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Note: This is the workflow for how to set up an invitation-only clinic in PrepMod. This scheduling workflow is one of the options for scheduling second-dose clinics. You will be required to input each patient's first name, last name, date of birth, and email address on the PrepMod spreadsheet template to be able to send out those targeted patients a single-use registration link.

Steps to Follow to Set Up a Clinic:

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

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- 2. Select Create Clinic.
- **3.** Select the clinic type.
- 4. Select Invitation-Only for the clinic type
 - Public = Clinic that is visible to all PrepMod users at your organization. This clinic will display on the public search page.
 - Private = Clinic is visible to PrepMod users at your organization. Once a private clinic has been saved, you will be able to copy a unique URL that you can share with targeted individuals for clinics you are offering to a limited group of people.
 - Invitation-Only = will allow you to upload a list of patients via a PrepMod provided spreadsheet template to send out an invitation-only URL link for the patient to sign-up for an upcoming private clinic. The link the patient is provided is a one-time-only registration link, and only one registration can be completed via that link. If the intended recipient shares this link with unauthorized individuals, those individuals will not be able to register via that link.
 - Private-Open = This new open style clinic is a clinic scheduling type that may be useful for scheduling employees at large employers who do not need specific dates or times assigned for appointments.

Clinic Type * 3		
COVID-19		\$
ls clinic public or p	rivate? * 4)
 Public Invitation only 	O Private	🔿 Private - Open 🚯

5. Follow the <u>Create a Clinic Quick Reference Guide</u> workflows to finalize setting up your clinic.

PrepMod Quick Reference Guide: Create Private Clinic | Page 1 of 4 | Revised 8/2022





Steps to Follow to Invite Patients to Register:

- 1. Follow the <u>Registration List Quick Reference Guide</u> to navigate to the registration list for the Invitation-Only clinic.
- 2. On the Registration List page, click the Upload and Invite button

Number Registered: 1	Waiting List: 0	Available Appointments: 3	1		See	Waiting List (0)
Search: Patient's first name or la	ast name	Search				
Email Vaccination Record	Email Reminde	er Bulk View Consent	Download Wai	ting List (0)	Download Regist	ration List
		2 Upload	and Invite	View Invitations	Add More	Patients +
3. Download the Pr	repMod spre	eadsheet template).			
Invite Patients	3	Click here to downlo the PrepMod templa	oad Ite			
Select a patient CSV data File to	o import					
Note - your data must be in	a readable format	. Please match this sample fi	le.			
Choose File No file chos	en					
Invite patients						

4. Input the targeted patients you would like to send a one-time invitation-only registration link to and save your file.

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1	first name	last name	email	phone nur	nber							
2	Sarah	St Patricks Test	sarah.keppen@mt.gov	· -								
3	Scooby	Doo	mysteryvan70@email.com									
4	Max	Vax	maxvax21@email.com			- 4	1					
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6												-
	()	PrepMod Uplo	oad Patient TEST 031	÷		:	•					•
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> Note: To invite patients to your clinic, you will need the following patient information: the patient's first name, last name, and email address on the templated spreadsheet to be able to send out those targeted patients an invitation-only registration link

Note: Delete the sample records and use the exact format as shown below. Also, do not add any additional data beyond the four columns listed.





5. Click the Choose File and search for the CSV file you saved on your computer.

5												
Invite Patien	Open										×	
Select a patient CSV data File	$\leftarrow \rightarrow - \uparrow$	← → · · ↑ 📑 > This PC > phs (\\hhs-hInshare.state.mt.ads\shared) (H;) > CDCP > IMM > IIS > PrepMod v Ö 🖉 Search PrepMod										
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Choose File No file ch	PrepMod	nal Development	^	•	Name	Date modified	Туре	Size			^	
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Invite patients	STC Comr	munication port Resources	v	,	PrepMod User Access Crosswalk PrepMod Upload Patient TESTC 02242021	2/10/2021 9:04 AM 2/24/2021 2:08 PM	Microsoft Word D Microsoft Excel C	179 KB 2 KB			~	
Invitation Im		File name:	PrepMod Upload Patient TEST 0317	720	21		~	All Files		~		
Filename								Open	✓ Can	cel		

file.

- 6. Click the Invite Patients button.
 - Note: The file type must be a CSV UTD-8 file to upload the information to PrepMod

Invite Patients 6									
Select a patient CSV data File to import									
Note - your data must be in a readable format. Please match this sample									
Choose File PrepMod U 03172021.csv									
Invite patients									

- **7.** After you upload the CSV file, the system will show you how many patients were added to the clinic. If there were any issues with a patient in your CSV file, they will be noted under the Total Failed column.
- 8. Click the 'Eye' icon to view the Invites Import Summary

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Invitation Import History

Filename	Filesize	Total	Created	Updated	Failed	Status	Initiated By	At	Actions	
PrepMod Upload Patient TEST 03162021.csv	412	2	0	0	2	Completed	Montana Onboarding	14 days ago	<u>@</u> !	8
PrepMod Upload Patient TEST 03162021.csv	384	2	0	0	2	Completed	Montana Onboarding	14 days ago	0 🛓	
PrepMod Upload Patient TEST 03152021.csv	393	4	1	0	3	Completed	Montana Onboarding	15 days ago	0 🛃	





9. Click on the **View Import Failures** button to see which patients were excluded from the upload and why their upload failed. You can then correct those issues in your CSV file and re-upload it.

	Invites Import Summary Import Summary (2 invites processed)								
	TOTAL CREATED	TOTAL UPDATED O	TOTAL FAILED						
		2/2 Processed							
	View Registration List View Invitations	View Import Failures 9							
Reason ↓î	Csv Row ↓↑								
Email can't be blank	{"sarah"=>"Shaggy", "test"=>"Dog", <i>"###################################</i>								
Email can't be blank	{"sarah"=>"Snoopy", "test"=>"Dog", "###################################								

- **10.** After uploading your patients to your clinic, patients will receive an email from the system with a personal link to register for the upcoming clinic.
- **11.** Patients that complete the registration process will appear on your Registration List with the confirmed appointment time that they chose. Patients that haven't completed the registration process can be viewed under the **View Invitations** button.

Numb	er Reg	jister	ed:	1 Waiti	ng List: () Availa	able Appointn	nents: 31				See Wai	ting List (0)
Search: Patient's first name or last name						Search							
Emai	il Vaccii	nation	Rec	ord	Email Rem	inder	Bulk View Con	sent D	ownload W	aiting List (0)	Dow	nload Registrati	ion List
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