



# User Manual

October 2020



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# Chapter 1: Introduction

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## 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](mailto: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.

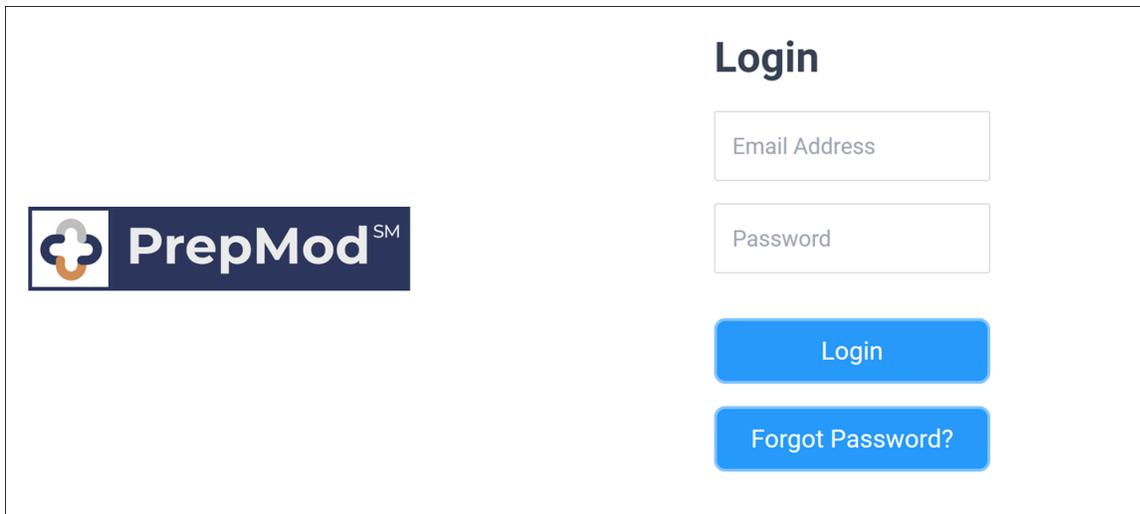
The Multi-State Partnership for Prevention reserves the right, in its sole discretion and without notice, to make substitutions and modifications to products and practices described in this document.

## Chapter 2: Accessing PrepMod

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### 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.

A screenshot of the PrepMod login page. On the left is the PrepMod logo, which consists of a blue square with a white cross and a small orange circle at the bottom left, followed by the text "PrepMod<sup>SM</sup>" in white on a dark blue background. To the right of the logo is the word "Login" in bold black text. Below "Login" are two input fields: the first is labeled "Email Address" and the second is labeled "Password". Below the input fields are two blue buttons: the top one is labeled "Login" and the bottom one is labeled "Forgot Password?".

**Login**

Email Address

Password

Login

Forgot Password?

### 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.

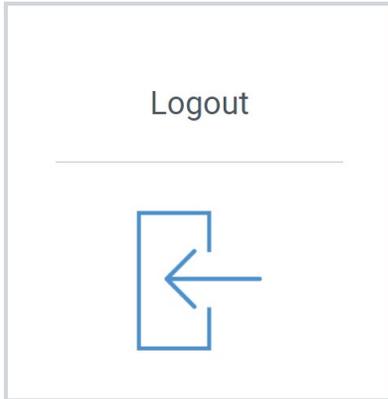
### Timing Out

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

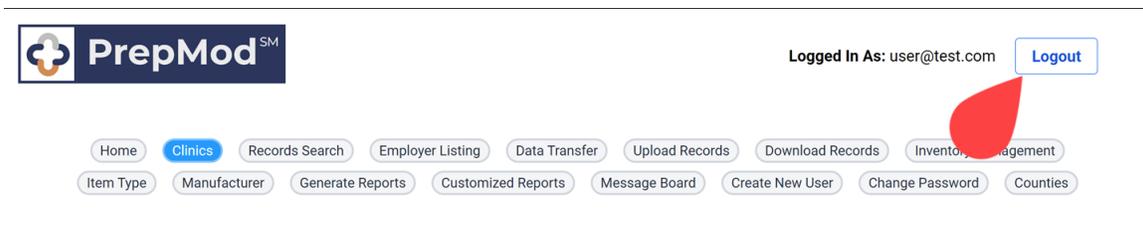
## Logging Out

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.

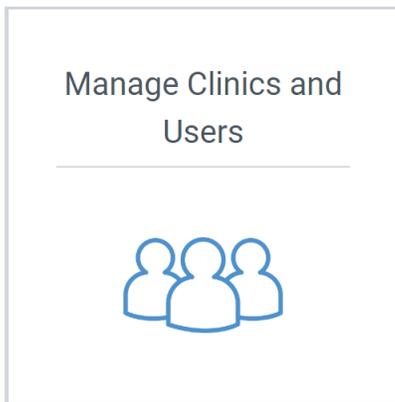


## Chapter 3: Setting Up Clinics

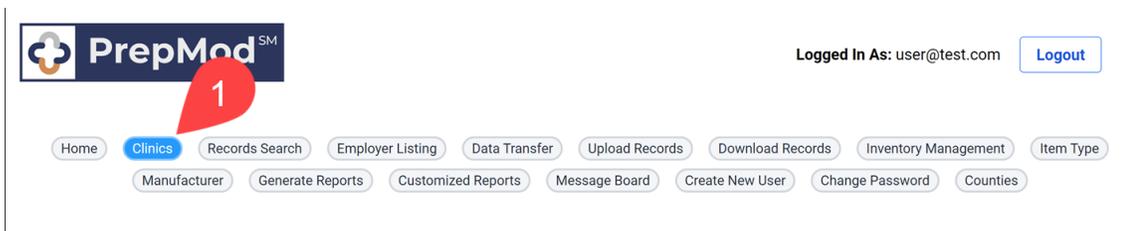
**Note:** Only users with appropriate permissions (such as system administrators) are able to create clinics.

### 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.



The **Clinics Listing** page displays.

2. Select **Create Clinic**.

Date ↓	County ↓	Venue Name ↓	Registered ↓	Menu	Action
08/24/2020	Carroll	Century High	1	<a href="#">» Registration List</a> <a href="#">» View/Edit Clinic</a>	<a href="#">Delete</a>
08/24/2020	Calvert	St. Leonard Elementary School	3	<a href="#">» Registration List</a> <a href="#">» View/Edit Clinic</a>	<a href="#">Delete</a>

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**.

**Create Clinic**

Number of Patients Registered: 0

**Clinic Type \*** 3  
 General

**Is clinic public or private? \*** 4  
 Public  Private

**Collect Insurance Information? \*** 5  
 Yes  No

**Services Provided \*** 6  
 Testing  Vaccination  Screening  
 Anti-Viral Distribution

**Open to \*** 7  
 All Ages  Children  Adults  
 Seniors  Other

County \* Organization \* Venue \*  
 Select Select an Option Select an Option

Setting  
 Select

**Date, Time, Location** 8

Clinic Date \* Start Time \* End Time \* Address \*  
 9:00 AM 5:00 PM

**Add Another Date**

Zip Code \* City \* State \*

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.

**Appointment Information**

Appointments available \*

Yes, required  Yes, optional  No (Walk-In) 9

Social Distancing Capacity  Registration Deadline \*

Allow registrations on the same day (This will re-open registrations on the date of the clinic even if registration deadline has passed).

Appointment Frequency (in minutes): Every \*  Appointment Slots \*

---

**Contact Information** 10

Contact Person  Contact Phone Number

Contact E-mail  Back-Up Contact Person

Back-Up Contact Phone Number  Back-Up Contact E-mail

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**.

**Additional Clinic Details**

Incidents Comments (This information will be displayed publicly in the clinics listings)

11

---

**Registration and Staff** 12

Lead Tester's Name

Clinic Staff  ✕

[Add more staff](#)

13. In the **Clinic Inventory** section, enter the clinic inventory as described in the following section, [“Add Inventory.”](#)

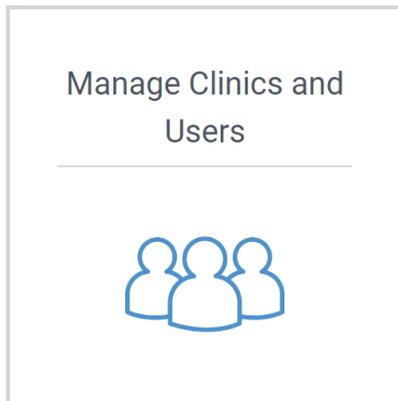
## Chapter 4: Preparing for Clinics

### Open the Clinics Listing Page

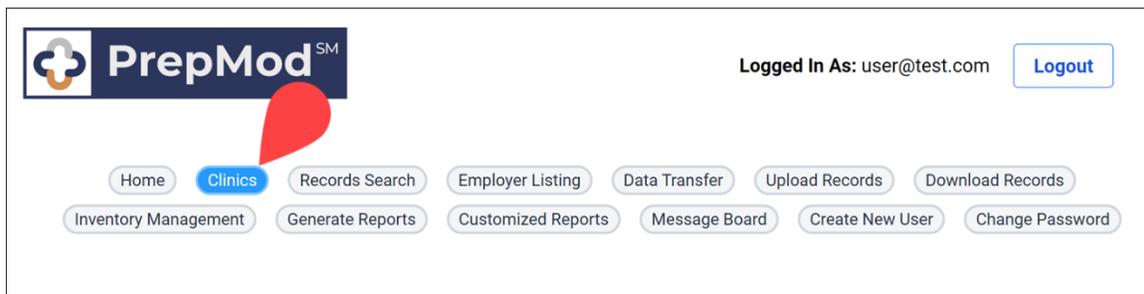
The **Clinics Listing** page is a list of all clinics to which you have access. From this page you have a number of options, including the ability to [filter the list of clinics](#), [view and edit a clinic](#), [view registered patients](#), [access the Clinic Activity Report](#), and [generate customized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



The **Clinics Listing** page displays.

**Clinics Listing**

Search:   All  Upcoming  Past  Closed Create Clinic

Date	County	Venue Name	Registered	Menu	Action
08/24/2020	Calvert	St. Leonard Elementary School	3	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/24/2020	Carroll	Century High	1	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/25/2020	Carroll	Career and Tech Center	1	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/26/2020			0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/28/2020			0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/29/2020	Howard	Centennial High School	0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
08/29/2020	Calvert	Appeal Elementary Schoole	0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>

## 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**

**Clinics Listing**

Search:   All  Upcoming  Past  Closed Create Clinic

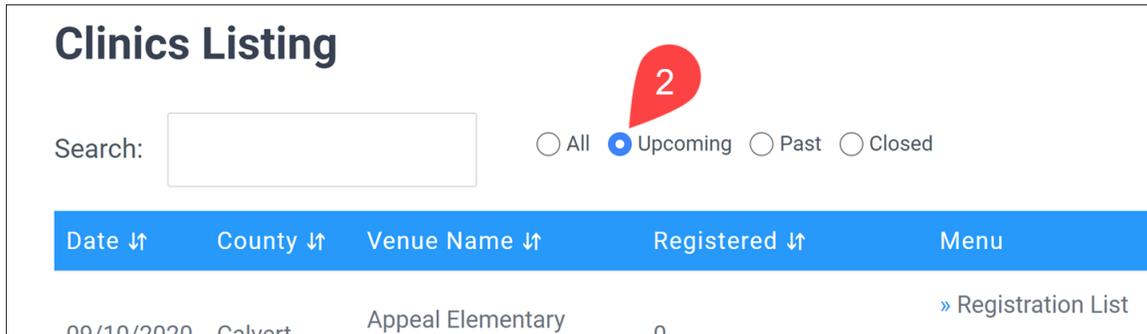
Date	County	Venue Name	Registered	Menu	Action
09/11/2020	Calvert	Calverton School	1	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
09/12/2020	Calvert	Calvert County Health Department	0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>
09/12/2020	Calvert	Appeal Elementary Schoole	0	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report <span>Delete</span>

## Find an Upcoming Clinic

1. Open the **Clinics Listing** page by taking the steps in [“Open the Clinics Listing Page”](#) on page 11.

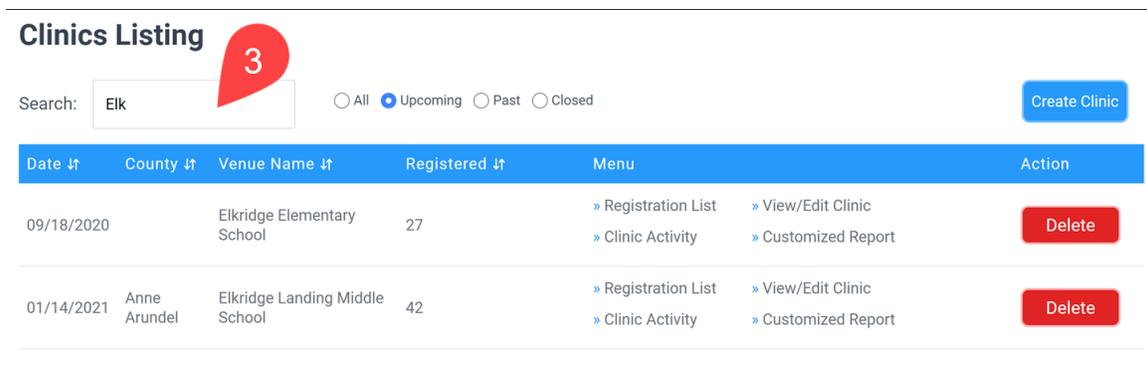
The **Clinics Listing** page displays.

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



The screenshot shows the 'Clinics Listing' page. At the top, there is a search bar and a filter section with radio buttons for 'All', 'Upcoming', 'Past', and 'Closed'. The 'Upcoming' filter is selected, indicated by a red callout bubble with the number '2'. Below the filters is a table with columns: Date ↑, County ↑, Venue Name ↑, Registered ↑, and Menu. A partial row is visible with the date '09/10/2020', county 'Calvert', and venue name 'Appeal Elementary'. A 'Registration List' link is visible in the menu column.

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



The screenshot shows the 'Clinics Listing' page with the search field containing 'Elk'. A red callout bubble with the number '3' points to the search field. The filter section shows 'Upcoming' selected. A 'Create Clinic' button is visible. The table below has columns: Date ↑, County ↑, Venue Name ↑, Registered ↑, Menu, and Action. Two rows are visible:

Date ↑	County ↑	Venue Name ↑	Registered ↑	Menu	Action
09/18/2020		Elkridge Elementary School	27	<a href="#">» Registration List</a> <a href="#">» Clinic Activity</a>	<a href="#">» View/Edit Clinic</a> <a href="#">» Customized Report</a> <a href="#">Delete</a>
01/14/2021	Anne Arundel	Elkridge Landing Middle School	42	<a href="#">» Registration List</a> <a href="#">» Clinic Activity</a>	<a href="#">» View/Edit Clinic</a> <a href="#">» Customized Report</a> <a href="#">Delete</a>

## 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.

Clinics Listing						
Search: <input type="text" value="Elk"/>		<input type="radio"/> All <input checked="" type="radio"/> Upcoming <input type="radio"/> Past <input type="radio"/> Closed			<a href="#">Create Clinic</a>	
Date ↑	County ↑	Venue Name ↑	Registered ↑	Menu		Action
09/18/2020		Elkridge Elementary School	27	<a href="#">» Registration List</a> <a href="#">» Clinic Activity</a>	<a href="#">» View/Edit Clinic</a> <a href="#">» Customized Report</a>	<a href="#">Delete</a>
01/14/2021	Anne Arundel	Elkridge Landing Middle School	42	<a href="#">» Registration List</a> <a href="#">» Clinic Activity</a>	<a href="#">» View/Edit Clinic</a> <a href="#">» Customized Report</a>	<a href="#">Delete</a>

The **View/Edit Clinic** page displays.

### View/Edit Clinic

**Elkridge Elementary School**

**Clinic Status:** Opened 
[» Registration List](#)
[» Virtual Queue](#)
[» \*\*View/Edit Clinic\*\*](#)
[» Activity Form](#)
[» Activity Report](#)
[» Customized Report](#)

---

**Number of Patients Registered:** 27

**Is clinic public or private? \***  
 Public  Private

**Services Provided \*** **Open to \***

Testing  Vaccination  Screening  All Ages  Children  Adults  
 Anti-Viral Distribution  Seniors  Other

County:  Venue:

---

**Date, Time, Location**

Clinic Date \*  Address

Start Time \*   Zip Code  City  State

End Time \*

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**

Search:   All  Upcoming  Past  Closed Create Clinic

Date ↑	County ↑	Venue Name ↑	Registered ↑	Menu	Action
09/18/2020		Elkridge Elementary School	27	<a href="#">» Registration List</a> <a href="#">» View/Edit Clinic</a> <a href="#">» Clinic Activity</a> <a href="#">» Customized Report</a>	<span style="background-color: red; color: white; padding: 2px 5px;">Delete</span>
01/14/2021	Anne Arundel	Elkridge Landing Middle School	42	<a href="#">» Registration List</a> <a href="#">» View/Edit Clinic</a> <a href="#">» Clinic Activity</a> <a href="#">» Customized Report</a>	<span style="background-color: red; color: white; padding: 2px 5px;">Delete</span>

The **Registration List** page displays.

