

BLUPRINT PREP TRACKER USER MANUAL

VERSION 2.0 | MARCH 2024

The **BLUPrint PrEP Tracker** is designed to provide clinic staff with an **electronic system** for tracking patient appointments, reminder calls, and insurance/medication assistance programs.

The BLUPrint PrEP Tracker has been programmed in Excel, allowing access to a **free, secure, locally-stored** and easy to manage system.

This manual provides information about **how to get started using the tracker** and gives detailed information and examples about each of its product features.



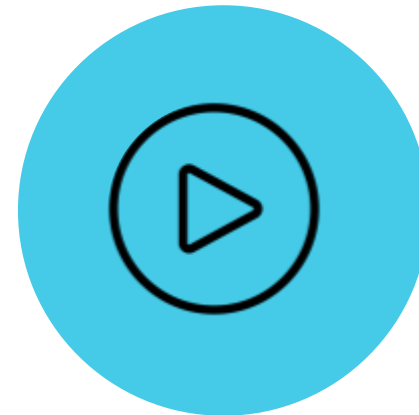
BLUPrint (**B**uilding, **L**earning, and **U**nderstanding **P**revention **I**nterventions) is an NIH-funded implementation science project designed to develop data-driven tools and resources that can accelerate equitable diffusion of proven HIV prevention strategies (R01MH123262; Golub/Meyers, MPI).

www.hivbluprint.org

QUICK START GUIDE



Click the ICON ABOVE to **DOWNLOAD** the
BLUPRINT PREP TRACKER
(See Page 3 for more details)



Click the ICON ABOVE for a link to a
video on how to “**ENABLE
MACROS**”
(See Page 4 for more details)

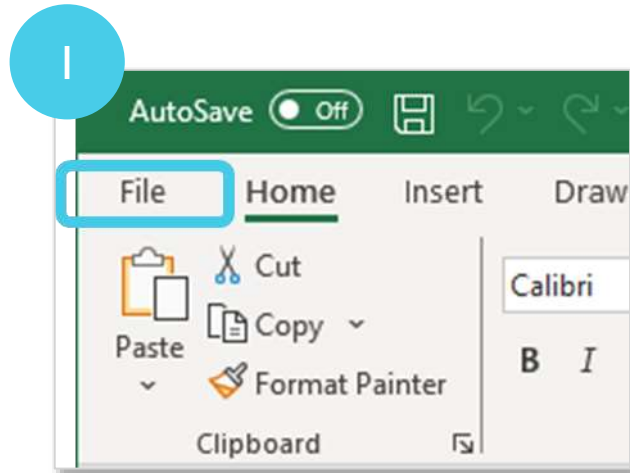
WAYS TO DOWNLOAD THE BLUPRINT PREP TRACKER

- Click on the icon on page 2 of this manual
- Download at the end of the survey or the follow-up email
- Download from the [BLUPrint website](#) (password: PrEP)
- Email us: bluprint@hunter.cuny.edu



HOW TO CHANGE YOUR SETTINGS TO ENABLE MACROS

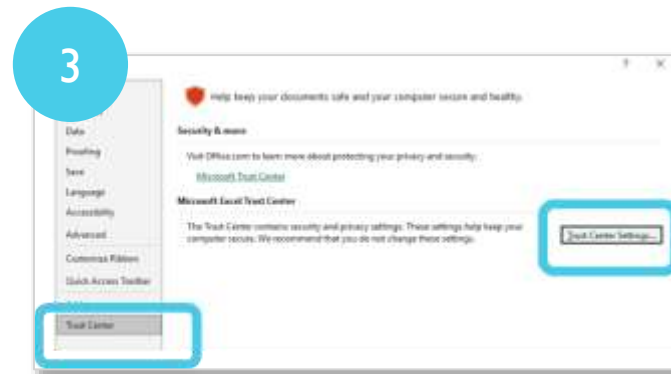
1. Click *File* in the navigation bar



2. Click *Options* at the bottom



3. When the window opens, select *Trust Center*, and then click *Trust Center Settings*



4. Click *Macro Settings* and select the last option, *Enable all macros*

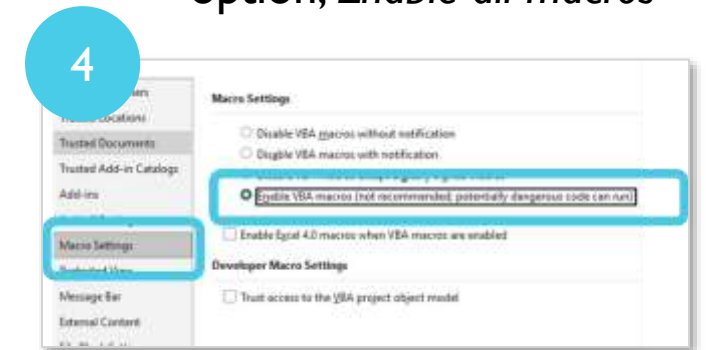




TABLE OF CONTENTS

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUPRINT.ORG](https://hivbluprint.org)

TABLE OF CONTENTS

Topic	Pages
Adding New Patients to the Tracker (<i>Using the Patient Intake form</i>)	8
Using the Patient Dashboard to view patient data	16
Flag Upcoming Appointments, Reminders, and Missed Visits (<i>Using the Tracking Tab</i>)	43
Standardize initial check-ins for Patients Starting PrEP (<i>Using the PrEP Start tab</i>)	52
<i>Frequently Asked Questions</i>	56
How can I keep patients' personal information safe?	57
What do I do if Excel says its "Not Responding"?	60
What is the background and thinking behind this Tracker?	62





ADDING NEW PATIENTS TO THE TRACKER

USING THE PATIENT INTAKE FORM

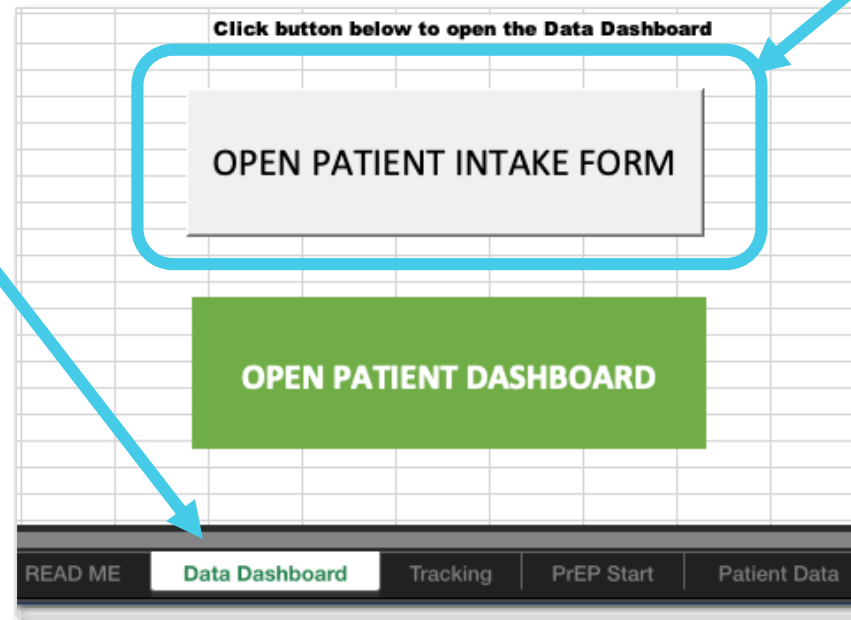
BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUEPRINT.ORG](https://hivblueprint.org)

CLICK “OPEN PATIENT INTAKE FORM” TO BEGIN ADDING PATIENTS

1. Click the **Data Dashboard** tab to access the **OPEN PATIENT INTAKE FORM** button

2. Click this button to start adding patients to the BLUPrint PrEP Tracker



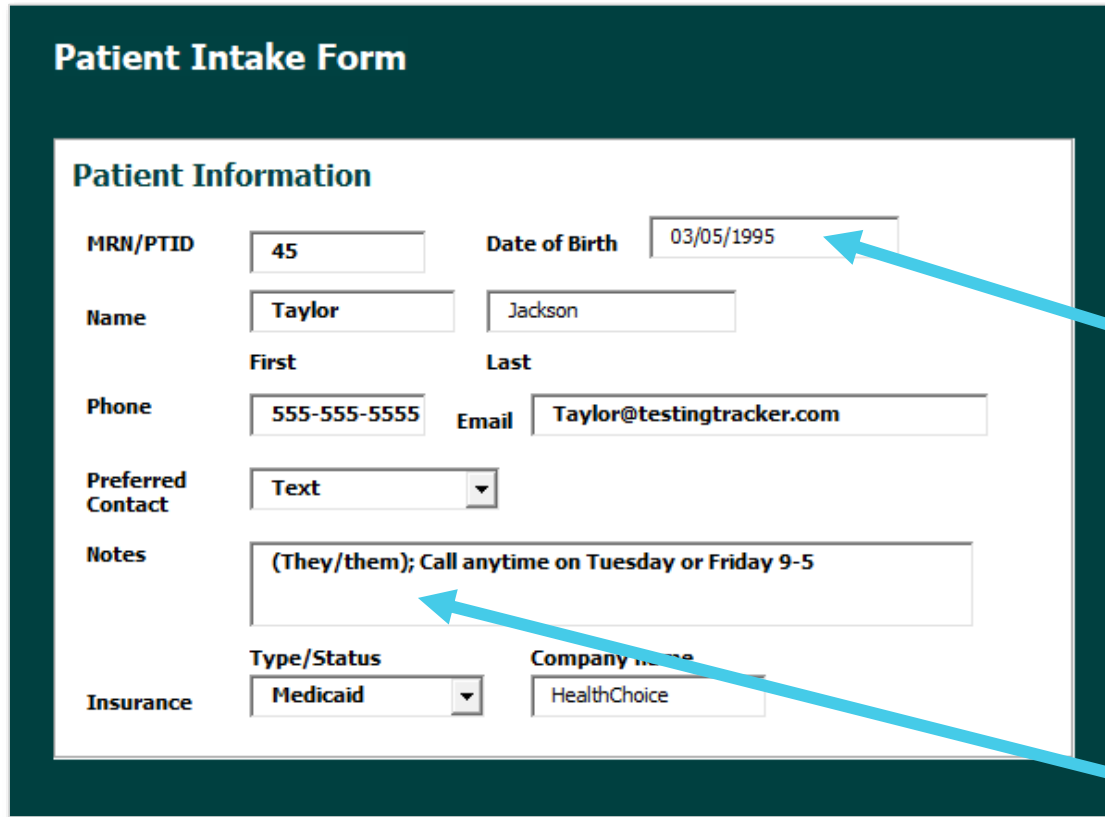
OVERVIEW OF PATIENT INTAKE FORM

The purpose of the intake form is to capture the basic information necessary to track/manage patients who are on or interested in starting PrEP.

All fields are editable; click the triangle (▼) to see a dropdown menu of pre-populated options.

Click on *OPEN PATIENT INTAKE FORM* to pull up this window!

