

**Note: This document provides answers to frequently asked PrepMod questions.**

## Creating A Clinic:

**1. FAQ #1: How can we get a new off-site venue added in PrepMod for an upcoming clinic?**

Answer: Please contact one of the PrepMod superusers at the Montana Immunization Program.

**2. FAQ #2: Can someone at my location have access to modify a venue name in PrepMod?**

Answer: Any changes to venue names will need to be made at the state level by the Montana PrepMod support team so that we can ensure data will flow over to *imMTrax* appropriately. Please contact one of the PrepMod superusers at the Montana Immunization Program to update a venue name.

**3. FAQ #3: What is the difference between a Public clinic vs. a Private clinic in PrepMod?**

- a. **Public** = Clinic that all users at your Organization can see this and it's displayed on the public-facing PrepMod page.
- b. **Private** - Clinic that is visible to all users at your organization can see. The public can see this clinic only if they have been given the unique URL for this clinic. It will NOT display on the public-facing PrepMod page.

**4. FAQ #4: How can I ensure that a private clinic will not be shared with individuals that are not eligible for an upcoming private clinic?**

Answer: At this time, there is no way to prevent a link from being shared and an unauthorized person signing up for a clinic. When you are sharing a private clinic link via email, it's recommended that you include a statement asking the recipient not to share the private clinic. The best way to prevent link sharing is to use PrepMod's new Invitation-Only clinic scheduling type. This will allow you to invite patients to sign-up for an upcoming clinic by sending each patient a single-use registration link.

**5. FAQ #5: What is the new Invitation-Only clinic scheduling type and when would we use this?**

This would be would you have a specific targeted list of patients that you are inviting for a clinic and they need specific appointment times. This is the single-use URL feature that was developed to avoid link-sharing. If you are targeting vaccinating employees at a large employer and need employees to pick a timeslot to help you better plan out the day, this would be a good option for that.

## 6. FAQ #6: What is the new Private-Open clinic scheduling and when would we use this?

Private-Open is a clinic scheduling type for situations where you need to have a list of patients that will be vaccinated but those patients do not need a specific clinic appointment time on a specific day. Some use cases for Private-Open scheduling would be for vaccinating congregate settings like an assisted living facility or a group home. Another option might be for doing a vaccination clinic at a large employer where you are given a list of employees ahead of time and it's a walk-in style clinic.

## 7. FAQ #7: Can we block out a time? For example, can we schedule a lunch break – or do we need to create two different clinics- a morning and an afternoon

There isn't a way to schedule a lunch break. The Montana PrepMod support team would recommend setting up a clinic with your morning hours and then choose the Add Another Date to then add in the hours for when you are open after lunch.

**Date, Time, Location**

Clinic Date *	Start Time *	End Time *	Address *
March 31, 2021	9:00 AM	12:00 PM	Address
Clinic Date *	Start Time *	End Time *	Zip Code *
March 31, 2021	1:00 PM	5:00 PM	Zip
			City
			State

[Add Another Date](#)

### Patient Registration:

#### 1. FAQ #1: Can patients schedule an appointment for an upcoming clinic if they do not meet the eligibility criteria for that particular clinic?

Unfortunately, yes a patient can inadvertently schedule themselves for a clinic they are not eligible for. The Montana PrepMod support team has added some screening questions to the healthcare screening page of the registration process. We hope this will assist in your screening process. You can hover over the question mark icon to the right of the patient's name in the registration list to view the patient's responses to the screening questions.

#### 2. FAQ #2: Do waiting list patients fill out the same information as patients who were able to get a confirmed timeslot?

Yes, all patients who fill out a registration fill out the same information. If a clinic appointment becomes available, you will have all of the necessary information you need (example: consent to vaccinate) from a waiting list patient. You will be able to easily move a waiting list patient into an open timeslot for an upcoming clinic.

**3. FAQ #3: When a patient is registering for an upcoming clinic are all fields on the screens required?**

The fields with a red asterisk are the required fields. Depending on how you set up your clinic, fields such as insurance ID may or may not be required to complete registration.

**4. FAQ #4 Can the patient registration confirmation and clinic reminder notification be sent via text?**

This functionality is not available at this time

**5. FAQ #5: Can we customize the patient registration confirmation email and appointment reminders the patient is sent regarding the clinic they signed up for?**

No, the automatic emails the PrepMod system sends out to registered patients are not customizable. You can use the **Message Board** feature to send a customized location or clinic-specific message to all confirmed patients. You can send a message to Confirmed Patients (patients with a confirmed clinic slot), Waiting List (patients on the waiting list) All Registered patients (includes patients with confirmed timeslot and waiting list patients).

