Administrative User Training

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I. Introduction

Welcome to Administrative User Training for the IRIS Immunization Information System.

IRIS is a population-based web application containing consolidated demographic and immunization history information. IRIS performs a variety of functions for health care providers including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts
- Producing recall and reminder notices, vaccine usage, and patient reports
- Managing vaccine inventory
- Ordering state supplied vaccines

Access to the web application is available at www.IRIS.iowa.gov. By law, only authorized users are allowed to access immunization information in IRIS. Authorized users include heath care providers, local health departments, health plans, schools, and child care facilities. Additionally, health care providers may only obtain information specific to their own patients. Schools and childcare facilities may only access records specific to their enrollees.

II. Training Objectives

Upon completion of Administrative User Training, participants can:

- Maintain, edit, and add user accounts
- Modify access to user accounts
- Add, edit, delete, and list schools
- Add, edit, delete, and list physicians
- Add, edit, delete, list, and merge clinicians

III. Training Resources

- Help Desk: 1-800-374-3958
- Website: http://www.idph.state.ia.us/ImmTB/Immunization.aspx?prog=Imm&pg=Iris
- Online Help (Light bulb)
- User Manual
- Webinars (Live and Pre-recorded)
- Self-guided online training videos

Additional Information:

- For self-guided online training videos, new users can go to IRIS at www.IRIS.Iowa.gov and click the **Training** tab at the top of the page.

IV. Administrative User Functions

At least one Administrative user must be designated for an organization. The designated staff person must then be assigned the Administrative use role in IRIS. This is accomplished by calling the IRIS Help Desk (1-800-374-3958).

The Administrative user is responsible for performing the following functions in IRIS:

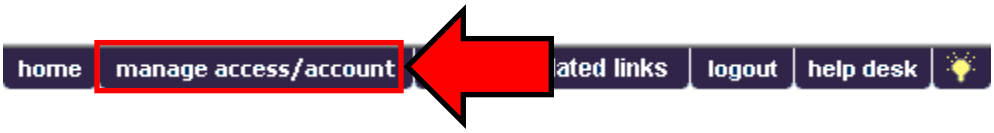
- Managing Access
- Maintenance

V. Managing Access

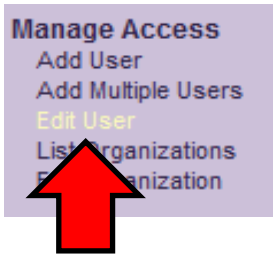
Maintaining Users

IRIS allows Administrative users to edit user accounts for their organization(s). To edit user accounts, the Administrative user must find the corresponding user account in IRIS prior to editing the account information. To find a specific user account within your organization:

1. Click the **manage access/account** button in the menu bar.

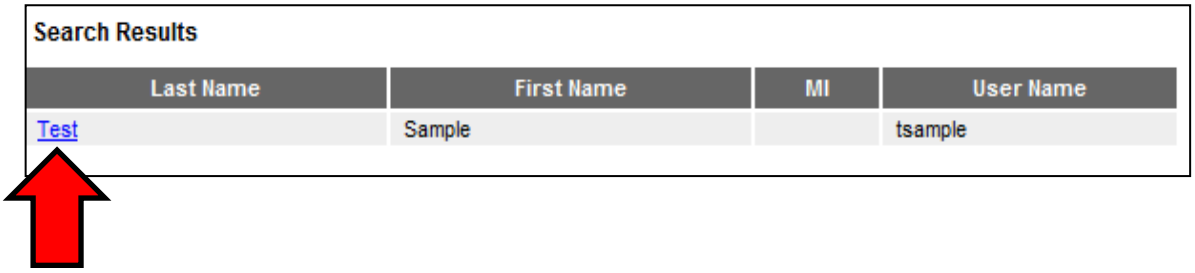


2. Click **Edit User** underneath "Manage Access" in the menu panel.

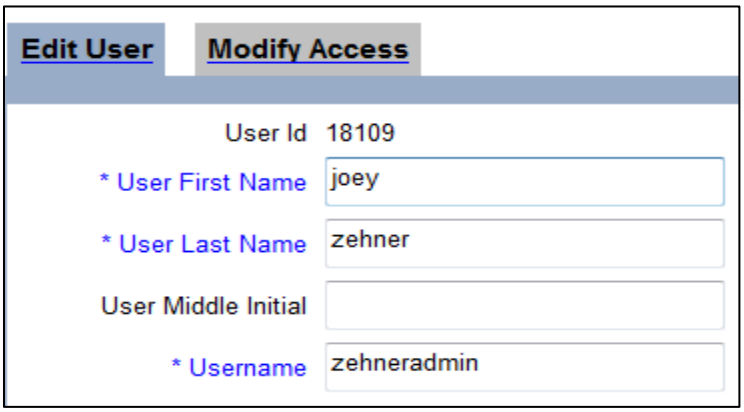


3. On the "Edit User – Search" page, click the user's organization from the Organization drop-down list. If you are associated to only one organization, IRIS will default to your organization's name.
4. Click the appropriate Status of user account for which you are searching.
5. Enter the first and last name of the user for whom you are searching, or leave both fields blank to display a complete list of users associated to your organization.
6. Click the **Find** button.