PATIENT INFORMATION CAPTURES CONTACT INFO & PREFERENCES



The screenshot shows a 'Patient Intake Form' with the following fields and values:

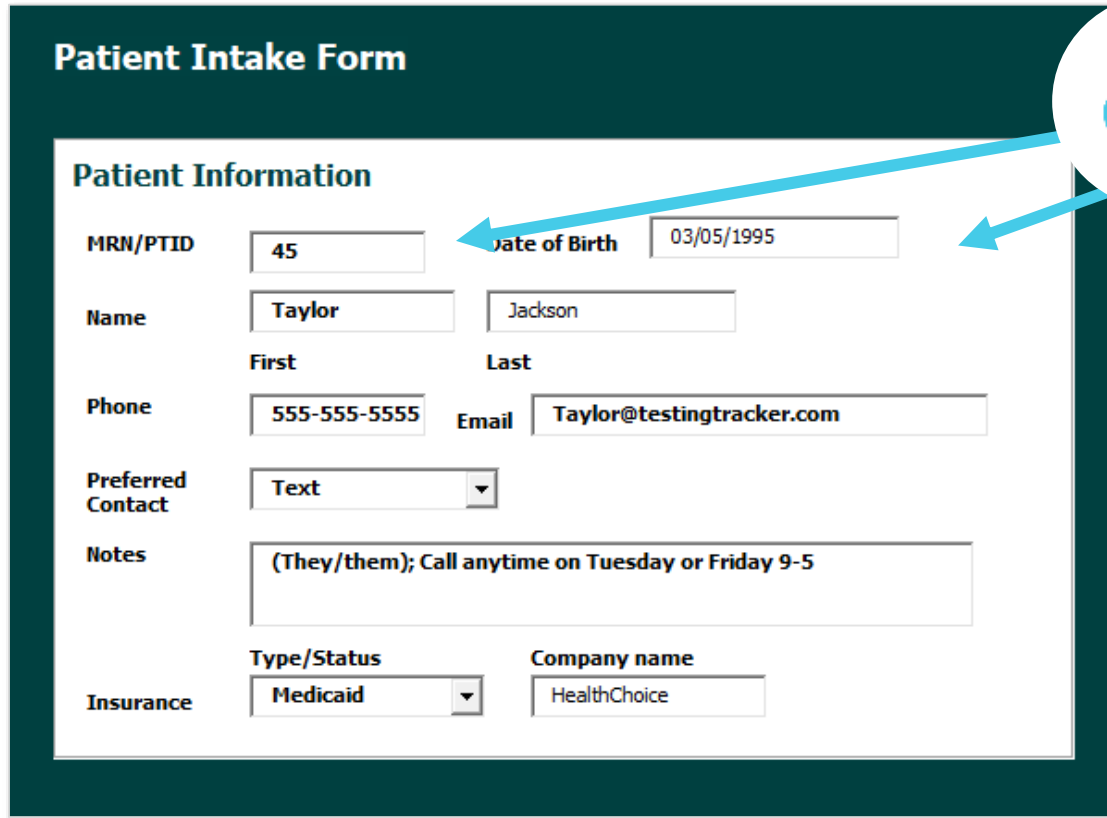
- MRN/PTID:** 45
- Date of Birth:** 03/05/1995 (annotated with a blue arrow)
- Name:** Taylor (First), Jackson (Last)
- Phone:** 555-555-5555
- Email:** Taylor@testingtracker.com
- Preferred Contact:** Text (dropdown menu)
- Notes:** (They/them); Call anytime on Tuesday or Friday 9-5 (annotated with a blue arrow)
- Insurance:** Medicaid (dropdown menu)
- Company Name:** HealthChoice

Capture key contact info (e.g., name, phone number, email) and communication preferences

DOB is automatically formatted with dashes; enter as a string of digits (MMDDYYYY)

Using someone's correct pronouns is a fundamental part of providing gender-affirming care. We suggest using the **Notes** space to capture and document the patient patients' pronouns.

KEY FEATURE: SEARCH RECORDS USING MRN AND DOB



Patient Intake Form

Patient Information

MRN/PTID	<input type="text" value="45"/>	Date of Birth	<input type="text" value="03/05/1995"/>
Name	<input type="text" value="Taylor"/> <input type="text" value="Jackson"/>	First	Last
Phone	<input type="text" value="555-555-5555"/>	Email	<input type="text" value="Taylor@testingtracker.com"/>
Preferred Contact	<input type="text" value="Text"/>		
Notes	<input type="text" value="(They/them); Call anytime on Tuesday or Friday 9-5"/>		
Insurance	Type/Status <input type="text" value="Medicaid"/>	Company name	<input type="text" value="HealthChoice"/>

Key Feature

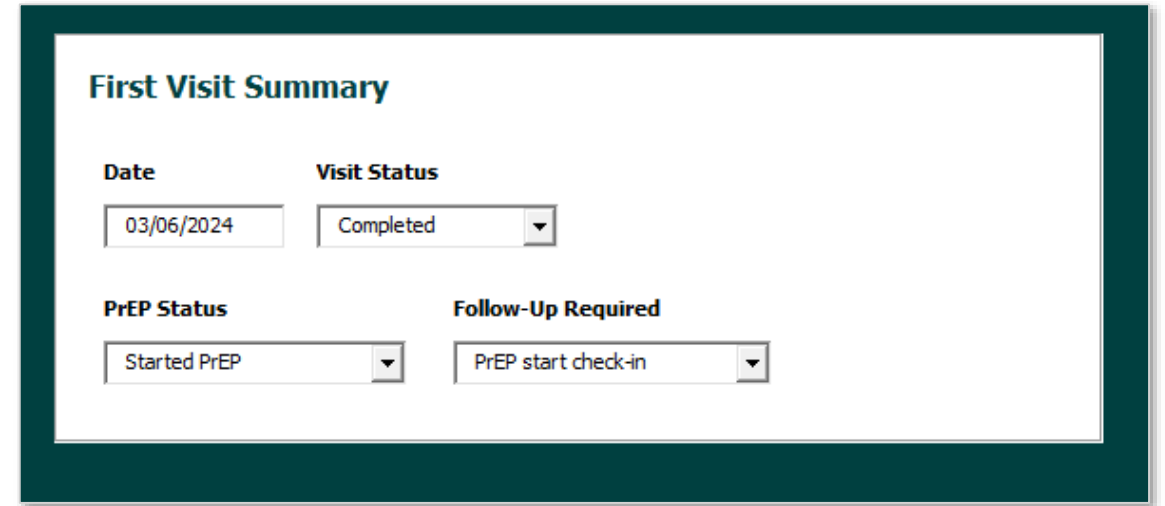
Medical Record Number (**MRN**) / PTID and the date of birth (**DOB**) are **searchable fields** that will help you locate patient records.

However, search function is case sensitive. Search must *exactly* match the original entry

FIRST VISIT SUMMARY DATA

The **First Visit Summary** is intended to be the first visit that the Tracker is used to capture information.

It does *not* need to be the patient's first visit with the practice (though excel will allow you to easily back enter data!)



The screenshot displays a form titled "First Visit Summary" with the following fields:

Date	Visit Status
03/06/2024	Completed
PrEP Status	Follow-Up Required
Started PrEP	PrEP start check-in

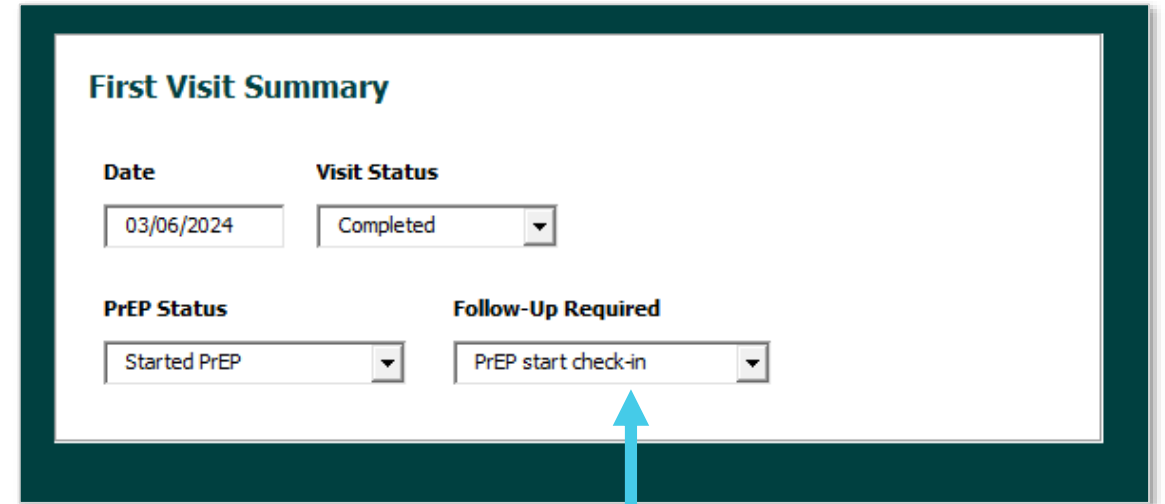
PREP START CHECK-IN AS A FOLLOW-UP OPTION

We recommend that staff check-in on patients ~2 weeks after the start PrEP.

Starting a new medication can be overwhelming—data indicate that additional patient interaction and outreach during this transition period may facilitate greater PrEP adherence and sustainment!

This **brief phone call** is intended to assess side effects, provide support, and identify any additional concerns or needs the patient might have.

The check-in is a supplement to standard clinical monitoring recommended by the treatment guidelines.



The screenshot shows a 'First Visit Summary' form with the following fields:

Date	Visit Status
03/06/2024	Completed
PrEP Status	Follow-Up Required
Started PrEP	PrEP start check-in

A blue arrow points to the 'PrEP start check-in' dropdown menu in the 'Follow-Up Required' field.

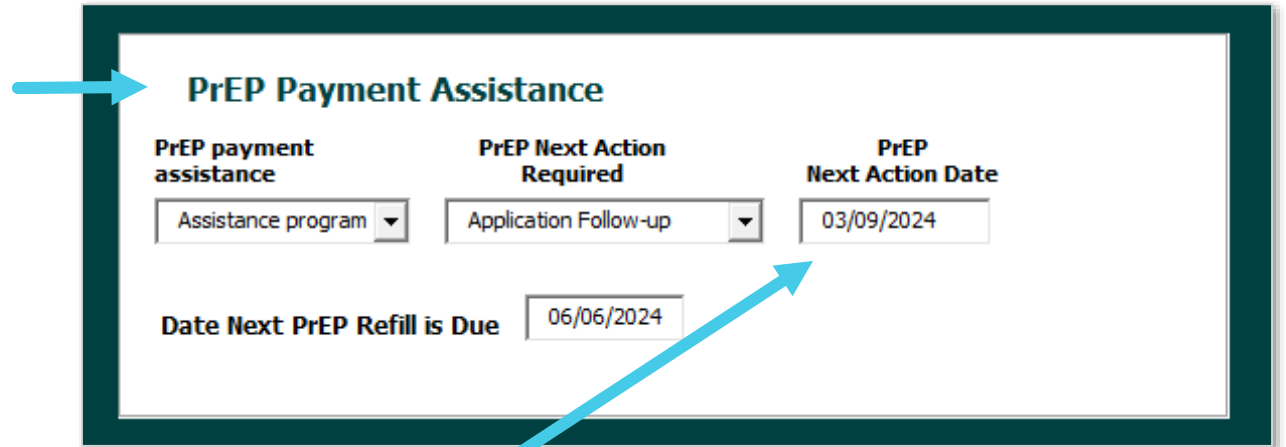
You can **document** the need for a PrEP start check-in here, and **track your contact** with the patient on the PrEP Start Tab (see pages 53)



DOCUMENT **PrEP PAYMENT ASSISTANCE** NEEDS AND NEXT STEPS FOR STAFF

Some patients need financial assistance in order to access PrEP. Using the **PrEP Payment Assistance Panel**, document the type of payment assistance needed (if any) and the next steps.