**Registration List**  
Elkridge Elementary School

Clinic Status: Opened » **Registration List** » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12 See Waiting List Upload records

Search:  Download Waiting List Download Registration List Print

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Registration School	Vaccination School	
<a href="#">Ji Keeling</a>	10/09/65	54	Female	05:45 PM	Bonnie Branch Middle School		<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span> <span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<a href="#">Rupert Kemmer</a>	11/04/95	24	Female	05:30 PM	Veterans Elementary School		<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span> <span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<a href="#">Wade Grimes</a>	06/13/94	26	Female	05:00 PM	Oakland Mills Middle School		<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span> <span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<a href="#">Eloisa Beer</a>	05/03/70	50	Female	03:30 PM	Hollifield Station Elementary School		<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span> <span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>

## 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**.

### Registration List

Elkridge Elementary School

Clinic Status: Opened » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

**Number Registered: 15**   **Waiting List: 12**

Search:

See Waiting List Upload records

Download Waiting List Download Registration List Print

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Registration School	Vaccination School	
<a href="#">Ji Keeling</a>	10/09/65	54	Female	05:45 PM	Bonnie Branch Middle School		<span style="border: 1px solid #007bff; padding: 2px 5px; border-radius: 4px;">View Consent</span> <span style="border: 1px solid #007bff; padding: 2px 5px; border-radius: 4px;">Delete</span>
<a href="#">Rupert Kemmer</a>	11/04/95	24	Female	05:30 PM	Veterans Elementary School		<span style="border: 1px solid #007bff; padding: 2px 5px; border-radius: 4px;">View Consent</span> <span style="border: 1px solid #007bff; padding: 2px 5px; border-radius: 4px;">Delete</span>

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

The screenshot shows an Excel spreadsheet titled 'patients\_registration\_list\_10\_09\_2020.csv'. The data is organized into two main sections. The first section lists individual patients with columns for Venue Name, Date of Registration, County, School Name, Student's First Name, Student's Last Name, Date of Birth, Age, Grade, and Homeroom Teacher. The second section lists vaccine counts with columns for Vaccine Name and Count.

Venue Name	Venue Date	Date of Registration	County	School Name	Student's First Name	Student's Last Name	Date of Birth	Age	Grade	Homeroom Teacher
Elkridge Elementary Schoc	09/18/20 - 09:01 AM - 01:01 PM	08/20/20	Washington	Bonnie Branch Middle School	Ji	Keeling	10/09/65	54	5	
		08/20/20	Baltimore City	Veterans Elementary School	Rupert	Kemmer	11/04/95	24	4	
		08/20/20	Howard	Oakland Mills Middle School	Wade	Grimes	06/13/94	26	1	
		08/20/20	Calvert	Hollfield Station Elementary Scho	Eloisa	Beer	05/03/70	50	2	
		08/20/20	St. Mary	Northwest Middle	Edwardo	Lehner	11/20/80	39	1	
		08/20/20	Garrett	Pointers Run Elementary School	Noriko	Casper	01/09/93	27	3	
		08/20/20	Talbot	Westminster West Middle	Emerita	Huels	09/19/62	57	3	
		08/20/20	Calvert	Career and Tech Center	Pearl	Quigley	10/15/63	56	5	
		08/20/20	Baltimore City	Centennial Lane Elementary Schc	Graham	Hansen	02/16/61	59	4	
		08/20/20	Prince George	Wm. Winchester Elem.	Ramiro	Boehm	05/02/78	42	5	
		08/20/20	Allegany	Wilde Lake High School	Virgil	Pollich	03/06/82	38	4	
		08/20/20	St. Mary	Winfield Elem.	Delmer	Bergstrom	06/24/01	19	5	
		08/20/20	Somerset	Dowell Elementary School	Darryl	Leffler	08/31/64	55	3	
		08/20/20	Calvert	Bushy Park Elementary School	Xavier	Conn	04/01/62	58	2	
		08/20/20	St. Mary	Francis Scott Key High	Luis	Walker	04/30/83	37	4	

## 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**.

### Registration List

Elkridge Elementary School

Clinic Status: Opened      » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12

Search:

[See Waiting List](#)    [Upload records](#)

2
[Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Registration School	Vaccination School	
<a href="#">Ji Keeling</a>	10/09/65	54	Female	05:45 PM	Bonnie Branch Middle School		<a href="#">View Consent</a> <a href="#">Delete</a>
<a href="#">Rupert Kemmer</a>	11/04/95	24	Female	05:30 PM	Veterans Elementary School		<a href="#">View Consent</a> <a href="#">Delete</a>
<a href="#">Wade Grimes</a>	06/13/94	26	Female	05:00 PM	Oakland Mills Middle School		<a href="#">View Consent</a> <a href="#">Delete</a>

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**.

**Patients Waiting List**  
North Carroll Middle

Clinic Status: Opened For Check In » **Registration List** » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 11    **Waiting List: 12**    [See Registration List](#)    [Upload records](#)

Search:     [Bulk Email Vaccination](#)    [Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Home School	
<input type="checkbox"/> <a href="#">Osvaldo Weimann</a>	04/27/1971	49	Male	Waiting List	Oakland Mills High School	<a href="#">Move</a> <a href="#">Invite</a> <a href="#">Email Vaccination Record</a> <a href="#">View Consent</a> <a href="#">Delete</a>

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**.

**Patients Waiting List**  
St. Leonard Elementary School

Clinic Status: Opened For Check In » [Registration List](#) » [Virtual Queue](#) » [View/Edit Clinic](#) » [Activity Form](#) » [Activity Report](#) » [Customized Report](#)

Number Registered: 0    Waiting List: 2    [See Registration List](#)    [Upload records](#)

Search:     [Bulk Email Vaccination](#)    [Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Health Status	
<input type="checkbox"/> <a href="#">Sam Sally</a>	09/17/1992	28	Male	Waiting List		<a href="#">Move</a> <a href="#">Invite</a> <a href="#">Email Vaccination Record</a> <a href="#">View Consent</a> <a href="#">Delete</a>

[< Prev](#)    1    [Next >](#)

The **Schedule patient appointment** page displays.

4. Select an available appointment slot.
5. Select **Move patient off waiting list**.

**Schedule patient appointment**

Time	Appointments Available
<input type="radio"/> 10:00am	3 appointments available
<input type="radio"/> 10:15am	3 appointments available
<input type="radio"/> 10:30am	3 appointments available
<input type="radio"/> 10:45am	2 appointments available
<input checked="" type="radio"/> 11:00am	3 appointments available
<input type="radio"/> 11:15am	3 appointments available
<input type="radio"/> 11:30am	3 appointments available
<input type="radio"/> 11:45am	3 appointments available
<input type="radio"/> Add To Waiting List	Someone will contact you about your appointment.

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.

**Registration List**  
Elkridge Elementary School

Clinic Status: Opened      » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12    [See Waiting List](#)    [Upload records](#)

Search:     [Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↓	of 1 ↓	Age ↓	Gender ↓	Appointment ↓	Registration School	Vaccination School	
<a href="#">Graham Hansen</a>		02/16/61	59	Male	05:15 PM	Centennial Lane Elementary School	<a href="#">View Consent</a> <a href="#">Delete</a>

The **Patient History** page displays.

4. To print the patient's history, select **Print**.

**Patient History**  
Graham Hansen

[Back to records](#)    [View Consent](#)    [Print](#)

Date	Location	Service	Status	Notes	Actions
09/18/2020	Eastern Kentucky Institute	Vaccinated			<a href="#">Delete</a>
09/08/2020	Eastern Delaware University	Temperature Check		Normal. And he is a nice guy!	<a href="#">Delete</a>

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**.

**Registration List**  
Elkridge Elementary School

Clinic Status: Opened » **Registration List** » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12    [See Waiting List](#)    [Upload records](#)

Search:     [Bulk Email Vaccination](#)    [Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Home School	
<input type="checkbox"/> <a href="#">Graham Hansen</a>	02/16/1961	59	Male	05:15 PM	Centennial Lane Elementary School	<a href="#">Email Vaccination Record</a> <a href="#">View Consent</a> <a href="#">Delete</a>

[Prev](#)    1    2    [Next](#)

The patient’s consent form displays in your browser.

276.pdf    1 / 2

**2020 COVID-19 Test Clinic Consent Form**

DEMO FORM: PrepMod is in testing mode. This is not a real consent for medical services.

Please Print Clearly in Ink

LAST Name Hansen	FIRST Name Graham	MI U	DOB 02/16/1961	Age 59	Sex M
Address 8117 Mountain View Circle		City Pasadena		State MD	ZIP Code 21122
Email Address jude_johns@bechtelar.name			Phone Number (407) 536-6339		

**HEALTH INSURANCE INFORMATION — Please fill out COMPLETELY and ACCURATELY**

Please write this information FROM YOUR INSURANCE CARD. We will bill your insurance. You will NOT be charged for a co-pay or deductible.

Type of Insurance Medicare	Insurance Company Name Fisher, Waters and Langworth	Insurance Member Number 283-27-8901
Insurance Group Number 2607540705243818	Other Insurance Number 2407876603344546	
Insured Adult's Name Franklin Gaylord	Relationship to Patient Granddaughter	Insured Adult's Date of Birth 02/23/2004

**Do any of the following apply to you?**

Do you have?  
 A fever of 100.4 degrees Fahrenheit or

Have you traveled in the past 14 days to regions affected by COVID-19?

- 4. To download or print the form, use the icons in the upper-right corner of the page.

1 / 2

⌂ ⬇️ 🖨️ 📌 ▾

4

### Test Clinic Consent Form

Real consent for medical services.

📄 Open in Acrobat ✕

	<b>MI</b> W	<b>DOB</b> 06/13/94	<b>Age</b> 26	<b>Sex</b> F
	<b>City</b> Glen Burnie		<b>State</b> MD	<b>ZIP Code</b> 21060
	<b>Phone Number</b> (407) 536-6339			

— Please fill out COMPLETELY and ACCURATELY

We will bill your insurance. You will NOT be charged for a co-pay or deductible.

## 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**.



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**.

**Create a COVID-19 Testing Referral**

County/Jurisdiction \*  Clinic \*  **2**

---

Patient's First Name  Middle initial  **3** Patient's Last Name  Mother's Maiden Name \*

---

Date of birth \*    Age  Gender \*  Race \*

---

Address \*  City \*  State \*  Zip Code \*  Mobile or Daytime Number \*

---

Email Address \*

---

**Send Patient Invitation Via** **4**

SMS  Email

**5**

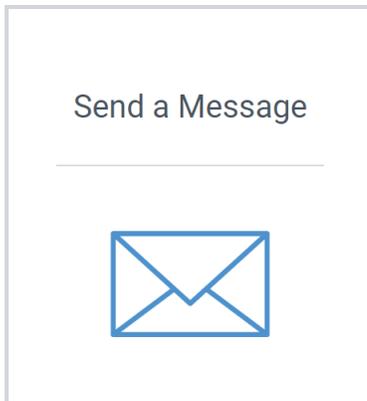
PrepMod sends an invitation to the patient that contains a unique URL they can use for registration.

## Send Messages to Other PrepMod Users

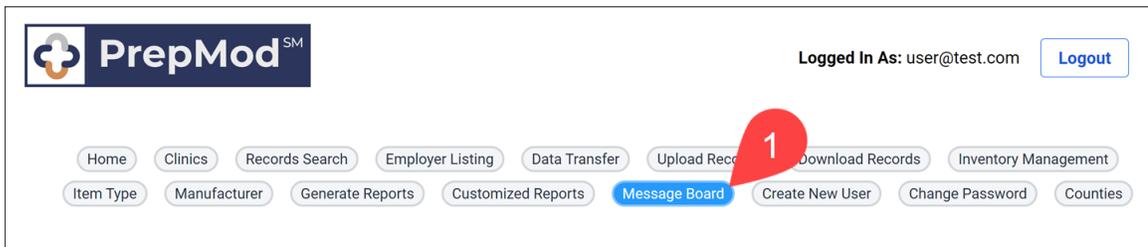
Using PrepMod's Message Board, you can send clinic-related messages to other PrepMod users. For example, if a clinic is coming up soon and you realize you have a shortage of tests or PPE, you can contact local providers or health departments to see if someone can help.

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

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



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



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**.

The screenshot shows a 'Message Board' interface. On the left, there is a 'Subject:' text input field with a red callout bubble containing the number '2'. Below it is a larger text area for the message content with the placeholder text 'Enter your message here.'. On the right, there is a 'Send Message to:' section with a red callout bubble containing the number '3'. This section includes five radio button options: 'All Users', 'Healthcare Providers', 'Local Health Departments', 'School Health', and 'Agency Administrator'. Below these options is a red asterisked note: '\* All messages must be approved by Regional Administrator', with a red callout bubble containing the number '4' pointing to the text. At the bottom right of the form is a blue 'Submit Message' button with a red callout bubble containing the number '4' pointing to it.

**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.

**Registration and Staff**

Lead Tester's Name

Audrey Batts

Clinic Staff

Angela Bassett

Isaac Newton

Theodore Roosevelt

Rico Suave

Don Julio

Audrey Batts

[Add more staff](#)

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**

Select Add Item

Number	Expiration Date	# of Items	Action
			Submit Cancel

The item is added to the clinic inventory.

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

**Clinic Inventory**

Facere Ipsa (PCR) Lot #: B000CFIMWQ • Type: PCR • Exp. Date: 09/05/2020 • Add Item

Name (Type)	Manufacturer	Lot Number	Expiration Date	# of Items	Action
Facere Ipsa (PCR)	Sanofi Pasteur	B000CFIMWQ	09/05/2020	34	Remove

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**

Ut Quidem (DTaP) Lot #: B00079UXEC • Type: DTaP • Exp. Date: 09/14/2020 • Add Item

Name (Type)	Manufacturer	Lot Number	Expiration Date	# of Items	Action
Facere Ipsa (PCR)	Sanofi Pasteur	B000CFIMWQ	09/14/2020	34	<span style="color: red; font-weight: bold; font-size: 2em;">4</span> Remove
Aut Earum (Measles, Mumps, Rubella)	GlaxoSmithKline	B000AR99QO	09/18/2020	12	Remove
Ut Quidem (DTaP)	Pfizer	B00079UXEC	09/14/2020	40	Remove

5
Submit
Cancel

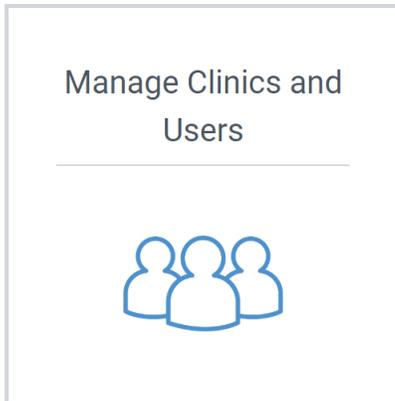
7. The clinic is updated.

## Entering Clinic Outcomes

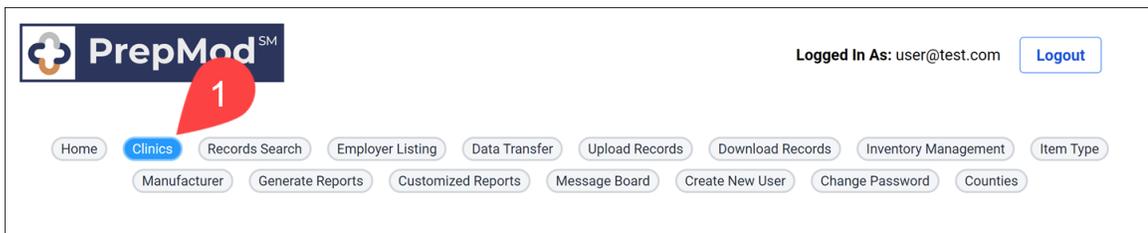
### Open the Clinic Activity Form

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**.

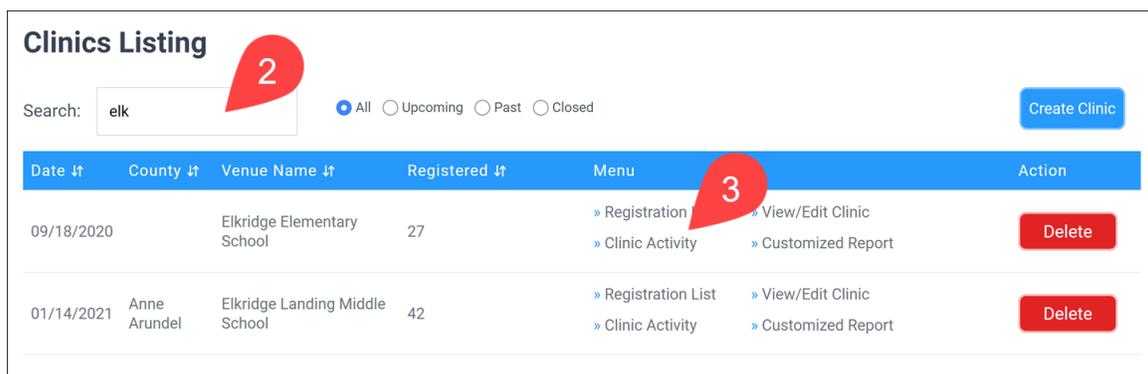


- From any other PrepMod page, select **Clinics** from the menu bar.