7. All user accounts matching the criterion used in steps 4-6 is displayed underneath the “Search Results” portion of the page.
8. Click the last name hyperlink for the corresponding user account.



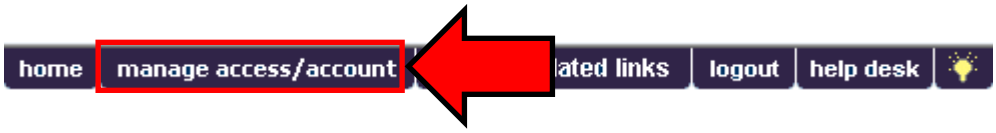
9. You will then be directed to the user’s account information, where you can edit information and modify access.



Editing My User Account

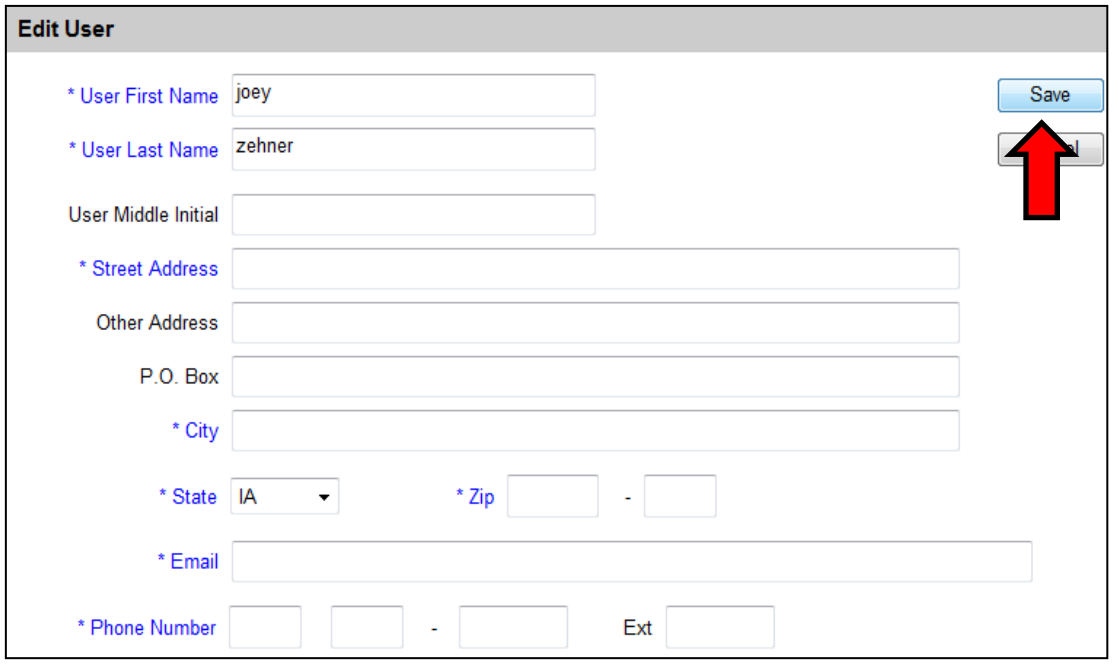
IRIS allows all users to manage their own user account information. To verify or edit your user account information:

1. Click the **manage access/account** button in the menu bar.



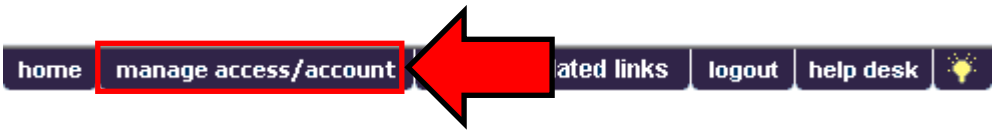
2. Click **Edit My User Account** link underneath “Manage My Account” in the menu panel.