The **Next Action Date** documents when the next action is due (e.g., payment assistance needs to be renewed)

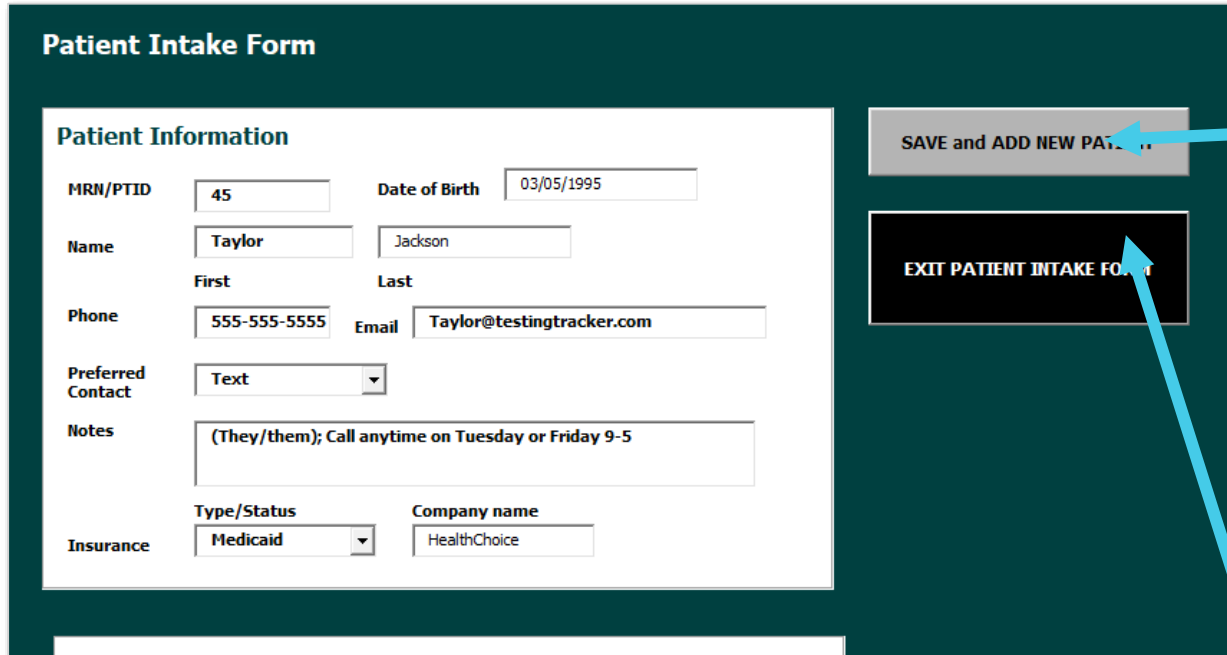


The screenshot shows a form titled "PrEP Payment Assistance" with the following fields:

PrEP payment assistance	PrEP Next Action Required	PrEP Next Action Date
Assistance program ▼	Application Follow-up ▼	03/09/2024
Date Next PrEP Refill is Due		06/06/2024

A blue arrow points to the "PrEP Payment Assistance" title, and another blue arrow points to the "PrEP Next Action Date" field.

SAVE THE PATIENT INTAKE FORM AND RETURN TO THE MAIN WINDOW



Patient Intake Form

Patient Information

MRN/PTID: 45 Date of Birth: 03/05/1995

Name: Taylor Jackson

First: Last:

Phone: 555-555-5555 Email: Taylor@testingtracker.com

Preferred Contact: Text

Notes: (They/them); Call anytime on Tuesday or Friday 9-5

Insurance: Type/Status: Medicaid Company name: HealthChoice

SAVE and ADD NEW PATIENT

EXIT PATIENT INTAKE FORM

Once all fields have been edited, click **“ADD NEW PATIENT”** to save information.

If adding patients in batches, simply hit **“ADD NEW PATIENT”** after each new entry.

Click **“EXIT PATIENT INTAKE FORM”** to close out and return to the main window.

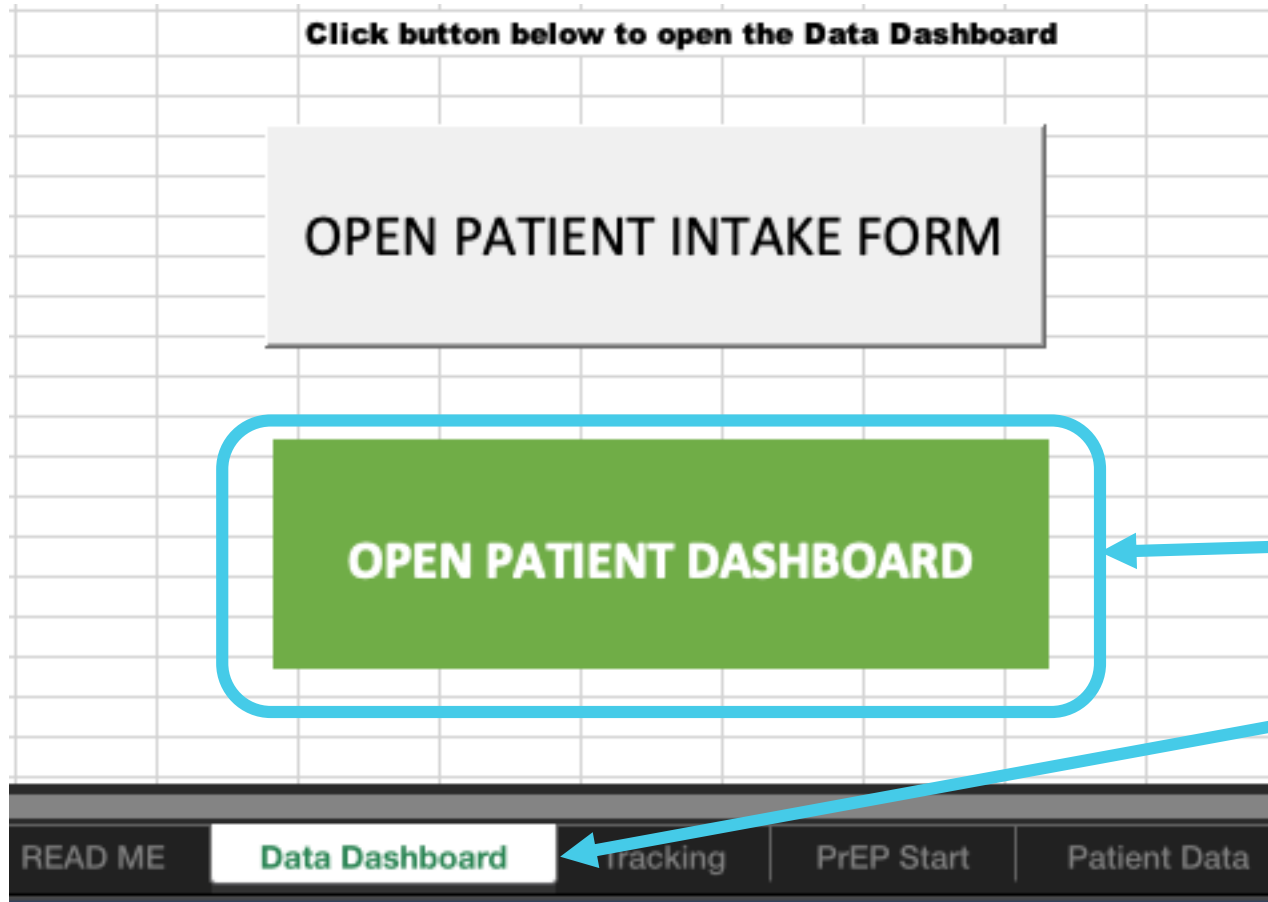


USING THE PATIENT DASHBOARD TO VIEW PATIENT DATA

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUPRINT.ORG](https://HIVBLUPRINT.ORG)

ACCESS THE PATIENT DASHBOARD



The PATIENT DASHBOARD is an at-a-glance summary of key information related to the ongoing management of PrEP patients.

Access by clicking the green **OPEN PATIENT DASHBOARD** is button on the **Data Dashboard** tab.

ORIENTATION TO THE **PATIENT DASHBOARD**

When you enter the **Patient Dashboard** through this button, a *blank* dashboard will pop up.



Click on this button to open up this window!

Patient Information

Date of Birth

HRR/PTID

Name

Phone

Preferred Contact

Notes

PrEP Status

Current PrEP Status

Date PrEP Initiated

Rx Start

Rx Expiration

Insurance and Payment Assistance Information

Type/Status

Company name

Insurance

Insurance#/Member ID

PrEP payment assistance method

PrEP payment Action Required

Date Next Action Required

Date Next PrEP Refill is Due

Insurance Reminder Status

Next Visit Summary

Next Visit Date

Visit Summary Data

	Date	Visit Status	PrEP Status	Follow Up Required
Visit 1				
Visit 2				
Visit 3				
Visit 4				
Visit 5				
Visit 6				
Visit 7				
Visit 8				
Visit 9				
Visit 10				
Visit 11				
Visit 12				

Reminder Tracker Data

Reminder Status	Reminder Notes
N/A (Not used)	

MRR/PTID SEARCH and DISPLAY

DOB SEARCH and DISPLAY

EDIT REMINDER TRACKING

EDIT PREP CHECK IN TRACKING

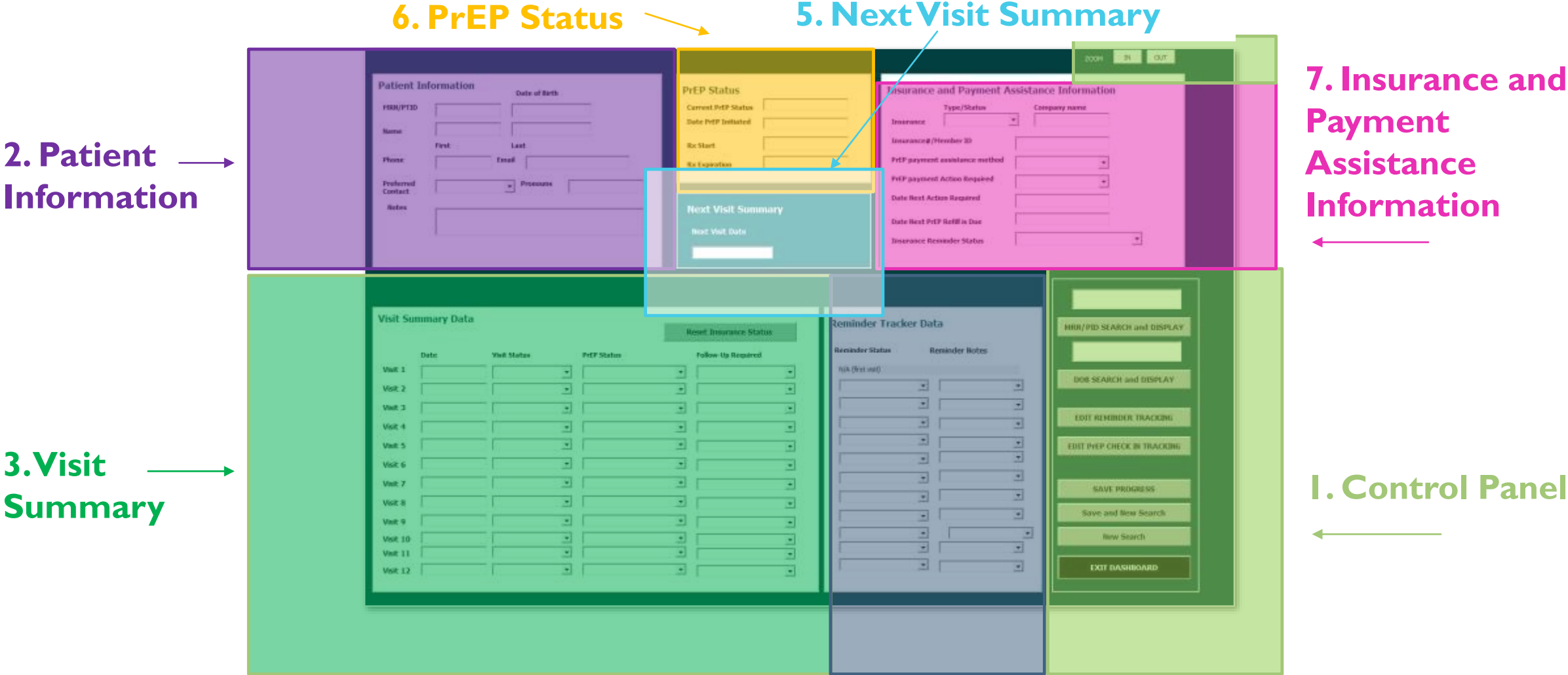
SAVE PROGRESS

Save and New Search

New Search

EXIT DASHBOARD

LET'S GET TO KNOW THE "ZONES" OF THE PATIENT DASHBOARD



I. CONTROL PANEL: SEARCH, EDIT, SAVE, ZOOM

- **Search** for patients by MRN or DOB
- Capture more granular detail using the **Edit** buttons
- **Save** progress
- Use **Zoom** to increase or decrease text size

The screenshot displays a web-based control panel for patient information. It is divided into several sections: Patient Information, PrEP Status, Insurance and Payment Assistance Information, Next Visit Summary, Visit Summary Data, and Reminder Tracker Data. A green box highlights the 'ZOOM IN' and 'ZOOM OUT' buttons in the top right corner. Another green box highlights a vertical sidebar on the right side of the interface, containing buttons for 'MRN/PID SEARCH and DISPLAY', 'DOB SEARCH and DISPLAY', 'EDIT REMINDER TRACKING', 'EDIT PrEP CHECK IN TRACKING', 'SAVE PROGRESS', 'Save and New Search', 'New Search', and 'EXIT DASHBOARD'. A green arrow points from the 'ZOOM IN' button to the 'EDIT PrEP CHECK IN TRACKING' button.

