

Facility Client System Administration – Immunization Information System Quick Reference Guide – Physicians Vaccinators

The Administration Menu Heading

The System Administration Function is a permission that can only be granted by your system administrator or by registry staff if you are the system administrator for your organization.

The System Administration Function will allow you to:

- Create and update Immunization Information System usernames and passwords for your clinic's staff.
- Change the System access level and permissions of your clinic's staff.
- Inactivate user accounts of staff that are no longer a part of your organization.

Keep the Registry Secure

Help keep the Immunization Information System secure by maintaining and inactivating user accounts. If an employee is no longer a part of your organization, or if you suspect inappropriate use of the registry, please inactivate the user account in order to prevent future access to the system. Inactivate an account by clicking the "Set Inactive" checkbox under the password field on the *Web User Maintenance Update Screen*. If the employee returns to your organization, you can reactivate the account by un-checking the checkbox.

Administration Main Menu

Click Search/Add User to create and/or modify user access accounts.

Click User Reports to run reports that list user account information in an easy to read format.

Administration Menu Heading

Add/Update User Access Accounts

1. Using the Navigation Menu, click on the **Administration Menu Heading**.
2. From the *Administration Main Menu Page*, click **Search/Add User** (see the *administration main menu diagram*) to move to the *Web User Search Page*.
3. Enter either the username or the user's last name to search for a specific user and click the **Search** button; OR you may click the **Search** button without entering specific criteria to get a list of all user accounts for your facility.
4. If the user does not appear in the search results, click the **Add** button to create the new user account. If the user appears in the search results, select the appropriate user account by clicking on the **Select Arrow** to the left of the Username and then click the **Update** button.
5. You are now at the *Web User Maintenance Page*. From here you will be able to add or update the person's information.
6. The User Name, Password, First Name, Last Name and Access Level are all required fields and must be completed for each user account.

NOTE: When creating or resetting passwords, we recommend creating a temporary password (such as Welcome1) and then click the "Expire Now" check box next to the password fields. When the user logs onto the system with the temporary password, he will be automatically promoted to change his password.

7. Choose the Access Level and, if applicable, the Permissions (see the other side of this document for details on each).
8. Once you have entered all appropriate information, click the **Save** or **Update** button to save the changes and return to the *Web User Maintenance (Detail) Page*.

Web User Search Page

Enter the criteria and click the **Search** button

Click the **Select Arrow** to update the user account.

Click the **Add** Button to add a new user account

Select	User Name	First Name	Last Name	Organization (IRMS)	Facility
→	KCRANE	KARI	CRANE	TEST CLINIC	TEST CLINIC
→	KRISTINA	KRISTINA	CRANE	TEST CLINIC	TEST CLINIC

Web User Maintenance Page

Set Inactive Checkbox

Select Facility Client or Facility View from the dropdown box.

If applicable, select the "Lot Number Manager Access", "Physician Administrator", or "System Administrator" permissions.

Clear Cancel Save

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Access Levels

The access level determines how a registry user interacts with Immunization Information System. All users must be assigned an access level, and there two available options when assigning user access to the registry. Facility accounts must be identified to a specific facility.

- **Facility View:** Allows the user to view (read only) patient and vaccination records. They may also print patient specific reports.
- **Facility Client:** Allows the user to view, add, edit and print patient and vaccination records. It also gives access to the Reminder/Recall and CoCASA Export features.

Permission Functions

There are three additional permissions that may be applicable to your organization. These permissions allow a user to perform additional functions within the registry based on specific tasks as outlined below. It is important to note that permissions are optional and they are not required to allow users to view and update patient records since that level of access is determined by the Access Levels described above.

- **System Administration:** A user with this permission may create and update IIS user information for your organization's staff. This permission gives you access to do the functions outlined in this quick reference guide.
- **Physician Administration:** A user with this permission may add, update and inactivate the vaccinator names that appear on the vaccinator dropdown list on the administered vaccine detail page & the physician names that appear on the physician dropdown list on the patient demographic record. Typically, it is the system administrator that performs this function.
- **Lot Number Manager Access:** A user with this permission has the ability to maintain your vaccine inventory in the IIS, including the ability to add, update and inactivate the lot numbers that appear on the administered vaccine detail lot number selection box. This permission also allows the user to run the state vaccine accountability reports. Typically, it is the current vaccine managers for your organization that performs this function.

