Quick-Start
HOW-TO GUIDE
Module 1: Clinic Planning

TABLE OF CONTENTS | CREATE A CLINIC

1

This is the **public-facing home screen for the PrepMod™ website**. It's the online platform for patients wanting to register for health screenings or vaccines, for community providers interested in engaging with a specific campaign, and for businesses that would like to participate.

This is the **administrative home screen for the PrepMod™ website**. It's the online portal for health professionals and administrators to set-up, schedule, plan, implement, track, and evaluate a clinic. **The How-To Guide on the pages that follow focuses on the administrative side of the website**.

2

PREPMOD | ADMINISTRATIVE HOME SCREEN

Click here to create a clinic. Also provides access to clinic and patient details.

Click here to start the Virtual Clinic queue for Patients.

Start your clinic here.

Click here to search for a specific patient record.

Click here to refer specific patients for additional services.

PrepMod℠

Manage Clinics and Users	Start Clinic **Virtual Queue**	Start Clinic **Standard**	Find a Record	Refer Patient for Services

Enroll Provider or Business	Inventory Management	Generate Reports	Send a Message	Logout
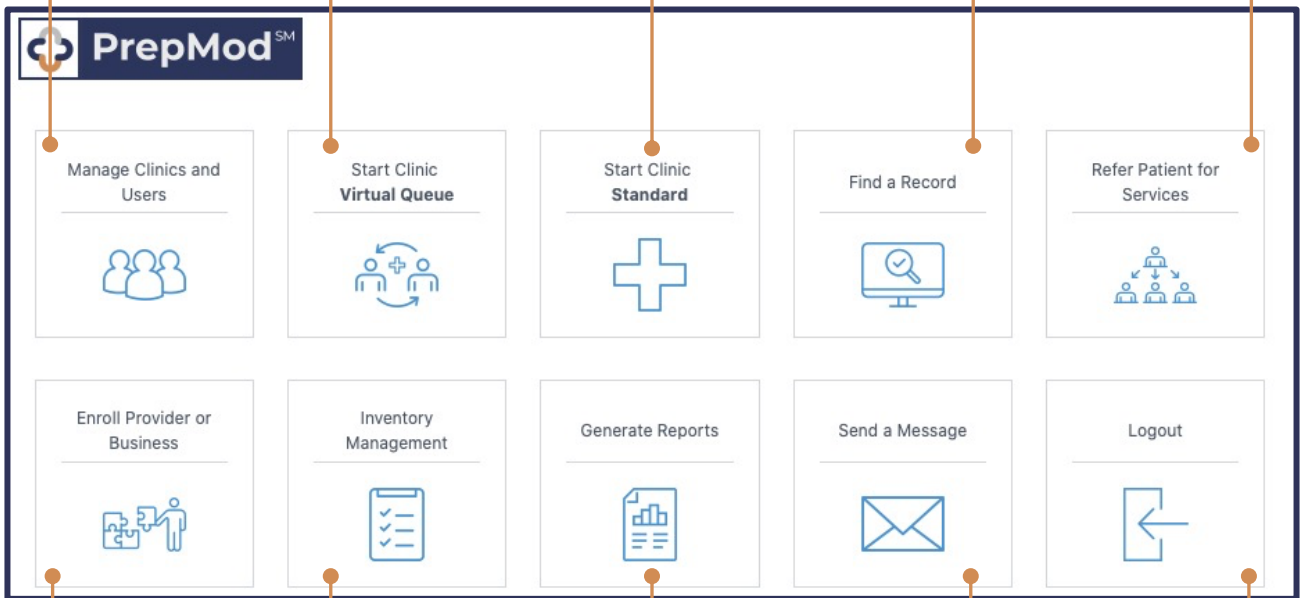
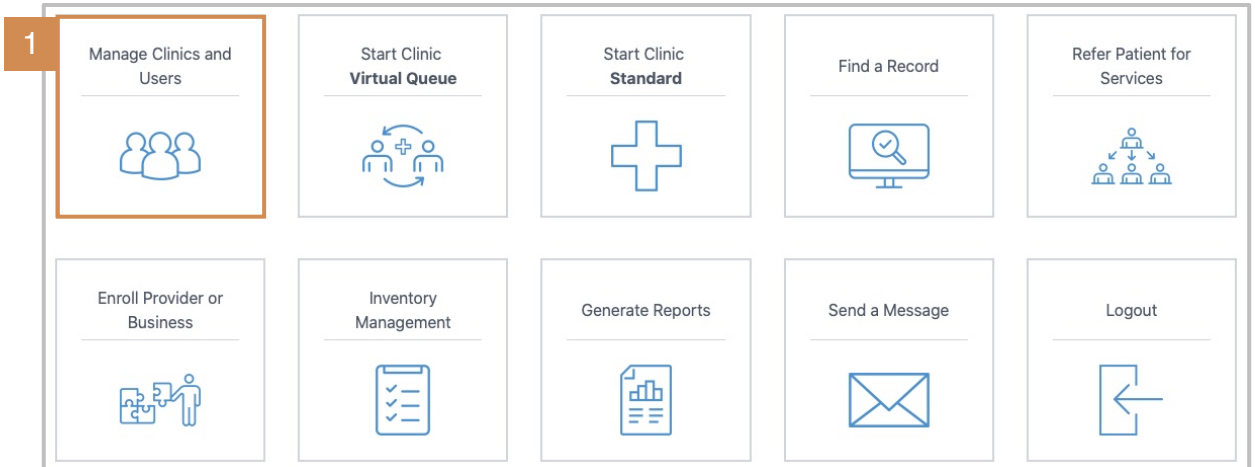Click to add, track & manage medication & supplies here.