Date	Visit Status	PrEP Status	Follow-Up Required
Visit 1			
Visit 2			
Visit 3			
Visit 4			
Visit 5			
Visit 6			
Visit 7			
Visit 8			
Visit 9			
Visit 10			
Visit 11			
Visit 12			

ENTER DOB OR MRN TO LOCATE AN INDIVIDUAL PATIENT RECORD

When you click “Search and Display,” the patient’s information will appear, taken from what you entered in the **Patient Intake Form**

Remember, the search function is case sensitive. MRN or search must exactly match the original entry (DOB must be entered in MM/DD/YYYY)

Entering “45” in the MRN Search Field Pulls record for Taylor Jackson (our sample patient)

The screenshot displays a web-based Patient Intake Form. The top section contains several input fields for patient information, including MRN/PTID, Date of Birth, Name, Phone, and Preferred Contact. A 'Next Visit Summary' box is also present. The middle section is divided into 'PREP Status' and 'Insurance and Payment Assistance Information'. The bottom section features a 'Visit Summary Data' table and a 'Reminder Tracker Data' table. On the right side, there is a vertical sidebar with a search field and several buttons: 'MRN/PTID SEARCH and DISPLAY', 'DOB SEARCH and DISPLAY', 'EDIT REMINDER TRACKING', 'EDIT PREP CHECK IN TRACKING', 'SAVE PROGRESS', 'Save and New Search', 'New Search', and 'EXIT DASHBOARD'. A green arrow points from the text above to the search field, and another green arrow points from the text below to the 'MRN/PTID SEARCH and DISPLAY' button.

Date	Visit Status	PREP Status	Follow-Up Required
3/5/2024	Completed	Started PREP	PREP start check in



2. PATIENT INFORMATION

Many of these fields are pre-populated from the Patient Intake Form.

One additional field to document **pronouns** (if not already captured in the notes, add here)

The screenshot shows a patient information form with several sections:

- Patient Information:** Fields for HRII/PTID (48), Date of Birth (3/5/1995), Name (Taylor Jackson), Phone (555-555-5555), Email (Taylor@testingtracker.com), Preferred Contact (Text), and Pronouns (highlighted with a callout box). A note reads: "(They/Them): Call anytime on Tuesday or Friday 9-5".
- PrEP Status:** Fields for Current PrEP Status, Date PrEP Initiated (3/6/2024), Rx Start, and Rx Expiration.
- Insurance and Payment Assistance Information:** Fields for Insurance (Medicaid), Company name (HealthChoice), Insurance#/Member ID, PrEP payment assistance method (Assistance program), PrEP payment Action Required (Application Follow-up), Date Next Action Required (3/9/2024), Date Next PrEP Refill is Due (6/6/2024), and Insurance Reminder Status.
- Next Visit Summary:** Field for Next Visit Date (3/6/2024).
- Visit Summary Data:** A table with columns for Date, Visit Status, PrEP Status, and Follow-Up Required. The first row shows Visit 1 on 3/5/2024, Completed, Started PrEP, and PrEP start check-in.
- Reminder Tracker Data:** A table with columns for Reminder Status and Reminder Notes. The first row shows N/A (first visit).
- Navigation Panel:** Buttons for MRH/PID SEARCH and DISPLAY, DOB SEARCH and DISPLAY, EDIT REMINDER TRACKING, EDIT PrEP CHECK IN TRACKING, SAVE PROGRESS, Save and New Search, New Search, and EXIT DASHBOARD.

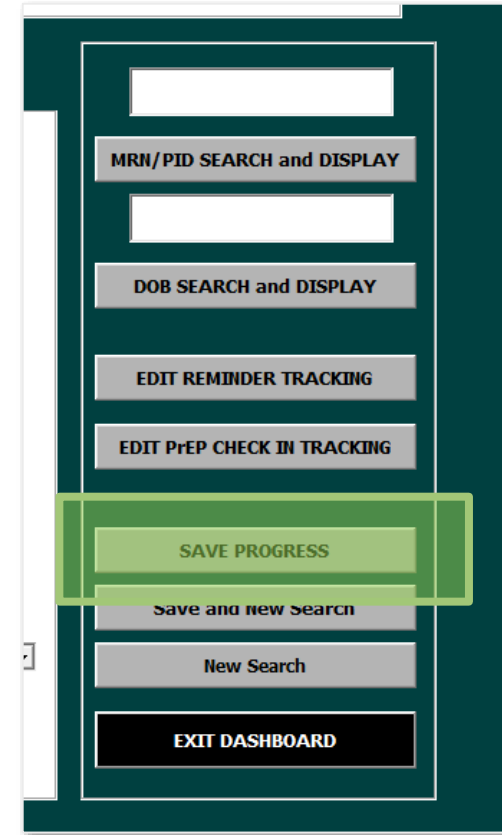
2. PATIENT INFORMATION: EDIT AND “SAVE PROGRESS”



Patient Information

HRN/PID	45	Date of Birth	3/5/1995
Name	Taylor	Jackson	
Phone	555-555-5555	Email	Taylor@testingtracker.com
Preferred Contact	Text	Preferred	They/their
Notes	(They/their); Call anytime on Tuesday or Friday 9-5		

Edit fields as desired



MRI/PID SEARCH and DISPLAY

DOB SEARCH and DISPLAY

EDIT REMINDER TRACKING

EDIT PrEP CHECK IN TRACKING

SAVE PROGRESS

Save and new Search

New Search

EXIT DASHBOARD

Then, click **SAVE PROGRESS**
in the control panel

3. VISIT SUMMARY: TRACK PREP STATUS, VISIT STATUS, AND FOLLOW-UP

*When was the last time a patient was in?
Where they on PrEP—or just thinking about starting?*

The visit summary can help you assess if clients' follow-ups are happening regularly across visits. They will also provide some context about the patients' ongoing history with PrEP (and any after-visit action items for staff).

The screenshot displays a patient management interface with several key sections:

- Patient Information:** Fields for Name (Taylor Jackson), Phone (815.555.0000), Email (Taylor@strongtrader.com), and Professional Contact (Therapist).
- PrEP Status:** Fields for Current PrEP Status, Date PrEP Initiated (3/8/2024), Rx Start, and Rx Expiration.
- Insurance and Payment Assistance Information:** Fields for Insurance Type (Medical), Company Name (HealthCross), Assistance Program, and PrEP Payment Action Required.
- Next Visit Summary:** A section for tracking the next visit date (3/8/24).
- Visit Summary Data:** A table with columns for Date, Visit Status, PrEP Status, and Follow-Up Required. The first row shows Visit 1 on 3/8/24 with a status of 'Completed', 'Started PrEP', and a follow-up requirement of 'PrEP Start Check-in'.
- Reminder Tracker Data:** A section for tracking reminder status and dates.
- Navigation and Search:** A sidebar on the right with buttons for 'NEW/PAT SEARCH AND DISPLAY', 'DOB SEARCH AND DISPLAY', 'EDIT REMINDER TRACKING', 'EDIT PREP CHECK IN TRACKING', 'SAVE PROGRESS', 'Save and How Search?', 'New Search', and 'EXIT DASHBOARD'.

3.VISIT SUMMARY: VIEW AND EDIT

Visit Summary Data for **Visit 1** will be pre-populated from the patient intake form.

- **Date:** when was the first visit?
- **Visit status:** Was the visit successfully completed? Did it need to be rescheduled?
- **PrEP status:** Is the patient still on PrEP? Did they stop? Start?
- **Follow-up required:** Is a PrEP start check-in required? Reschedule appointment?

The screenshot shows a web form titled "Visit Summary Data". In the top right corner, there is a grey button labeled "Reset Insurance Status". Below this is a table with five columns: "Date", "Visit Status", "PrEP Status", and "Follow-Up Required". The first row, labeled "Visit 1", is highlighted with a green border and contains the following data: "Date" is a text input field with "3/6/2024"; "Visit Status" is a dropdown menu with "Completed" selected; "PrEP Status" is a dropdown menu with "Started PrEP" selected; and "Follow-Up Required" is a dropdown menu with "PrEP start check-in" selected. The second row, labeled "Visit 2", has empty input fields for all four columns.

	Date	Visit Status	PrEP Status	Follow-Up Required
Visit 1	3/6/2024	Completed	Started PrEP	PrEP start check-in
Visit 2				

3. VISIT SUMMARY: FOLLOW-UPS AND SCHEDULING

After Visit 1, staff should check the **follow-up required** (e.g., PrEP start check-in)

Schedule patients for their next appointment (e.g., every 3 months for lab monitoring).

This patient's next visit is in the future, so the Visit Status and PrEP status are pending

	Date	Visit Status	PrEP Status	Follow-Up Required
Visit 1	3/6/2024	Completed	Started PrEP	PrEP start check-in
Visit 2	06/08/2024	Pending	To be confirmed	None
Visit 3				
Visit 4				
Visit 5				
Visit 6				
Visit 7				
Visit 8				
Visit 9				
Visit 10				
Visit 11				
Visit 12				

PREVIEW OF KEY FEATURE: FLAG PATIENTS WHO MISSED THEIR VISIT



In the **Tracking Tab** (next section of manual) we have programmed a button to “highlight” the patients who need a follow-up because they have likely missed their appointment (see page 45 for more info)

Note: If you already have an appointment reminder system baked into your EHR, this functionality may not be for you

	D	E	F	
	DOB	Next_Visit_Date	Next_Visit_Status	In
	04/05/1991	06/09/2024	Pending	Che
	12/26/1972	01/03/2024	Pending	Che
	12/20/1965	03/02/2024	Pending	Che
	05/02/1999	03/22/2024	Completed	Che
	02/22/1992	04/01/2024	Pending	
	02/02/1996	04/12/2024	Pending	Che
	03/05/1995	03/06/2024	Completed	

4. REMINDER TRACKER DATA

When did we last reach out to that patient? Who spoke to them? Does the patient need any assistance in getting to their appointment?

Reminder Tracking is designed to help staff coordinate patient outreach efforts to minimize the risk that patients fall through the cracks.

The screenshot displays a patient management interface with several sections:

- Patient Information:** Fields for MRN/PTID, Date of Birth, Name (First, Last), Phone, Preferred Contact, and Notes.
- PfPR Status:** Fields for Current PfPR Status, Date PfPR Initiated, No Start, and No Injection.
- Insurance and Payment Assistance Information:** Fields for Type/Status, Company name, Insurance, Insurance/Member ID, PfPR payment assistance method, PfPR payment Action Required, Date Next PfPR Bill is Due, and Insurance Reminder Status.
- Next Visit Summary:** A summary box showing Next Visit Date: 10/20/24.
- Visit Summary Data:** A table with columns: Date, Visit Status, PfPR Status, and Follow Up Required. The first row shows Visit 1 on 10/20/24 with a status of 'Completed', 'Started PfPR', and 'PfPR Start Check-in'.
- Reminder Tracker Data:** A table with columns: Reminder Status and Reminder Notes. It includes a 'PA Check-in' field and several rows with dropdown menus for status and notes.
- Navigation Panel:** Buttons for 'NEW PFPR SEARCH AND DISPLAY', 'OLD SEARCH AND DISPLAY', 'EDIT REMINDER TRACKING', 'EDIT PFPR CHECK IN TRACKING', 'SAVE PROGRESS', 'View and New Search', 'New Search', and 'EXIT DASHBOARD'.