3. On the “Edit User” page, you can change all information listed including; user first name, user last name, street address, email address, and phone number.
4. Click the **Save** button. If changes were made, the message “User Updated” appears at the top of the page.
5.

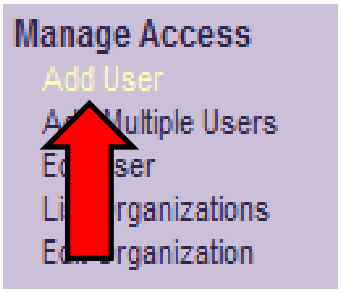


Adding a Single User

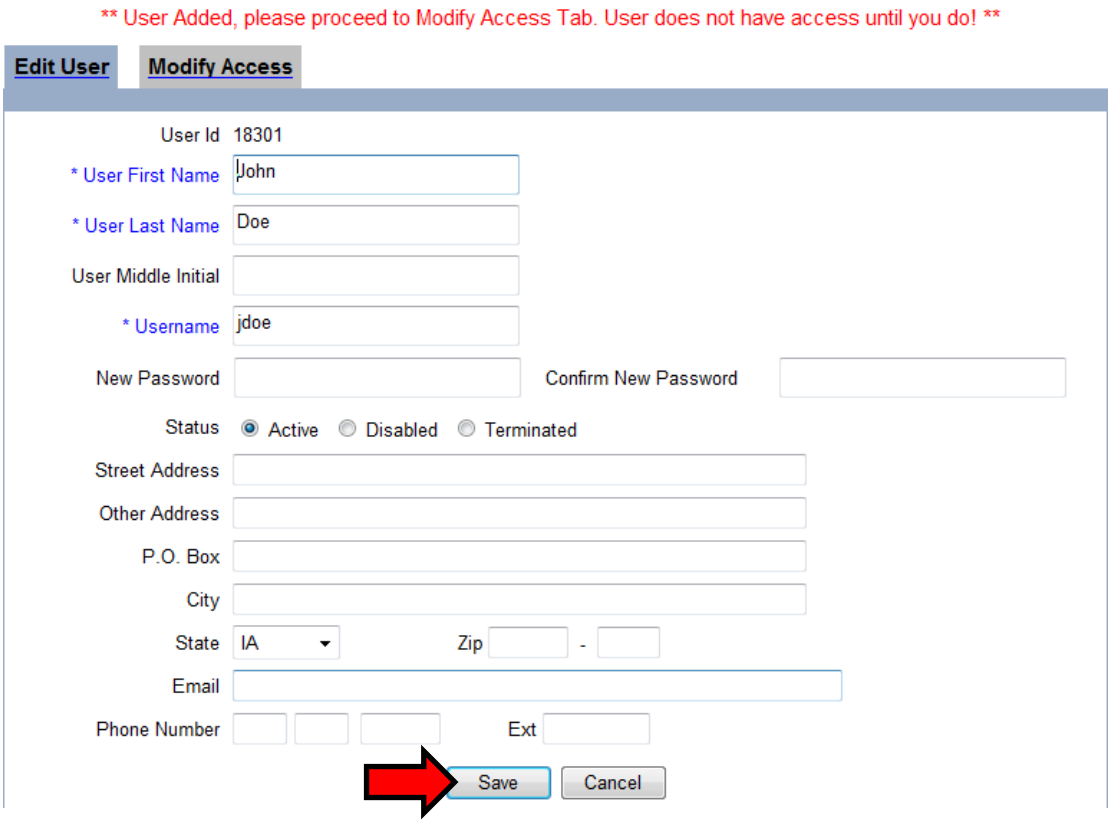
1. Click the **manage access/account** button in the menu bar.



2. Click **Add User** underneath “Manage Access” in the menu panel.



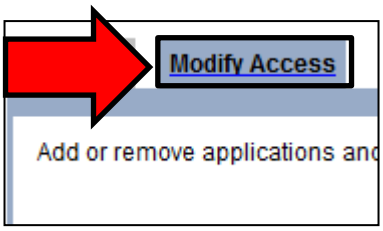
3. Enter the required information. Required information is blue text as opposed to black text and is denoted by an asterisk (*).
4. Click the **Save** button. The following message will display at the top of the page: “User Added, please proceed to the Modify Access tab. User does not have access until you do.”



