here</a> . | Powerhouse plan (For HIPAA compliance) - covers up to 36 staff/locations - \$50 per month (monthly plan) or save 10% and pay annually which comes out to \$45 per month.<br><br>Other plans include: "Emerging Entrepreneur" for 1 calendar at 1 location: \$15/ month or \$165/ year; "Growing Business" \$25/month or \$275/year with 6 different locations and includes a text message feature.   | <ul style="list-style-type: none"> <li>■ HIPAA Compliance: Enabling HIPAA-related features in Acuity alone isn't enough to make you HIPAA compliant. You must also ensure your business practices and systems work with Acuity to stay in compliance. To use Acuity in a way that complies with the HIPAA Security Rule, you must exercise responsibility when setting up your account. These responsibilities include carefully selecting the amount and type of electronic protected health information included in and excluded from text and email messages, as well as entering into a Business Associate Addendum (BAA) with Squarespace.</li> </ul>  |
| Calendly<br>Click <a href="#">here</a><br>             | Calendly can connect with up to six of your calendars to automatically check availability and help you connect with your best contacts, prospects and clients. Allow your invitee to schedule individual slots. Automatically distribute meetings to your team based on availability, priority or equity. Enable your invitee to schedule a time with multiple team members at once. Host multiple invitees at the same event for webinars, trainings and more.   | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ No integration with pharmacy management systems</li> <li>■ Allows for ability to collect payment (PayPal or Stripe) for other services that aren't covid-19 vaccines</li> </ul>   | Computer, tablet, cell phone<br><br>Integrations: Some examples, include Zoom, GoToMeeting, PayPal, Facebook, Zapier, etc.  | No  | Approximate cost can be billed either monthly or annually; prices listed are monthly; Basic: \$0; Premium: \$8/per user; Pro: \$12/per user  | <ul style="list-style-type: none"> <li>■ HIPAA Compliance: "Calendly is a secure platform and we take all measures necessary to ensure your patients' information is safe. These measures include: Encrypting all data at rest and in transit using 256-bit encryption, Hosting Calendly on Amazon Web Services. We leverage all of the platform's built-in security, privacy and redundancy feature to keep your data safe. While we do take the above security measures and more, Calendly should not be used for collecting Protected Health Information (PHI). Calendly is never able to read patients' medical details, private information, etc. and is only able to read the free/busy status of events in your calendar in order to avoid double-bookings."</li> <li>■ "As a final layer of precaution, we encourage users who prioritize HIPPA compliance to refrain from including any personal or medical questions in the question form invitees complete when scheduling. If your Calendly usage does not deal with PHI or you are not a specialty practice as defined by HIPAA legislation, you may not require a HIPPA compliant solution and should consult your legal team on your compliance needs."</li> </ul> |
| Digital Pharmacist<br>Click <a href="#">here</a><br> | This system has two-way messaging feature and a scheduling tool that is set up to be used beyond COVID-19 for appointment-based models. They have additional features to support pharmacy workflow including IVR management and digital marketing. They are working towards more robust integrations where DP will pull information from pharmacy management systems (medications and other information) into the DP platform.  | <ul style="list-style-type: none"> <li>■ Pharmacies can upload their patients from PMS. The system can stratify by age and send a message to patients if they are targeting their current population for vaccines.</li> <li>■ Second waitlist includes an eligibility screener based on CDC phases</li> <li>■ 2-way messaging platform that allows for HIPAA compliant messaging that can be customized per pharmacy for scheduling.</li> <li>■ Contactless check-in</li> <li>■ Pharmacies can easily customize their schedule within the system and adjust appointment duration.</li> <li>■ Platform can specify how many days of availability you should list based on your available doses and schedule.</li> </ul> | Some integration with pharmacy management systems   | Yes   | Patient Engagement Product (includes scheduling, waitlist, and 2-way messaging) will be \$149/mo.<br>Core product, which includes website and mobile app, pricing will be finalized in the next couple of weeks (if not already)<br>They are leaning towards a 12-month contract, rather than a month-to-month contract<br>If pharmacies pay all 12 months upfront, there will be a discount<br>Existing customers may have a 60-day free trial and new customers may have a 30-day free trial for COVID-19 products | <ul style="list-style-type: none"> <li>■ <b>Full functionality to launch April 1<sup>st</sup>**</b></li> <li>■ Without seeing their COVID-19 vaccine workflows, it is difficult to know how dose 1 and dose 2 scheduling will be handled as well as what information will be collected during the registration process.</li> <li>■ Pricing is on the higher end for a monthly rate but they are built to support other appointment scheduling processes and 2-way messaging needs outside of COVID-19.</li> <li>■ Considered for anyone who is looking for scheduling and messaging. If they are also seeking a platform that supports collection of pertinent patient information for COVID-19 billing/reporting processes, I would recommend waiting until these features are released on April 1st to know if this will meet their needs.</li> </ul>   |