Key Feature: in the next section you will see how to quickly highlight patients with upcoming appointments who need reminders!

EACH REMINDER TRACKER STATUS ENTRY CORRESPONDS TO A VISIT

Each line of the **Reminder Tracker Data** has a counterpart in the **Visit Summary** (up to 12 visits)

- We assume that you will be entering patients on a rolling basis as they come in for their visits (versus completing the **Patient Intake Form** in advance of their first visit) → This is why Reminder status for Visit 1 is “N/A”
- Visit 2 has not occurred yet, so the patient will still need a reminder
- *On the next slide you’ll see a patient with more extensive PrEP experience...*

Reminder Tracker Data	
Reminder Status	Reminder Notes
N/A (first visit)	
Needs Reminder	

QUICKLY SCAN THE VISIT SUMMARY DATA TO SEE IF THE PATIENT IS DUE FOR AN APPOINTMENT OR NEEDS A REMINDER

Regular 3-month intervals for lab monitoring visits

The **PrEP Start Check-in** was completed as “Visit 2”—even though the patient didn’t come in to the clinic

Visit	Date	Visit Status	PrEP Status	Follow-Up Required
Visit 1	1/22/2023	Completed	Started PrEP	PrEP start check-in
Visit 2	1/30/2023	Completed	Continued PrEP	Check-in complete
Visit 3	4/22/2023	Completed	Continued PrEP	PrEP payment resolution
Visit 4	7/22/2023	Completed	Continued PrEP	None
Visit 5	10/20/2023	Need Rescheduling	To be confirmed	
Visit 6	10/25/2023	Completed	Continued PrEP	None
Visit 7	1/5/2024	Completed	Continued PrEP	None
Visit 8	4/12/2024	Pending	To be confirmed	
Visit 9				
Visit 10				
Visit 11				
Visit 12				

Reminder Tracker Data

Reminder Status	Reminder Notes
N/A (first visit)	
Reminder complete	Visit confirmed, no prob
Reminder complete	Visit confirmed, no prob
Reminder complete	Visit confirmed, no prob
No Response	LTF
Reminder complete	Visit confirmed, no prob
	Visit confirmed, no prob
Needs Reminder	

Right Sidebar: 65, MRH/PID SEARCH and DISPLAY, DOB SEARCH and DISPLAY, EDIT REMINDER TRACKING, EDIT PrEP CHECK IN TRACKING, SAVE PROGRESS, Save and New Search, New Search, EXIT DASHBOARD

Flag visits that need to be rescheduled

See next slide for **EDIT REMINDER TRACKING**



CLICK [EDIT REMINDER TRACKING](#) FOR DETAILED LOG OF PATIENT OUTREACH ATTEMPTS (PER APPOINTMENT)

The screenshot displays a patient management interface with several sections:

- Patient Information:** Fields for HRN/PTID, Name, Phone, Email, and Date of Birth.
- PrEP Payment and Refills:** Fields for Date PrEP Initiated, PrEP payment assistance, PrEP payment Active Required, Date Next Action Required, and Date Next PrEP Refill is Due.
- Last Visit and Next Visit Summary:** Summary of PrEP status at last visit, follow-up required, next visit date, and visit status.
- Reminder Tracking History:** A table with columns for Visit #, Date, Action, Attempt #, Date, Action, Reminder Notes, Reminder Status, and Overall remarks.

A callout box on the right side of the interface highlights the **EDIT REMINDER TRACKING** button.

Visit #	Date	Action	Attempt #	Date	Action	Reminder Notes	Reminder Status	Overall remarks
Visit 2	01/26/2024	Left Message	1	01/30/2024	Spoke to patient	Visit confirmed, no prob	Reminder complete	PrEP Checkin Complete
Visit 3	04/26/2023	No answer	1	04/21/2023	Sent text	Visit confirmed, no prob	Reminder complete	473 Case Manager: pt needs financial assistance for PrEP
Visit 4	07/18/2023	Wrong number/dia	1	07/06/2023	Sent email	Visit confirmed, no prob	Reminder complete	
Visit 5	12/18/2023	Sent email	1	10/19/2023	Wrong number/dia	12/05/2023	No answer	Did not hear from Patient, needs to reschedule the visit
Visit 6	10/21/2023	Spoke to patient	1	10/23/2023	Sent text	Visit confirmed, no prob	Reminder complete	
Visit 7	01/01/2024	Spoke to patient	1			Visit confirmed, no prob		
Visit 8							Needs Reminder	Contact once closer

Click on **EDIT REMINDER TRACKING** to pull up this window!



REMINDER TRACKING HISTORY DOCUMENTS PATIENT OUTREACH

Drag the **Reminder Tracking History** window to be superimposed over the **Patient Dashboard**. This will make it visually easier to match up the **Visit Date** with the corresponding outreach **Attempt #1, #2, and #3**

Reminder Tracking History for **Visit 1** is N/A.

Use **Overall Remarks** to capture internal notes to the team (e.g., who last spoke with the patient)

The screenshot displays two main components: a 'Visit Summary Data' table on the left and a 'Reminder Tracking History' table on the right. Arrows from the text above point to these elements.

Visit Summary Data	
Visit	Visit Status
Visit 1	Completed
Visit 2	Completed
Visit 3	Completed
Visit 4	Completed
Visit 5	Need Rescheduling
Visit 6	Completed
Visit 7	Completed
Visit 8	Pending
Visit 9	
Visit 10	
Visit 11	
Visit 12	

Visit	Attempt #1		Attempt #2		Attempt #3		Reminder Notes	Reminder Status	Overall remarks
	Date	Action	Date	Action	Date	Action			
Visit 2	01/29/2024	Left Message	01/30/2024	Spoke to patient			Visit confirmed, no prob	Reminder complete	PrEP Checkin Complete
Visit3	04/20/2023	No answer	04/21/2023	Sent text	04/21/2023	Spoke to patient	Visit confirmed, no prob	Reminder complete	4/21 Case Manager: pt needs financial assistance for PrEP
Visit4	07/16/2023	Wrong number/disc	07/20/2023	Sent email	07/21/2023	Spoke to patient	Visit confirmed, no prob	Reminder complete	
Visit 5	10/18/2023	Sent email	10/19/2023	Wrong number/disc	10/20/2023	No answer	LTP	No Response	Did not hear from Patient, needs to reschedule the visit
Visit 6	10/21/2023	Spoke to patient	10/23/2023	Sent text	10/24/2024	Spoke to patient	Visit confirmed, no prob	Reminder complete	
Visit 7	01/01/2024	Spoke to patient					Visit confirmed, no prob		
Visit 8								Needs Reminder	Contact once closer
Visit 9									
Visit 10									
Visit 11									
Visit 12									

VISIT SUMMARY & REMINDER TRACKING DATA WORK TOGETHER TO PROVIDE A READILY DIGESTIBLE PATIENT SUMMARY

What was happening the last time we saw this patient? When are they coming in next?

This teal box contains excel programming magic that pulls code from data entries in the **Visit Summary and Reminder Tracking Data** and cannot be directly edited.

The screenshot shows a patient summary form with two teal-highlighted sections. The top section, titled "PrEP Payment and Refills", contains fields for "Date PrEP Initiated" (01/22/2023), "PrEP payment assistance" (None), "PrEP payment Action Required" (None), "Date Next Action Required" (empty), "Date Next PrEP Refill is Due" (04/26/2024), "Insurance Type/Status" (Private), "Company name" (Aetna), and "Insurance Reminder Status" (Check Insurance Status). The bottom teal section, titled "Last Visit and Next Visit Summary", contains fields for "PrEP Status at Last Visit" (Continued PrEP), "Follow-Up Required from Last Visit" (None), "Next Visit Date" (04/12/2024), and "Visit Status" (Pending). Below these sections is a table with columns for "Attempt #2", "Attempt #3", "Reminder Notes", "Reminder Status", and "Overall remarks". The table has two rows of data.

Attempt #2		Attempt #3		Reminder Notes	Reminder Status	Overall remarks
Date	Action	Date	Action			
01/20/2024	Spoke to patient			Visit confirmed, no prob...	Reminder complete	PrEP Checkin Complete



PREP PAYMENT AND REFILLS LESS RELEVANT; INFORMATION IS COVERED BETTER OTHER PLACES IN THE TRACKER

This is a beta version of the tracker. Initially we thought the PrEP Payment and Refills Section belonged in the “tracking” data.

We heard from providers that Insurance and Payment Information should be escalated to the main Dashboard.

Ignore this section for now.

The screenshot shows a web interface for PrEP management. The top section is titled "PrEP Payment and Refills" and contains several input fields and dropdown menus. Below this is a "Last Visit and Next Visit Summary" section with a teal background, showing the current PrEP status and next visit details. At the bottom, there is a table for tracking PrEP attempts.

PrEP Payment and Refills		PrEP payment assistance		PrEP payment Action Required		Date Next Action Required		Date Next PrEP Refill is Due	
Date PrEP Initiated	01/22/2023	None	None					04/26/2024	
Insurance	Private	Company name	Aetna	Insurance Reminder Status	Check Insurance Status				

Last Visit and Next Visit Summary			
PrEP Status at Last Visit	Follow-Up Required from Last Visit	Next Visit Date	Visit Status
Continued PrEP	None	04/12/2024	Pending

Attempt #2		Attempt #3		Reminder Notes	Reminder Status	Overall remarks
Date	Action	Date	Action			
01/20/2024	Spoke to patient			Visit confirmed, no prob...	Reminder complete	PrEP Checkin Complete



SAVE CHANGES AND RETURN TO THE MAIN DASHBOARD

Once you're done editing the **Reminder Tracking History** click **SAVE CHANGES** in the upper right corner of the window.

The data will clear—don't worry, it's saved! **EXIT DASHBOARD** to return to the main page.

SAVE CHANGES EXIT DASHBOARD

PrEP payment Action Required: None

Date Next Action Required: []

Date Next PrEP Refill is Due: 04/26/2024

Insurance Reminder Status: Check Insurance Status

Next Visit Date: 04/12/2024

Visit Status: Pending

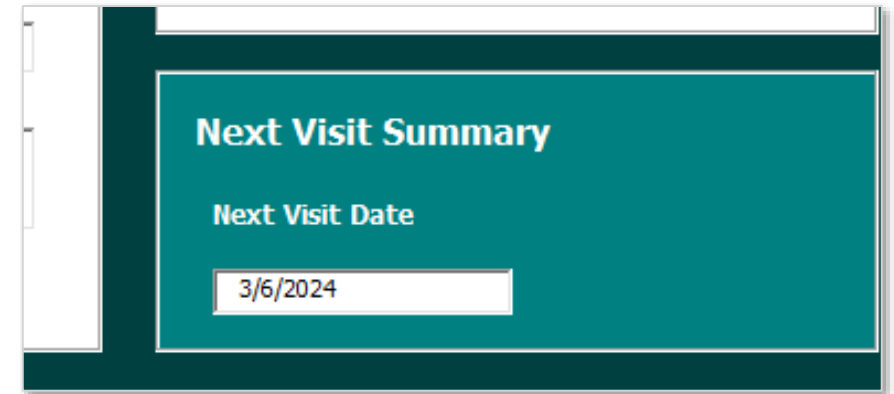
Reminder Notes Reminder Status Overall remarks

5. NEXT VISIT SUMMARY

*When is the next time the patient is coming in?
When is the last time we saw them?*

Using the **Next Visit Summary**, quickly assess if the patient is up-to-date with visits

- Date is in the future → Has an upcoming appointment
- Recent Date → Current patient, needs to be scheduled
- Out of Date → May need more outreach?



Like the other teal box on the dashboard, this box is for reference only.