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.
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.

### Clinic Activity Form

Elkridge Elementary School

**Clinic Status:** Opened      » Registration List » Virtual Queue » View/Edit Clinic » **Activity Form** » Activity Report » Customized Report

---

**Clinic Date:** 09/18/2020      **County:**      **Venue Name:** Elkridge Elementary School

**Lead Tester's Name:** Melvin Gutmann      **Patients Registered:** 27

## 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.

### Clinic Activity Form

Elkridge Elementary School

**Clinic Status:** Opened      » Registration List » Virtual Queue » View/Edit Clinic » **Activity Form** » Activity Report » Customized Report

---

**Clinic Date:** 09/18/2020      **County:**      **Venue Name:** Elkridge Elementary School

**Lead Tester's Name:** Melvin Gutmann      **Patients Registered:** 27

**Clinic Start Time:** 02:00 AM      **Clinic End Time:** 06:00 PM      **Clinic Length (in minutes):** 240

**Clinic Incidents or Comments:** Nihil harum non. Comedo cultura centum. Sint credo certo. Supellex decimus eum.

Test Name	Test Lot Number	# of Starting Kits	# of Tests Administered	# Unusable Tests	# Tests Returned	Default
Architecto Et	B000BJ20J4	109	0	0	0	<input type="radio"/>
Tempore Velit	B000I6VQX6	180	0	0	0	<input checked="" type="radio"/>
Saepe Commodi	B000A2LWKU	198	0	0	0	<input type="radio"/>

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

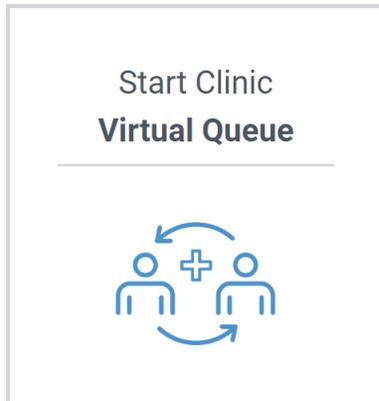
Here's an overview of how PrepMod's Virtual Queue automates the check-in and check-out process for clinic patients:

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**.



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**

Search:  All  Upcoming  Past  Closed Create Clinic

Date ↑	County ↑	Venue Name ↑	Registered ↑	Soc. Dist. Capacity	Action
02/07/2021	Anne Arundel	North Carroll Middle	23	3	<span>Start</span>

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**.

### Start Virtual Queue

North Carroll Middle

**Clinic Status:** Upcoming    » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

To start this clinic with a virtual queue, please enter the number of patients the clinic can see at a time.

**Social Distancing Capacity:**

[Start Virtual Queue](#)

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**.

### Manage Virtual Queue

North Carroll Middle

**Clinic Status:** Upcoming    » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

**Total Registered:** 23

Search:

**Filter:** [All](#) [Not Checked In \(23\)](#) [Canceled \(0\)](#) [Checked In \(0\)](#) [Invited \(0\)](#) [At Clinic \(0\)](#) [Completed \(0\)](#) [Pending \(0\)](#)

**Social Distancing Capacity:** 3 [\(update\)](#)

[Send Reminder Messages](#)

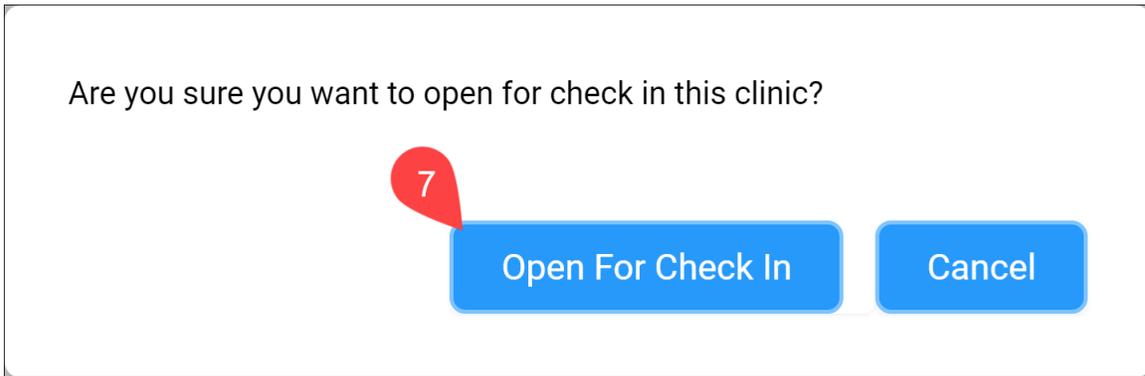
[Open For Check In](#)

[Add Patient +](#)

**Not Checked In**

Appointment Time	Name	Date of Birth	Queue State	Actions
06:18 PM	Laverne Schiller	07/07/1957	Not Checked In	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 5px;">Cancel</a>
07:19 PM	Rhonda McKenzie	11/17/1982	Not Checked In	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 5px;">Cancel</a>
07:19 PM	Gaylene Oberbrunner	09/27/1988	Not Checked In	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 5px;">Cancel</a>

- 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.

### Manage Virtual Queue

North Carroll Middle

**Clinic Status:** Opened For Check In » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

**Total Registered:** 23      **Social Distancing Capacity:** 3 [\(update\)](#)      Open Clinic   Revert To Pending

Search:  Add Patient +

**Filter:** All Not Checked In (23) Canceled (0) Checked In (0) Invited (0) At Clinic (0) Completed (0) Pending (0)

#### Not Checked In

Appointment Time	Name	Date of Birth	Queue State	Actions
06:18 PM	Laverne Schiller	07/07/1957	Not Checked In	<span>Check In</span> <span>Cancel</span>
07:19 PM	Rhonda McKenzie	11/17/1982	Not Checked In	<span>Check In</span> <span>Cancel</span>

## 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.

### Manage Virtual Queue

North Carroll Middle

**Clinic Status:** Opened For Check In » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

**Total Registered:** 23    **Social Distancing Capacity:** 3 [\(update\)](#)

Search:  
[Open Clinic](#)   [Revert To Pending](#)  
[Add Patient +](#)

**Filter:** [All](#)   [Not Checked In \(23\)](#)   [Canceled \(0\)](#)   [Checked In \(0\)](#)   [Invited \(0\)](#)   [At Clinic \(0\)](#)   [Completed \(0\)](#)   [Pending \(0\)](#)

#### Not Checked In

Appointment Time	Name	Date of Birth	Queue State	Actions
08:20 PM	Cassie Purdy	11/14/1968	Not Checked In	<a href="#">Check In</a> <a href="#">Cancel</a>

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**.

### Manage Virtual Queue

Appeal Elementary Schoole

Clinic Status: Opened For Check In » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Total Registered: 29      Social Distancing Capacity: 4 [\(update\)](#)

Search:

Filter: [All](#) [Not Checked In \(16\)](#) [Canceled \(1\)](#) [Checked In \(0\)](#) [Invited \(1\)](#) [At Clinic \(1\)](#) [Completed \(10\)](#) [Pending \(0\)](#)

**Not Checked In**

Appointment Time	Name	Date of Birth	Queue State	Actions
12:00 AM	Marco Brakus	01/04/1956	Not Checked In	<a href="#">Check In</a> <a href="#">Cancel</a>
12:00 AM	Kirby Langosh	08/13/1966	Not Checked In	<a href="#">Check In</a> <a href="#">Cancel</a>
12:00 AM	Ignacio Simonis	10/03/1999	Not Checked In	<a href="#">Check In</a> <a href="#">Cancel</a>

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

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 » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

---

**Total Registered:** 29     **Social Distancing Capacity:** 4 [\(update\)](#)    
 Pause Automation    
 Close Clinic    
 Reopen for Check-In Only

Search:  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

Appointment Time	Name	Date of Birth	Queue State	Actions
12:00 AM	Marco Brakus	01/04/1956	Not Checked In	<span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Check In</span> <span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Cancel</span>
12:00 AM	Kirby Langosh	08/13/1966	Not Checked In	<span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Check In</span> <span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Cancel</span>
12:00 AM	Ignacio Simonis	10/03/1999	Not Checked In	<span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Check In</span> <span style="border: 1px solid black; padding: 2px 5px; background-color: #007bff; color: white;">Cancel</span>

## 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**.

### Manage Virtual Queue

North Carroll Middle

Clinic Status: Opened For Check In » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Total Registered: 23      Social Distancing Capacity: 3 [\(update\)](#)

Search:

Filter: [All](#) [Not Checked In \(22\)](#) [Canceled \(1\)](#) [Checked In \(0\)](#) [Invited \(0\)](#) [At Clinic \(0\)](#) [Completed \(0\)](#) [Pending \(0\)](#)

**Not Checked In**

Appointment Time	Name	Date of Birth	Queue State	Actions
06:18 PM	Laverne Schiller	07/07/1957	Not Checked In	<a href="#">Check In</a> <a href="#">Cancel</a>

The **Add a Patient** window displays.

### Add a Patient

Select Patient

Clinic Date

Choose Appointment

2:00pm (3 appointments available)

2:10pm (3 appointments available)

2:20pm (3 appointments available)

2:30pm (3 appointments available)

2:40pm (3 appointments available)

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**.

### Manage Virtual Queue

Appeal Elementary Schoole

Clinic Status: Opened » Registration List » **Virtual Queue** » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Total Registered: 29    Social Distancing Capacity: 3 [\(update\)](#)    **Pause Automation**    Close Clinic    Reopen for Check-In Only

Search:  **Add Patient +**

Filter: **All**    Not Checked In (17)    Canceled (0)    Checked In (3)    Invited (5)    At Clinic (3)    Completed (1)    Pending (0)

#### Not Checked In

Appointment Time	Name	Date of Birth	Queue State	Actions
11:23 PM	Doris Cummings	07/03/66	Not Checked In	<b>Check In</b> Cancel
11:23 PM	Sherley Crooks	10/13/74	Not Checked In	<b>Check In</b> Cancel
12:00 AM	Apryl McDermott	01/31/63	Not Checked In	<b>Check In</b> Cancel

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

Are you sure you want to pause automation this clinic?

**Pause Automation**    **Cancel**

**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.

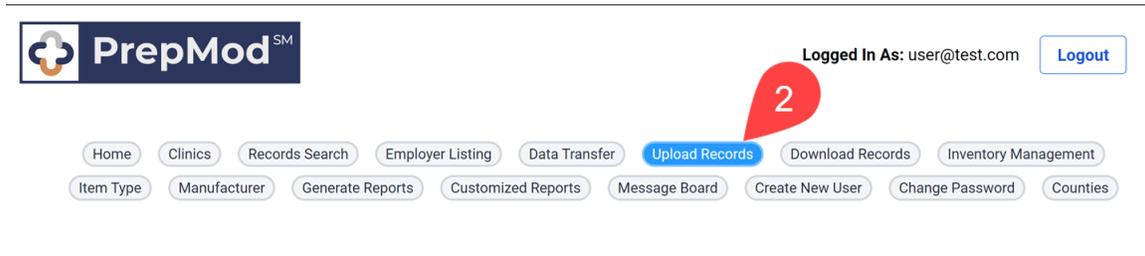
For more information see the ["View and Print a Patient's History"](#) section of Chapter 3, "Preparing for Clinics," on page 19.

For instructions on removing an event from a patient's history, see ["Delete an Event from the Patient's History"](#) on page 60.

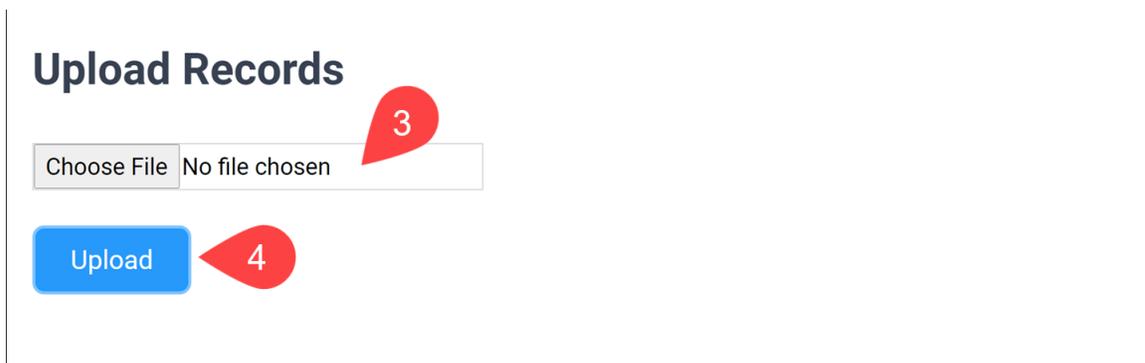
## Upload Patient Records

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**.

### View/Edit Clinic

Dowell Elementary School

1

Clinic Status: Opened For Check In » Registration List » Virtual Queue » **View/Edit Clinic** » Activity Form » Activity Report » Customized Report

---

**Number of Patients Registered:** 27

---

**Is clinic public or private? \***

Public     Private

---

**Services Provided \***

Testing     Vaccination     Screening

Anti-Viral Distribution

**Open to \***

All Ages     Children     Adults

Seniors     Other

The **Clinic Activity Report** page displays.

2. To download the report, select **Export in PDF** or **Export in Excel**.

### Clinic Activity Report

Appeal Elementary Schoole

2

Clinic Status: Opened For Check In » Registration Paused » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » **Activity Report** » Customized Report

---

Export in PDF
Export in Excel

Clinic Date	Venue Name	County	Lead Vaccinator	Number of Patients Seen	Clinic Staff
Thursday September 3, 2020	Southern Littel	Calvert	Wilburn Hilpert	27	5

---

**Tested**

Name	Date of Birth	Outcome
Kirby Langosh	Saturday August 13, 1966	Low Risk
Benny Oberbrunner	Friday May 5, 1967	Low Risk
Mayola Turcotte	Saturday June 1, 1996	Low Risk
Tod Prohaska	Monday December 1, 1986	Low Risk
Luigi Mann	Wednesday July 3, 1974	Low Risk
Ignacio Simonis	Sunday October 3, 1999	Low Risk

## 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.

### Registration List

Elkridge Elementary School

Clinic Status: Opened » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12 [See Waiting List](#) [Upload records](#)

Search:  [Bulk Email Vaccination](#) [Download Waiting List](#) [Download Registration List](#) [Print](#)

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment ↑	Home School	
<input type="checkbox"/> <a href="#">Noriko Casper</a>	01/09/1993	27	Male	05:30 PM	Pointers Run Elementary School	<a href="#">Email Vaccination Record</a> <a href="#">View Consent</a> <a href="#">Delete</a>

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**.

### Registration List

Elkridge Elementary School

Clinic Status: Opened      » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12    See Waiting List    Upload records

Search:     Bulk Email Vaccination    Download Waiting List    Download Registration List    Print

Name ↕	Date of Birth ↕	Age ↕	Gender ↕	Appointment ↕	Home School			
<input type="checkbox"/> <a href="#">Graham Hansen</a>	02/16/1961	59	Male	05:15 PM	Centennial Lane Elementary School	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Email Vaccination Record</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<input type="checkbox"/> <a href="#">Rupert Kemmer</a>	11/04/1995	24	Female	05:30 PM	Veterans Elementary School	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Email Vaccination Record</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<input type="checkbox"/> <a href="#">Wade Grimes</a>	06/13/1994	26	Female	05:00 PM	Oakland Mills Middle School	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Email Vaccination Record</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>
<input type="checkbox"/> <a href="#">Edwardo Lehner</a>	11/20/1980	39	Male	04:45 PM	Northwest Middle	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Email Vaccination Record</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">View Consent</span>	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Delete</span>

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.
3. Select **Customized Report**.

**Clinics Listing**

Search:  2  All  Upcoming  Past  Closed Create Clinic

Date ↑	County ↑	Venue Name ↑	Registered ↑	Menu	Action
09/22/2020	Calvert	Westminster West Middle	28	<a href="#">» Registration List</a> <a href="#">» View/Edit Clinic</a> <a href="#">» Clinic Activity</a> <a href="#">» Customized Report</a> <span>3</span>	<span>Delete</span>

The **New Customized Report** page displays.

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

**New Customized Report**

Elkridge Elementary School

Clinic Status: Opened » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report 3

Please select the data you would like in your customized report:

Which patients do you want included in the report?

Patients Screened  Patients Tested

Which patients fields do you want included in the report?

Gender  Race

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.

## New Customized Report

Westminster West Middle

Clinic Status: Closed » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » **Customized Report**

4

Please select the data you would like in your customized report:

Which patients do you want included in the report?

- Patients Screened
- Patients Tested
- Pending Patients
- Vaccinated Patients
- Safety Kit

Which patients fields do you want included in the report?

