

PrepMod Bulk Upload Guide

Summary

The bulk upload feature in PrepMod allows a user to upload a list of vaccine recipients and invite them to schedule an appointment at a particular clinic. The recipients receive an email with a one-time use link to complete their registration in PrepMod. The one-time use link expires after the recipient has completed their registration.

The bulk upload works by uploading a .csv file into the system. PrepMod provides a .csv file template that can be downloaded. The .csv file data elements are: First Name, Middle Name, Last Name, Date of Birth, E-mail, and Phone Number. Only First Name, Last Name, and E-mail are mandatory. All other data is optional for the bulk upload.

Once bulk upload is complete, PrepMod will create a record of the vaccine recipients in the invitation list. Recipients will remain in the invitation list until they complete the registration process. Once a recipient completes the registration, the individual will be added to the registration list. Once a recipient is on the registration list; clinic staff is able to take the recipient through the remainder of the vaccine workflow in PrepMod via clinic activity (i.e. input vaccine administered etc.)

The bulk upload function and one-time link features are available only under the **Invitation Only** and **Private Open** clinics:

- An “Invitation Only” clinic is a clinic which has an established date and time duration. Appointment slots will be generated. The recipients are required to use the one-time link to schedule an appointment in addition to providing their demographic information, health information, and consent prior to recording the vaccine administered.
- A “Private Open” clinic is a clinic which does not include a date and time duration. There are no appointment slots generated. This can be used to serve as a walk-in clinic where the recipients do not need an appointment set up in the PrepMod system. However, a registration has to be completed by the recipient to capture their demographic information, health information, and consent prior to recording the vaccine administered.

Key Steps

Step 1: Navigate to the Bulk Upload Function

- Click on **“View/Edit Clinic”**
- Verify the clinic is **Invitation Only** or **Private Open**.

Update the clinic if necessary, by selecting **Invitation Only** or **Private Open** and then clicking **“Update”** at the bottom of the page.

Note: Bulk upload does not work on Private or Public clinics. Private clinics can always be converted to Private Open.

- Click on **“Registration List”**
- Bulk upload can be performed by clicking:

“Upload and Invite” – This feature allows the user to upload a list of recipients to the system and send them email invites to the clinic.

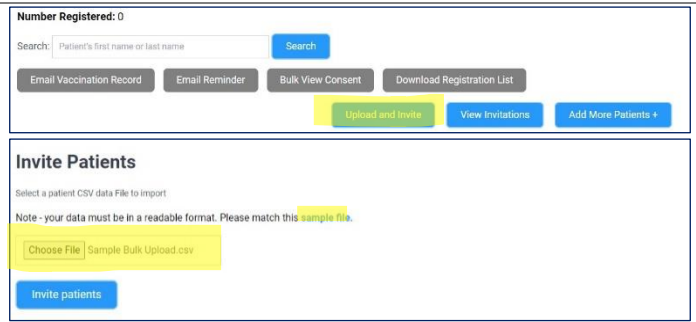
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Step 2: Click on “Upload and Invite”

- a. On **Invite Patients** click on “**Choose File**” to select the file to be uploaded into the system.

The selected file when ready to be uploaded will be displayed in the file box.

Note: A sample .csv file for bulk upload can be downloaded by clicking on the “sample file” link.

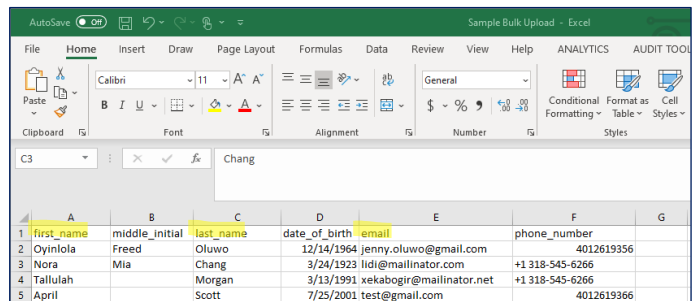


- b. The .csv file must contain entries in three mandatory fields: **First Name, Last Name, and E-mail**
All other information is optional for the bulk upload.

Note: Special characters like Ñ or é are removed from recipient names by PrepMod during a bulk upload and therefore, not included in the invitation list and invitation email. The upload will continue without the special characters.

The **recommendation** is to update the file to not include special characters in the names since recipients will be able to input special characters as needed for their names during the registration process. Special character entries made by the recipient from the registration process will be reflected in the clinic’s registration list and subsequently on the clinic activity form and their vaccination record.

