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Multi-State Partnership for Prevention 3
Chapter 1: Introduction

Welcome to PrepMod

PrepMod is a public health enterprise solution that provides tools for setting up and operating testing and vaccination clinics, managing clinic inventory, updating patient health records, generating reports, and more.

About This Manual

This user manual explains how to access and use PrepMod. Its intended audience is PrepMod users at all access levels.

Note: Depending on your assigned access level, some of the functions described in this document may not be available to you.

If you have any questions, please contact us at info@multistatep4p.com.

Ensuring Consent and Maintaining Privacy and Confidentiality

The data in this system is protected health information (PHI) and is considered a medical record.

- Ensure that all downloaded consents are signed.
- Do not share your password with anyone. All activity done under your username and password will be attributed to you.
- Always log out when you are done.
- Do not leave the computer unattended with this program open.
- Take caution to ensure that others cannot see the screen when the patient information is displayed.
- Any violation to the above will be cause for having your access revoked.

Disclaimer

Technical information in this document is subject to change without notice.

The Multi-State Partnership for Prevention reserves the right, in its sole discretion and without notice, to make substitutions and modifications to products and practices described in this document.
Chapter 2: Accessing PrepMod

Logging In

You need an email address and password to access PrepMod. Your administrator will enter you into the system, and you will receive an email with your login and temporary password. Your password is case-sensitive, so be sure to type it exactly as it appears in the email.

![Login page](image)

Protecting Your Password

*Important:* Never share your password with anyone. Be vigilant and aware of your surroundings at all times while using PrepMod.

Resetting Your Password

For privacy and security reasons, PrepMod does not store passwords. If you forget your password, you must create a new one by selecting **Forgot Password?** on the login page.

Timing Out

The system will time out after five minutes of inactivity. You must log back in to regain access.
Logging Out

Be sure to log out whenever you are away from the system. You can do this in either of the following ways:

- From the home page, select **Logout**.

- From any other PrepMod page, select **Logout** in the upper-right corner of the page.
Chapter 3: Setting Up Clinics

**Note:** Only users with appropriate permissions (such as system administrators) are able to create clinics.

Add a Clinic

1. Open the **Clinics Listing** page in either of the following ways:
   - From the home page, select **Manage Clinics and Users**.
   - From any other PrepMod page, select **Clinics** from the menu bar.

   ![Manage Clinics and Users](image)

   The **Clinics Listing** page displays.

2. Select **Create Clinic**.

   ![Clinics Listing](image)
The **Create Clinic** page displays.

3. Select the clinic type. Options include **General**, **Childhood**, **Flu**, and **School Flu Children & Adults**.

4. Select **Public** or **Private** to specify what type of clinic this is. Public clinics are visible to all users in the system. Private clinics are visible only to users who have permission to view them.

5. In the **Collect Insurance Information** area, indicate whether or not the patients’ insurance information will be collected at the clinic.

6. In the **Services Provided** area, select the services that will be provided by the clinic.

7. In the **Open to** area, select the groups to whom the clinic will be open.

8. Enter the clinic date, time, and location.

   **Tip:** To add additional dates and times, select **Add Another Date**.

9. In the **Appointment Information** section, select one of the following options to indicate whether appointments are available for the clinic:
   - **Yes, required**
   - **Yes, optional**
• No (Walk-In)

Then enter the social-distancing capacity, registration deadline, appointment frequency, and number of appointment slots. If you want to allow patients to register on the day of the clinic, select the check box provided.

10. In the **Contact Information** section, enter the name, e-mail, and phone number for the clinic’s contact person and backup contact person.

11. In the **Additional Clinic Details** section, enter any other pertinent information you feel is necessary.

12. In the **Registration and Staff** section, enter the lead tester’s name and other clinic staff.

**Tip:** To add additional staff, select **Add more staff.**

13. In the **Clinic Inventory** section, enter the clinic inventory as described in the following section, “**Add Inventory**.”
Chapter 4: Preparing for Clinics

Open the Clinics Listing Page

The Clinics Listing page is a list of all clinics to which you have access. From this page you have a number of options, including the ability to filter the list of clinics, view and edit a clinic, view registered patients, access the Clinic Activity Report, and generate customized reports.

You can access the Clinics Listing page in either of the following ways:

- From the home page, select Manage Clinics and Users.

- From any other PrepMod page, select Clinics from the menu bar.
PrepMod User Manual  Preparing for Clinics

The Clinics Listing page displays.

Filter the Clinics Listing Page

Select one of the following options at the top of the Clinics Listing page to filter the list by clinic status:

- **All**
- **Upcoming**
- **Past**
- **Closed**
Find an Upcoming Clinic

1. Open the Clinics Listing page by taking the steps in “Open the Clinics Listing Page” on page 11.

   The Clinics Listing page displays.

