Organization (IRMS) Client Administration Training Guide

Purpose: This guide will show the system administrator of a **multi-facility** medical organization how to set up and edit Washington State Immunization Information System user accounts.

Definitions:

Administration Menu Heading

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

The Organization Client Administration Function will allow you to:

- Create and update 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.
- Add and update the VIS Publication Defaults for all users within your organization (please see the VIS Publication Default Dates Quick Reference Guide for details regarding this feature)

Keep the Registry Secure

Help keep the registry 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 registry. 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.

Username and Password Rules

- Passwords must be at least 8 characters long.
- The previous 5 passwords cannot be reused.
- Passwords must contain at least one number.
- Passwords must contain at least one uppercase letter.
- Passwords must contain at least one lowercase letter.
- Passwords cannot be your full name or your username.
- Passwords expire after 120 days.

Adding Facility Locations

If your organization opens a new facility, please contact the Help Desk (1-800-325-5599) to set up the new location in the Immunization Information System as a new facility within your organization.

User Access Levels

User Types: There are two types of users that may be created in a multi-facility medical organization: Organization (IRMS) user accounts and Facility user accounts. Think of the Organization/IRMS as the parent organization and the facilities as the actual locations where care is given (*see the diagram below for a visual illustration)*.

- Organization user Accounts allow the user to access and run reports for all facilities within the organization and aggregate reports for the entire organization as a whole.
- Facility user Accounts allow the user to access and run reports only for the facility for which he or she is assigned.

Great Care Medical Centers (The Organization)

North Side Great Care Medical Center (Facility) | **Great Care Medical Center Main Clinic (Facility)** | **South Side Great Care Medical Center (Facility)**

User Levels: In addition to the two different user types (Organization and Facility) there are also two different types of user levels: Client and View.

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

The different user account types and levels combine to give four possible User Access Levels.

- **Organization Client**
- **Organization View**
- **Facility Client**
- **Facility View**

Depending on the employee's role and work location you will need to select the appropriate *User Access Level.* For example:

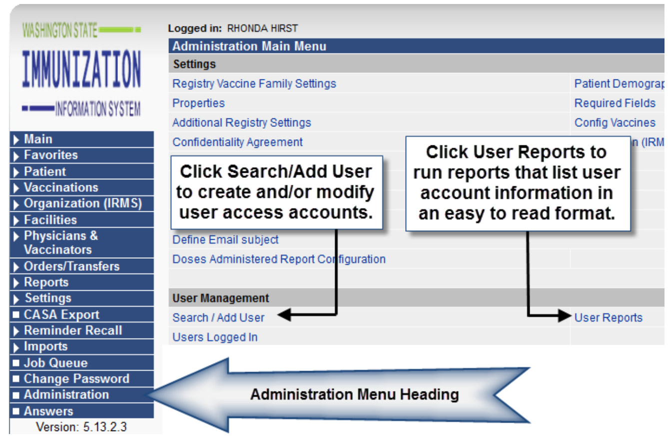
- If a nurse works solely at the South Side Great Care Medical Center and he will enter data into the system, you would assign him as a Facility Client assigned to the appropriate facility name (in this case South Side Great Care Medical Center).
- If a nurse floats between facility locations and enters data into the system, this nurse would need to be assigned as an Organization Client.

User Permissions

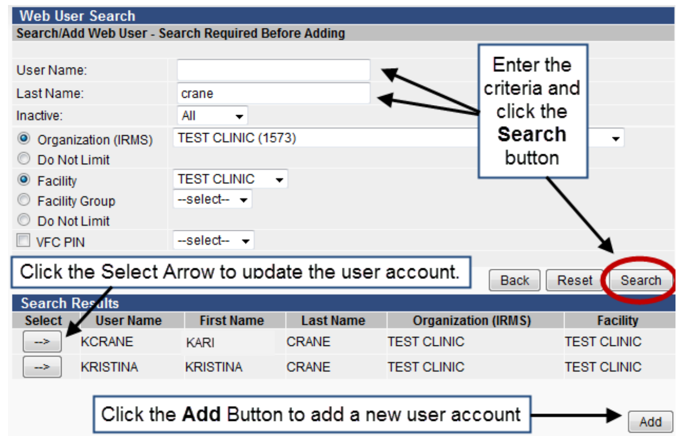
There are three additional permissions that may be applicable to your organization. These permissions allow a user to perform additional functions within the registry based on specific tasks as outlined below. It is important to note that permissions are optional and they are **not** required to allow 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 Immunization Information System user access accounts 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 or nurse supervisor that performs this function.
- **Lot Number Manager Access:** A user with this permission has the ability to maintain your vaccine inventory in the system, including the ability to add, update and inactivate the lot numbers that appear on the vaccine lot number selection box when adding an administered shot to a patient's record. This permission also allows the user to run the state vaccine accountability reports. Typically, it is the current vaccine manager(s) for your organization that perform this function.