Click here to create customized, real-time reports.

Click to email & communicate with patients or other professionals enrolled in the system.
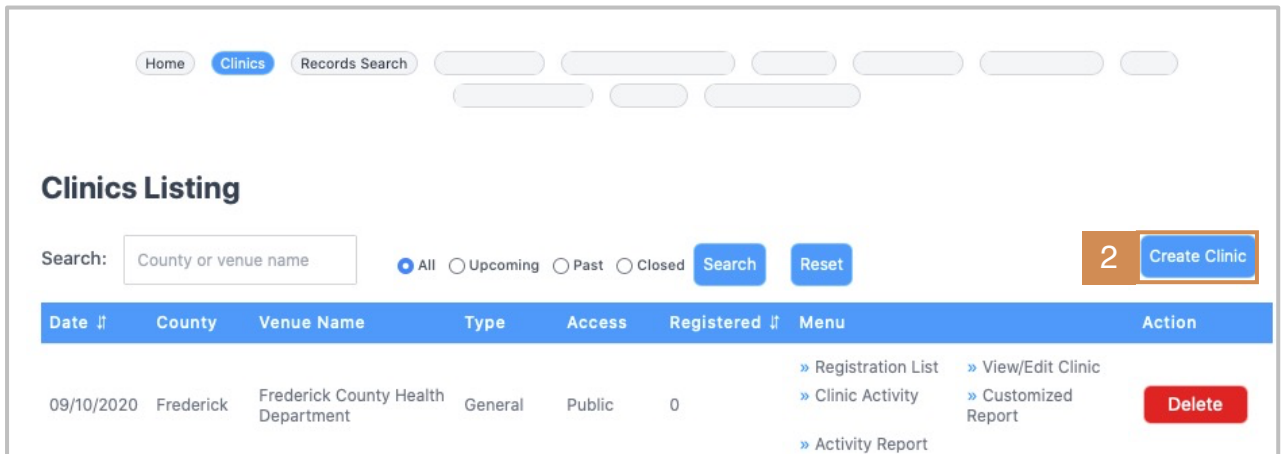
Click here to access details to enroll/ approve requests.

Click to Logout.

1. From the PrepMod Home Screen, Click **Manage Clinics and Users**.

2. On the **Clinics Listing** page, select **Create Clinic**.

Create Clinic

Number of Patients Registered: 0

Clinic Type *

| General | Flu | 3 |
| Childhood | School Flu Children & Adults | |

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

5 **Collect Insurance Information?**
○ Yes, required   ○ Yes, optional   ○ No

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

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

8 County *
Select

9 Organization *
Select an Option

10 Venue *
Select an Option

Setting
Church
Health department   **11**
Hospital
School

Complete the fields on the **Create Clinic** page.