2. To filter the list to show only upcoming clinics, select the Upcoming filter.

   ![Clinics Listing](image)

3. Locate the clinic by scrolling through the list or by entering part of its name in the Search field.

   ![Clinics Listing](image)
View and Edit a Clinic

From the View/Edit Clinic page, you can make changes to the information that was entered when the clinic was created, as described in “Add a Clinic” on page 8.

1. Locate the clinic by taking the steps in “Find an Upcoming Clinic” on page 12.

2. Select View/Edit Clinic in the clinic’s row.

The View/Edit Clinic page displays.
3. Make changes to the clinic’s information as you see fit, and then select **Update** at the bottom of the page.

**View Registered Patients**

The Registration List shows the patients who have registered online for the clinic through the public site.

1. Locate the clinic by taking the steps in “**View an Upcoming Clinic**” on page 12.

2. Select **Registration List**.

![Clinics Listing](image)

The **Registration List** page displays.

![Registration List](image)
Generate a Spreadsheet of Registered Patients

You can download the Registration List as a CSV file. This file is great for monitoring new registrations, as it contains each patient’s date of registration, along with information from the patient’s consent form. You may sort the contents however you like and delete any unwanted columns.

1. Open the Registration List by taking the steps in “View Registered Patients” on page 15.

2. Select Download Registration List.

PrepMod generates a comma-separated values (CSV) file of registered patients and saves it to your Downloads folder.
View the Waiting List

The Waiting List page shows patients who signed up for the clinic after all available appointment slots were filled.

1. Open the Registration List by taking the steps in “View Registered Patients” on page 15.

2. Select See Waiting List.

The Patients Waiting List page displays.
Generate a Spreadsheet of the Waiting List

You can download the Waiting List in an Excel format. This file contains the same patient information as the Registration List.

1. Open the Registration List by taking the steps in “View Registered Participants” on page 15.

2. Select **Download Waiting List**.

PrepMod generates an Excel spreadsheet version of the Waiting List and saves it to your Downloads folder.
Invite a Patient on the Waiting List to Schedule an Appointment

If an appointment slot becomes available for a patient on the waiting list, you can invite them to register for the clinic.

1. Open the Waiting List by taking the steps in “View the Waiting List” on page 17.

2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.

3. Select Invite.

PrepMod sends an invitation to the patient. The invitation provides a link they can use to select an available appointment.
Schedule an Appointment for a Patient on the Waiting List

You can remove a patient from the waiting list by scheduling an appointment for them.

1. Open the Waiting List by taking the steps in “View the Waiting List” on page 17.

2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.

3. Select Move.

The Schedule patient appointment page displays.

4. Select an available appointment slot.

5. Select Move patient off waiting list.
PrepMod schedules the patient for the selected appointment and sends a notification to the patient.
View and Print a Patient’s History

From the Registration List or Waiting List, you can select a name to view the patient’s history stored in PrepMod.

1. Open the Registration List or Waiting List by taking the steps in “View Registered patients” on page 15.

2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.

3. Select the patient’s name.

The Patient History page displays.

4. To print the patient’s history, select Print.

From this page you also have the following additional options:

- To return to the Registration List, select Back to records.
- To view the patient’s consent form, select View Consent.
View and Print a Patient’s Consent Form

From the **Patient History** page, you can view and print the patient’s consent form.

1. Open the Registration List or Waiting List by taking the steps in “**View Registered patients**” on page 15.

2. Locate the patient by scrolling through the list or by entering part of their name in the **Search** field.

3. Select **View Consent**.

The patient’s consent form displays in your browser.
4. To download or print the form, use the icons in the upper-right corner of the page.
Refer a Patient for Services

When you refer a patient for testing or vaccination, PrepMod generates an access code and sends it to the patient to use in the registration form on the public site.

1. From the home page, select **Refer Patient for Services**.

![](Refer Patient for Services)

The **Create a COVID-19 Testing Referral** page displays.

2. Select the county and clinic in which the testing or vaccination will occur.

3. Enter the patient’s information.

4. To send the patient an invitation, select one or both of the invitation options (**SMS** or **Email**).
5. Select **Create**.

PrepMod sends an invitation to the patient that contains a unique URL they can use for registration.
Send Messages to Other PrepMod Users

Using PrepMod’s Message Board, you can send clinic-related messages to other PrepMod users. For example, if a clinic is coming up soon and you realize you have a shortage of tests or PPE, you can contact local providers or health departments to see if someone can help.

1. Open the Message Board in either of the following ways:

   - From the home page, select **Send a Message**.

   ![Send a Message](image)

   - From any other page, select **Message Board** from the menu bar.

   ![PrepMod Message Board](image)

   The **Message Board** page displays.

2. Enter a subject and the text of the message.

3. Select the users to whom you want to send the message.

   **Note:** Because the Message Board can be customized by each PrepMod customer, the options in the **Send Message to** list may differ for your organization.
4. Select **Submit Message**.

![Message Board](image.png)

**Note:** In many cases, messages must be approved by a regional administrator, but because this is customizable by each PrepMod customer, this requirement may differ for your organization.
Chapter 5: Clinic Day Operations

Enter Clinic Staff

On the day of the clinic, one of your first actions will be to open the View/Edit Clinic page and make sure the appropriate clinic staff are entered.