Step by Step Directions for Adding and Updating Immunization Information System User Accounts



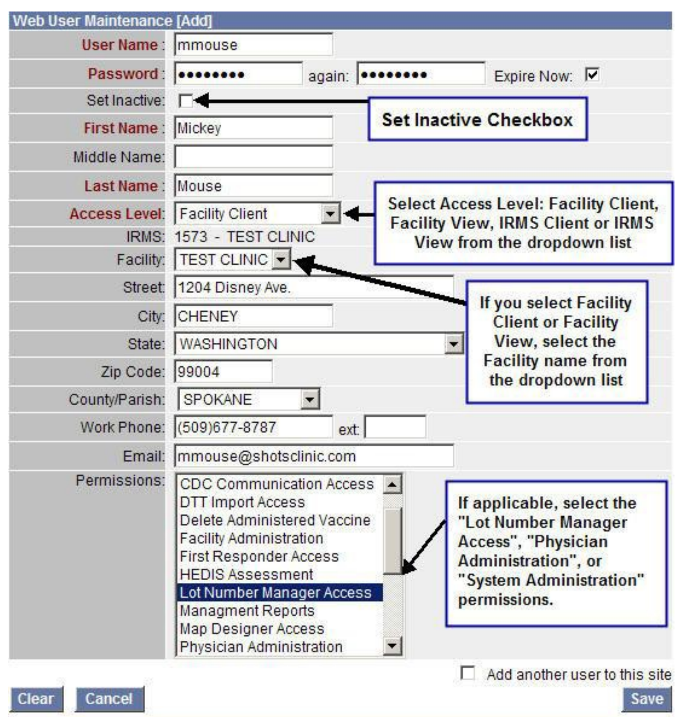
1. Log into the system with your user account.
2. Using the Navigation Menu click on the **Administration Menu Heading.**
3. From the *Administration Main Menu Page*, click "Search/Add User."
4. You are now at the *Web User Search Page*.



5. Enter either the username or the user's last name to search for a specific user. You may also use the Facility dropdown list to search for users in a specific facility. Once you have entered your criteria click the **Search** button.

   Or, you may click the **Search** button without entering the username or user's last name to get a list of all user accounts for your organization (or simply select a facility name from the Facility dropdown list and click **Search** button to get a list of all user accounts for a specific facility).

6. <u>If the user does not appear</u> in the search results, click the **Add** button to create the new user account. <u>If the user appears</u> 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.



7. You are now at the *Web User Maintenance Page*. From here you will be able to add or update the person's information.
8. 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.

9. Chose the Access Level and, if applicable, any Permissions (see page two of this guide for details on each). If you chose Facility Client or Facility View as an Access Level make sure you select the appropriate Facility Name from the dropdown list.
10. 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*.

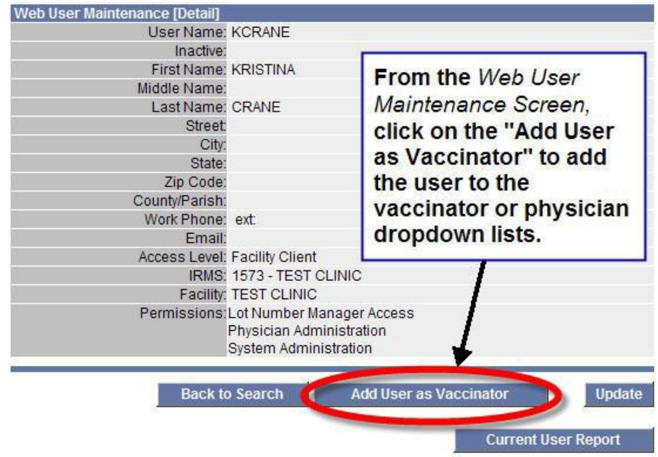
Step by Step Directions for Adding and Updating Physician and Vaccinator Names

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.

Option 1: Through the Administration Menu Heading

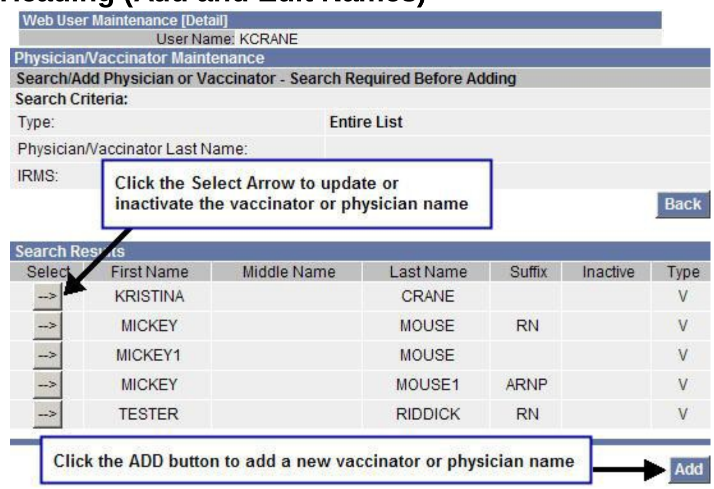
Note: this option is for adding new names only.

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 below (under the Option 2), to complete and save your vaccinator and physician information.



Option 2: Through the Physician & Vaccinator Menu Heading (Add and Edit Names)

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. <u>If the person does not appear</u> in the search results, click the **Add** button to create the new name. <u>If the person appears</u> 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 system as a complete legal vaccination record).
6. Check to ensure that the facility name is correctly selected or if the person works at more than one facility location leave the box on the "Select" choice.
7. 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.
8. After entering the appropriate information, click the **Save** button to save the person's information.