**6. FAQ #6: Can we register a patient on their behalf?**

Yes, the easiest way to do that is to click the **Add More Patients** button on the clinic **Registration List** page. When you get to the consent page of the patient registration process, choose 'Other' for the relationship to the patient. In the first name field type in 'registered on patient's behalf' or an Organization agreed-upon statement to signify you registered patient on their behalf. In the last name field put in your name or initials and the date, you registered the patient.

This process is to ensure that PrepMod users at your Organization can easily audit who registered the patient for an upcoming clinic. It is also recommended that you print off the consent form and have the patient physically wet sign the consent form on the same of the clinic. The Montana Immunization Program does not support verbal consent.

**7. FAQ #7: If we put a date-specific deadline for the registration process to close what time of day does the registration process close?**

The registration process will close at 11:59 on the date you set for the registration deadline.

**8. FAQ #8: Do we have the ability to set a limit as to how many people can put themselves on the waiting list?**

There isn't a straightforward way to limit the waiting list. What can be done is to monitor how many people are signing up on the waiting list and then manually turning off the waiting list. Any patients that signed up on the waiting list for a clinic when it was enabled will have their information saved when the waiting list is turned off.

**9. FAQ #9: How do we help a patient who called us stating they didn't get a registration confirmation email.**

Have the patient check their junk/spam or Promotions folder. You can also have the patient validate their email address. If the patient inputted the incorrect email address, you can follow the edit a patient record workflow to edit the patient's email address. Once you have updated the patient's email address navigate to the registration list for the clinic the patient is registered for and click the send a reminder button to re-send the patient their clinic registration reminder.

**10. FAQ #10: If we turn off the waiting list will the patients who were already on the waiting list be saved?**

Yes, any patients that signed up on the waiting list for a clinic when it was enabled will have their information saved when the waiting list is turned off.

**11. FAQ #11: We're hearing reports from patients that inputting their zip code on the public-facing search page does not narrow the list down and show our clinic. Is the zip code search parameter broken?**

Individuals searching for upcoming public clinics in their county need to change their search within filter. The default is set to all which will bring up all public clinics in Montana.

**12. FAQ #12: What is the best way to get patients on a master waiting list.**

Currently, PrepMod does not support creating a clinic to be a master waitlist. The Montana PrepMod support team is looking into further what's possible to support the creation of a master waiting list, but currently, you would not be able to move a patient from one clinic to another clinic. It's recommended that you curate your patient waiting list outside of PrepMod at this time.

**13. FAQ #13: Once people register for a clinic appointment time, can they go back and view this at any time? Can they change their appointment time if need be, or will they have to contact us?**

A patient can reschedule their appointment from the confirmation email they received. They would only be able to pick an appointment from the clinic they registered for and if appointments are still available.

## Preparing for Upcoming Clinic:

### 1. **FAQ #1: What is the easiest way to see patient demographic information for a registered patient?**

From the **Registration** page you can see the patient's DOB. Download the **registration list** to see the patient's phone number and email address. Click **View Consent** to see additional demographic information for the patient.

### 2. **FAQ #2: How can we see the screening questions for a registered patient?**

You can hover over the question mark icon to the right of the patient's name in the registration list to view the patient's responses to the screening questions.

### 3. **FAQ #3: Can we download and print patient consents in bulk?**

Yes. You can do that by going to the **Registration** page and clicking

### 4. **FAQ #4: We have a lot of people that sign up who don't qualify for COVID-19 vaccination in Phase 1B. It is very time-consuming to go through the list and call people to tell them they don't qualify and delete their appointments. Is there anything that we could do from a PrepMod end to deny an appointment?**

Unfortunately, there is no way to prevent an individual from registering for a clinic they are not eligible for. On the registration page, you can hover over the question mark (?) icon to see the patient's response to the health screening questionnaires. Provided the patient answered their screening questionnaire truthfully, you should be able to see at a glance if the individual is eligible for the current vaccine priority phase. If the patient doesn't meet the eligibility requirements you would need to call the patient to let them know they are ineligible for the current vaccine priority phase. You would then be able to delete/cancel the patient's appointment slot (this does not notify the patient).

### 5. **FAQ #5: We are getting a large number of people that are signing up for our clinics from other counties. How can we prevent individuals from other counties from registering for our clinics?**

There are a couple of things that you could look at doing to deter individuals from other counties attempting to register for a vaccine clinic in your county. For a private clinic, you could include in your communication to designated recipients to ask them not to share the link. If you are seeing individuals registering for clinics you set up as public (which I suspect is the case here), you could type in a message in the additional information box outlining that individuals must be a resident of your county to sign up and any other clinic eligibility requirements. The public search feature shows public clinics state-wide and more locations are starting to schedule public clinics and there is the potential for individuals to inadvertently scheduling themselves for a clinic in another county.