1. Open the View/Edit Clinic page by taking the steps in “View and Edit a Clinic” on page 14.

2. Scroll down to the Registration and Staff section and enter the names of the lead tester and clinic staff.

3. To add additional staff, select Add more staff and enter another name. Repeat this step as many times as necessary.

4. Select Update.
Add Vaccine Inventory

1. Open the **View/Edit Clinic** page by taking the steps in “View and Edit a Clinic” on page 14.

2. Scroll down to the **Clinic Inventory** section of the **Create Clinic** page and select an item from the inventory list.

   **Tip:** Enter part of the inventory item’s name in the search field to locate it quickly.

   The item’s lot number, type, and expiration date display.

3. Select **Add Item**.

   ![Clinic Inventory Table](image)

   The item is added to the clinic inventory.

4. In the **# of Items** column, enter the number of items at the clinic.

   ![Clinic Inventory Table](image)

5. Repeat steps 1 – 3 to add additional items.
6. Take one of the following actions:

- If you are creating a new clinic, select **Submit**.
- If you are adding inventory to an existing clinic, select **Update**.

![Clinic Inventory Table]

7. The clinic is updated.
Entering Clinic Outcomes

Open the Clinic Activity Form

The Clinic Activity Form page is where you enter information about clinic encounters.

1. Open the Clinics Listing page in either of the following ways:
   - From the home page, select Manage Clinics and Users.
   - From any other PrepMod page, select Clinics from the menu bar.

2. Locate the clinic that you wish to view or edit by scrolling through the list or by entering the clinic name in the Search field.

3. Select Clinic Activity.
The **Clinic Activity Form** page displays.

**Tip:** You can also access this page by selecting **Activity Form** from the clinic menu.

### Document Patient Outcomes

1. Open the **Clinic Activity Form** page by taking the steps in “**Open the Clinic Activity Form**” on page 32.

2. In the list of tests or vaccines, select the **Default** button next to the test or vaccine you want to be your default. This is the one that will be selected by default when you are entering results for each patient, so you should select the one that was used the most.

**Note:** If your clinic is using only one test or vaccine, there is no need to specify a default.
3. Scroll down to the list of patients and document the test or vaccination outcome for the patient by taking the following steps:

A. Locate the patient by scrolling through the list or by entering part of their name in the Search Here field.

B. Administer the test or vaccine or directly to the screen if vaccination does not occur.

C. Select one of the following outcomes for the patient:
   - Vaccinated
   - Refused
   - Sick
   - Absent/Withdrawn

   **Note:** These outcomes are for vaccinations. The available outcomes will differ for testing.

D. If you selected Vaccinated, a popup window displays. If necessary, use the list boxes in this window to update the details about the patient’s vaccination and then select Update.

E. To add notes to the encounter, select Remark in the patient’s row. Then enter the remark in the popup window and select Update.

**Complete the Clinic Activity Form**
When the clinic has officially closed, add the final data to complete the Clinic Activity Form.

1. Open the Clinic Activity Form page by taking the steps in “Open the Clinic Activity Form” on page 32.

2. Select the clinic start and end times.

3. In the Clinic Incidents or Comments field, at the conclusion of the clinic, enter any incidents or comments you think are important to save to the clinic record.

4. Select Save.
The Virtual Queue

Please add a note that the use of the Virtual Queue is optional and that Clinic Activity Form for Clinic Day is used when not using Virtual Queue (you wordsmithing here would be appreciated)

How the Virtual Queue Works
Here’s an overview of how PrepMod’s Virtual Queue automates the check-in and check-out process for clinic patients:

1. Prior to clinic day, PrepMod sends each patient a link they can use to let the system know they have arrived at the clinic.

2. When the patient arrives at the clinic and clicks the link from their mobile device they are checked in and PrepMod sees that the patient is present.

3. Clinic staff open the clinic for check-in. See “Activate the Virtual Queue” on page 36 for more information.) PrepMod notifies the checked-in patients in order of their arrival and invites them into the clinic in intervals.

4. Clinic staff open the clinic so that patients can begin coming into the clinic. See “Open the Clinic” on page 40 for details.

5. When a patient enters the clinic, staff mark the patient as arrived.

6. Clinic staff administer the test or vaccine and record the results on the Clinic Activity Form. See “Entering Clinic Outcomes” on page 32 for more information.

7. When the patient encounter is saved the system invites in the next patient.

**Note:** The Virtual Queue is based on check-in time and appointment time. PrepMod expects patients to arrive 15 minutes before their scheduled appointment time. If a patient shows up late and checks in, they will be moved to the bottom of the Checked In list.
Activate the Virtual Queue

1. From the home page, select Start Clinic – Virtual Queue.

![Start Clinic Virtual Queue](image)

The Activate Virtual Queue page displays. This page lists all upcoming clinics to which you have access.

