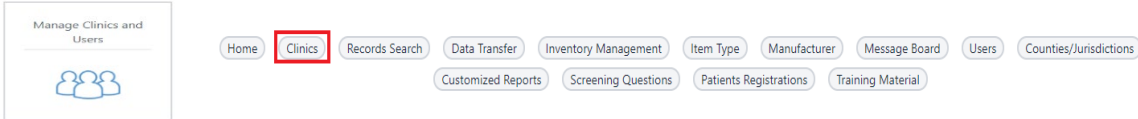


PrepMod Create Invitation-Only Clinic Quick Reference Guide

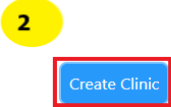
Note: This is the workflow for how to set up an invitation-only clinic in PrepMod. This scheduling workflow is one of the options for scheduling second-dose clinics. You will be required to input each patient’s first name, last name, date of birth, and email address on the PrepMod spreadsheet template 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.



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

Is clinic public or private? * 4

Public
 Private
 Private - Open ⓘ

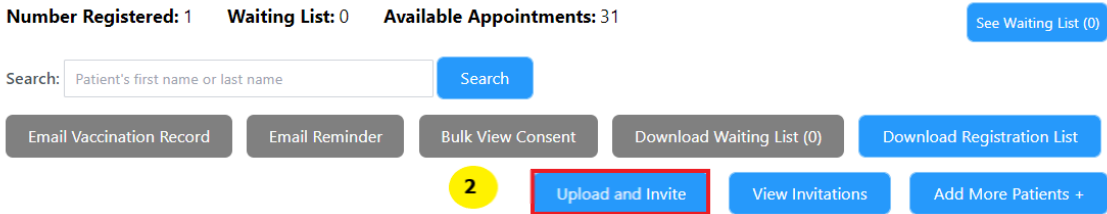
Invitation only

5. Follow the [Create a Clinic Quick Reference Guide](#) workflows to finalize setting up your clinic.

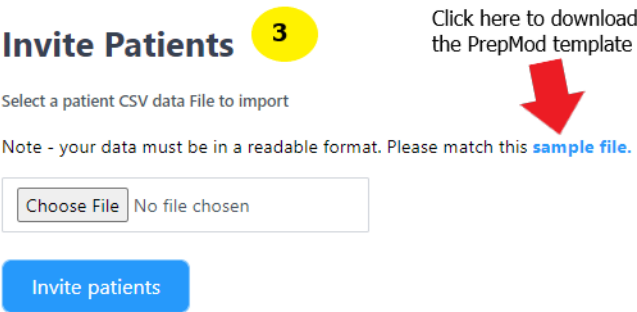
PrepMod Create Invitation-Only Clinic Quick Reference Guide

Steps to Follow to Invite Patients to Register:

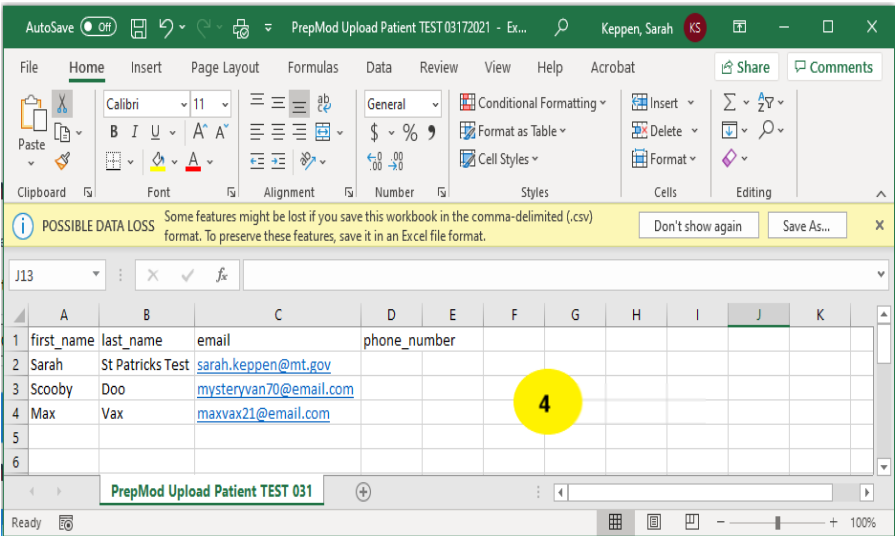
1. Follow the [Registration List Quick Reference Guide](#) to navigate to the registration list for the Invitation-Only clinic.
2. On the Registration List page, click the **Upload and Invite** button