3. Select **clinic type** from the drop-down menu.

4. Choose **public or private** clinic.

5. Indicate if **insurance information** will be collected at the clinic.

6. Select the **services provided** at the upcoming clinic.

7. Determine whom the clinic is **Open To** (ie, Is the clinic targeted to a specific age group or is it all ages?).

8. Select the **county** in which your clinic is located.

9. Select the **organization** sponsoring the clinic.

10. Select the specific **venue** where the clinic will be held.

11. Choose the type of **setting** for your clinic

Under Date, Time, & Location

12. Enter the upcoming **clinic date, including start** and **end times.**

13. Populate the **address** of your venue, including **zip, city,** and **state.**

14. If the same venue will be hosting another clinic, select **Add Another Date.**

15. Enter the **next clinic date, including start** and **end times.**

   ▪ Click **Add Another Date** for each new clinic at the same venue.

16. If you need to delete a clinic, click the **red trash-can symbol**.

Under **Appointment Information**

17. Select if the appointments for your clinic will be **Required, Optional**, or **Walk-In**.

18. Determine the **Social Distancing Capacity**. (See next page.)

19. Enter the **Registration Deadline** and check the box if you'll allow registration on the same day of the clinic.

20. Determine the **Appointment Frequency** and **Appointment Slots**.

Social Distancing Capacity is the number of patients that the clinic determines can be safely inside the venue during the clinic.

Once determined, the social distancing capacity is also used to set-up the virtual queue. As patients communicate their arrival the day of the clinic, they'll be placed "in queue" as they comfortably wait in their car or vehicle. They will then receive a confirmation message when their appointment slot is ready and it's time to come inside.

Social Distancing Capacity: PrepMod Quick Tip

Contact Information

Contact Person
21 Tiffany Tate

Contact Phone Number
222-222-2222

Contact E-mail
22 TiffanyTate@prepmod.com

Back-Up Contact Person
Julie Wagner

Back-Up Contact Phone Number
23 333-333-3333

Back-Up Contact E-mail
24 Juliewager@healthtrain.com

Additional Clinic Details

Incidents Comments   (This information will be displayed publicly in the clinics listings)
25 Pre-registration is recommended for the most efficient experience, but walk-ins are welcome at the clinic.

Registration and Staff

Lead Tester's Name
26 Tiffany Tate

Clinic Staff
27 Julie Wagner

Add more staff **28**

Under **Contact Information**:

21. Type the designated **Contact Person** for the clinic.
22. Add the **Contact's Phone Number** and **Email Address.**
23. Type the back-up or secondary **Contact Person** for the clinic.
24. Add the **Back-Up Contact's Phone Number** and **Email Address**.
25. Add **Additional Clinic Details** / information as needed.

Under **Registration and Staff**:

26. Enter the **Lead Tester's** (or Vaccinator's) name; the person in charge.
27. Enter the names of the **Clinic Staff** that will be working the day of the event.
28. Click **Add More Staff**, to add additional names.

Under **Clinic Inventory**

Clinic inventory can be added now or through View/Edit Clinic.

29. From the drop-down field, select the vaccine, test, or screen that will be administered the day of the clinic.

30. Click **Add Item.**

31. Choose from the **Clinic Inventory** list, if needed; click **Add Item** again.

32. If you know the quantity of items you'll need, add the **# of Items**.

33. Take a moment to review the names, data, and details generated for the clinic. If everything looks correct, click **Submit**.

You've created a clinic.

If anything changes within the clinic or requires updating, simply click the **Clinics** tab and edit through **View/Edit** clinic.

HOW TO | SEARCH FOR A CLINIC

Clinics Listing

Search: Century High — All ○ Upcoming ○ Past ○ Closed [Search] [Reset] [Create Clinic]

Date	County/Jurisdiction	Venue/Location Name	Type	Access	Registered	Menu	Action
08/23/2020	Calvert	Appeal Elementary Schoole	5	» Registration List » Clinic Activity		» View/Edit Clinic » Customized Report	Delete
08/24/2020	Carroll	Century High	1	» Registration List » Clinic Activity		» View/Edit Clinic » Customized Report	Delete
08/24/2020	Calvert	St. Leonard Elementary School	2	» Registration List » Clinic Activity		» View/Edit Clinic » Customized Report	Delete

Within the Clinics tab is the *Clinics Listing*. In it, one can select a clinic and either **view the list of registered and wait-listed patients** or **view/edit clinic details.**

The registration list can also be download into an Excel spreadsheet and printed along with the patient's Consent Form.

