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Chapter 1: Introduction

Welcome to PrepMod

PrepMod is a public health enterprise solution that provides tools for setting up and operating vaccination clinics, managing clinic inventory, documenting patient vaccine administration, emailing proof of vaccination to patients, 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 PrepMod Help Desk at (888) 503-0515 or techsupport@vaccineconsent.com from 8:00 am to 8:00 pm (EST) Monday thru Friday

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

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. It is important for all clinic staff to create your own password from the link they receive in the email prior to begin vaccinating. The password must be minimum of 12 characters long and must include upper- and lowercase letters, a number, and a special character. Once you set up your own password, you can go to CalVax website to login: https://cw.calvax.org/pages/landing_page
Logging in to PrepMod is a two-way authentication process. After entering your username and password, a code will be sent to your email or phone as a text message. Entering the code will grant you access to the PrepMod administrative site.

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?** option 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
## Users Access Levels

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<th>Provider/Employer</th>
<th>Local Admin</th>
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</table>
Add a Venue
Prior to adding a clinic, a venue must be added.
1. From any PrepMod page, select Counties/Jurisdictions from the menu bar.
2. Select Los Angeles County. The list of Organizations within LA County will display.
3. Locate the name of your organization (facility name that you provided for COVIDReadie) and click its name. The Organization/Provider Information page displays.
4. Select Add Venue/Location. The Venue/Location Information page displays.
5. Enter the venue’s name. It could be the name of the location where the vaccination clinic will be held. Enter the complete address of the location.
6. Unique Internal ID can be assigned to each venue.
7. Select Create Venue/Location. The new venue will be saved in PrepMod and linked to the Organization that you selected.

Edit a Venue
1. From the menu bar, select Counties/Jurisdictions.
2. Click on Los Angeles county. The Los Angeles 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. The Venue Information page displays.
5. Edit the venue as you see fit.
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. The Create Clinic page displays.


4. Select Public or Private to specify what type of clinic this is. Public clinics are visible on the front end of PrepMod. Anyone can locate this clinic and register for an appointment. Private clinics are visible only to users who have permission to view them (encrypted link needs to be sent to participants via email to register.)

5. In the Collect Insurance Information area, indicate whether the patients’ insurance information will be collected at the clinic. During COVID-19 vaccination clinics, detailed Insurance information will not be collected, only insurance type. Select No in this area.

6. In the Services Provided area, select the services that will be provided by the clinic. Select Vaccination in this area.

7. In the Open to area, select the groups to whom the clinic will be open. For COVID-19 vaccination select Adults and Seniors.
   - Select Los Angeles in the County/Jurisdiction drop-down, appropriate Organization, and Venue/Location.

8. Enter the clinic date, time. The location will be already pre-populated. Tip: To add additional dates and times, select Add Another Date.

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, Estimated Length of Encounter (in minutes), and Appointment Slots per Encounter Length (how many vaccinators you anticipate at the event)
   Appointment frequency and Total number of appointments will be calculated for you. 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, phone number, and e-mail for the clinic’s contact person and back-up contact person.

11. In the Additional Clinic Details section, enter any other pertinent information you feel is necessary (i.e. Masks are required, 6-feet social distancing must be maintained, Entrance from the side street, instructions for parking, or drive-thru instructions). This is what clients will see when registering for the vaccination clinic.

12. In the Registration and Staff section, enter the Lead Clinic Staff name and other clinic staff (vaccinators only).
   Tip: To add additional staff, select 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.

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

Find an Upcoming, Past, or Closed Clinic

1. Open the Clinics Listing page.
2. To filter the list to show only upcoming clinics, select the Upcoming filter.
3. Locate the clinic by scrolling through the list or by entering part of its name in the Search field.
4. Use steps 1-3 to filter Past or Closed clinics.

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” in Chapter 3.

1. Locate the clinic by taking the steps described in “Find an Upcoming Clinic.”
2. Select View/Edit Clinic in the clinic’s row.
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**

1. The Registration List shows the patients who have registered online for the clinic.
2. Locate the clinic by taking the steps in “View an Upcoming Clinic.”
   Select Registration List. The Registration List page displays.

**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 and delete any unwanted columns.

1. Open the Registration List by taking the steps in “View Registered Patients.”
2. Select Download Registration List. PrepMod generates a comma-separated values (CSV) file of registered patients and saves it to your Downloads folder.

**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.”
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.”
2. Select Download Waiting List. 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.”
2. Locate the patient by scrolling through the list or by entering part of their name in the Search field. You can search either by the first name or the last name.
3. Select Invite. PrepMod sends an invitation to the patient via email. 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.”
2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.
4. Select an available appointment slot.
5. Select Move patient off waiting list. PrepMod schedules the patient for the selected appointment and sends a notification to the patient via email about their appointment time.

View a Patient’s History

From the Registration List or Waiting List, you can select a patient’s name to view their vaccination history stored in PrepMod.

1. Open the Registration List or Waiting List by taking the steps in “View Registered patients”
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. The Patient History page displays.
4. From this page you have the following 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

The patient’s consent form can be viewed and printed from either the Patient History page, from the Registration List, or from the Waiting List.

1. Open the Registration List or Waiting List.
2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.
4. To download or print the form, use the icons in the upper-right corner of the page.
Inventory Management

Before adding inventory items to a venue or clinic, the inventory must be added to the Inventory Management page.

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.

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 Inventory

1. Select a COVID-19 vaccine from the Vaccine Name drop-down list Scroll to the bottom of the drop-down list to locate the two available COVID-19 products. Product/Brand Name and Manufacture will auto-populate.