3. Download the PrepMod spreadsheet template.



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

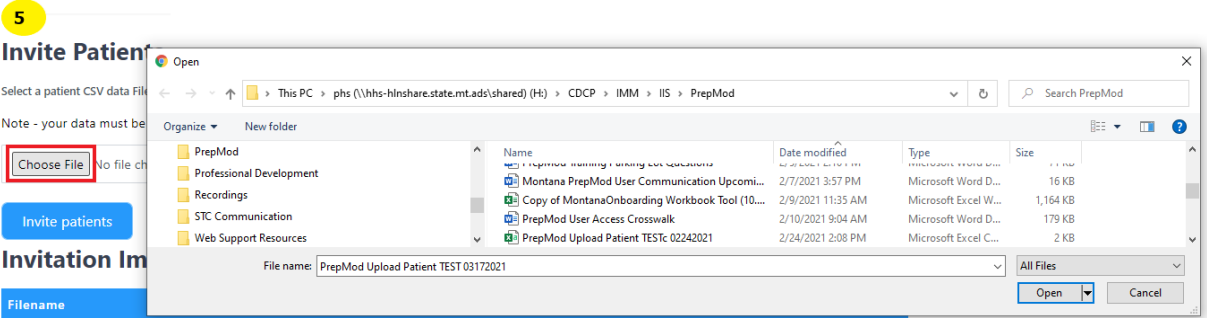


➤ Note: To invite patients to your clinic, you will need the following patient information: the patient's first name, last name, and email address on the templated spreadsheet to be able to send out those targeted patients an invitation-only registration link

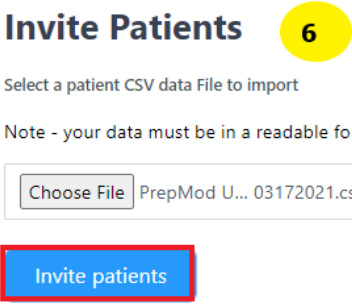
➤ Note: Delete the sample records and use the exact format as shown below. Also, do not add any additional data beyond the four columns listed.

PrepMod Create Invitation-Only Clinic Quick Reference Guide

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



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



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

Invitation Import History 7

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	
PrepMod Upload Patient TEST 03162021.csv	384	2	0	0	2	Completed	Montana Onboarding	14 days ago	
PrepMod Upload Patient TEST 03152021.csv	393	4	1	0	3	Completed	Montana Onboarding	15 days ago	

8

PrepMod Create Invitation-Only Clinic Quick Reference Guide

- 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 0	TOTAL UPDATED 0	TOTAL FAILED 2
---------------------------	---------------------------	--------------------------

2/2 Processed

View Registration List
View Invitations
View Import Failures
9

Reason ↑	Csv Row ↑
Email can't be blank	{"sarah"=>"Shaggy", "test"=>"Dog", "sarah.keppen@mt.gov"=>"sarah.keppen@mt.gov", "406_444_9539"=>"406-444-1234", "email"=>nil}
Email can't be blank	{"sarah"=>"Snoopy", "test"=>"Dog", "sarah.keppen@mt.gov"=>"sarah.keppen@mt.gov", "406_444_9539"=>"406-444-1234", "email"=>nil}

- 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.

- 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.

Number Registered: 1
Waiting List: 0
Available Appointments: 31
See Waiting List (0)

Search
11

Email Vaccination Record
Email Reminder
Bulk View Consent
Download Waiting List (0)
Download Registration List

Upload and Invite
View Invitations
Add More Patients +

Name ↑	Date of Birth ↑	Age ↑	Gender ↑	Appointment Time ↑	Occupation ↑	First Dose Type	
<input type="checkbox"/> Sarah b Test	(1st) ⓘ 09/20/1983	37	Female	12:00 pm	Healthcare/ Public Health		Email Reminder View Consent Delete

< Prev
1
Next >