2. Find the clinic that you wish to start by scrolling through the list or by entering the clinic name in the Search field.

3. Select Start in the clinic’s row.

![Activate Virtual Queue](image)

The Start Virtual Queue page displays.

4. If necessary, update the clinic’s social distancing capacity. The default value in this field is the one that was entered when the clinic was created in PrepMod.
5. Select **Start Virtual**.

The **Manage Virtual Queue** page displays.

**Tip:** You can also access this page by selecting **Virtual Queue** from the clinic menu.

6. Select **Open for Check In**.
7. In the confirmation dialog that displays, select **Open for Check In**.

The **Manage Virtual Queue** page redisplay. The clinic status is now **Opened for Check In**. PrepMod sends notifications to patients who are scheduled for the first appointment slot so that they can check in using their mobile devices.
Check in a Patient
If a patient is unable to check in themselves with their mobile device, you can check them in yourself from the virtual queue:

1. Open the Manage Virtual Queue page.
2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.
3. Select Check In in the patient’s row.

The patient is moved to the Checked In list.
Open the Clinic
After you have opened the clinic for check-in and patients have begun checking in, you are ready to open the clinic so that patients can begin coming into the clinic.

1. Open the **Manage Virtual Queue** page.

2. Select **Open Clinic**.

3. In the confirmation dialog that displays, select **Open Clinic**.

![Manage Virtual Queue](image)

Are you sure you want to open this clinic?

[Open Clinic]  [Cancel]
PrepMod changes the clinic status to **Opened** and begins notifying patients that they may come into the clinic for services.

**Note:** When notifying patients that they may come into the opened clinic, PrepMod ensures that only the allowed number of patients is in the clinic at any given moment given your social-distancing capacity.

---

**Manage Virtual Queue**

Appeal Elementary School

**Clinic Status:** Opened

- Total Registered: 29
- Social Distancing Capacity: 4 (update)
- Pause Automation
- Close Clinic
- Reopen for Check-In Only
- Add Patient +

**Filter:**
- All
- Not Checked In (16)
- Canceled (1)
- Checked In (0)
- Invited (1)
- At Clinic (1)
- Completed (10)
- Pending (0)

**Not Checked In**

<table>
<thead>
<tr>
<th>Appointment Time</th>
<th>Name</th>
<th>Date of Birth</th>
<th>Queue State</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00 AM</td>
<td>Marco Brokus</td>
<td>01/04/1956</td>
<td>Not Checked In</td>
<td>Check In, Cancel</td>
</tr>
<tr>
<td>12:00 AM</td>
<td>Kirby Langosh</td>
<td>08/13/1966</td>
<td>Not Checked In</td>
<td>Check In, Cancel</td>
</tr>
<tr>
<td>12:00 AM</td>
<td>Ignacio Simons</td>
<td>10/03/1999</td>
<td>Not Checked In</td>
<td>Check In, Cancel</td>
</tr>
</tbody>
</table>
Manually Add a Patient
If your clinic accommodates walk-in patients, you can manually add them to the clinic.

1. Open the Manage Virtual Queue page.

2. Select Add Patient.

The Add a Patient window displays.

3. Select a patient, clinic date, and appointment slot.

4. Select Save.
Pause Automation

When you need to temporarily stop the clinic—for example, when staff are taking a lunch break—you can pause the automated actions of the virtual queue.

1. Open the Manage Virtual Queue page.

2. Select Pause Automation.

3. In the confirmation dialog that displays, select Pause Automation.

Tip: To resume the virtual queue, select Resume Automation.
Filter the Virtual Queue
Near the top of the Manage Virtual Queue page is series of buttons that allow you to filter the list of patients according to their status.

The available filters are as follows:

- **All** – All patients who are registered for the clinic.
- **Not Checked In** – Patients who have not checked in.
- **Canceled** – Patients whose appointments have been canceled.
- **Checked In** – Patients who have check in.
- **Invited** – Patients who have been invited to come in.
- **At Clinic** – Patients who are being seen in the clinic.
- **Completed** – Patients who have completed testing or vaccination and left the clinic.
- **Pending** – Patients who have still not entered the clinic after they were invited and sent a follow-up reminder.
Cancel an Appointment
From the **Manage Virtual Queue** page, you can cancel a patient’s appointment by selecting **Cancel** in the row of the appointment.

Reinstate a Canceled Appointment
1. From the **Manage Virtual Queue** page, select the **Canceled** filter, or just scroll down to the list of canceled appointments.
   
   The list of canceled appointments displays.
2. Select **Reinstate** in the row of the appointment.
   
   The patient is moved from the **Canceled** list to the **Not Checked In** list.

Registration List
The Registration List shows the patients who have registered online for the clinic through the public site. For more information about this feature, see the following sections of Chapter 3, “Preparing for Clinics”:

- “**View Registered Patients**” on page 15
- “**Generate a Spreadsheet of Registered Patients**” on page 16
- “**View the Waiting List**” on page 17
- “**Generate a Spreadsheet of the Waiting List**” on page 18

View and Print a Patient’s History
From the Registration List and Waiting List, you can select a patient’s name to view their history based on what has been entered in PrepMod.