It pulls data from the **Visit Summary** and cannot be edited.

6. PREP STATUS: PATIENT'S CURRENT RELATIONSHIP WITH PREP

*Have we talked to this patient about PrEP?
Are they still on PrEP? When is their
prescription set to expire?*

We hope the **PrEP Status** window will help providers access this crucial information at a glance and allow for actionable follow-up—such as scheduling a visit with a patient whose prescription is about to expire.

The screenshot displays a patient record interface with several key sections:

- PrEP Status** (highlighted in yellow):
 - Current PrEP Status: Continued PrEP
 - Date PrEP Initiated: 1/22/2023
 - Rx Start: [Empty]
 - Rx Expiration: [Empty]
- Insurance and Payment Assistance**:
 - Type/Status: Private
 - Company: Aetna
 - Insurance#/Member ID: [Empty]
 - PrEP payment assistance method: None
 - PrEP payment Action Required: None
 - Date Next Action Required: [Empty]
 - Date Next PrEP Refill is Due: 4/05/2024
 - Insurance Reminder Status: Check Insoon
- Next Visit Summary**:
 - Next Visit Date: 4/12/2024
- Reset Insurance Status**: A button to update insurance information.
- Reminder Tracker Data**: A table with columns for PrEP Status, Follow-Up Required, Reminder Status, and Reminder Notes.

PrEP Status	Follow-Up Required	Reminder Status	Reminder Notes
Started PrEP	PrEP start check-in	Reminder complete	Visit confirmed, no prob.
Continued PrEP	Check-in complete	Reminder complete	Visit confirmed, no prob.
Continued PrEP	PrEP payment resolution	Reminder complete	Visit confirmed, no prob.
Continued PrEP	None	No Response	LTP
To be confirmed	[Empty]	Reminder complete	Visit confirmed, no prob.
Continued PrEP	None	[Empty]	Visit confirmed, no prob.
Continued PrEP	None	[Empty]	Visit confirmed, no prob.
To be confirmed	[Empty]	Needs Reminder	[Empty]
[Empty]	[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]	[Empty]
[Empty]	[Empty]	[Empty]	[Empty]

6. PREP STATUS PULLS FROM THE VISIT SUMMARY DATA

Current PrEP Status and Date PrEP Initiated cannot be edited manually and is pulled from the **Visit Summary Data**

The screenshot displays two main components of a PrEP management system. On the left is a 'Visit Summary Data' table, and on the right is a 'PrEP Status' summary card. A yellow arrow points from the 'PrEP Status' field in the table to the 'PrEP Status' summary card, illustrating that the data is pulled from the table.

Visit	Date	Visit Status	PrEP Status	Follow-Up Required
Visit 1	1/22/2023	Completed	Started PrEP	PrEP start check
Visit 2	1/30/2023	Completed	Continued PrEP	Check-in c
Visit 3	4/22/2023	Completed	Continued PrEP	PrEP payment res
Visit 4	7/22/2023	Completed	Continued PrEP	None
Visit 5	10/20/2023	Need Rescheduling	To be confirmed	
Visit 6	10/25/2023	Completed	Continued PrEP	None
Visit 7	1/5/2024	Completed	Continued PrEP	None
Visit 8	4/12/2024	Pending	To be confirmed	
Visit 9				
Visit 10				
Visit 11				
Visit 12				

The 'PrEP Status' summary card shows the following information:

- PrEP Status:** Continued PrEP
- Current PrEP Status:** Continued PrEP
- Date PrEP Initiated:** 1/22/2023
- Rx Start:** [Empty field]
- Rx Expiration:** [Empty field]

6. PREP STATUS: MANUALLY ENTER PRESCRIPTION START AND EXPIRATION DATES

The screenshot shows a form titled "PrEP Status" with four input fields. The first field, "Current PrEP Status", contains "Continued PrEP". The second field, "Date PrEP Initiated", contains "1/22/2023". The third field, "Rx Start", contains "01/05/2024". The fourth field, "Rx Expiration", contains "01/04/2025". A yellow arrow points to the "Rx Expiration" field. A yellow bracket on the right side of the form groups the "Date PrEP Initiated", "Rx Start", and "Rx Expiration" fields together.

PrEP Status	
Current PrEP Status	Continued PrEP
Date PrEP Initiated	1/22/2023
Rx Start	01/05/2024
Rx Expiration	01/04/2025

Automatically populated from **Visit Summary**

Manual entry in this section of the **Patient Dashboard**

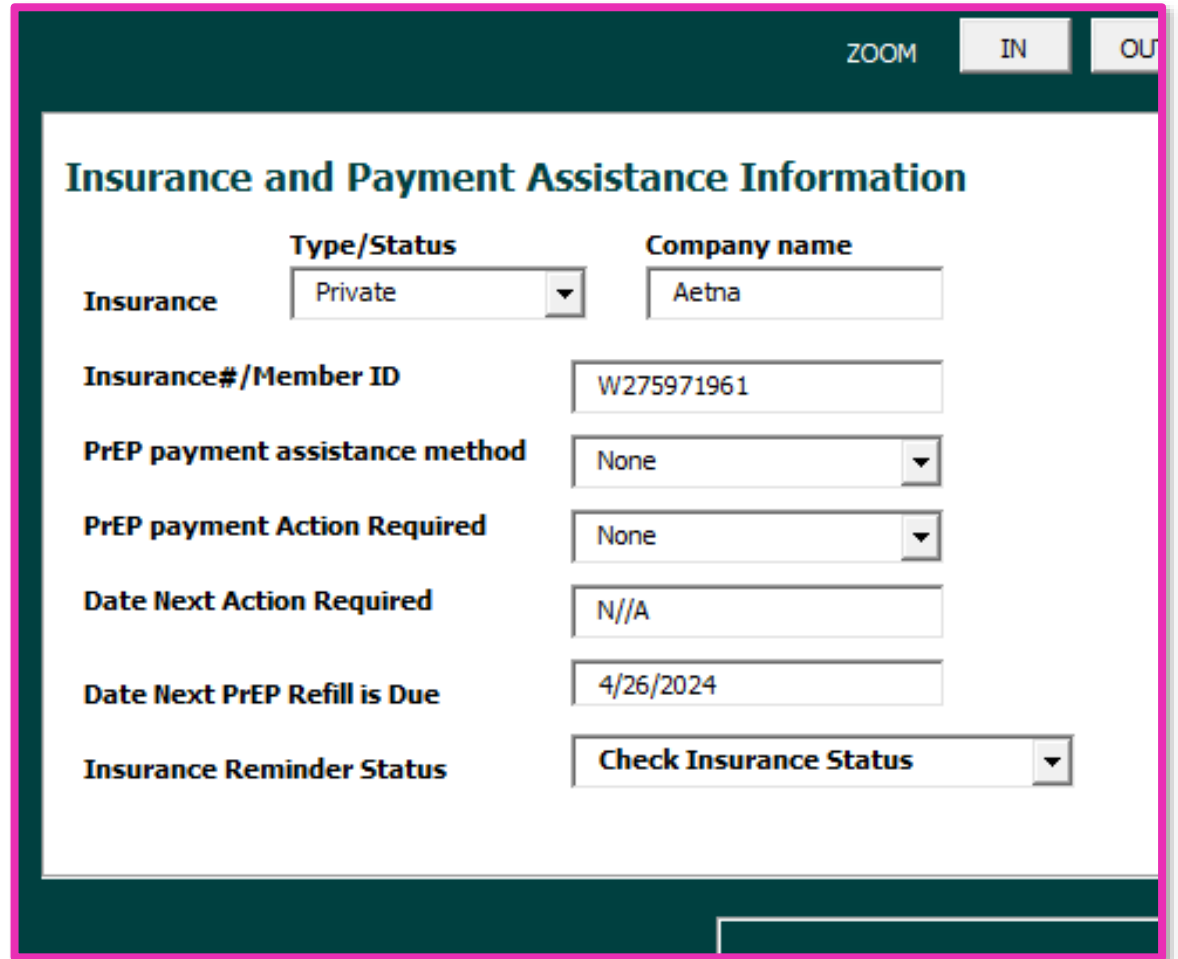
Remember: dates need to be entered MMDDYYYY and they will be automatically formatted

7. INSURANCE AND PAYMENT ASSISTANCE INFORMATION

Is the patient part of the patient assistance program? What's their Member ID? When is their next refill due?

The **Insurance and Payment Assistance** section is designed to provide easy access to the patient's insurance information for **navigation and tracking**.

Some of this information will be pre-populated from the Patient Intake Form, but you can **edit the data directly** into this section of the Data Dashboard at any time.



The screenshot shows a Zoom meeting window with a title bar containing 'ZOOM', 'IN', and 'OUT' buttons. The main content is a form titled 'Insurance and Payment Assistance Information'. The form contains the following fields:

	Type/Status	Company name
Insurance	Private	Aetna
Insurance#/Member ID	W275971961	
PrEP payment assistance method	None	
PrEP payment Action Required	None	
Date Next Action Required	N//A	
Date Next PrEP Refill is Due	4/26/2024	
Insurance Reminder Status	Check Insurance Status	

7. INSURANCE AND PAYMENT ASSISTANCE INFORMATION

The **Action Required** field lets you track when the patient might need renewal of their co-pay card or medication assistance program.

It also lets you track when the assistance program or co-pay card will **expire**, and when the patient's **next refill** is due.

Some patients will need you to **check their insurance status** regularly, and you can indicate that here.

The screenshot shows a form titled "Insurance and Payment Assistance Information" with the following fields and values:

	Type/Status	Company name
Insurance	Private	aetna
Insurance#/Member ID	234565	
PrEP payment assistance method	Co-pay card	
PrEP payment Action Required	Renewal	
Date Next Action Required	1/3/2024	
Date Next PrEP Refill is Due	1/3/2024	
Insurance Reminder Status	Insurance Status Confirmed	

Annotations in the image include a purple arrow pointing from the text "The Action Required field lets you track..." to the "PrEP payment Action Required" dropdown menu. Another purple arrow points from the text "It also lets you track when the assistance program or co-pay card will expire, and when the patient's next refill is due." to a purple box that encloses the "Date Next Action Required" and "Date Next PrEP Refill is Due" fields. A third purple arrow points from the text "Some patients will need you to check their insurance status regularly, and you can indicate that here." to the "Insurance Reminder Status" dropdown menu.



“RESET INSURANCE STATUS” BUTTON REMINDS PROVIDERS TO CHECK INSURANCE BEFORE EVERY APPOINTMENT

Gaps in coverage or changes in insurance status can create bottlenecks that make it more difficult for patients to access or stay on PrEP.

This button is a reminder to reset/re-confirm the patients’ insurance status before each appointment.

The screenshot displays a software interface with a dark green header. A button labeled "Reset Insurance Status" is highlighted with a purple rectangular box. Below the button is a table with two main columns: "Follow-Up Required" and "Reminder Tracker Data".