- Gender
- Race
- ZIP Code
- Insurance Type
- Age
- Date of Birth
- Test Type
- Test Results
- Remarks
- Registration Date

Generate Report in PDF

Generate Report in Excel

5

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.

10.pdf 1 / 5

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### Westminster West Middle on Tuesday September 22, 2020

Screened

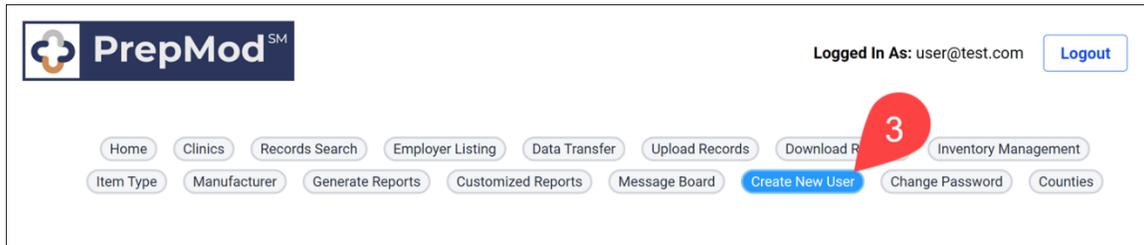
Name	Age	Gender	Race	Zip Code	Insurance Type	Date of birth	Registration Date
Salvador Kutch	34	M	Black or African-American	21060	Medicaid/Medical Assistance	11/15/1985	08-20-2020
Stewart Steuber	41	M	Asian	21401	Private Insurance	07/02/1979	08-20-2020
Queen Cole	43	F	Some Other Race	21122	Private Insurance	06/04/1977	08-20-2020
Tamar Hyatt	47	F	Asian	21144	Private Insurance	04/18/1973	08-20-2020
Shirly D'Amore	31	M	American Indian or Alaska Native	20714	Medicaid/Medical Assistance	03/17/1989	08-20-2020
Rubi Stracke	40	F	Native Hawaiian and Pacific Islander	21146	Medicare	10/23/1979	08-20-2020
Ariel Hickie	31	F	Some Other Race	21122	Medicaid/Medical Assistance	10/09/1988	08-20-2020
Marcel Spencer	30	F	White	21061	Private Insurance	10/10/1989	08-20-2020
Isaias Rowe	21	F	Some Other Race	21409	Medicare	03/27/1999	08-20-2020
Eldon Gutmann	51	M	Native Hawaiian and Pacific Islander	21114	No Insurance	02/27/1969	08-20-2020
...	...	...	Native Hawaiian and Pacific	...	...	...	...

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## Chapter 6: Other Administrative Functions

### Add a User

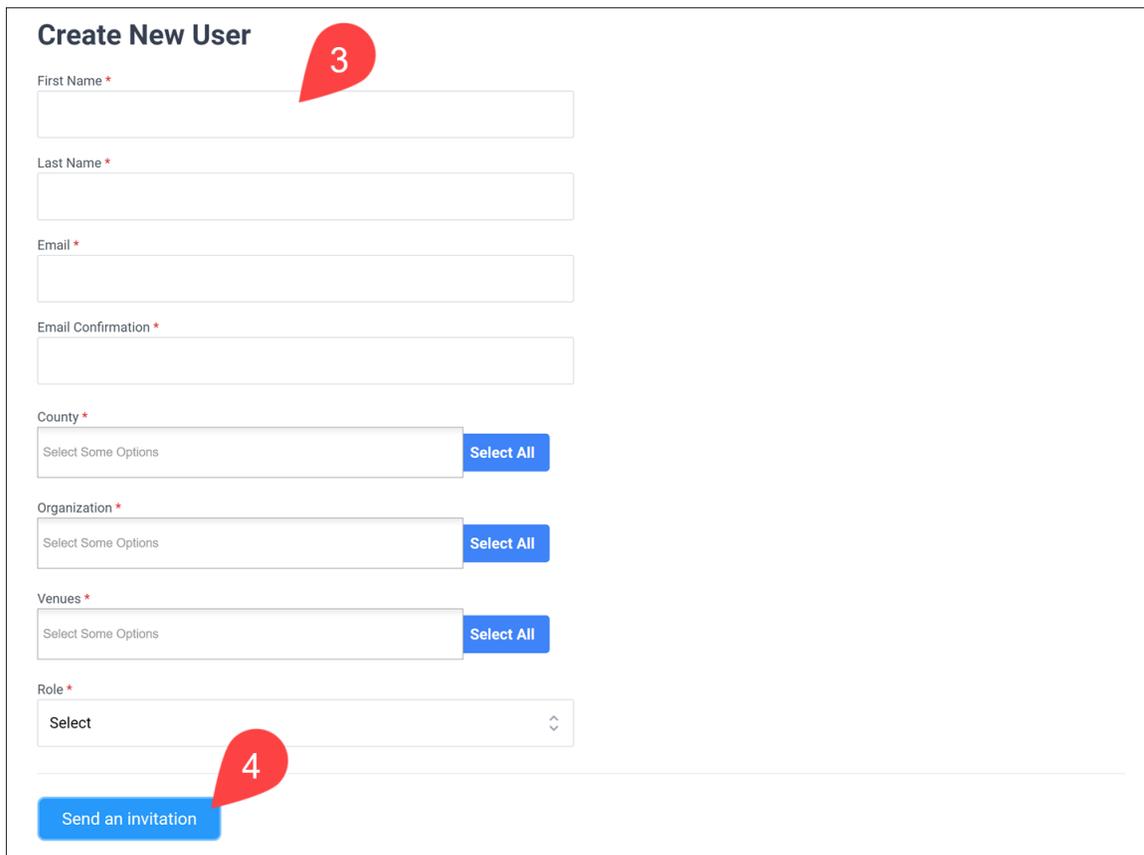
1. From the menu bar, select **Create New User**.



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.

A screenshot of the "Create New User" form. The form has the following fields: "First Name \*" (text input), "Last Name \*" (text input), "Email \*" (text input), "Email Confirmation \*" (text input), "County \*" (dropdown menu with "Select Some Options" and a "Select All" button), "Organization \*" (dropdown menu with "Select Some Options" and a "Select All" button), "Venues \*" (dropdown menu with "Select Some Options" and a "Select All" button), and "Role \*" (dropdown menu with "Select" and a "Select All" button). A red callout bubble with the number "3" points to the "First Name" field. At the bottom of the form is a blue button labeled "Send an invitation". A red callout bubble with the number "4" points to this button.

3. Select **Send an invitation**.

PrepMod sends the user an email with instructions for accessing the system.

## Delete Records

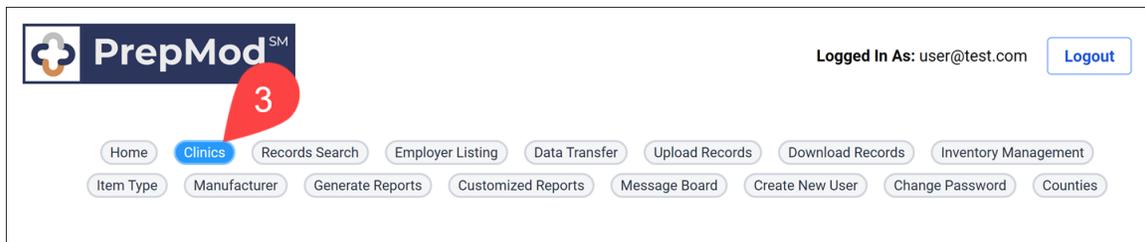
**Note:** In addition to administrators, users in the role of Lead Staff also have the ability to delete records.

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.

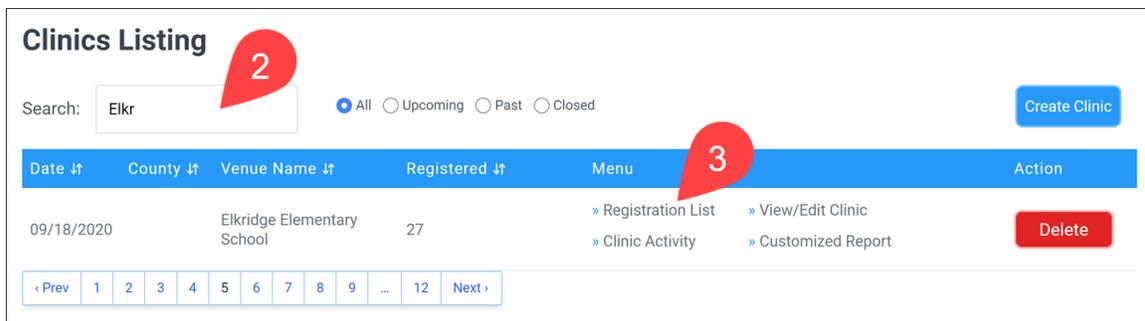
**Important:** Delete a duplicate record only if you have confirmed that the record you are keeping has complete information.

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



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.



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

Elkridge Elementary School

Clinic Status: Opened » Registration List » Virtual Queue » View/Edit Clinic » Activity Form » Activity Report » Customized Report

Number Registered: 15    Waiting List: 12    [See Waiting List](#)    [Upload records](#)

Search:     [Bulk Email Vaccination](#)    [Download Waiting List](#)    [Download Registration List](#)    [Print](#)

Name ↑↓	Date of Birth ↑↓	Age ↑↓	Gender ↑↓	Appointment ↑↓	Home School	
<input type="checkbox"/> <a href="#">Noriko Casper</a>	01/09/1993	27	Male	05:30 PM	Pointers Run Elementary School	<a href="#">Email Vaccination Record</a> <a href="#">View Consent</a> <a href="#">Delete</a>

[« Prev](#)    [1](#)    [2](#)    [Next »](#)

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

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

### Clinic Activity Form

Southern Littel

Clinic Status: Opened      » Registration List » Virtual Queue » View/Edit Clinic » **Activity Form** » Activity Report » Customized Report

---

Clinic Date: Thursday September 3, 2020      County:      Venue Name: Southern Littel

Lead Tester's Name: Wilburn Hilpert      Patients Registered: 29

Clinic Start Time: 09:00 AM      Clinic End Time: 04:00 PM      Clinic Length (in minutes): -1020

Clinic Incidents or Comments: Nihil aliquid centum.

Test Name	Test Lot Number	# of Starting Kits	# of Tests Administered	# Unusable Tests	# Tests Returned	Default
Explicabo Minima	B000A1FW8E	148	48	2	1	<input type="radio"/>
Occaecati Iste	B000I16WOW	185	56	1	496	<input type="radio"/>
<b>Totals:</b>		333	0	0	0	

5. Take one of the following actions:
  - To simply save your changes, select **Save**.

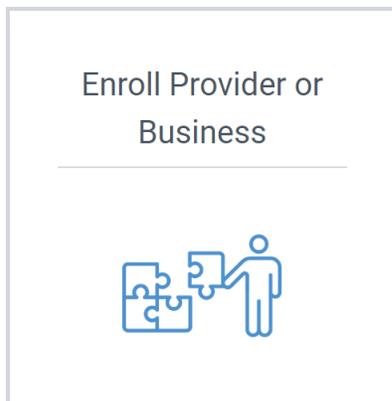
- To both save your changes and submit the clinic activity to your vaccine information system (VIS) or to an electronic health record (EHR) system, select **Save and Submit**. Notifications may also be sent to patients of the clinic.

**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.

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



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

- Locate the provider or business by scrolling through the list or by entering part of their name in the **Search** field.
- Select **Review Request**.

Request Date	Entity Name	Entity Type	County	Requested Service	Action
08/20/2020	Practice Name 6	Provider	Harford	Anti-Virals/Medication, Vaccinations, Screening, Safety Kit Distribution, Other	Review Request
08/21/2020	Temple Elizabeth Douglass	Provider	Harford	Testing, Vaccinations	Review Request

The provider's or business's request displays.

The screenshot shows the PrepMod interface for a COVID-19 service provider request. At the top left is the PrepMod logo. At the top right, it says 'Logged In As: user@test.com' with a 'Logout' button. Below this is a navigation menu with buttons for Home, Clinics, Records Search, Employer Listing, Data Transfer, Upload Records, Download Records, Inventory Management, Item Type, Manufacturer, Generate Reports, Customized Reports, Message Board, Create New User, Change Password, and Counties. The main heading is 'COVID-19 Service Provider Request from Elizebeth Bartoletti'. The form is divided into several sections:

- What services would you like to provide?**
  - Screening
  - Testing
  - Anti-Virals/Medication
  - Safety Kit Distribution
  - Vaccinations
  - Other
- Population(s) Served \***
  - All Ages
  - Children
  - Adults
  - Seniors
  - Other
- What high-risk or under-served groups are largely represented in your practice? \***
  - Seniors
  - African-Americans
  - Hispanics
  - Chronically Ill (eg. asthma, diabetes, heart disease, hypertension, COPD)
- Provider Contact's Information**
  - First Name \*: Elizebeth
  - Middle Name \*: Strosin
  - Last Name \*: Bartoletti
  - Professional License \*: DDS
  - Title \*: Title 6

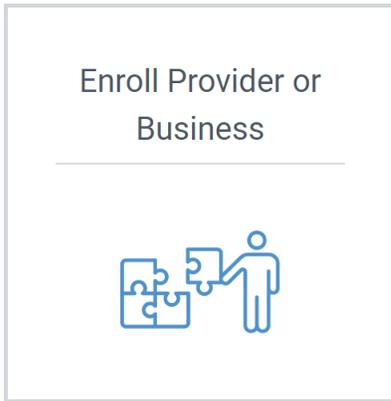
- Review the request for accuracy and completeness and then take one of the following actions:
  - Accept** – Accepts the request and adds the provider or business to the system. The request will remain in the system in case you need to access it again. PrepMod also sends a notification to the submitter 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**.



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

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

### Provider and Business Enrollment

Search:

2
 Add New Provider/Business

Request Date ↕	Entity Name ↕	Entity Type	County ↕	Requested Service	Action
08/20/2020	Practice Name 0	Provider	Prince George	Anti-Virals/Medication, Screening, Other	<a href="#" style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 5px;">Review Request</a>
08/20/2020	Practice Name 1	Provider	Queen Anne	Screening, Testing, Other, Anti-Virals/Medication, Vaccinations, Safety Kit Distribution	<a href="#" style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 5px;">Review Request</a>
08/20/2020	Practice Name 2	Provider	Talbot	Testing, Safety Kit Distribution, Anti-Virals/Medication, Screening	<a href="#" style="background-color: #007bff; color: white; padding: 5px 10px; border-radius: 5px;">Review Request</a>

The **Request to Become a COVID-19 Service Provider** page displays.

**PrepMod** EN ES

### Request to Become a COVID-19 Service Provider

**What services would you like to provide?**

Screening  Testing  Anti-Virals/Medication  
 Safety Kit Distribution  Vaccinations  Other

**Open to \***

All Ages  Children  Adults  
 Seniors  Other

**What high-risk or under-served groups are largely represented in your practice? \***

Seniors  African-Americans  Hispanics  
 Chronically ill (eg. asthma, diabetes, heart disease, hypertension, COPD)

**Provider Contact's Information**

First Name \* Middle Name \* Last Name \* Professional License \* Title \*

Office Phone Number \* Mobile Phone Number \* Email Address \* County \*

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**.

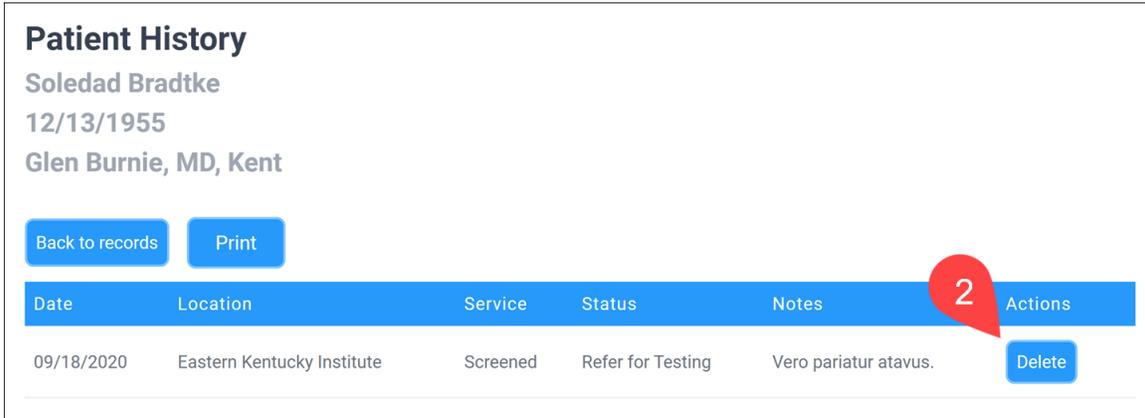
The request is submitted. It will now appear in the list of requests on the **Provider and Business Enrollment** page.

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.