For more information see the “**View and Print a Patient’s History**” section of Chapter 3, “Preparing for Clinics,” on page 19.

For instructions on removing an event from a patient’s history, see “**Delete an Event from the Patient’s History**” on page 60.
Upload Patient Records

You can upload patient immunization records or manually recorded clinic results into PrepMod.

1. Populate the CSV file with patient data and clinic results.

2. From the menu bar, select **Upload Records**.

3. The **Upload Records** page displays.

4. Select **Choose File** and select the CSV file.

5. Select **Upload**.
Run the Clinic Activity Report

The Clinic Activity Report provides a summary of your clinic. You should complete this report after all patients have received services.

1. From the clinic menu, select **Activity Report**.

2. To download the report, select **Export in PDF** or **Export in Excel**.
Email a Vaccination Record to a Patient

From the Registration List or Waiting List, you can email a patient’s vaccination record to them.

1. Open the Registration List by taking the steps in “View Registered Patients” on page 15.

2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.

3. Select Email Vaccination Record in the patient’s row.

PrepMod emails the vaccination to the patient.
Bulk-Email Vaccination Records to All Patients

From the Registration List or Waiting List, you can email vaccination records to all clinic patients at once.

1. Open the Registration List by taking the steps in “View Registered Patients” on page 15.

2. Select **Bulk Email Vaccination**.

PrepMod emails vaccination records to all patients who received vaccinations at the clinic.
Run Customized Reports

You can generate customized reports after the conclusion of your clinic.

1. Open the Clinics Listing page in either of the following ways:
   - From the home page, select Manage Clinics and Users.
   - From the menu bar, select Clinics.

   The Clinics Listing page displays.

2. Locate the clinic that you wish to view or edit by scrolling through the list or by entering the clinic name in the Search field.


   The New Customized Report page displays.

   Tip: You can also access this page by selecting Customized Report from the clinic menu.

4. Select the patients and fields you want included in the report.
5. Generate the report as a PDF or in an Excel format by selecting the appropriate button.

PrepMod creates the report. If you chose the PDF option, the report displays in your browser. If you chose the Excel option, PrepMod saves the file to your Downloads folder.
Chapter 6: Other Administrative Functions

Add a User

1. From the menu bar, select Create New User.

The Create New User page displays.

2. Enter the user’s name and email. Then select their county, organization, venue, and their role in the system.

Tip: You may select multiple counties, organizations, and venues. To select all, use the Select All button.

3. Select Send an invitation.
PrepMod sends the user an email with instructions for accessing the system.

Delete Records

**Note:** In addition to administrators, users in the role of Lead Staff also have the ability to delete records.

You should delete records only for the following two reasons:

- A duplicate record exists.
- The patient or their guardian requests that they be removed from the clinic.

**Important:** Delete a duplicate record only if you have confirmed that the record you are keeping has complete information.

1. From the menu bar, select **Clinics**.

   ![PrepMod User Interface](image)

   The **Clinics Listing** page displays.

2. Locate the clinic for which you want to delete a record by scrolling through the list or by entering its name in the **Search** field.

3. Select **Registration List** in the clinic’s row.

   ![Clinics Listing](image)

   The **Registration List** page displays.

4. Locate the patient by scrolling through the list or by entering part of their name in the **Search** field.
5. Select **Delete** in the patient’s row.

![Registration List](image)

6. Select **Delete** in the confirmation dialog that displays.

![Confirmation Dialog](image)

Are you sure you want to delete this patient *(Noriko Casper)* from the clinic? You will not be able to recover once you have deleted.

[Delete] [Cancel]
Close Out a Clinic

1. Open the **Activity Form** page.

2. In the **Clinic End Time** field, enter the approximate time you administered the last test or vaccine.

3. In the **Clinic Incidents or Comments** field, type any incidents or comments you feel are important to add to the record.

4. Enter the ending statistics for each test or vaccine:
   - Number administered
   - Number of unusable tests or doses
   - Number of tests or doses returned

5. Take one of the following actions:
   - To simply save your changes, select **Save**.
• To both save your changes and submit the clinic activity to your vaccine information system (VIS) or to an electronic health record (EHR) system, select **Save and Submit**. Notifications may also be sent to patients of the clinic.

**Note:** Because the actions taken by the **Save and Submit** button can be customized by each PrepMod customer, the results of this step may differ for your organization.

---

**Enroll a Provider or Business**

When a provider submits an enrollment request through the public site, the request will show up on the **Provider and Business Enrollment** page. You can then review the submitted information and approve the request, deny it, or contact the submitter for more information.

1. From the home page, select **Enroll Provider or Business**.

The **Provider and Business Enrollment** page displays.

2. Locate the provider or business by scrolling through the list or by entering part of their name in the **Search** field.