This section details steps for **accessing a clinic and viewing the registration list**.

View Clinic

To search your upcoming clinic and view the registration list:

1. Select **Manage Clinics and Users** from the PrepMod Home Page.

   Result: The **Clinics Listing** page will display, listing clinics in descending order by date.

2. Type the name of the clinic you're seeking into the **search** bar.

3. Click **Search.**

Clinics Listing

Search: [Century High] ● All ○ Upcoming ○ Past ○ Closed [Search] [Reset]   [Create Clinic]

Date ⇅	County/Jurisdiction	Venue/Location Name	Type	Access	Menu	Action
08/23/2020	Calvert	Appeal Elementary Schoole	5	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report	Delete
4 08/24/2020	Carroll	Century High	1	» Registration List » Clinic Activity	**5** Edit Clinic » Customized Report	Delete
08/24/2020	Calvert	St. Leonard Elementary School	2	» Registration List	» View/Edit Clinic	

Registration List
A Venue

Clinic Status: Upcoming   » Registration List » View/Edit Clin

Number Registered: 20   Waiting List: 0

Search: [Patient's first name or last name or venue] [Search]

[Email Vaccination Record] [Email Reminder] [Download Waiting List] [Download]

	Name ⇅	Date of Birth ⇅	Age ⇅	Gender ⇅	Appointment ⇅	Home School	
◻	Karri Trantow	11/16/1992	27	Other	09/22/2020 09:45 am	Dorchester County Health Department	Email Remind
◻	Guy Swift	03/08/1992	28	Other	09/22/2020 09:45 am		Email Remind
◻	Gemma Brakus	05/03/1994	26	Female	09/22/2020 06:45 pm		Email Remind
◻	Candyce Donnelly	03/24/1992	28	Male	09/22/2020 06:35 pm	Central Office	Email Remind

4. All clinics matching the searched name will display.

   ▪ You can also scroll through the Clinics Listing, though a bit more time consuming.

5. Identify the clinic you'd like to view, then select **Registration List**.

   Results: The registered list of clinic attendees will open.

   Note: Each clinic administrator has viewing access to his/her own clinics within the Clinics Listing. Only the regional administrator has viewing rights to any additional regionally scheduled and approved clinics.

   See next page for details of the Registration List.

Functions and options available on the **Registration List** home page.

a. Menu of functions specific to the selected clinic.

b. The number of registered and waiting-list patients for the selected clinic.

c. Click to view the **wait list**.

d. Type the patient's name to **search-by-name;** click **Search.**

e. View the waiting list.

f. Email a patient's **vaccination record**.

g. Email **appointment reminders** to one or more patients.

h. Click to **download** the **waiting** or **registration lists**, eg, if you'd like to save to your computer, create an Excel spreadsheet, or send.

i. Click to **print** an **open document** or a **patient record**.

j. Click to **add more patients.**

k. Click any **name** within the itemized list of registered attendees to open the record.

l. Click to email an **appointment reminder** to the selected patient.

m. Click to **view** (patient's)**Consent Form. (Example next page.)**

n. Click to **delete** a patient from the registration list.

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	FIRST Name	MI	DOB	Age	Sex
Grimes	Wade	W	06/13/94	26	F

Address	City	State	ZIP Code
7808 Baltimore Annapolis Boulevard	Glen Burnie	MD	21060

Email Address	Phone Number	
belle.jast@stokes.biz	(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	Insurance Company Name	Insurance Member Number
Medicare	Hills-Lang	609-56-9928

Insurance Group Number	Other Insurance Number	
4383805571478747	1957105263708193	

Insured Adult's Name	Relationship to Patient	Insured Adult's Date of Birth
Melvina Mraz	Uncle	Friday October 29, 2004

Do any of the following apply to you?

Do you have?

☐ A fever of 100.4 degrees Fahrenheit or higher
☐ A cough
☐ Shortness of breath or difficulty breathing

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

○ Yes
○ No

Have you been in close contact with anyone who has a confirmed COVID-19 diagnosis?

○ Yes
○ No

Do you have heart disease, lung disease, kidney disease or diabetes?

○ Yes
○ No

Are you 60 or older?

○ Yes
○ No

Is there any other reason you think you should be tested for COVID-19? If 'yes', explain

○ Yes
○ No

Consent and history; completed by the patient during clinic registration.
Viewable by clicking **View Consent** on the **Registered Patient's** page.