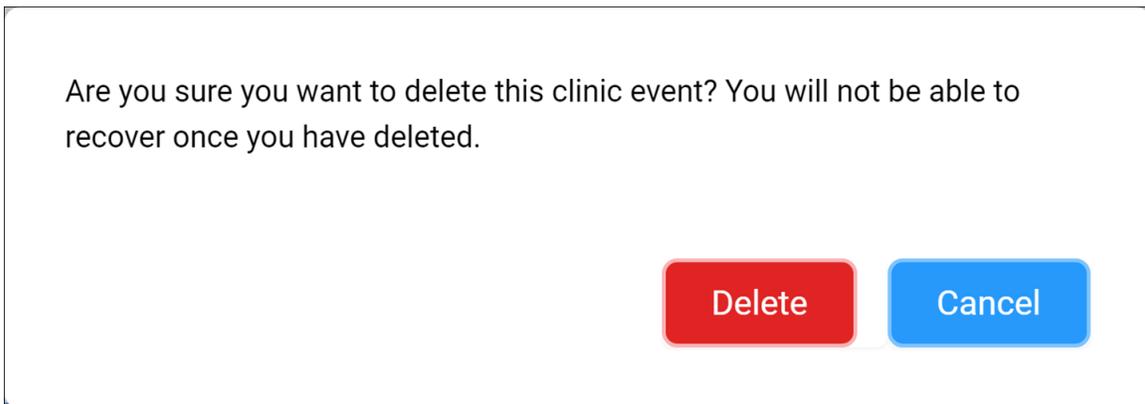


**Patient History**  
Soledad Bradtke  
12/13/1955  
Glen Burnie, MD, Kent

Back to records Print

Date	Location	Service	Status	Notes	Actions
09/18/2020	Eastern Kentucky Institute	Screened	Refer for Testing	Vero pariatu atavus.	Delete

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.

Delete Cancel

PrepMod removes the clinic event from the patient's history.

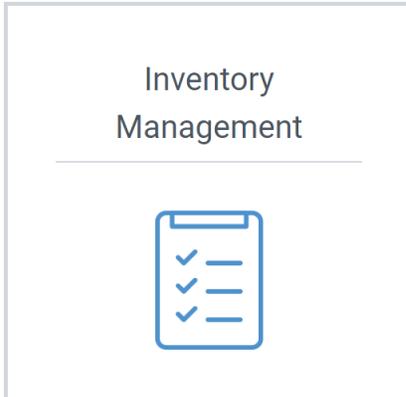
## Inventory Management

### Open the Inventory Management Page

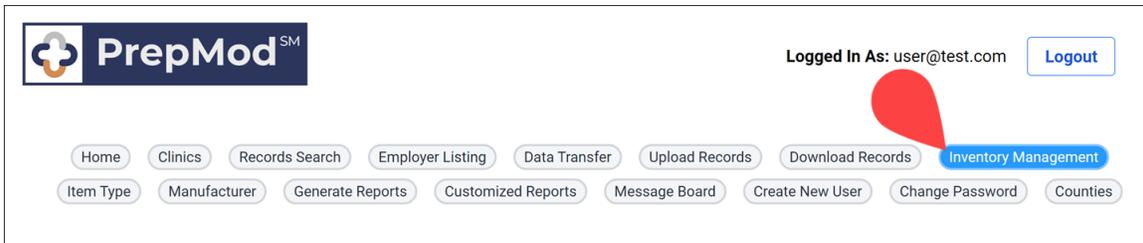
The **Inventory Management** page lists all supplies saved in the system. The items listed on this page are the pool from which users may select when adding inventory items to a clinic.

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

Upload Supplies

Received Date *	Item Type *	Product Name *	Manufacturer *
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="Select"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="Select"/>
Lot Number *	Expiration Date *	Number of Items *	Inventory Packaging *
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text" value="Select"/>
Source of Items *	County *	Venue *	Information Sheet
<input style="width: 100%;" type="text" value="Select"/>	<input style="width: 100%;" type="text" value="Select"/>	<input style="width: 100%;" type="text" value="Select"/>	<input style="width: 100%;" type="button" value="Choose File"/> No file chosen

Create

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.

Search:

Select Item	Date Received	Item Type	Item Name	Manufacturer	Source	Lot Number	Expiration Date	Starting Qty	Pkg	Qty Used	Qty Lost	Qty Loaned	Curr Qty
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Stiedemann-Halvorson</a>	MedImmune	VFC	B0009QHJSG	08/30/2020	162	Other	0	0	0	162
<input type="checkbox"/>	07/21/2020	PCR	<a href="#">White-Schaefer</a>	Seqiris	VFC	B000HBXMHK	08/26/2020	109	Unit	0	0	0	109
<input type="checkbox"/>	07/21/2020	Varicella (chickenpox)	<a href="#">Collins, Jakubowski and Bergstrom</a>	Seqiris	Borrowed	B000BPHSLS	09/16/2020	160	Box	132	2	2	20
<input type="checkbox"/>	07/21/2020	Hepatitis B	<a href="#">Graham Inc</a>	Sanofi Pasteur	Other	B000A409WK	08/20/2020	128	Unit	0	0	0	128
<input type="checkbox"/>	07/21/2020	Serological	<a href="#">Paucek-Flatley</a>	Pfizer	Other	B000A2LWKU	09/10/2020	188	Other	0	0	0	188

## 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**.

The screenshot shows the 'Inventory Management' page. At the top left, there is a blue button labeled 'Upload Supplies' with a red callout bubble containing the number '2'. Below this button are several form fields: 'Received Date \*' (text input with 'September 25, 2020'), 'Item Type \*' (dropdown menu with 'Select'), 'Product Name \*' (text input), 'Manufacturer \*' (dropdown menu with 'Select'), 'Lot Number \*' (text input), 'Expiration Date \*' (text input with 'September 25, 2020'), 'Number of Items \*' (text input), 'Inventory Packaging \*' (dropdown menu with 'Select'), 'Source of Items \*' (dropdown menu with 'Select'), 'County \*' (dropdown menu with 'Select'), 'Organization' (dropdown menu with 'Select an Option'), and 'Information Sheet' (button labeled 'Choose File' and 'No file chosen'). A blue 'Create' button is located at the bottom right of the form.

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**.

The screenshot shows the 'Import Supplies' page. At the top, there is a blue button labeled 'Download Headers in Excel' with a red callout bubble containing the number '3'. Below this button is a note: 'Note: Only import spreadsheets with appropriate headers.' Underneath the note is a file selection area. It includes a text label 'Select file:', a button labeled 'Choose File' and 'No file chosen' with a red callout bubble containing the number '4', and a blue button labeled 'Upload' with a red callout bubble containing the number '5'.

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.

Search:  2

Select Item	Date Received	Item Type	Item Name	Manufacturer	Source	Lot Number	Expiration Date	Starting Qty	Pkg	Qty Used	Qty Lost	Qty Loaned	Current Qty	Actions
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Stiedemann-Halvorson</a>	MedImmune	VFC	B0009QHJSG	08/30/2020	162	Other	0	0	0	58	<span style="color: red; font-weight: bold; font-size: 2em;">3</span> <input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Beer, Collier and Hoppe</a>	Sanofi Pasteur	VFC	B000JS9C70	09/12/2020	160	Other	102	0	0	58	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Hyatt, Monahan and Mertz</a>	Seqiris	Borrowed	B000P5YK8S	08/23/2020	151	Box	0	0	0	151	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Parisian-Reichel</a>	Sanofi Pasteur	Private Purchase	B0002I6HKW	09/09/2020	181	Other	0	0	0	181	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Champlin-Lindgren</a>	Pfizer	Borrowed	B000HGNY7I	09/15/2020	183	Box	0	0	0	183	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

The **Edit Inventory** page displays.

4. Edit the item’s details as you see fit.
5. Select **Update**.

Received Date \*

Item Type \*  4

Product Name \*

Manufacturer \*

Lot Number \*

Expiration Date \*

Number of Items \*

Inventory Packaging \*

Source of Items \*

County \*

Organization

Information Sheet  5

## 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.

Search:  2

Select Item	Date Received	Item Type	Item Name	Manufacturer	Source	Lot Number	Expiration Date	Starting Qty	Pkg	Qty Used	Qty Lost	Qty Loaned	Current Qty	Actions
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Stiedemann-Halvorsen</a>	MedImmune	VFC	B0009QHJSG	08/30/2020	162	Other	0	0	0	162	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Beer, Collier and Hoppe</a>	Pasteur	VFC	B000JS9C70	09/12/2020	160	Other	102	0	0	58	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Hyatt, Monahan and Mertz</a>	Seqiris	Borrowed	B000P5YK8S	08/23/2020	151	Box	0	0	0	151	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Parisian-Reichel</a>	Sanofi Pasteur	Private Purchase	B0002I6HKW	09/09/2020	181	Other	0	0	0	181	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/21/2020	Polio	<a href="#">Champlin-Lindgren</a>	Pfizer	Borrowed	B000HGNY7I	09/15/2020	183	Box	0	0	0	183	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/22/2020	Polio	<a href="#">Lynch and Sons</a>	GlaxoSmithKline	Private Purchase	B0000DHDW3	09/18/2020	184	Other	0	0	0	184	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/22/2020	Polio	<a href="#">Adams, Buckridge and Ryan</a>	Pfizer	VFC	B000IBFL2S	08/26/2020	118	Case	0	0	0	118	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	07/22/2020	Polio	<a href="#">Monahan, Strosin and Okuneva</a>	Sanofi Pasteur	Borrowed	B0000DE593	09/18/2020	151	Box	0	0	0	151	<a href="#">Edit</a> <a href="#">Delete</a>

3

The item’s inventory detail displays.

### New Entry for Beer, Collier and Hoppe (Received 07/21/2020)

View Information Sheet

Event Date *	Event Type *	Quantity Used *	Quantity Lost *
<input type="text"/>	<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>
Quantity Loaned *	Quantity Returned *	Quantity Destroyed *	Clinic
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Main Inventory
Review & Confirm

Clinic	Event Date	Event Type	Total Qty	Qty Used	Qty Lost	Qty Loaned	Qty Returned	Qty Destroyed	Quantity Remaining	Action
	09/21/2020	Mass Clinic	102							<a href="#">Edit</a> <a href="#">Delete</a>
TOTALS			160	102	0	0	0	0	58	

**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.

Clinic	Event Date	Event Type	Total Qty	Qty Used	Qty Lost	Qty Loaned	Qty Returned	Qty Destroyed	Quantity Remaining	Action
	07-21-2020	Mass Clinic		5	2	3	0	1		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
	07-29-2020	Mass Clinic		2	3	2	0	3		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
	08-19-2020	Community/Outreach Event		5	3	1		1		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
<b>TOTALS</b>			<b>169</b>	<b>12</b>	<b>8</b>	<b>6</b>	<b>0</b>	<b>5</b>	<b>138</b>	

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)**

Event Date *	Event Type *	Quantity Used *	Quantity Lost *
<input type="text" value="July 29, 2020"/>	<input type="text" value="Mass Clinic"/>	<input type="text" value="2"/>	<input type="text" value="3"/>
Quantity Loaned *	Quantity Returned *	Quantity Destroyed *	
<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="3"/>	

- 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.

#### Inventory Management

Upload Supplies

Received Date \*

Item Type \*

Product Name \*

Manufacturer \*

Lot Number \*

Expiration Date \*

Number of Items \*

Inventory Packaging \*

Source of Items \*

County \*

Organization

Information Sheet

 No file chosen

Create

Search:

Select Item	Date Received	Item Type	Item Name	Manufacturer	Source	Lot Number	Expiration Date	Starting Qty	Pkg	Qty Used	Qty Lost	Qty Loaned	Curr Qty
<input type="checkbox"/>	2020	Polio	<a href="#">Stiedemann-Halvorson</a>	MedImmune	VFC	B0009QHJSG	08/30/2020	162	Other	0	0	0	162
<input checked="" type="checkbox"/>	07/21/2020	PCR	<a href="#">White-Schaefer</a>	Seqiris	VFC	B000HBXMHK	08/26/2020	109	Unit	0	0	0	109
<input type="checkbox"/>	07/21/2020	Varicella (chickenpox)	<a href="#">Collins, Jakobowski and Bergstrom</a>	Seqiris	Borrowed	B000BPHSLS	09/16/2020	160	Box	132	2	2	20
<input checked="" type="checkbox"/>	07/21/2020	Hepatitis B	<a href="#">Graham Inc</a>	Sanofi Pasteur	Other	B000A409WK	08/20/2020	128	Unit	0	0	0	128
<input checked="" type="checkbox"/>	07/21/2020	Serological	<a href="#">Paucek-Flatley</a>	Pfizer	Other	B000A2LWKU	09/10/2020	188	Other	0	0	0	188

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**.

**Clinic Inventory**

Select Add Item

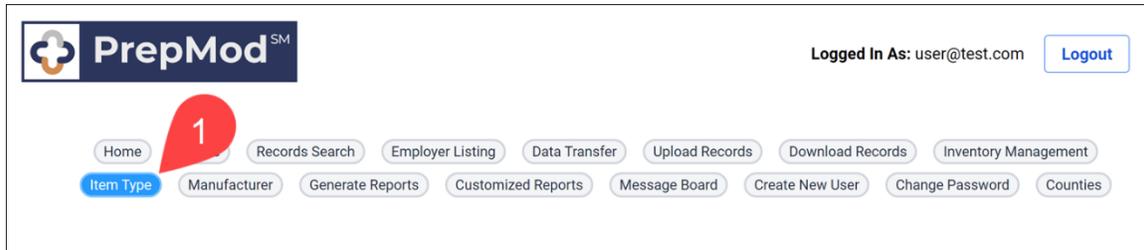
Name (Type)	Manufacturer	Lot Number	Expiration Date	# of Items	Action
Ut Maxime (DTaP)	Seqiris	B000CENBP0	08/28/2020	<input type="text"/>	<span>Remove</span>
Nostrum Inventore (Meningococcal Meningitis (MCV4))	Pfizer	B000I6QR90	09/05/2020	<input type="text"/>	<span>Remove</span>
Explicabo Minima (Meningococcal Meningitis (MCV4))	GlaxoSmithKline	B000A1FW8E	08/29/2020	<input type="text"/>	<span>Remove</span>
Occaecati Iste (PCR)	Seqiris	B000II6WOW	09/10/2020	<input type="text"/>	<span>Remove</span>

4 Update Cancel

PrepMod removes the item from the clinic inventory.

## Add an Inventory Item Type

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



The **Item Type Management** page displays.

2. Enter a name for the item type.
3. Select **Create**.

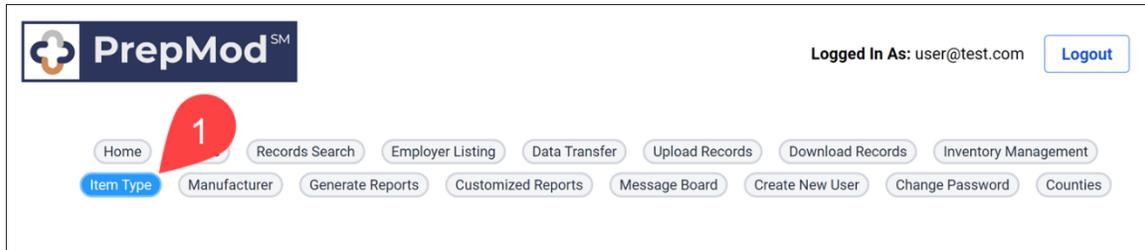
The screenshot shows the "Item Type Management" page. At the top is the title "Item Type Management". Below the title is a "Name\*" label and an empty input field, with a red callout bubble containing the number 2 pointing to it. Below the input field is a blue "Create" button, with a red callout bubble containing the number 3 pointing to it. Below the "Create" button is a "Search:" label and an empty input field. At the bottom is a table with two columns: "Name" and "Actions". The table contains three rows of data:

Name	Actions
MenB	<a href="#">Edit</a> <a href="#">Delete</a>
DTaP	<a href="#">Edit</a> <a href="#">Delete</a>
PCR	<a href="#">Edit</a> <a href="#">Delete</a>

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.