3. Select **Review Request**.
The provider’s or business’s request displays.

![Image of PrepMod interface]

4. Review the request for accuracy and completeness and then take one of the following actions:

- **Accept** – Accepts the request and adds the provider or business to the system. The request will remain in the system in case you need to access it again. PrepMod also sends a notification to the submitter to let them know they have been accepted.

- **Deny** – Denies the request and sends a notification to the submitter to let them know they have been denied.

- **Need More Information** – Marks the request as incomplete so that you can contact the submitter to obtain the missing information. PrepMod sends a notification to the submitter to let them know more information is needed.

- **Cancel** – Returns you to the **Provider and Business Enrollment** page.

**Note:** Notifications sent to providers and businesses can be customized by your organization.
Submit an Enrollment Request for a Provider or Business

If you provide printed enrollment forms for providers or businesses to fill out and submit, you can use the information on the completed form to submit an electronic enrollment request for them.

1. From the home page, select **Enroll Provider or Business**.

   ![Enroll Provider or Business](image)

   The **Provider and Business Enrollment** page displays.

2. Select **Add New Provider/Business**.

   ![Provider and Business Enrollment](image)

<table>
<thead>
<tr>
<th>Request Date</th>
<th>Entity Name</th>
<th>Entity Type</th>
<th>County</th>
<th>Requested Service</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/20/2020</td>
<td>Practice Name 0</td>
<td>Provider</td>
<td>Prince George</td>
<td>Anti-Virals/Medication, Screening, Other</td>
<td>Review Request</td>
</tr>
<tr>
<td>08/20/2020</td>
<td>Practice Name 1</td>
<td>Provider</td>
<td>Queen Anne</td>
<td>Screening, Testing, Other, Anti-Virals/Medication, Vaccinations, Safety Kit Distribution</td>
<td>Review Request</td>
</tr>
<tr>
<td>08/20/2020</td>
<td>Practice Name 2</td>
<td>Provider</td>
<td>Talbot</td>
<td>Testing, Safety Kit Distribution, Anti-Virals/Medication, Screening</td>
<td>Review Request</td>
</tr>
</tbody>
</table>
The Request to Become a COVID-19 Service Provider page displays.

3. Select your preferred language in the upper-right corner of the page (EN for English (default) or ES for Spanish).

4. Enter the provider’s or business’s information in the provided fields.

   **Note:** Required fields are indicated by a red asterisk.

5. Select Submit Request.

   The request is submitted. It will now appear in the list of requests on the Provider and Business Enrollment page.

6. Finish processing the request by taking the steps in “Enroll a Provider or Business” on page 56.
Delete an Event from a Patient’s History

Administrators can delete events from the patient history stored in PrepMod.

1. Open the Patient History page by taking the steps in “View and Print a Patient’s History” on page 19.

2. Select Delete in the row of the event you wish to remove.

3. In the confirmation dialog that displays, select Delete.

Are you sure you want to delete this clinic event? You will not be able to recover once you have deleted.

PrepMod removes the clinic event from the patient’s history.
Inventory Management

Open the Inventory Management Page
The **Inventory Management** page lists all supplies saved in the system. The items listed on this page are the pool from which users may select when adding inventory items to a clinic.

You can access the **Inventory Management** page in either of the following ways:

- From the home page, select **Inventory Management**.

- From any other PrepMod page, select **Inventory Management** from the menu bar.
Add Supplies Manually

You have two options for adding supplies to the inventory. You can enter them manually one by one by following the instructions in this section, or you can upload them in bulk from an Excel spreadsheet, as explained in “Add Supplies Via File Upload” on page 63.

1. Open the Inventory Management page. See “Open the Inventory Management Page” on page 61 for instructions.

   ![Inventory Management Page]

2. In the fields at the top of the page, enter details about the item.

3. To upload an information sheet, select Choose File and then select the sheet.

4. Select Create.

   The item is added to the inventory list.

<table>
<thead>
<tr>
<th>Item</th>
<th>Date Received</th>
<th>Item Type</th>
<th>Item Name</th>
<th>Manufacturer</th>
<th>Source</th>
<th>Lot Number</th>
<th>Expiration Date</th>
<th>Starting Qty</th>
<th>Qty Used</th>
<th>Qty Lost</th>
<th>Qty Loaned</th>
<th>Current Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polio</td>
<td>07/21/2020</td>
<td>VFC</td>
<td>Steckman, Hulvawon</td>
<td>MedImmune</td>
<td>VFC</td>
<td>B0100GJ55G</td>
<td>08/30/2020</td>
<td>162</td>
<td>Other</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>PCR</td>
<td>07/21/2020</td>
<td>VFC</td>
<td>White-Scharer</td>
<td>Seqiris</td>
<td>VFC</td>
<td>B0104BXMNH</td>
<td>08/26/2020</td>
<td>109</td>
<td>Unit</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Varicella (chickenpox)</td>
<td>07/21/2020</td>
<td>VFC</td>
<td>Collabor</td>
<td>Seqiris</td>
<td>Borrowed</td>
<td>B0100PHSL</td>
<td>09/16/2020</td>
<td>160</td>
<td>Box</td>
<td>132</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Hepatitis B</td>
<td>07/21/2020</td>
<td>VFC</td>
<td>Graham Lab</td>
<td>Sanofi Pasteur</td>
<td>Other</td>
<td>B0100499WK</td>
<td>08/20/2020</td>
<td>128</td>
<td>Unit</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Serological</td>
<td>07/21/2020</td>
<td>VFC</td>
<td>Pausch-Flatley</td>
<td>Pfizer</td>
<td>Other</td>
<td>B0100A2UKU</td>
<td>09/10/2020</td>
<td>188</td>
<td>Other</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Add Supplies via File Upload
You can add multiple inventory items at once by uploading a spreadsheet that contains information about the supplies.