Follow-Up Required	Reminder Tracker Data
PrEP start check-in	N/A (first visit)
Check-in complete	Reminder complete
PrEP payment resolution	Reminder complete
None	Reminder complete
	No Response
None	Reminder complete
None	
None	Needs Reminder





FLAG UPCOMING APPOINTMENTS, REMINDERS, AND MISSED VISITS

USING THE TRACKING TAB

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUPRINT.ORG](https://hivbluprint.org)

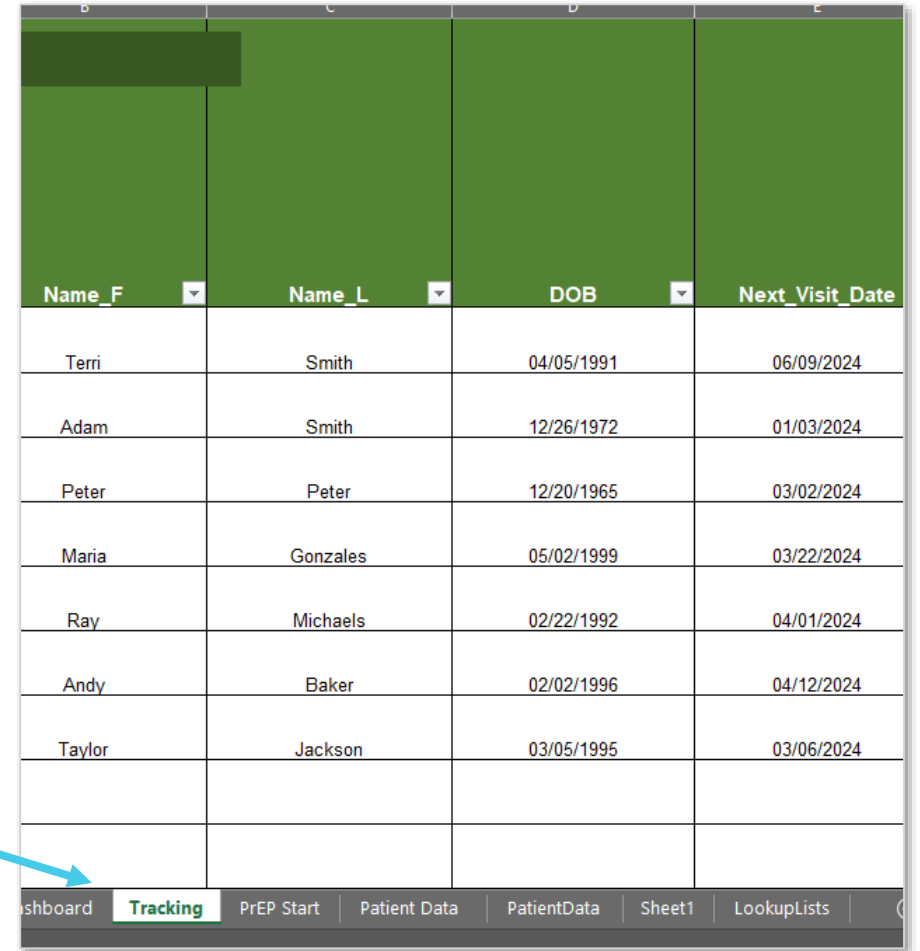
TRACKING TAB

We designed the tracking tab with the goal of sustainably scaling up PrEP programs.

We have heard from providers that the ad hoc systems that can support a handful of PrEP patients becomes unwieldy as the number of patients on PrEP begins to ramp up.

Use the **Tracking** tab to look across patients and flag those:

- With upcoming appointments who need reminders
- Patients who have missed appointments



Name_F	Name_L	DOB	Next_Visit_Date
Terri	Smith	04/05/1991	06/09/2024
Adam	Smith	12/26/1972	01/03/2024
Peter	Peter	12/20/1965	03/02/2024
Maria	Gonzales	05/02/1999	03/22/2024
Ray	Michaels	02/22/1992	04/01/2024
Andy	Baker	02/02/1996	04/12/2024
Taylor	Jackson	03/05/1995	03/06/2024

“HIGHLIGHT MISSED APPOINTMENTS”

Click the **HIGHLIGHT MISSED APPOINTMENTS** button to see patients whose:

- 1) Next visit appointment date has passed, and
- 2) Visit Status is still pending (i.e., not completed) in the **Visit Summary** section on the Dashboard

Click the **CLEAR HIGHLIGHTS** button to remove the highlights.

Next_Visit_Date	Next_Visit_Status	Insurance Status	Next Visit Remi
06/09/2024	Pending	Check Insurance Status	Needs Re
01/03/2024	Pending	Check Insurance Status	Reminder in
03/02/2024	Pending	Check Insurance Status	Needs Re
03/22/2024	Completed	Check Insurance Status	Needs Re
04/01/2024	Pending		Needs Re
04/12/2024	Pending	Check Insurance Status	Needs Re
03/06/2024	Completed	E	

“HIGHLIGHT PENDING APPOINTMENTS”

Click the **HIGHLIGHT PENDING APPOINTMENTS** button to see patients whose:

Visit Status is still pending (i.e., not completed) in the **Visit Summary** section on the Dashboard

This function will highlight all pending appointments.

Use Excel’s filter function to see patients with pending appointments in a particular date range.

(See next page for more instructions)

Next_Visit_Date	Next_Visit_Status	Insurance Status	Next Visit Remi
06/09/2024	Pending	Check Insurance Status	Needs Re
01/03/2024	Pending	Check Insurance Status	Reminder in
03/02/2024	Pending	Check Insurance Status	Needs Re
03/22/2024	Completed	Check Insurance Status	Needs Re
04/01/2024	Pending		Needs Re
04/12/2024	Pending	Check Insurance Status	Needs Re
03/06/2024	Completed	E	

FILTER PENDING APPOINTMENTS BY DATE

1. After you've highlighted the pending appointments, click on the filter icon under **Next_Visit_Date**

2. A pop-up window will open, showing you all the available date ranges

The first screenshot shows a table with columns 'DOB' and 'Next_Visit_Date'. The 'Next_Visit_Date' column has a filter icon. A pop-up window is open, showing a search bar and a list of options: (Select All), 2024, January, March, April, June, FALSE, and (Blanks). The '2024' option is checked. The second screenshot shows the same pop-up window, but now 'April' is selected under the '2024' option. The 'OK' button is highlighted in both screenshots.

3. Click **“Select All”** to unselect all the months, then click on the **specific month and year** you want to filter by.

In this example, we are choosing April 2024.

Click OK.

1	MRN_PID	Name_F	Name_L	DOB	Next_Visit_Date
7	6	Ray	Michaels	02/22/1992	04/01/2024
8	65	Andy	Baker	02/02/1996	04/12/2024

4. Your list will then be **restricted to patients with visits scheduled in April**

CLICK ON EACH PATIENT TO ACCESS OR EDIT DATA

Once you have found the patient(s) you need, simply click on their row in the tracking form to pull up their Patient Dashboard

Edit their reminder or tracking data and save.

MRN_PID	F	Name L
6	Rav	Michael
65	Andy	Baker

Click on a patient to pull up their editable window!

Patient Information

MRN/PID: 6 Date of Birth: 8/22/1966

Sex: M Ethnicity: White

Phone: (202) 222-0000 First: Rav Last: Michael

Email: rav@livingpartners.com

Preferred Contact: Telephone

Notes: WhatsApp or email - NO PHONE CALLS

PrEP Payment and Refills

Date PrEP Initiated: 8/10/2024 PrEP payment assistance: Assistance program PrEP payment Action Required: [Dropdown] Date Next Action Required: 8/10/2024 Date Next PrEP Refill is Due: 8/10/2024

Insurance: [Dropdown] Type/Status: [Dropdown] Priority Refill: [Dropdown] Insurance Renewal Status: [Dropdown]

Last Visit and Next Visit Summary

PrEP Status at Last Visit: [Dropdown] Follow-Up Required from Last Visit: [Dropdown] Next Visit Date: 8/10/2024 Visit Status: Pending

Reminder Tracking History

Visit #	Attempt #1		Attempt #2		Attempt #3		Reminder Status	Reminder Status	Overall remarks
	Date	Action	Date	Action	Date	Action			
Visit 2								Reminder complete	
Visit 3								Reminder in progress	
Visit 4									
Visit 5									
Visit 6									
Visit 7									
Visit 8									
Visit 9									
Visit 10									
Visit 11									
Visit 12									



WARNING: IT IS ***NOT*** POSSIBLE TO DIRECTLY EDIT DATA IN THE TRACKING SHEET; ***MUST*** CLICK AND EDIT IN WINDOW THAT POPS UP

MRN_PID	Name_F	Name_L	DOB
8	Ray	Michael	02/19/1992
65	Andy	Baker	02/02/1996
CAN NOT FREELY ADD PATIENTS HERE			

Someone went rogue and input data directly into the **Tracking Sheet** of the **Tracking Tab**

Let's say we then click the name, edit the patient information to read MRN = 100, save changes, and exit.

Patient Information

MRN/PTID: 100

Name: [First] [Last]

Phone: [Area] [Number]

Email: [Address]

Preferred Contact: [Dropdown]

Date of Birth: [Date]

PrEP Payment and Refills

Date PrEP Initiated: [Date]

PrEP payment assistance: [Dropdown]

PrEP payment Action Required: [Dropdown]

Date Next Action Required: [Date]

Date Next PrEP Refill is Due: [Date]

Insurance: [Dropdown]

Company status: [Dropdown]

Insurance Reminder Status: [Dropdown]

SAVE CHANGES

EXIT DASHBOARD

Reminder Tracker Data

MRN/PTID must start with exist in the database

Name: [First] [Last]

Address: [Street] [City] [State] [Zip]

Phone: [Area] [Number]

SEARCH

EDIT REMINDER TRACKING

EDIT PrEP CHECK IN TRACKING

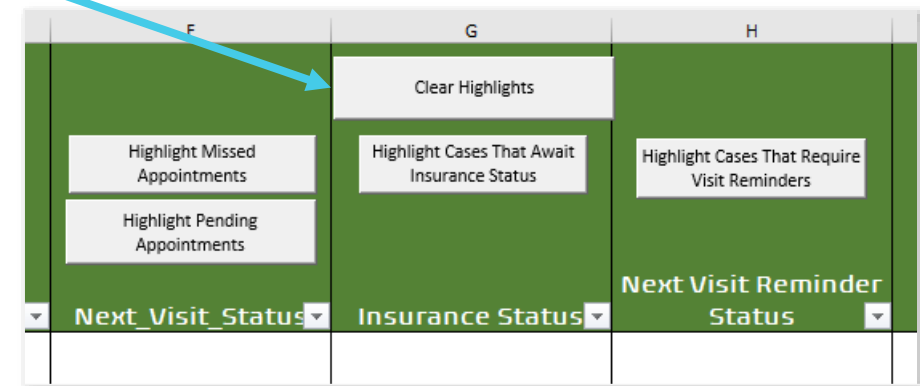
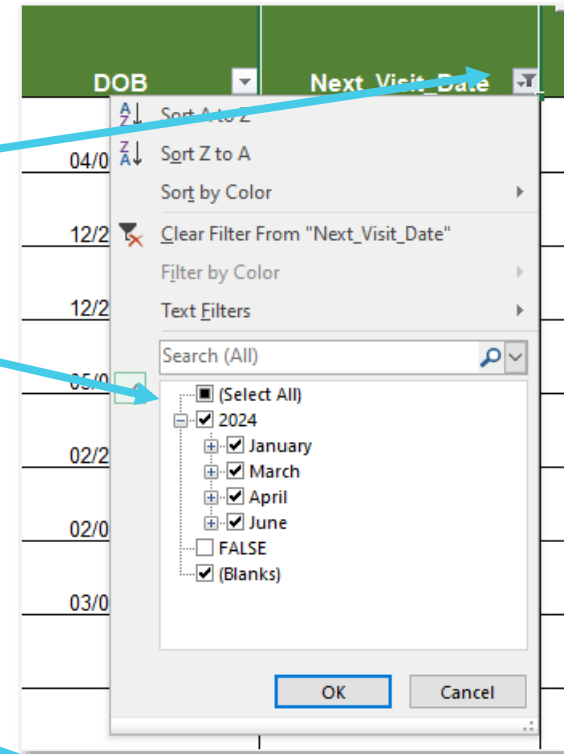
Searching MRN = "100" does not pull up any results ☹️ **Please do not try to add or edit data in the TRACKING SHEET of the Tracking tab**

RESET THE TRACKING TAB

When you are done finding the patients you need, click the filter and then click “select all”

Then click on the **Clear Highlights** tab on the top of the tracking sheet.

Your Tracking Tab is reset and ready for your next query.