2. Enter Lot Number and Expiration Date of the vaccines received for your Organization.

3. Enter Number of Items which equals the number of doses.

4. Packaging: select “Units” from the drop-down list.

5. Source of Items: select “Other” from the drop-down list.

6. Select County/Jurisdiction, Organization/Provider, and Venue/Location.

7. If you would like to upload any specific instructions or information about this inventory, you may do it by uploading a file to the Information Sheet.

   NOTE: This is not where VIS or the COVID-19 Vaccine Fact Sheet is uploaded. VIS Statement is pre-uploaded to PrepMod by the CHDP.

8. Select Create. The inventory will be added to PrepMod and linked to the Organization and the Venue.

Edit or Delete an Item’s Inventory Detail

1. Open the Inventory Management page.

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 events, locate the one you wish to edit or delete.

4. Take one of the following steps:
   - To edit the event, select Edit, make your changes, and then select Update Entry.
   - To delete the event, select Delete and then select OK in the confirmation dialog.

5. PrepMod updates or removes the event and updates the remaining quantity accordingly.
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.”
2. Scroll down to the Registration and Staff section and enter the names of the Lead Clinic Staff and clinic staff (vaccinators only).
3. To add additional staff, select Add more staff and enter another name. Repeat this step as many times as necessary.
4. Select Update.

Add Vaccine Inventory to the Clinic
Open the View/Edit Clinic page by taking the steps in “View and Edit a Clinic.”
1. Scroll down to the Clinic Inventory section of the View/Edit 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.
2. Select Add Item. The item is added to the clinic inventory.
3. In the # of Items column, enter the number of doses at the clinic.
4. Repeat steps 1 – 3 to add additional items.
5. 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.
6. The inventory is added to the clinic.

Remove an Inventory Item from the 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.
### Entering Clinic Outcomes

Open the **Clinic Activity Form**. The **Clinic Activity Form** page is where you enter information about clinic encounters.

1. To display the **Clinics Listing** page, open it in either of the following ways:
   a. From the home page, select **Manage Clinics and Users**.
   b. From any other PrepMod page, select **Clinics** from the menu bar.

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.

4. Document patient outcome as described in the next section.

### Document Patient Outcomes

1. Open the **Clinic Activity Form** page by taking the steps in “Open the **Clinic Activity Form**”

2. Enter any comments or incidents that happened during the clinic.

3. In the list of vaccines, select the **Default** button next to the 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 vaccine, there is no need to specify a default.

4. Scroll down to the list of patients and document the 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** field.

   B. Select one of the following outcomes for the patient:
      - **Vaccinated**
      - **Refused**
      - **Sick**
      - **Absent/Withdrawn**

   C. If you selected **Vaccinated**, a popup window displays. In the pop-up window you will need to complete the vaccine administration details. Check the box of the vaccine administered and verify the lot number. Select the route of administration, the site of injection, any adverse reaction, and VFC eligibility. Select the vaccinator’s name from the drop-down list and then select **Update**.

   D. 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”
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.

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. The Clinic Activity Report page displays.
2. To download the report, select Export in PDF or Export in Excel.

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”
2. Locate the patient by scrolling through the list or by entering part of their name in the Search field.
3. Select the checkbox next to their name or select all.
4. Select Email Vaccination Record. PrepMod emails the proof of vaccination to the patient.
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.
   **Tip:** You can also access this page by selecting Customized Report from the clinic menu.
4. Select County/Jurisdiction, Organization/Provider, and Venue/Locations.
5. Select the fields you want included in the report.
6. Select Create.
7. Select Generate Report.
8. The report is downloaded in an Excel format.
   PrepMod creates the report and saves the file to your Downloads folder.
Chapter 6: Other Administrative Functions

Add a User

1. From the menu bar, select Users. The Users page displays.
2. Select + Create New User.
3. Enter the new user’s name and email. Then select their role, county, organization, and venue in the system.
   Tip: You may select multiple counties, organizations, and venues. To select all, use the Select All button.
4. Select Submit. PrepMod sends the user an email with instructions for accessing the system.
5. The new user receives an email from: Vaccination Clinics no-reply@multistatep4p.com. Subject Line: Invitation instructions. Check Spam folder if the email is not received in the Inbox.

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.
6. Select Delete in the confirmation dialog that displays.
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 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 vaccine and select Save:
   - Number of Doses Administered
   - Number of Unusable Doses
   - Number of Doses Returned
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 California Immunization Registry (CAIR) select Save and Submit. During this step, notification emails providing Proof of Vaccination will also be emailed to all patients of the clinic.

   Note: The Save and Submit button will close out the clinic. Only Venue Administrator level user would be able to re-open the clinic.
# Chapter 7: Managing Organizations

## Add an Organization/Provider

1. From the menu bar, select **Counties/Jurisdictions**. The **Counties/Jurisdictions** page displays.
2. Click on Los Angeles county. The **Los Angeles 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/Provider’s Name

1. From the menu bar, select **Counties/Jurisdictions**. The **Counties/Jurisdictions** page displays.
2. Click on Los Angeles county. The **Los Angeles County Information** page displays.
3. Click the **Edit** icon in the organization’s row.
4. Edit the organization’s name as you see fit.
5. Select **Update Organization**.

## Delete an Organization

1. From the menu bar, select **Counties/Jurisdictions**. The **Counties/Jurisdictions** page displays.
2. Click on Los Angeles county. The **Los Angeles County Information** page displays.
3. Click the **Delete** icon in the organization’s row.
4. In the confirmation dialog that displays, select **Yes**.