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|---|---|---|---|--|--|---|
| <p>Dragonfly PHD</p> <p>Click <a href="#">here</a></p> <p>Or contact Julie Eskay Eagle<br/>julie@dragonflyphd.com<br/>Phone: 203-202-8085 x 1</p> | <p>DragonflyPHD is intended to support everything from appointment scheduling and automated reminders through to delivering results to patients and customers who have their own staff and need visibility on who has been tested or vaccinated and results/follow up with their own dashboard.</p>   | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ Highly customizable for multiple services and associated documentation, in house and on-site testing events, etc.</li> </ul>   | <p>Integrated with insurance billing software, some EMRs, lab analyzers and external labs. Capable and willing to do custom integrations to serve customers.</p>  | <p>Yes</p> <p>Must sign BAA, simple DocuSign link.</p> | <p>Charge per COVID-19 vaccine (~\$0.50) and test (~\$1) but no cost to use the platform itself for COVID-19 processes</p> <p>Expansion to use of other platform features is \$200-\$300 per month</p>   | <ul style="list-style-type: none"> <li>■ Compliance support (electronic record of manufacturer, lot#, expiration date for each episode of care, incident report form, public health report generation clinical follow up (patient follow up alerts, counseling notes, supplemental testing or second dose reminders and documentation), referral notes.</li> <li>■ Customized online intake forms for specific test and vaccination types.</li> <li>■ Assurance of authenticity of medical records to easily share with employers, educators, caregivers, providers, travel, etc. with confidence via secure platform.</li> <li>■ Automatically generates reports by state or county for public health reporting, including SNOMED and LOINC codes by procedure as required.</li> </ul> |
| <p>EveryDayRx CareXchange</p> <p>Click <a href="#">here</a></p>   | <p>The first people-logistics and workflow experience service helping you manage 1patient, 1experience, 1encounter between pharmacists and their patients.</p> <p>The CareXchange Marketplace is a cloud-based, mobile-responsive and customizable HIPAA-compliant platform allowing community independent pharmacies to shift patient services from the front counter to a digital pharmacy counter experience.</p> <p>Book, Schedule and Pay for Pharmacy Care Services including COVID-19 Tests, COVID-19 Vaccinations, Routine Immunizations, Point of Care Testing, Prescriptions and more.</p> <p>More than a Scheduler...EveryDayRx is a "Beyond the Counter" Digital PharmacyCare Experience Management Platform.</p> | <p>CareScheduler Patient Experience Application: Book, Schedule &amp; Pay for COVID-19 Services</p> <p>Patient Features:</p> <ul style="list-style-type: none"> <li>■ COVID-19 Vaccination Scheduling and Waiting List</li> <li>■ COVID-19 Test Scheduling – Antigen, Antibody and PCR</li> <li>■ Digital Patient Intake Support including Screening and Consent Forms</li> <li>■ Email and Text Notifications and Appointment Reminders</li> <li>■ Mobile Digital Wallet Card for COVID-19 Test Results and COVID-19 Vaccination Records</li> <li>■ Download and Print PDF of Results and Record Cards</li> <li>■ Peace of Mind: Access to Virtual Urgent Care Consultations</li> <li>■ Live Pharmacy Advisor Chat Support</li> </ul> <p>PharmacyConnect People Logistics Application: Manage Patient Scheduling, Communications and State Reporting</p> <p>Pharmacy Features:</p> <ul style="list-style-type: none"> <li>■ Configure and control Scheduling, Calendar, and Inventory Allocation</li> <li>■ Manage Multiple Locations</li> <li>■ Compliance Reporting</li> <li>■ Automated COVID-19 State Reporting (limited availability)</li> <li>■ Note: No integration with PMS</li> </ul> | <p>Mobile Responsive Application</p> <ul style="list-style-type: none"> <li>• Works on Desktop, Laptop, Tablet and Smart Phone: iOS and Android</li> <li>• Supported Browsers: Chrome, Firefox, Edge and Safari</li> <li>• Integrated and harmonized user experience from your website to the CareScheduler</li> <li>• HIPAA Compliant Data Storage and Transfer</li> </ul> | <p>Yes</p> <p>BAA Required</p>                         | <p>CareScheduler + PharmacyConnect Applications (all features):</p> <ul style="list-style-type: none"> <li>• Annual Subscription \$300</li> <li>• Annual Agreement</li> <li>• Implementation and Integration fees: Waived</li> <li>• State COVID-19 Test Reporting: \$250 set up fee + \$2 per record</li> <li>• COVID-19 Test Booking Revenue Share: \$10.00 off published retail price for test</li> <li>• All costs are per individual location.