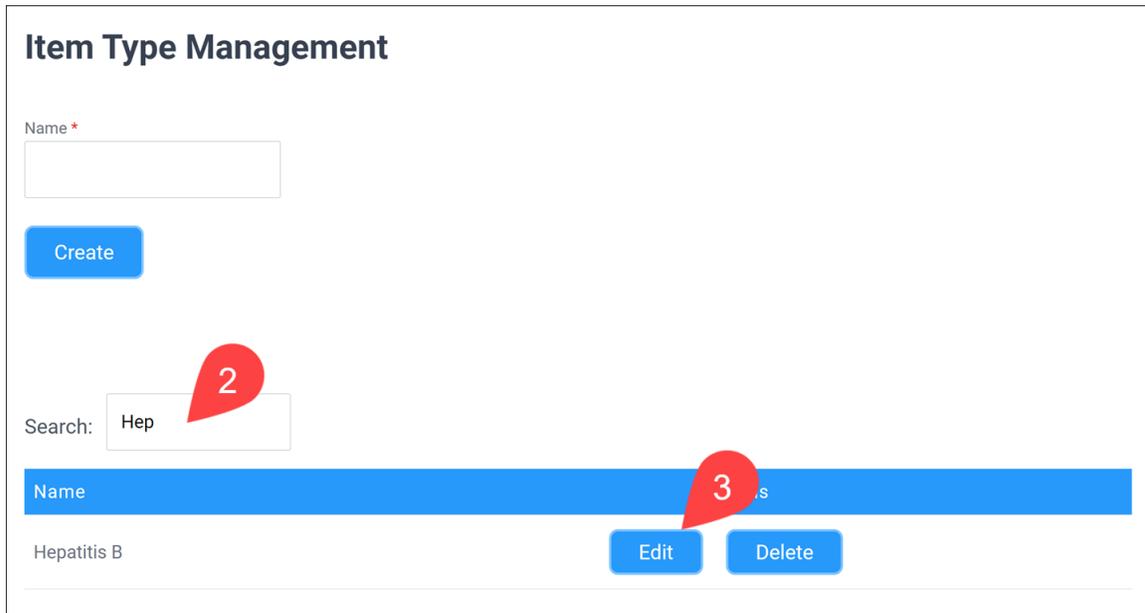
## Edit an Item Type

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.



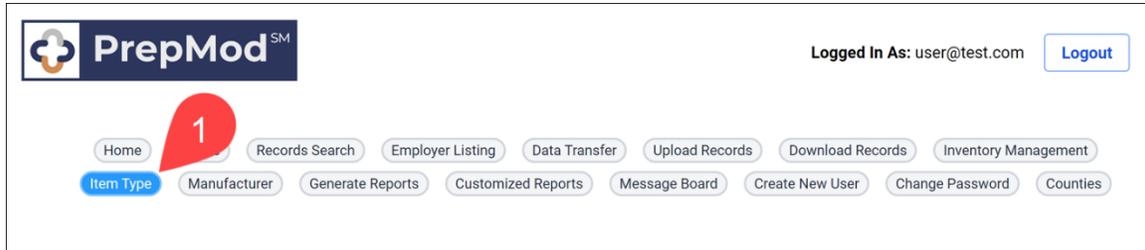
4. Edit the item type's name as you see fit.
5. Select **Update**.



## 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**.



The **Item Type Management** page displays.

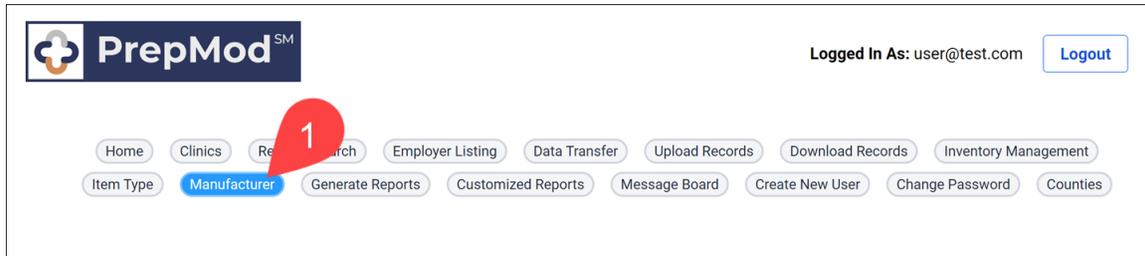
2. Locate the item type you wish to edit by scrolling through the list or by entering its name in the **Search** field.
3. Select **Delete** in the item type's row.



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

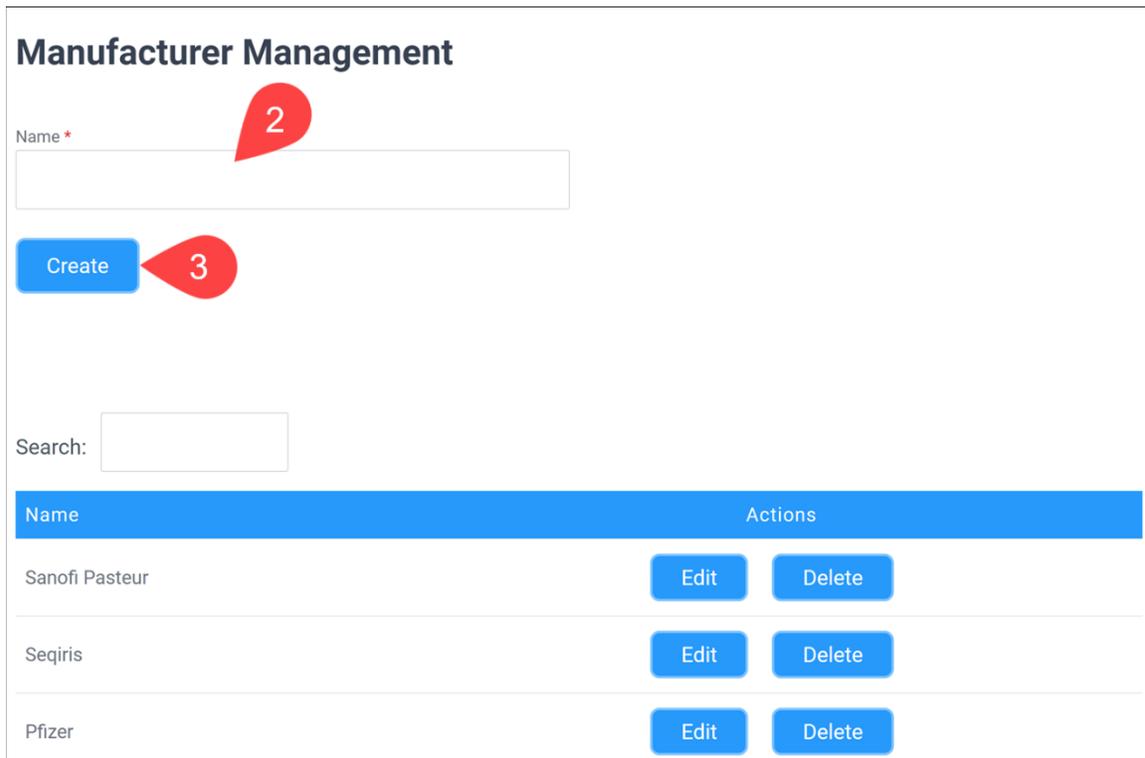
## Add a Manufacturer

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



The **Manufacturer Management** page displays.

2. Enter a name for the manufacturer.
3. Select **Create**.

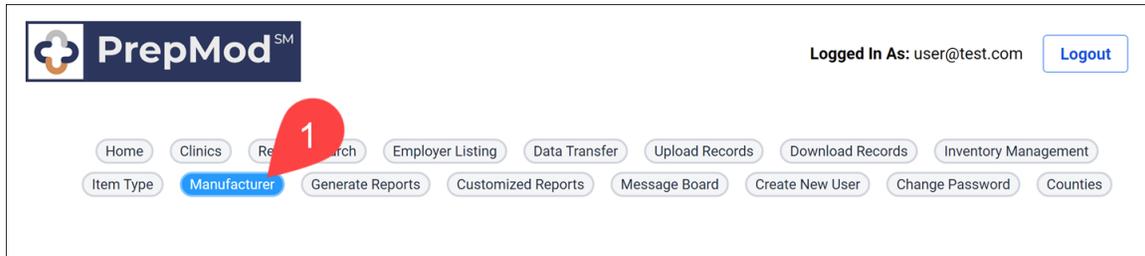


Name	Actions
Sanofi Pasteur	<button>Edit</button> <button>Delete</button>
Seqiris	<button>Edit</button> <button>Delete</button>
Pfizer	<button>Edit</button> <button>Delete</button>

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

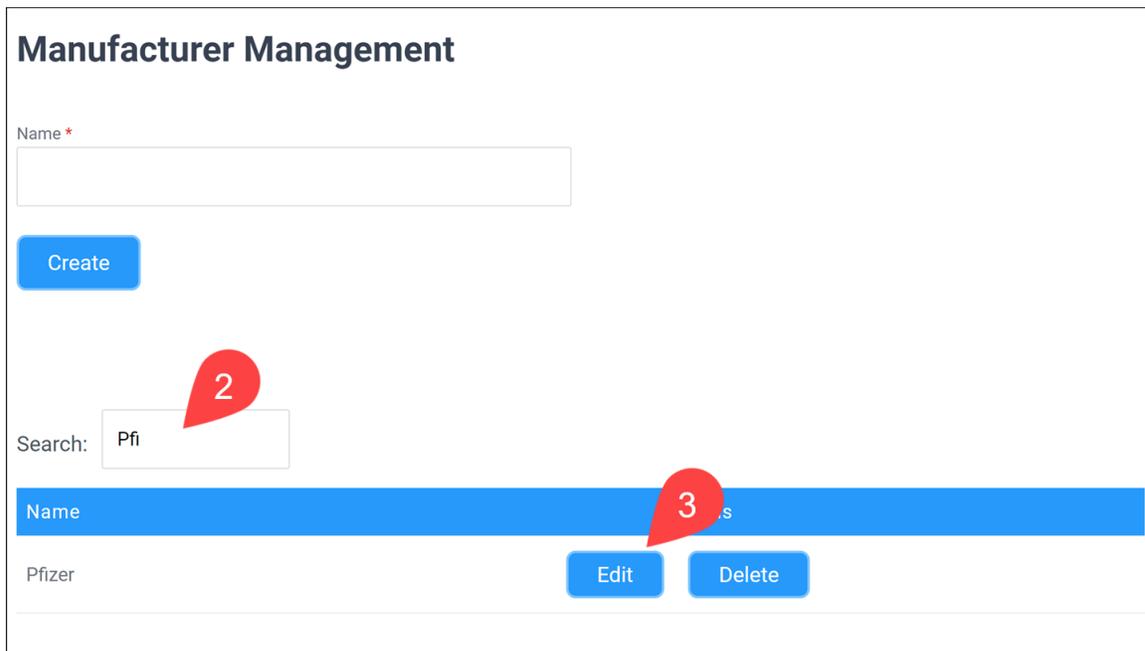
## Edit a Manufacturer

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



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.



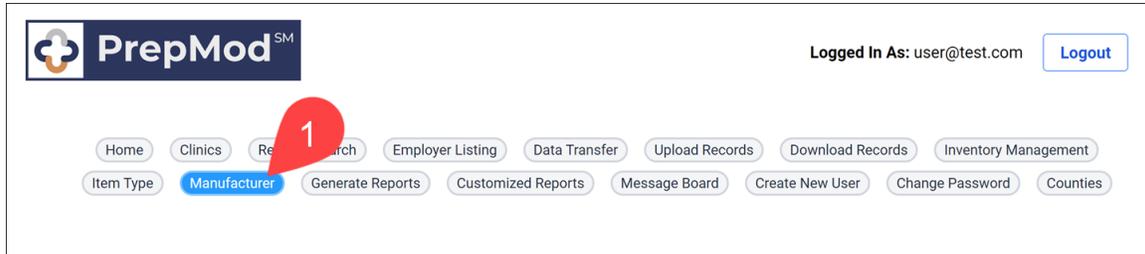
4. Edit the manufacturer's name as you see fit.
5. Select **Update**.



## Delete a Manufacturer

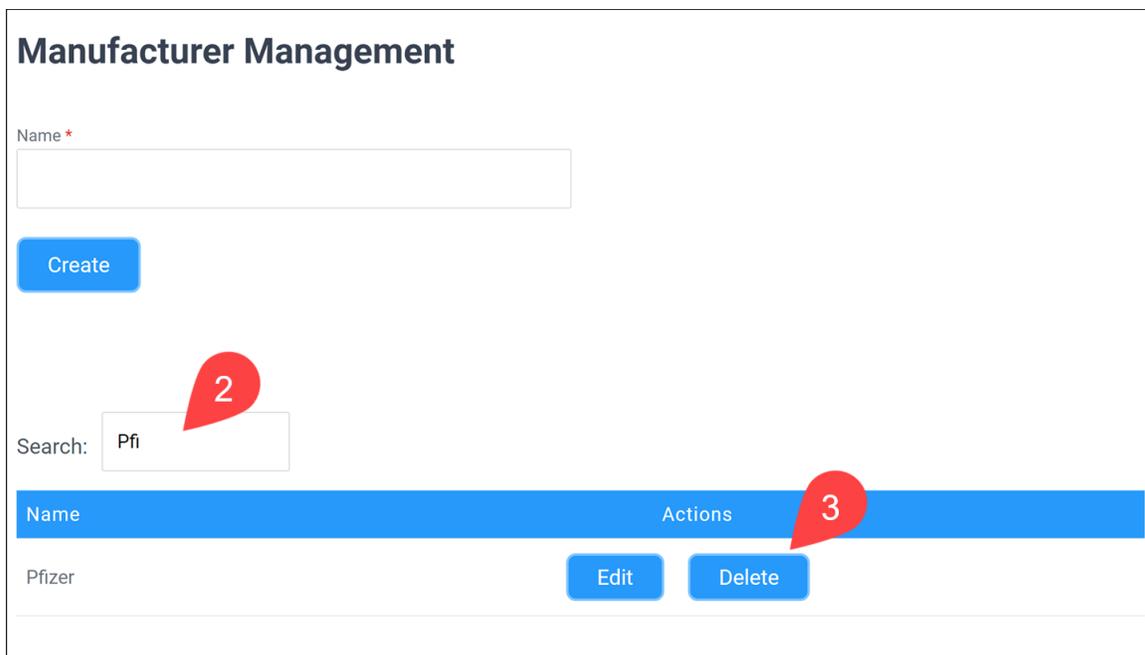
**Note:** You cannot delete a manufacturer if it has any associated inventory items.

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



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.

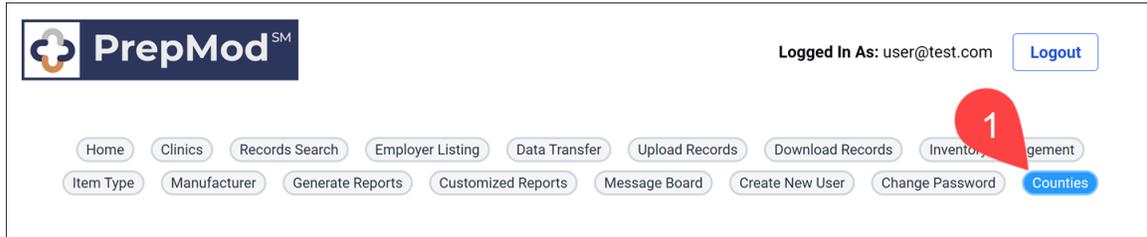


PrepMod deletes the manufacturer. It will no longer be available for selection when you are adding or editing inventory items.

## Managing Counties and Organizations

### Add a County or Municipality

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



The **Counties** page displays.

2. Select **Create County**.



The County Information page displays.

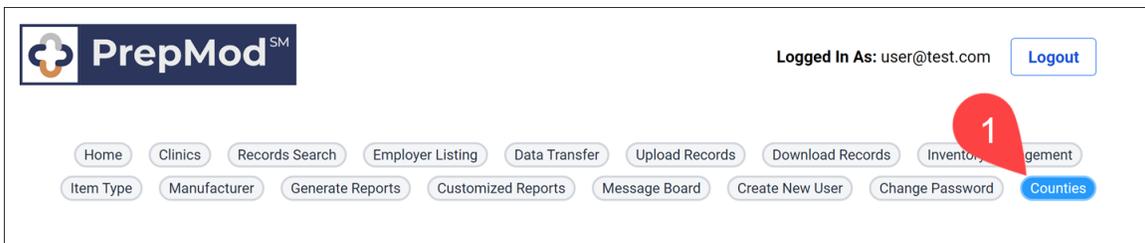
3. Enter the county name.

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.

Name	Action
<a href="#">Allegany</a>	
<a href="#">Anne Arundel</a>	
<a href="#">Baltimore</a>	

The **County Information** page displays.

3. Edit the county name as you see fit.

4. Select **Update County**.

**County Information**

Name

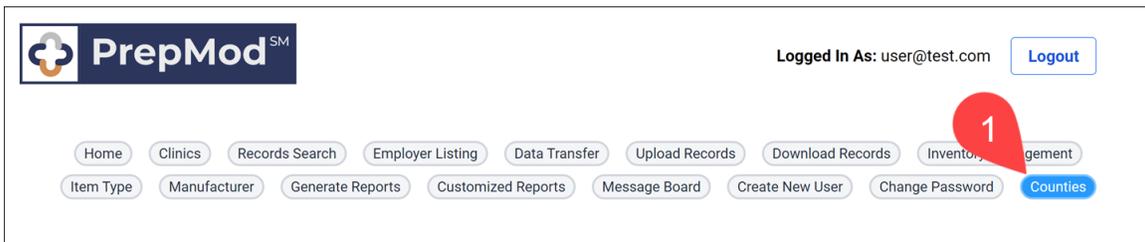
Anne Arundel

Update County

Back

### Delete a County

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



The **Counties** page displays.