1. Open the **Inventory Management** page. See “Open the Inventory Management Page” on page 61 for instructions.

2. Select **Upload Supplies**.

![Inventory Management](image)

The **Import Supplies** page displays.

3. If you haven’t already done so, select **Download Headers in Excel** to download a spreadsheet that contains the headers required for the upload, and then populate the spreadsheet with the records you wish to import.

4. Select **Choose File** and then select the Excel file.

5. Select **Upload**.

![Import Supplies](image)

*Note: Only import spreadsheets with appropriate headers.*

PrepMod uploads the inventory records.
Tip: After adding inventory items via file upload, you can then add an information sheet for each item by editing it. See “Edit an Inventory Item” for more information.

Edit an Inventory Item
You can edit an inventory item to modify its details or upload an information sheet.

1. Open the Inventory Management page. See “Open the Inventory Management Page” on page 61 for instructions.

2. Locate the inventory item by scrolling through the list or by entering part of its name in the Search field.

3. Select Edit in the inventory item’s row.

The Edit Inventory page displays.

4. Edit the item’s details as you see fit.

5. Select Update.
**View an Item’s Inventory Detail**

An item’s inventory detail is a history of changes to its inventory amounts through the

1. Open the **Inventory Management** page. See “Open the Inventory Management Page” on page 61 for instructions.

2. Locate the inventory item by scrolling through the list or by entering part of its name in the **Search** field.

3. In the list of supplies, select the name of the item you wish to update.

The item’s inventory detail displays.

**Tip:** To view an item’s information sheet, select the **View Information Sheet** link.
Edit or Delete an Event in an Item’s Inventory Detail

1. Open the item’s inventory detail by taking the steps in “View an Item’s Inventory Detail” on page 65.

2. In the list of events, locate the one you wish to edit or delete.

3. Take one of the following steps:

   - To edit the event, select Edit, make your changes, and then select Update Entry.

   ![Edit Entry for Hammes, Will and Bergstrom (Received 02-07-2020)](image)

   - To delete the event, select Delete and then select OK in the confirmation dialog.

   PrepMod updates or removes the event and updates the remaining quantity accordingly.
Synchronize Supply Data

Take the following steps to synchronize the supply data in PrepMod with your immunization system’s data.

1. Open the Inventory Management page. See “Open the Inventory Management Page” on page 61 for instructions.

2. In the list of supplies, locate the items you want to synchronize and select the check box in the Select Item column for each one.

3. Select Sync Selected Data.

PrepMod synchronizes the selected data with your immunization system’s data.
Remove an Inventory Item from a Clinic

If a decision is made not to use an inventory item that was already added to a clinic, you can remove the item from the clinic.

1. Open the View/Edit Clinic page by taking the steps in “View or Edit a Clinic.”

2. Scroll down to the Clinic Inventory section.

3. From the list of inventory items, select Remove in the row of the item you wish to remove from the clinic.

4. Select Update.

PrepMod removes the item from the clinic inventory.
Add an Inventory Item Type

1. From the menu bar, select Item Type.

   ![Image of menu bar with Item Type selected]

   The Item Type Management page displays.

2. Enter a name for the item type.

3. Select Create.

   ![Image of Item Type Management with create button highlighted]

   The item type is added to the list. The new item type will be available for selection when you are adding or editing inventory items.
Edit an Item Type

1. From the menu bar, select **Item Type**.

The **Item Type Management** page displays.

2. Locate the item type you wish to edit by scrolling through the list or by entering its name in the **Search** field.

3. Select **Edit** in the item type’s row.

4. Edit the item type’s name as you see fit.

5. Select **Update**.
Delete an Item Type

**Note:** You cannot delete an item type if it has any associated inventory items.

1. From the menu bar, select **Item Type**.

![Image of PrepMod interface with Item Type highlighted]

The **Item Type Management** page displays.

2. Locate the item type you wish to edit by scrolling through the list or by entering its name in the **Search** field.

3. Select **Delete** in the item type’s row.

![Image of Item Type Management page with selected item and delete action highlighted]

PrepMod deletes the item type. It will no longer be available for selection when you are adding or editing inventory items.
**Add a Manufacturer**

1. From the menu bar, select **Manufacturer**.

   ![Manufacturer Management page](image)

   The **Manufacturer Management** page displays.