Password Rules

- Passwords must be a minimum of 8 characters in length, with at least 1 uppercase letter, 1 lower case letter, and 1 number.
- Passwords are case sensitive.
- For security reasons, passwords expire every 120 days.
- Once a password has expired, when the user tries to login they will be prompted to create a new password.

Add Physician & Vaccinator Names

There are two ways to populate the vaccinator name dropdown list on the administered vaccine detail page & the physician names that appear on the physician dropdown list on the patient demographic record. Typically, it is the system administrator that performs this function.

Through the Administration Menu Heading

1. Search and select the user you would like to add as a vaccinator or physician.
2. Click the **Add User as Vaccinator** button and you will be taken to the *Physician/Vaccinator Maintenance Page*.
3. Follow the directions, starting with Step 5, in the next column to complete and save your vaccinator and physician information.

Web User Maintenance Screen

The screenshot shows the 'Web User Maintenance [Detail]' screen. The user information is as follows:

User Name:	KCRANE
Inactive:	
First Name:	KRISTINA
Middle Name:	
Last Name:	CRANE
Street:	
City:	
State:	
Zip Code:	
County/Parish:	
Work Phone: ext:	
Email:	
Access Level:	Facility Client
IRMS:	1573 - TEST CLINIC
Facility:	TEST CLINIC
Permissions:	Lot Number Manager Access Physician Administration System Administration

At the bottom of the screen, there are three buttons: 'Back to Search', 'Add User as Vaccinator' (which is circled in red), and 'Update'. Below these buttons is a 'Current User Report' link.

From the *Web User Maintenance Screen*, click on the "Add User as Vaccinator" to add the user to the vaccinator or physician dropdown lists.

Physicians & Vaccinators Menu Heading

1. Using the Navigation Menu, click on the **Physicians/Vaccinators Menu Heading**.
2. Click on the words *Search/Add* to bring up the *Physician/Vaccinator Maintenance Page*.
3. Enter the person's last name to search for a specific vaccinator or physician and click the **Search** button. OR, you may click the **Search** button without entering specific criteria to get a complete list for your facility.
4. If the person does not appear in the search results, click the **Add** button to create the new name. If the person appears in the search results, select the appropriate name by clicking on the select arrow to the left of the person's name & then click the **Edit** button.
5. Enter the person's First Name, Last Name and Suffix (the suffix title is important if you plan to use the IIS as a complete legal vaccination record).
6. Select the appropriate Type for each person:
 - **Physician**– will appear under the physician dropdown list on the patient's demographic page.
 - **Vaccinator**– will appear on the vaccinator dropdown list when adding a vaccine to a patient's record.
 - **Both**– the name will appear on both the physician and vaccinator dropdown lists.
7. After entering the appropriate information, click the **Save** button to save the person's information.

Physician/Vaccinator Maintenance Screen

The screenshot shows the 'Physician/Vaccinator Maintenance [Add]' screen. The form fields are as follows:

First Name:	Susie	Enter the First and Last Name
Middle Name:		
Last Name:	Smith	
Suffix:	MA	Select the person's suffix
SSN:		
BOMEX:		
DO:		
Medicaid PIN:		
Medicaid Group:		
IRMS:	1573 - TEST CLINIC	
Facility:	TEST CLINIC	Check to ensure that the facility name is correctly selected
Phone Number:		
Phone Number Extension:		
Fax Number:		
Email:		
District/Region:		
Inactive:	<input type="checkbox"/>	
Automatic Ownership Blocked:	<input type="checkbox"/>	
Type:	<input type="radio"/> Physician <input checked="" type="radio"/> Vaccinator <input type="radio"/> Both	Select the appropriate type: Physician, Vaccinator, or Both

At the bottom right of the screen, there are two buttons: 'Cancel' and 'Save' (which is circled in red).