## Clinic Day:

### 1. FAQ #1: What is the Virtual Queue?

The Virtual Queue is an automated check-in tool that will invite the patient to virtual check-in based on clinic appointment times and the number you inputted in the social distancing field to ensure adequate six feet social distancing.

### 2. FAQ #2: Do we have to use the Virtual Queue?

No. The Virtual Queue is an optional tool. If you choose not to enable this tool for virtual check-in you can use other methods to ensure a safe, social-distanced clinic check-in process. If you are not using the Virtual Queue, you will proceed directly to the **Activity Form** for vaccine documentation if you choose to document vaccines given into the PreMod system.

### 3. FAQ #3: If we choose to use the Virtual Queue do we have to send check-in links to all patients?

If you choose to use the Virtual Queue, the PrepMod system will send all patients with a confirmed timeslot an email message when it's their turn in the queue to be able to come to the clinic to physically check-in. If you have patients that do not have access to their email via a mobile device, you can manually check-in a patient.

### 4. FAQ #4: If a patient decides they do want to consent to have their PHI in *imMTrax* after speaking with a clinic staff member but they have already said not via the registration process, can we go in and edit the patient's *imMTrax* consent before we close the clinic?

No, you are unable to edit the patient *imMTrax* consent. Please contact the Montana PrepMod support team for assistance to get the record processed appropriately into *imMTrax*.

### 5. FAQ #5: Does patient information only get send to *imMTrax* when you click the **Save and Submit** button?

Yes. Information is only sent to *imMTrax* after you click the **Save and Submit** button. Please wait until you have finished all patient vaccine charting before clicking the purple **Save and Submit** button to avoid sending duplicate information over to *imMTrax*.

### 6. FAQ #6: If a patient does not already have an *imMTrax* record, will a new patient record in *imMTrax* be created when you click the **Save and Submit** button?

Yes. Patients that do have a patient record in *imMTrax*, will have a record created in *imMTrax* when you click the **Save and Submit** button to send information to *imMTrax*.

- 7. FAQ #7: I clicked the Save and Submit button to send patient vaccines administered to *imMTrax* when I finished vaccine documentation for a clinic. I checked *imMTrax* and some of the patient vaccines charted aren't showing in *imMTrax*?**

Please contact the Montana PrepMod support team for further investigation. Most patient records that appear that they haven't transferred to *imMTrax* have transferred over. If the patient has a potential duplicate record in *imMTrax*, it will get flagged in your Organization's *imMTrax* merge queue. If your organization does not have an *imMTrax* merge role user, contact *imMTrax* Training & Support Specialist Sarah Keppen to start the process to get someone at your facility signed-up to assist with *imMTrax* patient record merging to ensure timely access to patient vaccine information in *imMTrax*.

- 8. FAQ: We discovered some inaccurate patient demographic data on clinic day such as patients inputting their incorrect date of birth or signing up with a nickname instead of their legal name, how can we those data quality issues fixed before submitting data to *imMTrax*?**

You can follow the edit a patient record workflow to edit the patient's demographic information. You can edit the patient's first name, last name, birth date, and email address.

### Setting Up Second-Dose Clinic :

- 1. FAQ #1: What is the easiest way to set up a second-dose clinic?**

You have two options below that will assist in getting patients registered for an appointment to get their second dose.

Option #1. Set up a private clinic. You can send the URL link to all vaccinated patients using the **Message Board** tool. Some other states have had a sheet of paper displayed with a QR code during the check-in process that patients can scan to get the link to the private clinic registration page. Contact Sarah Keppen at [sarah.keppen@mt.gov](mailto:sarah.keppen@mt.gov) if you would like more information about setting up QR codes.

Option #2: Set up a clinic as invitation-only. You can pull first-dose vaccinated patients' contact information from the registration list of the first-dose clinic. Input each patient's first name, last name, and email address on the PrepMod provided CSV spreadsheet template. Follow the instructions in the Invitation-Only quick reference guide inviting each patient due for their second dose to register for the second-dose clinic. The invitation the patient will be sent is a single-use registration link.

- 2. FAQ #2: Is there a slick way to get a patient signed-up for a second-dose clinic automatically so they do not have to enter in their demographic information a second time?**

No, unfortunately, patients will have to enter their demographic information again to register for a second-dose clinic. The PrepMod system is clinic-centric.