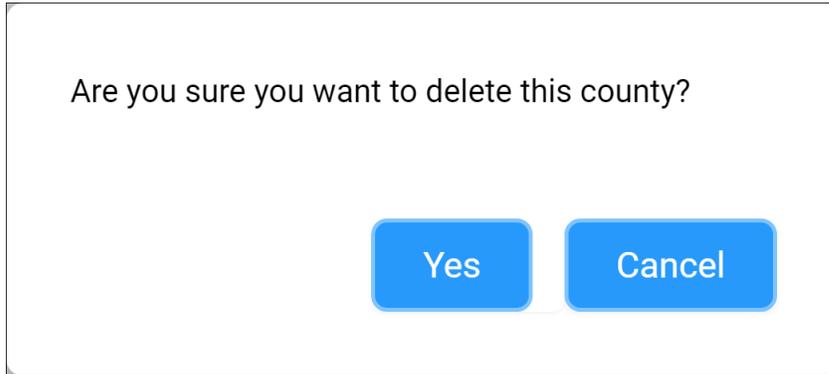
2. Locate the county you wish to delete, and click the **Delete** icon in its row.

**Counties**

Create County

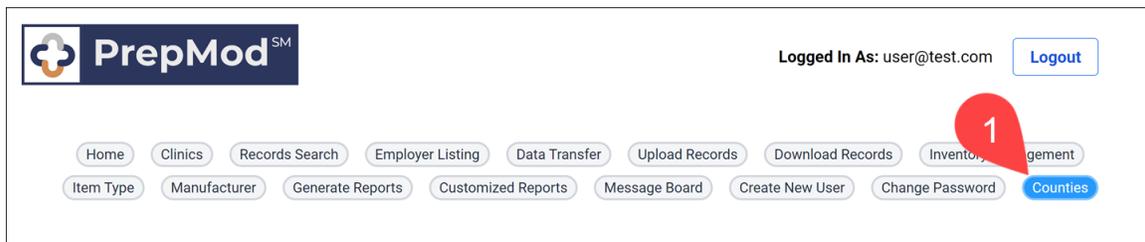
Name ↑	Action
<a href="#">Allegany</a>	
<a href="#">Anne Arundel</a>	
<a href="#">Baltimore</a>	

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



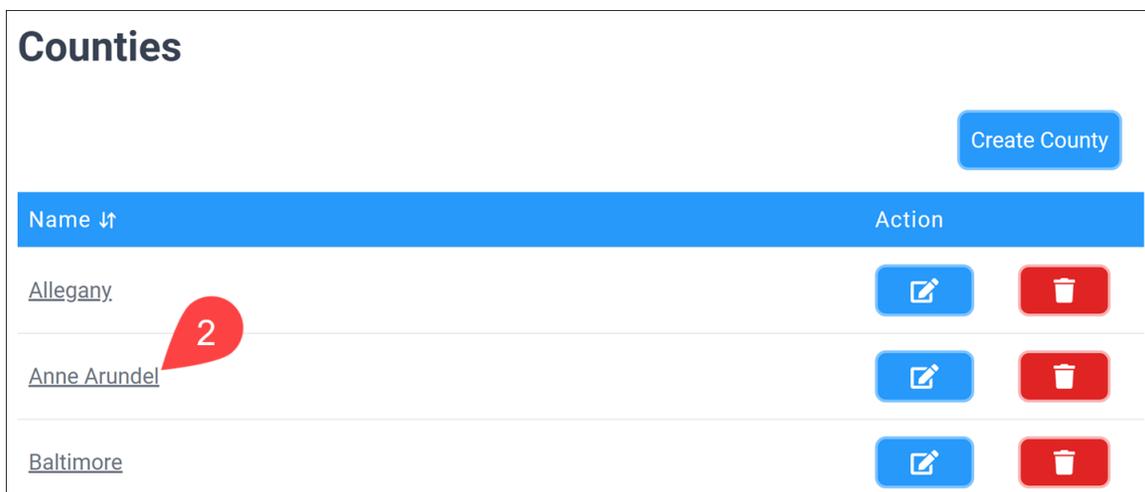
## Add an Organization

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



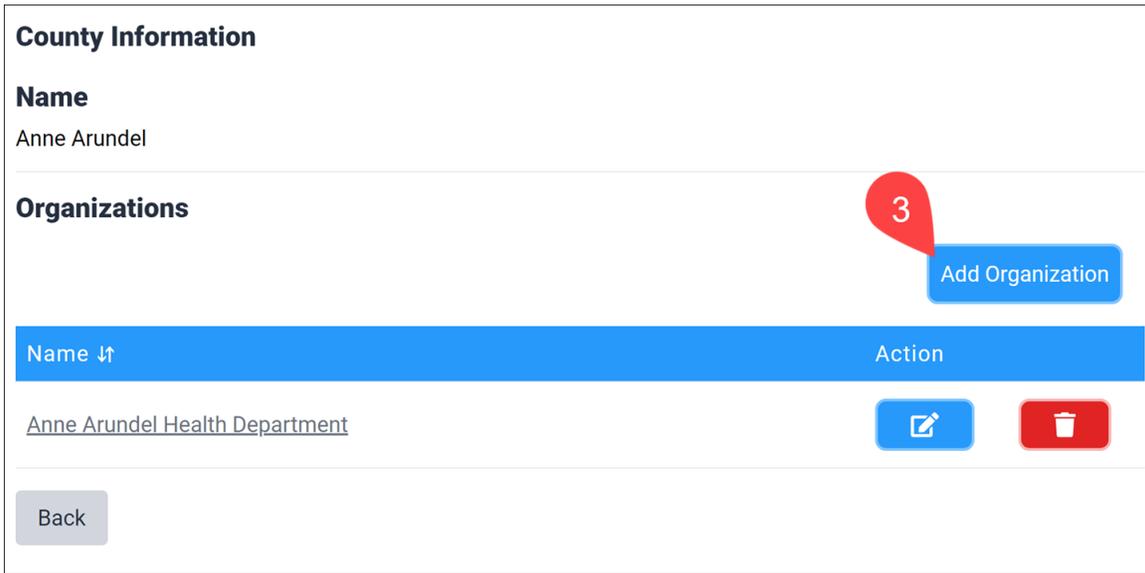
The **Counties** page displays.

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



The **County Information** page displays.

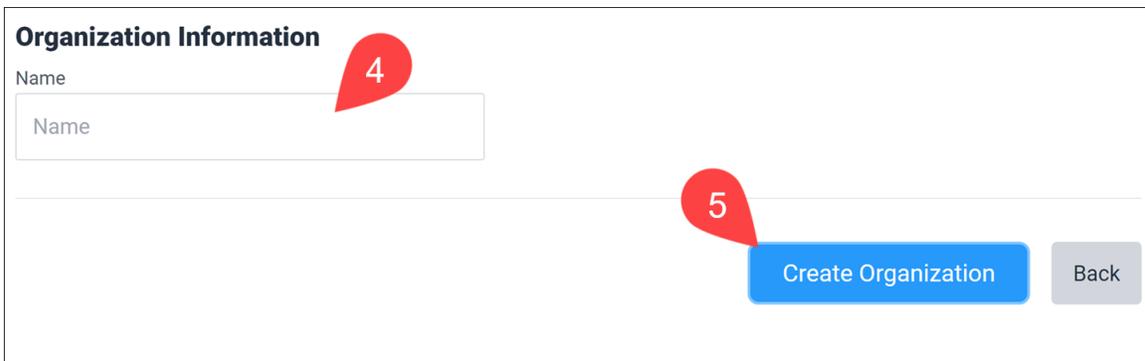
3. Select **Add Organization**.



The **Organization Information** page displays.

4. Enter the organization's name.

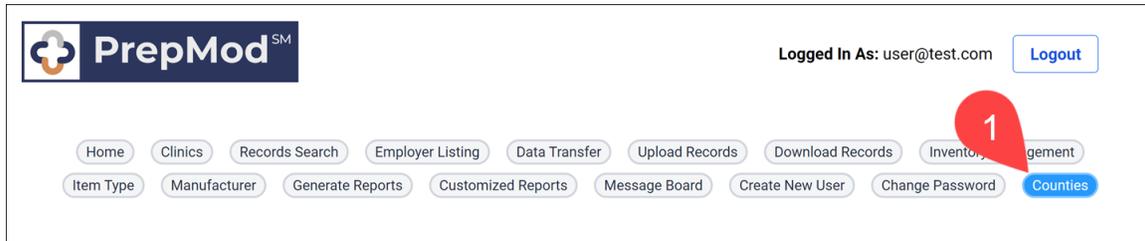
5. Select **Create Organization**.



The organization is added to the county.

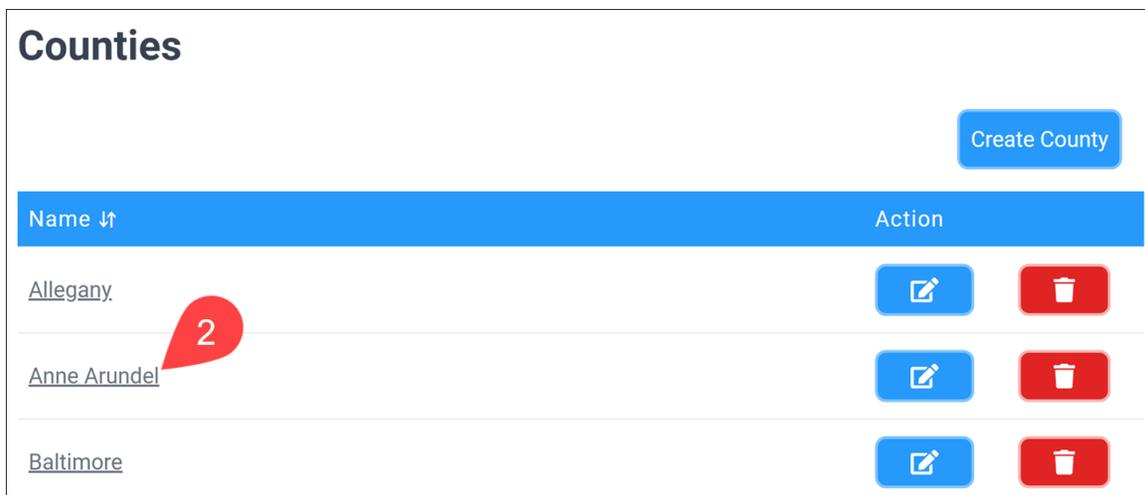
## Edit an Organization's Name

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



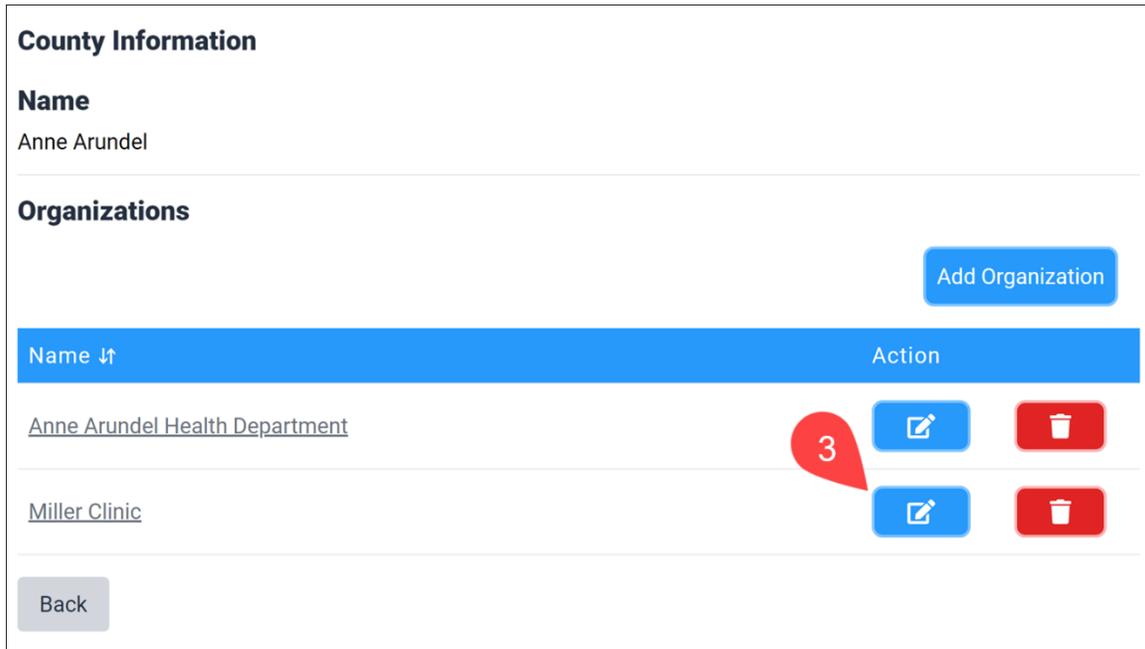
The **Counties** page displays.

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.



**County Information**

**Name**  
Anne Arundel

---

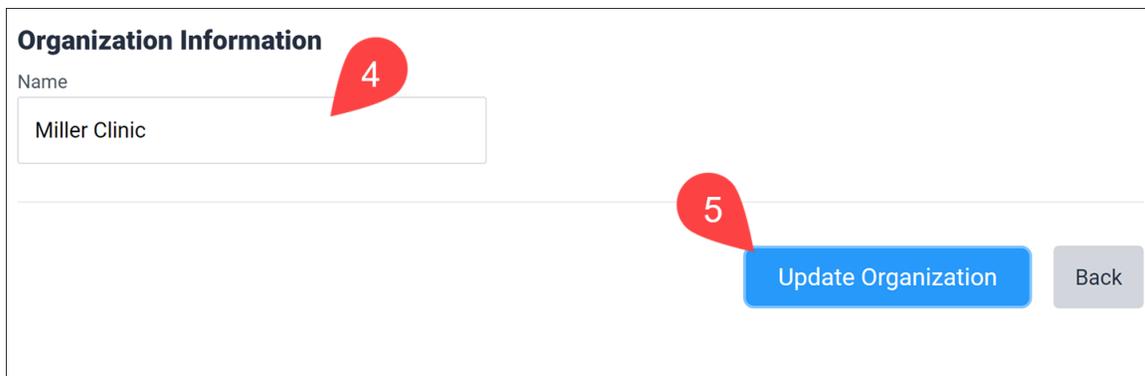
**Organizations**

[Add Organization](#)

Name ↓	Action
<a href="#">Anne Arundel Health Department</a>	 
<a href="#">Miller Clinic</a>	 

[Back](#)

4. Edit the organization's name as you see fit.
5. Select **Update Organization**.



**Organization Information**

Name 

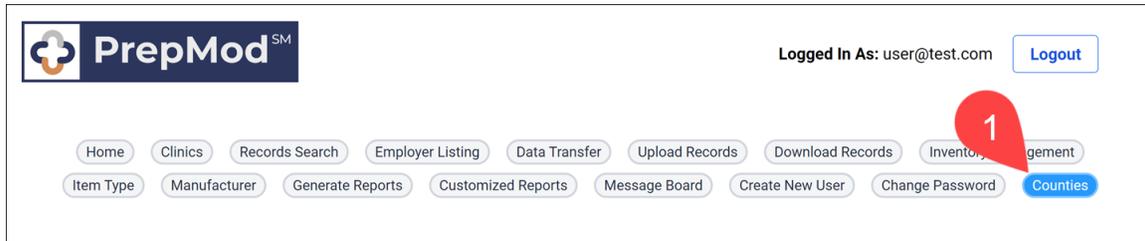
Miller Clinic

---

 [Update Organization](#) [Back](#)