2020 COVID-19 Test Clinic Consent Form

Clinics Listing

Search: [   ]   ● All ○ Upcoming ○ Past ○ Closed   [Create Clinic]

Date ⇅	County ⇅	Venue Name ⇅	Registered ⇅	Menu		Action
08/24/2020	Carroll	Century High	**1**	» Registration List » Clinic Activity	» View/Edit Clinic » Customized Report **2**	[Delete]

View/Edit Clinic
A Venue

Clinic Status: Closed [Reopen]   » Registration List » **View/Edit Clinic** » Activity Form » Activity Report

Number of Patients Registered: 19   **Clinic Creation Date:** 09/14/2020

Clinic Type *
[Flu   ⌄]

Is clinic public or private? *   **Collect Insurance Information?**
● ○   ○ Yes, required ● Yes, optional ○ No
Public Private

Services Provided *   **Open to** *
☑ Testing   ☑ Vaccination   ☐ Screening   ☑ All Ages   ☐ Children   ☐ Adults
☑ Anti-Viral Distribution   ☐ Seniors   ☐ Other

1 of 3

To begin View/Edit Clinic:

1. From the **Clinic Listing** page, locate your scheduled clinic.

2. Click **View/Edit Clinic**.

   Result: Your selected clinic will open onto the **View/Edit Clinic** page, displaying status of clinic details.

   Edit as needed.

Use the **View/Edit Clinic** tab to **add, remove, or modify** upcoming clinic details.

a. Is the **clinic type** correct?

b. Is the clinic **Public or Private?**

c. Are the **services provided** accurate?

d. Is the clinic **open to** the correct demographic?

View/Edit Clinic

Date, Time, Location E

Clinic Date *

January 14, 2021

Start Time *

05:00 PM

End Time *

10:00 PM

Address

F 629 Cutter Court

Zip Code | City | State
21401 | Annapolis | MD

Appointment Information

Appointments available *

○ Yes, required   ● Yes, optional   ○ No (Walk-In)

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

Social Distancing Capacity   Registration Deadline

G 3   H

Appointment Frequency: Every

I 30

Appointment Slots

2

Contact Information J

Contact Person

Reginald Farrell VM

Contact Phone Number

284-867-5783

Contact E-mail

april.hane@durgan.info

Back-Up Contact Person

Filiberto Ernser

Back-Up Contact Phone Number

(826) 977-1872

Back-Up Contact E-mail

alesia_borer@sipes-hayes.biz

2 of 3

e. Verify **date, time** and **location.**

f. Verify **venue address.**

g. Is the **social distancing capacity** accurate? (Click here for more info.)

h. Verify the established **registration deadline**.

i. Are the **appointment frequency** and **appointment slots** correct?

   Frequency = The amount of time for each appointment / in minutes.
   Slots = The number of clinicians concurrently treating patients.

j. Verify **contact information** for primary and back-up clinic staff.

View/Edit Clinic

3 of 3

k. Confirm **additional clinic details**, as needed.

l. Verify **registration and clinic staff**.

m. Verify **vaccinations** and/or add, as needed.

n. Verify **clinic inventory,** ie, the available medications and supplies.