</li> </ul> <p>Learn more about our PharmacyCare Experience Accelerators for Community Independent Pharmacies, click here: <a href="https://everydayrx.com/">https://everydayrx.com/</a></p> <p>Additional PharmacyCare Experience Applications Include:</p> <ul style="list-style-type: none"> <li>• Virtual CareXchange Clinic Application: Easily schedule and conduct virtual consultations with your customers anytime, anywhere.</li> <li>• CareXchange Marketplace: Your Digital PharmacyCare Experience Gateway to Promote Products and Services on a Customized eCommerce Enabled Digital Store Front</li> </ul> | <p>Beyond the software: Our Pharmacy Support Team will help you establish and launch your COVID-19 Services to ensure success. Patient engagement tools are available for patient enrollment and social media campaigns.</p> <p>Beyond the Experience: Our PharmacyCare Experiences and Services are uniquely crafted with the direct input from Community Independent Pharmacies.</p> <p>Join our network movement to elevate the role of Community Independent Pharmacies Today and Beyond.</p>   |

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|--|---|--|---|---|---|---|
| Full Slate®<br>Click <a href="#">here</a><br>          | Full Slate helps you book more business by accepting appointments where your clients and prospects already are: online – including your website or free booking page, Facebook and email. With an online scheduler, you can turn visitors into customers even when you can't answer the phone. No more phone tag, and your clients will love the convenience of online booking. | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ Allows for ability to collect payment for other services that aren't covid-19 vaccines</li> <li>■ No integration with pharmacy management systems</li> </ul>  | Chrome<br>Integrations: n/a   | Yes<br>Click <a href="#">here</a> for more info         | Cost: \$30/month  |   |
| GetMeVaccinate.d.org<br>Click <a href="#">here</a><br> | It can be used as a primary scheduling tool but can also be used to optimize any remnant vaccine doses if a patient no-shows and the pharmacy needs to use the vaccine since the vial has already been brought to room temperature/punctured.   | <ul style="list-style-type: none"> <li>■ Process of registration can be fully completed by SMS messaging and the process is supported in both English and Spanish. This is helpful for any patients who do not have access to a computer but can receive text messages.</li> <li>■ Built to support last-minute messaging for remnant doses of COVID-19 vaccines. Waitlist feature will confirm if the patient can be available to visit the pharmacy within a certain time frame on a certain date and the patient can confirm if they can make it. It will also manage how many remaining time slots are available based on how many doses are remaining.</li> <li>■ Built to support single locations or multi-site locations and they can build a custom landing page and custom phone line as they are building an IVR process for registration for those who do not have texting capabilities.</li> <li>■ They can customize messaging that is sent to users to collect information for eligibility criteria.</li> </ul> | SMS messaging   |   | No cost at this time  | <ul style="list-style-type: none"> <li>■ This tool may not be the best solution for a primary scheduling tool but it can be a great add-on for pharmacies who frequently have remnant doses.</li> <li>■ Collected information from registration does not include all details that would be needed to support billing processes within the pharmacy but since this tool specializes in handling last minute/expiring doses, this was not their primary focus. They are open to feedback and are willing to expand but since their tool relies on SMS messaging registration, the process may be lengthy.</li> <li>■ They did not have an export feature for information that was collected from the patients for being added to the system (name, DOB, etc.) but they are planning to build this along with the ability to create a schedule of availability. At the moment, it is built to support a specific number of doses for a specific time frame.</li> </ul> |
| Google Scheduling<br>                                  |   | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ Does not allow for ability to collect payment</li> <li>■ No integration with pharmacy management systems</li> </ul>   | Any computer, that you can access Google from.<br>Integrations: n/a                           | Yes<br>Considered HIPAA Compliant when a BAA is signed. | No cost (unless there is a cost associated with the G Suite Services) | <ul style="list-style-type: none"> <li>■ Click <a href="#">here</a> to view the G Suite &amp; Cloud Identity HIPAA Implementation Guide.</li> </ul>   |
| JotForm<br>Click <a href="#">here</a><br>            | Patients can book appointments by selecting date and time. The appointments are integrated into google calendar and created as events.  | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ Allows for ability to collect payment (click <a href="#">here</a> for options and fees)</li> <li>■ No integration with pharmacy management systems</li> </ul>   | IOS and google play   | Yes   | Cost: \$29 per month after the free period                            | <ul style="list-style-type: none"> <li>■ Click <a href="#">here</a> to view templates that you can utilize shared by other CPESN Pharmacies.</li> <li>■ JotForm is offering a free HIPAA Compliant through March 31, 2021 for healthcare workers responding to the COVID-19 Pandemic. More info <a href="#">here</a>.</li> </ul>  |