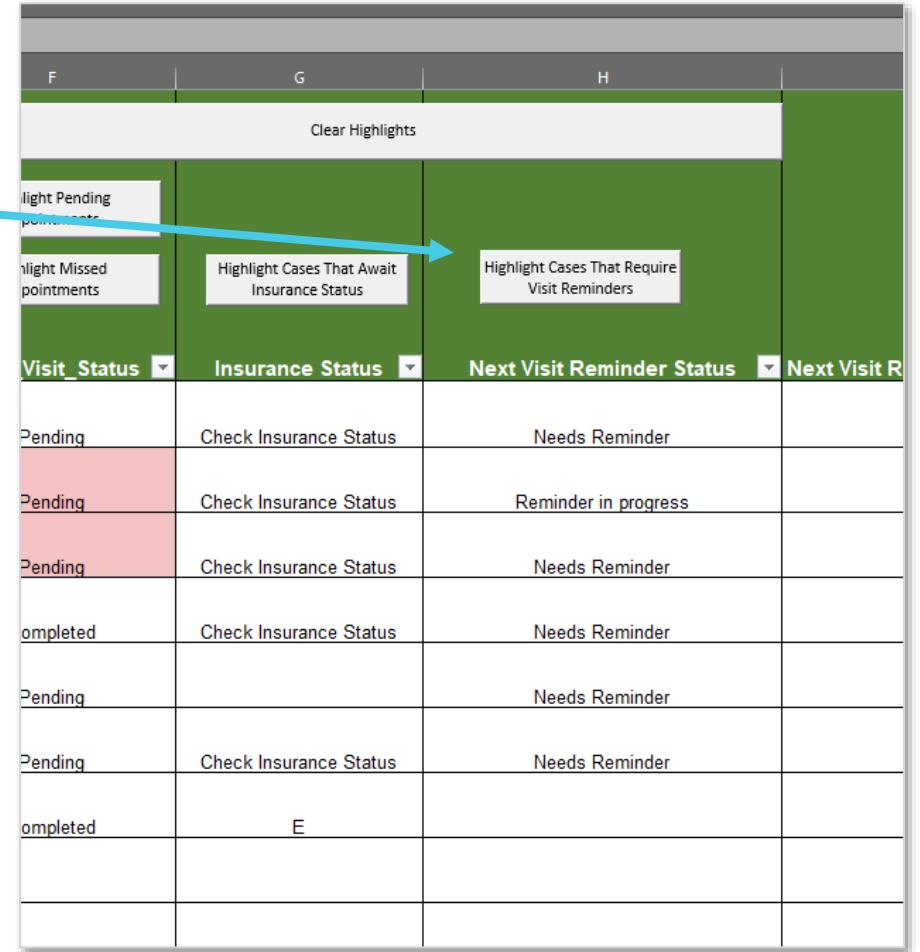


“HIGHLIGHT CASES THAT REQUIRE VISIT REMINDERS”

You can also highlight patients who **need visit reminders** for their upcoming appointments.

Filter patients by visit date in the same way you did for visit status (see pages 47)

Click on the patient to pull up the dashboard and edit reminder data (see page 28)



The screenshot shows a data table with columns for Visit_Status, Insurance Status, Next Visit Reminder Status, and Next Visit R. A 'Clear Highlights' button is at the top. A blue arrow points from the text 'need visit reminders' to a filter button labeled 'Highlight Cases That Require Visit Reminders'. The table contains several rows with 'Pending' visit status and 'Needs Reminder' or 'Reminder in progress' next visit reminder status.

Visit_Status	Insurance Status	Next Visit Reminder Status	Next Visit R
Pending	Check Insurance Status	Needs Reminder	
Pending	Check Insurance Status	Reminder in progress	
Pending	Check Insurance Status	Needs Reminder	
Completed	Check Insurance Status	Needs Reminder	
Pending		Needs Reminder	
Pending	Check Insurance Status	Needs Reminder	
Completed	E		



STANDARDIZE INITIAL CHECK-INS FOR PATIENTS STARTING PREP (USING THE PREP START TAB)

HIGHLIGHT ACTION ITEMS AND FOLLOW UPS FROM THE FIRST VISIT

“Follow up required” from their **First Visit Summary** is captured in Column I of the **PrEP Start tab**. (See page 13 for Patient Intake Form)

Filter patients by visit date and click the highlight button to see which patients require a PrEP start Check-in (see pages 50 for how to sort)

7	6	Ray	Michaels	02/22/1992	555-222-55
8	54	Keisha	Lee	04/05/1988	929991765

Navigation: READ ME | Data Dashboard | Tracking | **PrEP Start** | Patient Data | PatientData | +

Accessibility: Investigate

First Visit Summary

Date: 03/06/2024 | Visit Status: Completed

PrEP Status: Started PrEP | Follow-Up Required: PrEP start check-in

Clear all highlight	
Follow Up from Last Visit	Date PrEP Started
PrEP payment resolution	12/22/2023
None	01/01/2024
PrEP start check-in	02/02/2024
None	
PrEP start check-in	01/31/2024
Check-in complete	01/06/2024
None	01/22/2023
	03/06/2024



PREP CHECK-IN TRACKING

Column K of the **PrEP Start** tab also contains a highlight button to see which patients still require a PrEP start check-in.

Patient Information

HRN/PTID: Date of Birth:

Name:

Phone:

Email:

Preferred Contact:

Notes:

PrEP Payment and Refills

Date PrEP Initiated: PrEP payment assistance:

Insurance:

PrEP Check-In Tracking

Follow-Up Required from Last Visit:

PrEP Check In Status:

Attempt #1		Attempt #2		Attempt #3	
Date	Action	Date	Action	Date	Action
<input type="text" value="01/12/2024"/>	<input type="text" value="Sent email"/>	<input type="text" value="01/17/2024"/>	<input type="text" value="Sent text"/>	<input type="text"/>	<input type="text"/>

K
<div style="border: 1px solid gray; padding: 5px; background-color: white; width: fit-content; margin: 0 auto;"> Highlight Cases that PrEP Check-in Status is Pending </div> <p style="text-align: center; font-weight: bold; margin-top: 5px;">PrEP Check-in Status</p>
Completed
Completed
Completed
Pending

Click the **EDIT PrEP CHECK IN TRACKING** Button of the Patient Dashboard to pull up this window



LOCATE PATIENTS AND CLICK TO WORK IN THEIR INDIVIDUAL RECORD

Click on the patient to pull up the dashboard and edit reminder data (see page 30)

MRN_ID	Name_F	Name_L	DOB	Phone	Email	Contact	Notes_Ser	Follow Up from Last Visit
1	Bugs	Bunny	04/05/1991	9294456665	bugs@gmail.com	Phone	call between 1 - 3 pm	PrEP start check-in
2	Adam	Groth		929004242	adam@gmail.com	Text	between 5 - 6 pm	None
3	Peter	Peter	12/20/1965	5555555555	peter@testing.com	Phone	in AMT check email regularly. Call or text	PrEP start check-in
4	Maria	Gonzales	05/02/1998	5555555656	maria@testing.com	Text	Whatsapp is best	None
5	Jason	Wren	08/14/1988	5555559999	jason@pretracker.com	No preference	text or email. Call is best on weekends	None
6	Ray	Moham	02/20/1993	555-222-3333	ray@testing.com	No preference	whatsapp or email -- NO PHONE CALLS	None
74	Keisha	Lee	04/05/1988	9299917655	conniechiu@gmail.com	Phone	call between 1 - 2 pm	PrEP start check-in

UserForm3

Patient Information

MRN/PTID: Date of Birth:

Name:

First: Last:

Phone:

Email:

Preferred Contact:

PrEP Payment and Refills

Date PrEP Initiated: PrEP payment assistance: PrEP payment Action Required: Date Next Act Required:

Insurance: Type/Status: Company name: Insurance Reminder Status:

PrEP Check In Status

PrEP Check In Status:

Attempt #2		Attempt #3	
Date	Action	Date	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>





FREQUENTLY ASKED QUESTIONS

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUPRINT.ORG](https://hivbluprint.org)

FAQ

HOW CAN I KEEP PATIENTS' PERSONAL INFORMATION SAFE?

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUEPRINT.ORG](https://hivblueprint.org)

THE BLUPRINT TRACKER AND DATA SAFETY

- We programmed the BLUPrint PrEP Patient Tracker in Microsoft Excel—as opposed to any cloud-based data platform—so that it can be stored on a local drive. No one will be able to access the information in Tracker other than staff at your clinical site.
- Clinics should use the same data safety protocols for saving the Tracker as they would for any other patient information that is saved on computers at their site.
- In addition, clinics might consider saving the Tracker as an encrypted file that requires a password. This additional level of security might not be necessary if the clinic computers are already password protected, but is an option for clinics that want the extra level of security.
- We explain how to password protect the Tracker workbook on the next page.
- **Warning:** If you forget or lose your password, Microsoft can't retrieve it for you! Be sure to store the password someplace safe



HOW TO PASSWORD PROTECT YOUR TRACKER

The tracker will store some sensitive information (e.g., date of birth). How can I ensure that sensitive patient information doesn't get leaked?

We suggest file encryption; when encrypt a file, you specify a password and lock the Excel file. This prevents other users from opening the file.

See the Microsoft [support page](#) for more information

Adding a Password to your BLUPrint PrEP Patient Tracker:

- Select **File > Info**.
- Select the **Protect Workbook** box and choose **Encrypt with Password**.
- Enter a password in the **Password** box, and then select **OK**.
- Confirm the password in the **Reenter Password** box, and then select **OK**.

Warning: If you forget or lose your password, Microsoft can't retrieve it for you! Be sure to store the password someplace safe



FAQ

WHAT DO I DO IF EXCEL SAYS ITS “NOT RESPONDING”?

WHAT DO I DO IF EXCEL SAYS ITS “NOT RESPONDING”?



- **Step 1:** Walk away and get a cup of coffee
- **Step 2:** Force quit and restart the excel
- **Step 3:** Restart the computer
- **Step 4:** If you're still experiencing a lot of bugs or if the excel freezes, please reach out to: bluprint@hunter.cuny.edu

FAQ

WHAT IS THE BACKGROUND AND THINKING BEHIND THIS TRACKER?

BUILDING, LEARNING, UNDERSTANDING PREVENTION INTERVENTIONS (R01MH123262; GOLUB/MEYERS, MPI)

LEARN MORE: [HTTPS://HIVBLUEPRINT.ORG](https://hivblueprint.org)

WHAT IS BLUPRINT?

Building, **L**earning, and **U**nderstanding **P**revention **I**nterventions for HIV = **BLUPrint**

BLUPrint seeks to facilitate the equitable implementation and scale-up of PrEP programs.

We're a collaboration of interdisciplinary researchers at:

- Hunter Alliance for Research & Translation (HART) at the City University of New York
- Aaron Diamond AIDS Research Center (ADARC) at Columbia University
- Clinical partners across the U.S.



WE MADE THIS PREP PATIENT TRACKER BECAUSE ...

- Increasing PrEP usage is a cornerstone prevention strategy in the Ending the HIV Epidemic (EHE)
- Only one-third of patients who could benefit from PrEP have a prescription for it; furthermore, a growing body of evidence suggests it is difficult for patients to stay on PrEP
- Staff at clinics and community-based organizations have expressed an urgent need for tools and systems to help keep track their PrEP patients



WHAT IS THE THINKING BEHIND THE TRACKER?

Task	Excel Function(s)	Goal(s)
Track and monitor patients' PrEP status	Patient Dashboard; highlight missed appointments	Reduce risk someone falls through the cracks
Patient outreach (e.g., visit reminders, PrEP start check-in)	Document communication preferences and outreach efforts	Coordinate across staff; standardize patient outreach;
Document prescription and payment information (incl. assistance programs)	Programmed to flag upcoming refills/expiration and program renewals	Minimize disruptions in Rx access

If you don't need help with these things or already have a system that works, this excel may not be right for you.



THANK YOU FOR
PILOTING THE BLUPRINT
PREP PATIENT TRACKER!

We look forward to hearing your
feedback! If you have any
questions about the tracker, please
reach out to:

bluprint@hunter.cuny.edu

Building, Learning, Understanding Prevention Interventions (R01MH123262; Golub/Meyers, MPI)

Learn More: <https://hivbluprint.org>