—The inventory list should have been created when the supplies were ordered, within the **Inventory Management** tab.
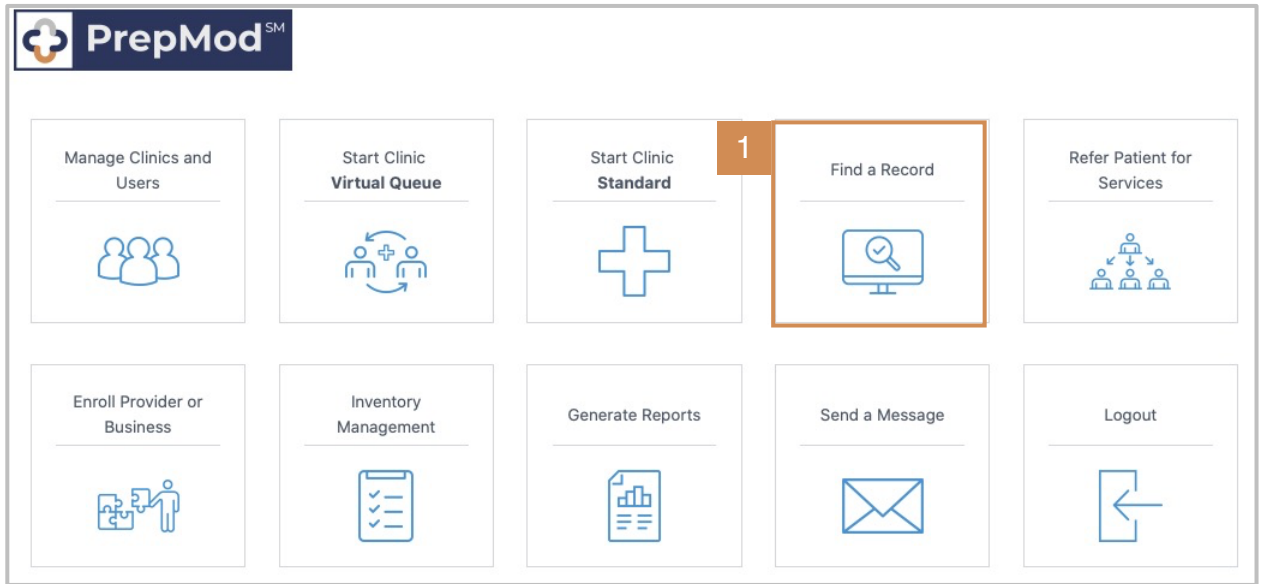
—The fields use predictive text when available, thus eliminating keystroke error and increasing overall efficiency.
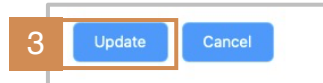
View/Edit Clinic

3. When all edits on the **View/Edit Clinic** page have been made, click **Update** to save.

There are **two methods** to **search for a patient**:

1 **Records Search**

2 **Registered Patient's List**

— PrepMod records are electronic, like EHR and IHS.

— There are nine levels of user-access, with graduating levels of user-visibility.

— Patients records may be accessed by their associated clinical /source domain **only**.

How to Search for a Registered Patient

To locate a patient using a Records Search, on the PrepMod Home page:

1. Select **Find a Record**.

   Result: The **Find a Record** home-page will open.

On the **Find a Record page:**

2. Type the **First Name + Last Name** in the search fields.

3. Click **Search**.

4. If unable to locate, click **Reset**, then re-enter name, **adding or removing DOB;** click Search.

   Result: Any / all records under the searched name will list in the next window.

5. Cross-check name with DOB, then **click on selected patient to open**.

Selected patient will display on the **Patient History page. Review details of the patient record.**

a. The patient's history and treatment overview, including **date, location, service,** and **notes** from patient's visit.

b. Option to **print** a record.

c. Option to **delete** a record.

d. The **back button**; return to records list.

You've located a patient via a Records Search.

To locate a patient using the Registered Patient's List, on the PrepMod Home Page:

1. Select **Manage Clinics and Users**

On the **Clinics Listing page:**

2. Locate the **Venue Name** where the patient you're seeking is registered and the **date** they're registered to attend.

3. Click **Registration List.**

   Result: The complete registration list for the venue will display. (Next page.)

Registration List
A Venue

Clinic Status: Closed [Reopen]   » **Registration List** » View/Edit Clinic » Activity Form » Activity Report

Number Registered: 19   **Waiting List:** 0   [See Waiting List]

Search: [Fredric Barton] **4** [Search]

[Email Vaccination Record] [Email Reminder] [Download Waiting List] [Download Registration List] [Print]

[Add More Patients +]

Name ⇅	Date of Birth ⇅	Age ⇅	Gender ⇅	Appointment ⇅	Home School			
Karri Trantow	11/16/1992	27	Other	09/22/2020 09:45 am	Dorchester County Health Department	[Email Reminder]	[View Consent]	[Delete]
Guy Swift	03/08/1992	28	Other	09/22/2020 09:45 am		[Email Reminder]	[View Consent]	[Delete]

Number Registered: 34   **Waiting List:** 9   [See Waiting List] [Upload records]

Search: [Fredric Barton]   [Download Waiting List] [Download Registration List] [Print]

Name ⇅	Date of Birth ⇅	Age ⇅	Gender ⇅	Appointment ⇅	Registration School	Vaccination School		
5 Fredric Barton	01/08/67	53	Male	07:00 PM	Phelps Luck Elementary School		[View Consent]	[Delete]