| OmniSYS/STRAND<br>Click <a href="#">here</a>   |   | <ul style="list-style-type: none"> <li>■ Does not integrate with calendars</li> <li>■ Currently does not allow patients to get appt. reminders, but it does allow patients to receive intake forms and the VIS via text messaging</li> <li>■ Does not collect payment</li> </ul>   | Desktop and Mobile friendly<br>Integration: Integrates with most pharmacy management systems. | Yes<br>BAA required                                     | No additional cost to regular STRAND/OmniSYS                          | <ul style="list-style-type: none"> <li>■ Strand reports to state immunization registries and the CDC</li> <li>■ Medical Billing integration</li> <li>■ Query state immunization registries</li> </ul>   |

BAA = Business Associate Agreement: any individual or entity that performs functions or activities on behalf of a covered entity that requires the business associate to access PHI is considered a business associate

|  |  |   |  |                                    |  |  |
|--|--|---|--|------------------------------------|--|--|
| <p>Prescribe-Wellness</p> <p>Click <a href="#">here</a></p>  | <p>Contact-free vaccination management through PrescribeWellness is a safe and convenient way to engage patients via an online, appointment-based solution. Electronic patient intake and scheduling capabilities present pharmacists with improved patient loyalty and better workflow.</p> | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ You can add any custom notes, and schedule patient outreaches specific to events.</li> <li>■ Pharmacies can be equipped with marketing materials, complete with a provided QR code, to promote accessibility throughout their patient population.</li> <li>■ Does not allow for ability to collect payment</li> </ul>  | <p>iOS, Android, and web-based</p> <p>Integration: Integrates with most pharmacy management systems.</p> | <p>Yes</p>                         | <p>Cost: \$150 a month but may be provided by your PSAO.</p>   | <ul style="list-style-type: none"> <li>■</li> </ul>  |
| <p>Prescriptive</p> <p>Click <a href="#">here</a></p> <p>EngageDr:</p>   | <p>Prescriptive is a user-friendly health intelligence platform built to empower consumers and pharmacies. Their scheduling solution can be used for COVID-19 vaccines and testing.</p>  | <ul style="list-style-type: none"> <li>■ Waitlist that can be managed by manual entry or pt import - pts are contacted</li> <li>■ Waitlist pts are contacted via text to schedule within a specified date range and can be contacted for a specific consultation type (vaccine Dose 1, etc.)</li> <li>■ Pt messages can be customized with pharmacy specific information</li> <li>■ Pts can sign up for a global vaccine waitlist that pharmacists can access and invite from</li> <li>■ Manage multiple locations from one login</li> <li>■ Reporting with export for entry in pharmacy management systems and IIS information</li> <li>■ Payment reports for COVID-19 testing and other consultation types</li> <li>■ Standardized questions collected at time of appointment scheduling with option to customize three questions</li> <li>■ At time of vaccine admin for dose 1, pharmacy is prompted to provide window for scheduling dose 2</li> </ul> | <p>Web and mobile web compatibility</p> <p>No integration</p>  | <p>Yes</p>                         | <p>Free for COVID-19 vaccine scheduling</p> <p>\$10 technology fee per COVID-19 test</p>   | <ul style="list-style-type: none"> <li>■ User-friendly</li> <li>■ Can specify number of lanes/immunizers for scheduling multiple pts within the same time slot</li> <li>■ Mobile web compatibility allows for ease of patient scheduling on <a href="#">myrx.io</a></li> </ul> |
| <p>SimplePractice</p> <p>Click <a href="#">here</a></p>  | <p>SimplePractice is designed for health and wellness professionals that offers a solution for patient scheduling, billing, and charting. Other features include telehealth video appointments, secure messaging, customizable paperless intake forms, free appointment reminders.</p>       | <ul style="list-style-type: none"> <li>■ Patient Appointment Reminders</li> <li>■ Ability to Set Pharmacy Available Hours for Appts</li> <li>■ Integration capabilities with calendars on the pharmacy's computers to allow for easy notification of new appointments</li> <li>■ Contains robust library of customizable intake forms, treatment plans, and assessments to document clinical encounters and keep track of patient progress. Also, create, submit, and track insurance claims and allow patients to make payments from their online client portal</li> <li>■ Allows for ability to collect payment for other services that aren't covid-19 vaccines</li> <li>■ No integration with pharmacy management systems</li> </ul>  | <p>iOS, Android, and web-based</p>   | <p>Yes</p> <p>Must sign a BAA.</p> | <p>Cost: Solo Practice: \$59/month-professional plan; additional \$10 per month per clinician for unlimited telehealth sessions</p> <p>Cost: Group Practice: \$98 for 2 clinicians and rate goes up with additional clinicians</p> | <ul style="list-style-type: none"> <li>■</li> </ul>  |