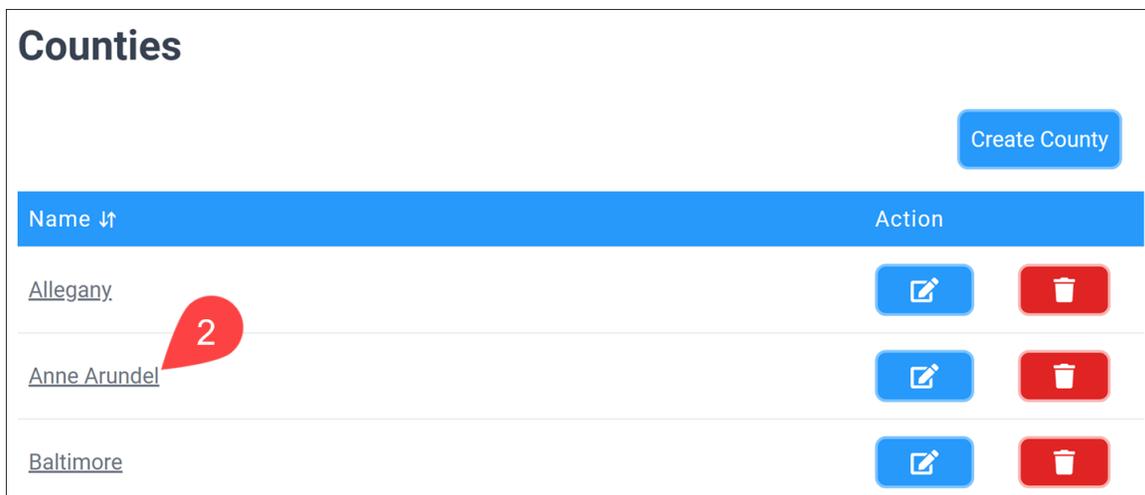
## Delete an Organization

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



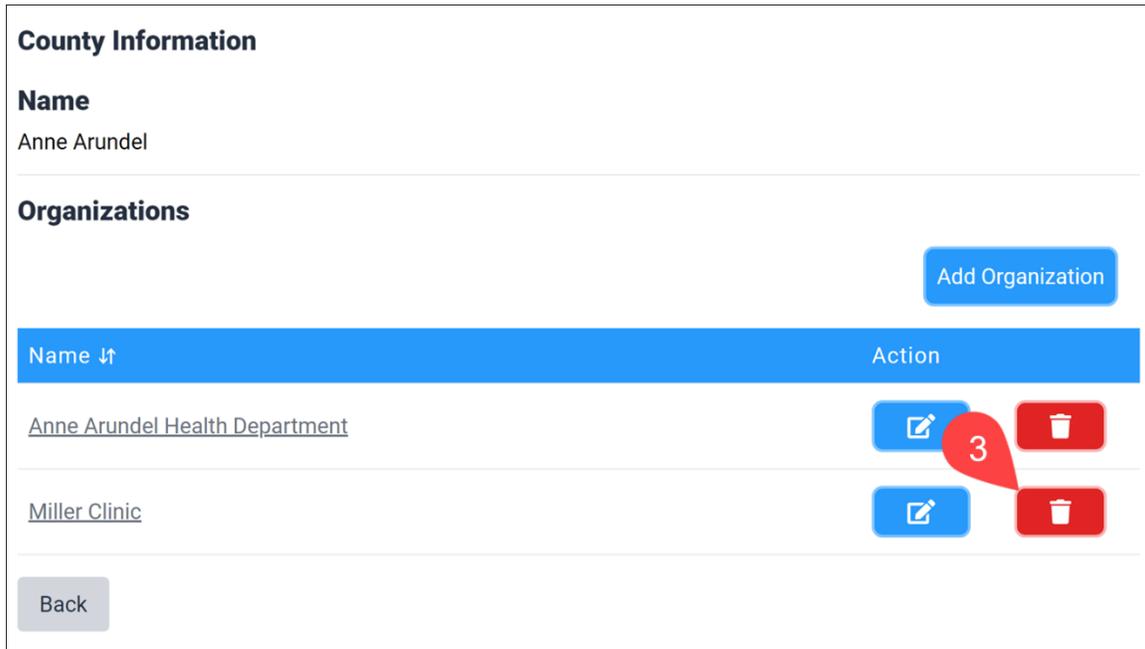
The **Counties** page displays.

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.



**County Information**

**Name**  
Anne Arundel

---

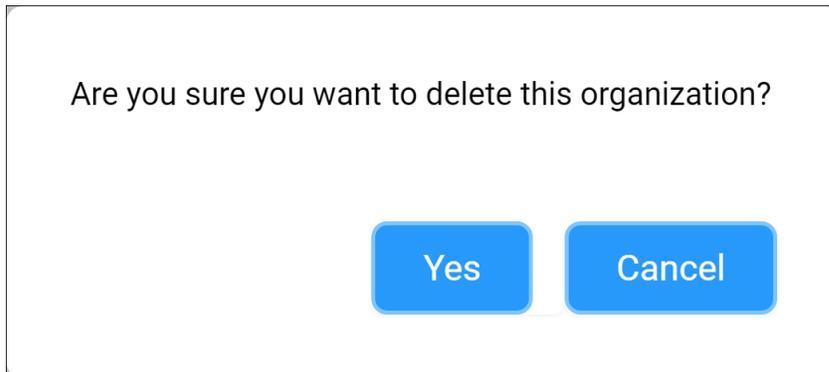
**Organizations**

[Add Organization](#)

Name ↓	Action
<a href="#">Anne Arundel Health Department</a>	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">Miller Clinic</a>	<a href="#">Edit</a> <a href="#">Delete</a>

[Back](#)

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

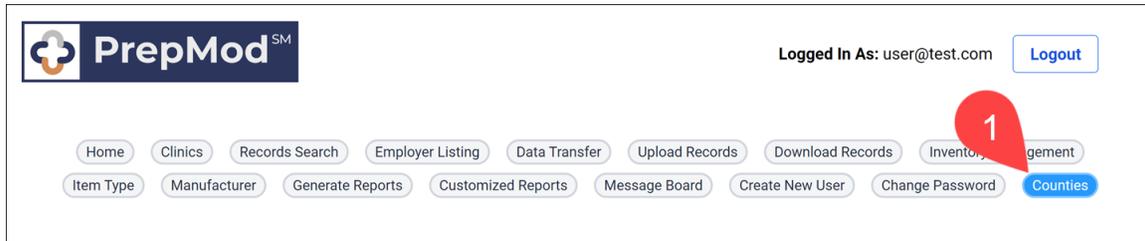


Are you sure you want to delete this organization?

[Yes](#) [Cancel](#)

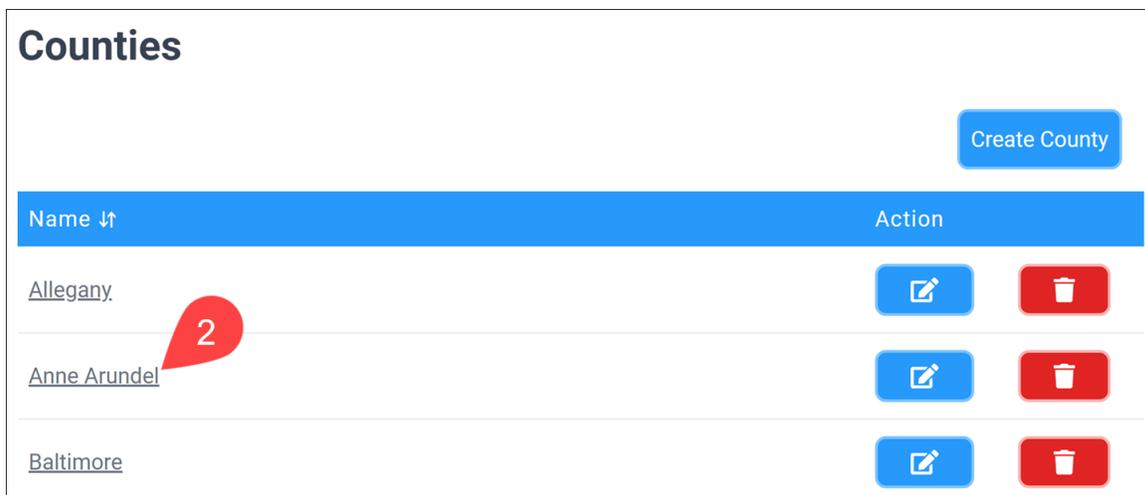
## Add a Venue

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



The **Counties** page displays.

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



The **County Information** page displays.

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



The **Organization Information** page displays.

4. Select **Add Venue**.

The screenshot shows the 'Organization Information' page for 'Anne Arundel Health Department'. Under the 'Venues' heading, there is a search input field and a blue 'Add Venue' button. A red callout bubble with the number '4' points to the 'Add Venue' button. Below the search field is a table header with columns: Name, Address, City, Zip Code, State, Category, Location, and Action.

The **Venue Information** page displays.

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

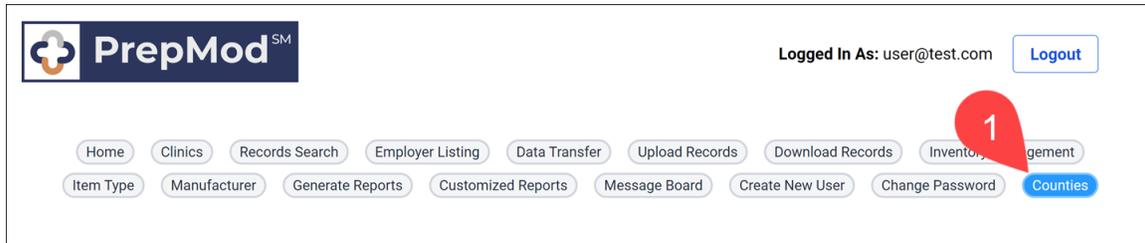
6. Select **Create Venue**.

The screenshot shows the 'Venue Information' form. It contains several input fields: Name, City, Address, Zip Code, State, Longitude, Latitude, and Category. A red callout bubble with the number '5' points to the 'City' field. At the bottom right, there is a blue 'Create Venue' button and a grey 'Back' button. A red callout bubble with the number '6' points to the 'Create Venue' button.

The venue is added to the organization.

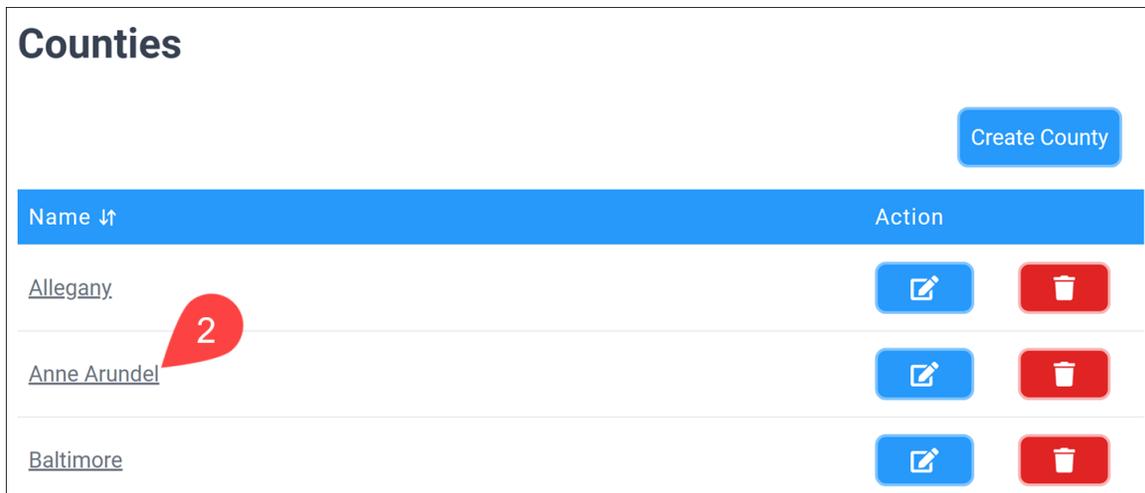
## Edit a Venue

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.

**Organization Information**

**Name**  
Anne Arundel Health Department

---

**Venues**

Search:  Add Venue

Name ↕	Address ↕	City ↕	Zip Code ↕	State ↕	Category ↕	Location	Action
<a href="#">Johnson Clinic</a>	123 Main Street, Edison, NJ, USA	Edison	8817	Union			<span style="color: red; font-size: 2em; font-weight: bold;">4</span>
<a href="#">Hargrove Medical</a>	123 Smith Street, Edison, NJ, USA	Edison	8817	Franklin			

The **Venue Information** page displays.

5. Edit the venue as you see fit.
6. Select **Update Venue**.

**Venue Information**

Name

City  5

Address

Zip Code

State

Longitude

Latitude

Category

---

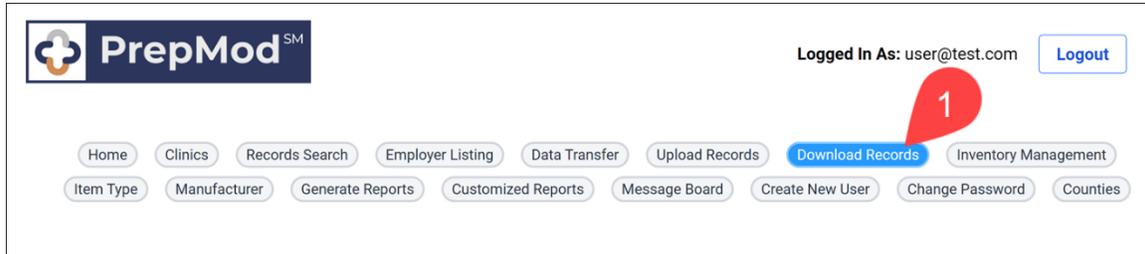
6

## Chapter 7: Download Records

### Download News and Notifications Signups

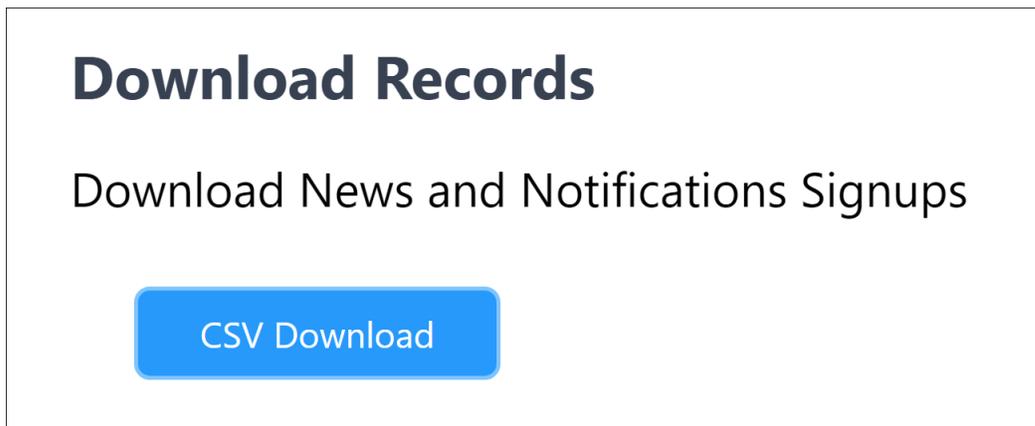
To download a CSV file of people and organizations that have signed up for news and notifications through the public site, take the following steps.

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



The **Download Records** page displays.

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

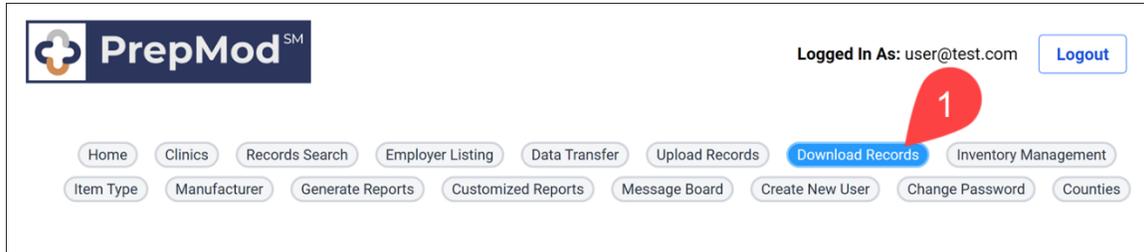


PrepMod saves the file to your **Downloads** folder.

## Download Clinic Results

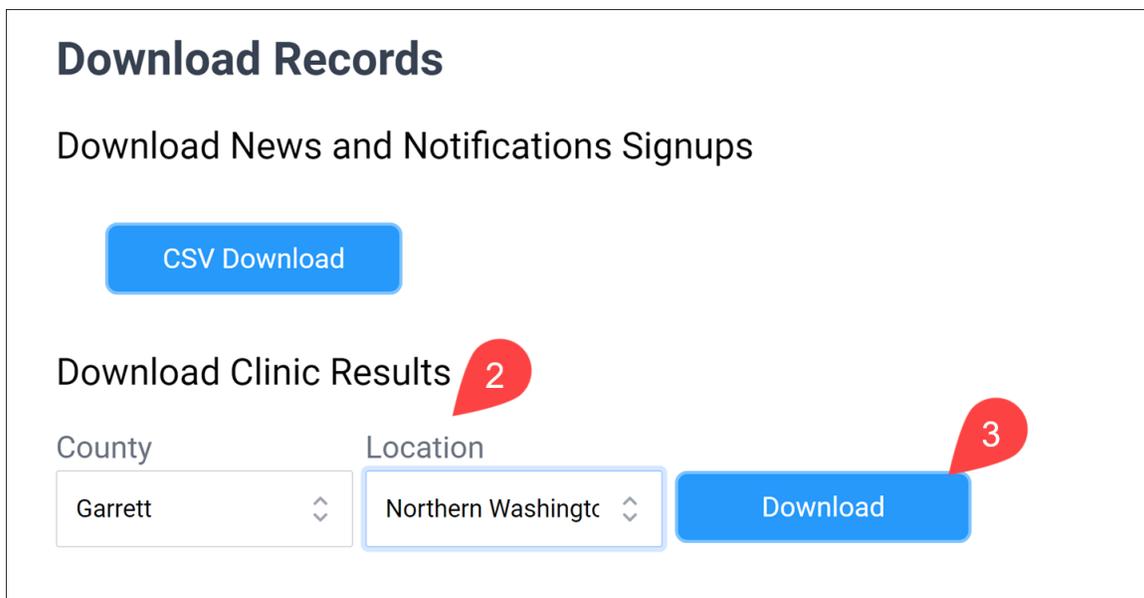
You can download clinic results in the form of a CSV file.

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.