2. Enter a name for the manufacturer.

3. Select **Create**.

   ![Manufacturer Management form](image)

   The manufacturer is added to the list. The new manufacturer will be available for selection when you are adding or editing inventory items.
Edit a Manufacturer

1. From the menu bar, select **Manufacturer**.

   ![Menu Bar Screenshot](image)

   The **Manufacturer Management** page displays.

2. Locate the manufacturer you wish to edit by scrolling through the list or by entering its name in the **Search** field.

3. Select **Edit** in the manufacturer’s row.

   ![Manufacturer Management Page](image)

4. Edit the manufacturer’s name as you see fit.

5. Select **Update**.
Delete a Manufacturer

**Note:** You cannot delete a manufacturer if it has any associated inventory items.

1. From the menu bar, select **Manufacturer**.

   ![Manufacturer Management Page](image)

   The **Manufacturer Management** page displays.

2. Locate the manufacturer you wish to edit by scrolling through the list or by entering its name in the **Search** field.

3. Select **Delete** in the manufacturer’s row.

   ![Manufacturer Management List](image)

   PrepMod deletes the manufacturer. It will no longer be available for selection when you are adding or editing inventory items.
Managing Counties and Organizations

Add a County or Municipality

1. From the menu bar, select Counties.

   ![Counties page]

   The Counties page displays.

2. Select Create County.

   ![Counties table]

   The County Information page displays.

3. Enter the county name.
4. Select **Create County**.

The county is added to the list.

**Edit a County Name**

1. From the menu bar, select **Counties**.

The **Counties** page displays.

2. Locate the county you wish to edit, and click the **Edit** icon in its row.

The **County Information** page displays.

3. Edit the county name as you see fit.
4. Select **Update County**.

![County Information]

**Delete a County**

1. From the menu bar, select **Counties**.

   ![Menu Bar]

   The **Counties** page displays.

2. Locate the county you wish to delete, and click the **Delete** icon in its row.

   ![Counties Table]
3. In the confirmation dialog that displays, select **Yes**.

![Confirmation Dialog]

---

**Add an Organization**

1. From the menu bar, select **Counties**.

   ![Menu Bar]

   The **Counties** page displays.

2. Locate the county under which you wish to add the organization, and click its name.

   ![Counties Page]

   The **County Information** page displays.
3. Select **Add Organization**.

The **Organization Information** page displays.

4. Enter the organization’s name.

5. Select **Create Organization**.

The organization is added to the county.
Edit an Organization’s Name

1. From the menu bar, select **Counties**.

The **Counties** page displays.

2. Locate the county in which the organization is located, and click its name.

The **County Information** page displays.
3. Click the **Edit** icon in the organization’s row.

4. Edit the organization’s name as you see fit.

5. Select **Update Organization**.
Delete an Organization

1. From the menu bar, select **Counties**.

   The **Counties** page displays.

2. Locate the county in which the organization is located, and click its name.

   The **County Information** page displays.
3. Click the **Delete** icon in the organization’s row.

4. In the confirmation dialog that displays, select **Yes**.

![Confirmation dialog](image)

Are you sure you want to delete this organization?

- Yes
- Cancel
Add a Venue

1. From the menu bar, select Counties.

   ![Counties Page](image)

   The Counties page displays.

2. Locate the county under which you wish to add the venue, and click its name.

   ![County Information Page](image)

   The County Information page displays.

3. Locate the organization under which you wish to add the venue, and click its name.

   ![Organization Information Page](image)

   The Organization Information page displays.
4. Select **Add Venue**.

The **Venue Information** page displays.

5. Enter the venue’s name, address, location information, and category.

6. Select **Create Venue**.

The venue is added to the organization.
Edit a Venue

1. From the menu bar, select Counties.

The Counties page displays.

2. Locate the county in which the venue is located, and click its name.

The County Information page displays.

3. Locate the organization to which the venue belongs, and click its name.

The Organization Information page displays.
4. Locate the venue you wish to edit, and click the **Edit** icon in its row.

![Venues Table]

The **Venue Information** page displays.

5. Edit the venue as you see fit.

6. Select **Update Venue**.
Chapter 7: Download Records

Download News and Notifications Signups

To download a CSV file of people and organizations that have signed up for news and notifications through the public site, take the following steps.

1. From the menu bar, select **Download Records**.

   ![PrepMod User Interface](image)

   The **Download Records** page displays.

2. Under “Download News and Notifications Signups,” select **CSV Download**.

   ![CSV Download Button](image)

   PrepMod saves the file to your **Downloads** folder.
Download Clinic Results

You can download clinic results in the form of a CSV file.

1. From the menu bar, select **Download Records**.

The **Download Records** page displays.

2. Under “Download Clinic Results,” select a county and location.

3. Select **Download**.

PrepMod saves the file to your **Downloads** folder.