Note: The sample .csv file available for download has the accepted format and should be used as a reference.

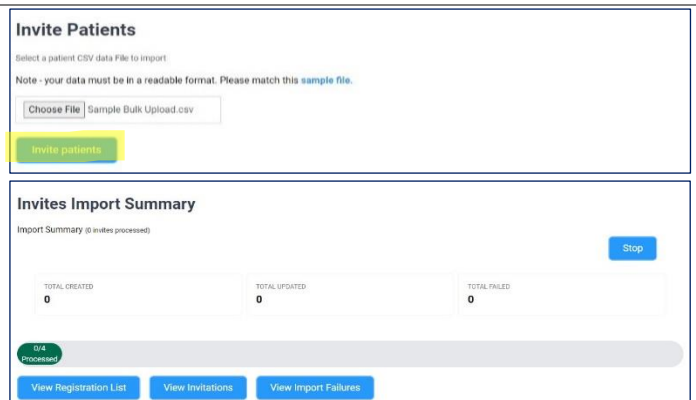


Step 3: Click on “Invite Patients” to Start Bulk Upload

- a. The system will start processing the data from the .csv file. When the import process is complete recipients on the bulk upload will receive an invite to schedule an appointment via email.

Invites Import Summary Status:

- **Total Created** is a counter of all the recipients successfully imported into the system this upload.
- **Total Updated** is a counter of all the recipients updated in the system because of this upload. Update only occurs if a list was previously uploaded into the system and the same list is re-uploaded with recipient corrections; such as updated phone numbers.
- **Total Failed** is a counter of all the recipients not processed due to errors in the .csv file.



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- b. **Invite Import Summary** provides three buttons to review the results of the bulk upload:
1. Click on **“View Registration List”** – to view a list of recipients who have registered via the invitation.
 2. Click on **“View Invitation List”** – to view a list of recipients who have received an invitation via email.
 3. Click on **“View Import Failures”** – to view and download a list of recipients that were identified as having errors in the .csv file upload.

Note: Recipient data may fail to import due to various reasons. For example, if the proper template is not used or if any of the mandatory fields are missing (First Name, Last, or E-mail).

Recipient data that does not meet template requirements will prompt PrepMod to skip over that recipient entirely and therefore, not be included in the registration list. The system will then report the reasons as to why a recipient did not import. For example, missing first name or last name.

The recipient data must be corrected and resubmitted.

A .csv file can be downloaded of all failed imports by clicking **“Download CSV”** under Failed Imports.

Failed .csv entry example:

Step 4: The Recipient Interacts/Accepts Invite

- a. The recipient must now complete the registration via the one-time link provided on the invitation email.

- b. Click on **“Registration List”**

Recipients listed at the bottom of the page have completed the invitation registration process.

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c. Click on “Clinic Activity”

Recipients listed at the bottom of the page have completed the invitation registration process.

Clinic staff may now take them through the remainder of the vaccine workflow in PrepMod (i.e. input vaccine administered etc.)

Note: All recipients who have not acted on the invite email can only be found in the invitation list.

Disclaimer – Recipients in the examples shown are made of data for training purposes only.

Clinic Activity Form
Danville City Health Department

Clinic Status: Upcoming | Registration List | Virtual Queue | View/Edit Clinic | **Activity Form** | Activity Report | History

Clinic Date: _____ County/Jurisdiction: _____ Venue/Location Name: Danville City Health Department

Lead Clinic Staff Name: Lead Staff Patients Registered: 0

Clinic Start Time: 01:00 AM Clinic End Time: 01:00 AM Clinic Length (in minutes): 0

Clinic Incidents or Comments
Bulk Upload Testing

Vaccine Name	Vaccine Lot Number	# of Starting Doses	# of Doses Administered	# Unusable Doses	# Remaining Doses
Pfizer COVID-19 Vaccine	BLK123	3000	0	0	3000
Totals:		3000	0	0	3000

Buttons: Save, Save And Submit

Search: Patient's first name or last name
Buttons: Search, Reset

Add More Patients +

Patient Name	Vaccine #	DOB	Appointment Time	Vaccinated	Refused	Sick	Absent/Withdrawn	Remark	Actions
Quintola, Oscar	(19)	01/01/1943	Walk In	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		Remark Delete

Additional Resources

PrepMod Quick Reference Guides and Videos: <https://www.vdh.virginia.gov/covid-19-vaccine/prepmod-job-aids/>