When the Registration List for the clinic opens:

4. Type the patient's **first and last name** in the **search** field; click **search**.

5. The patient's **name and demographic details will display**, if registered.

  ▪ **Click the patient's name to open the record.**

Patient History

Fredric Barton

D

Back to records   View Consent   Print

Date	Location	Service	Status	Notes	Actions
01/15/20 A	Gleason College	Hep B. #1 of 3 B			Delete
02/15/20	Gleason College	Absent; 2nd NS, "Family Emergency" C			Delete
06/10/20	Gleason College	Vaccine, Refused Treatment after arrival.			Delete

On the **Patient History** page, view the patient record for clinic and treatment details, if available.

    a.   Date and location of **previously attended clinics**, if any.

    b.   The **type of services** the patient has received.

    c.   Status and notes of **previous treatment**.

    d.   The **back-button** to previous page / records.

You've located a patient via the Registered Patient's List.

Registration List

A Venue

Clinic Status: Closed [Reopen]

» **Registration List** » View/Edit Clinic » Activity Form » Activity Report

Number Registered: 19   **Waiting List:** 0   [See Waiting List]

Search: **1** [Fredric Barton] **2** [Search]

[Email Vaccination Record] [Email Reminder] [Download Waiting List] [Download Registration List] [Print]

[Add More Patients +]

•	Name ⇅	Date of Birth ⇅	Age ⇅	Gender ⇅	Appointment ⇅	Home School			
	Karri Trantow	11/16/1992	27	Other	09/22/2020 09:45 am	Dorchester County Health Department	[Email Reminder]	[View Consent]	[Delete]
3	Fredric Barton	01/08/67	53	Male	07:00 PM	Phelps Luck Elementary School	[Email Reminder]	[View Consent]	[Delete]

There are **two ways** to **print a patient record.** You can print a record through:

1 **The Registration List**

2 **A Records Search**

How to Search for Clinic

To print a record from the **Registration List**:

1. Type the **name of the patient** you're seeking into the **search** field.

2. Click **search**.

3. You may also search the patient's name on the **Registration List**; click to open.

Results: The patient record will open onto the **Patient History** page.

Patient History

Fredric Barton   4   5

Services

Appointment Date	Appointment Time	Location	Notes
09/22/2020	06:35 pm	A County - A Venue	

Vaccinations Received

Date	Vaccination Type	Vaccination Name	Manufacturer	Lot Number	Expiration Date	Notes
09/22/2020			TestManufacturer1	36	09/28/2020	

View Consent   Back to records

On the **Patient History** page:

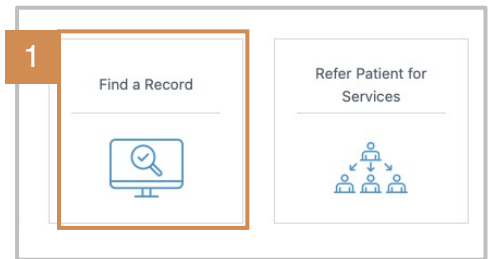4. Confirm the **patient name.**

5. Click **Print.**

   Result: A print dialogue window will open, preparing the record to print.

5. Confirm and **print.**

You've printed a record from the Registration List.

1

Find a Record

Refer Patient for Services

Find a Record

2 Tiffany | Tate | Date of Birth | Mother's Maiden Name **3** Search | Reset | Print

Name ⇅	Date of Birth ⇅	Age ⇅	Gender ⇅		
s d	04/03/1904	116	Male	Enter Encounter	Delete
firsttime1 lastname1	05/07/1988	32	Male	Enter Encounter	Delete
Gregory Tate	06/13/2007	13	Female	Enter Encounter	Delete
Gregory Branch	08/10/2017	3	Other	Enter Encounter	Delete

To print a record from a **Records Search:**

1. Click **Find a Record** on the **PrepMod Home Page**.

2. On the **Find a Record** page, enter the **first name, last name**, and **DOB,** if available.

3. Click **Search**.

   Result: The patient record will open onto the **Find a Record** page.

From the **Find a Record** page:

4. Confirm the **patient name and DOB.**

5. Click **Print.**

   Result: A print dialogue window will open, preparing the record to print.

6. Confirm and **print.**

You've printed a record from the Find a Records page.