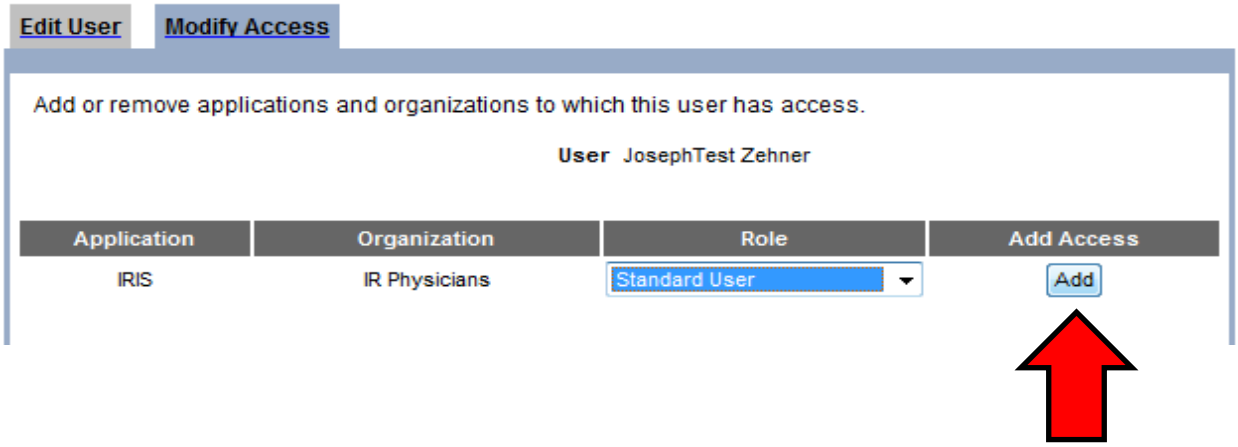
Modifying Access

After adding a user, you must complete the Modify Access page to assign the user the appropriate level of access to the appropriate organization. To give a user access:

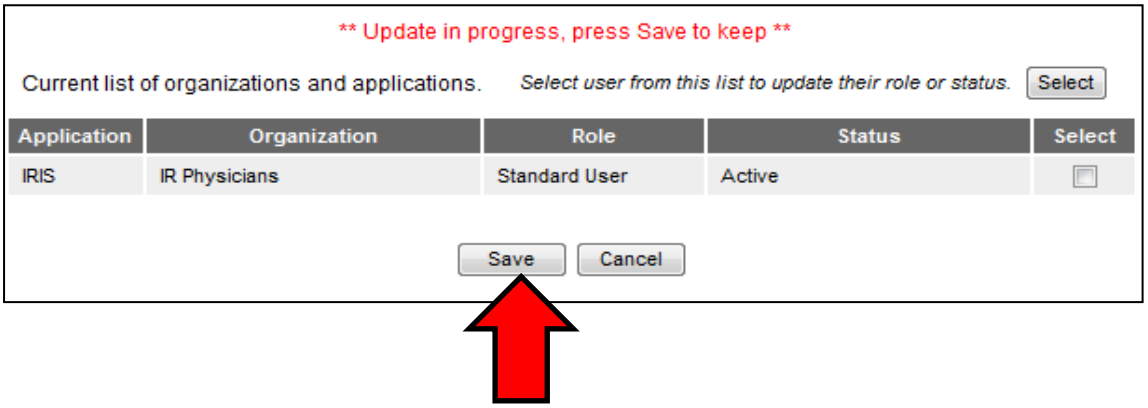
1. On the Edit User page, click the **Modify Access** tab.



2. Click the appropriate Organization for the user from the **Organization** drop-down list.
3. Click the appropriate Role for the new use from the **Role** drop-down list.
4. Click the **Add** button underneath “Add Access”.



5. Click the **Save** button once you have finished entering access information for this user.



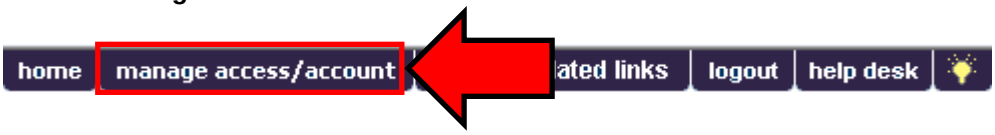
6. You will then see the message “**User Updated**” at the top of the screen and the user now has access to the organization.

Additional Information:
If you grant a user access to more than one organization, he or she must select the specific organization to access upon logging into IRIS.

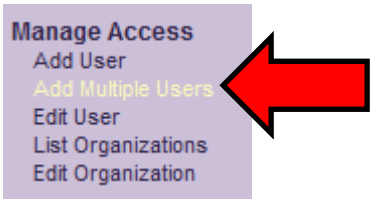
Adding Multiple Users

Administrative users have the option of adding multiple standard users at once for their organization. This is the quickest way to create standard user accounts. To add multiple standard users:

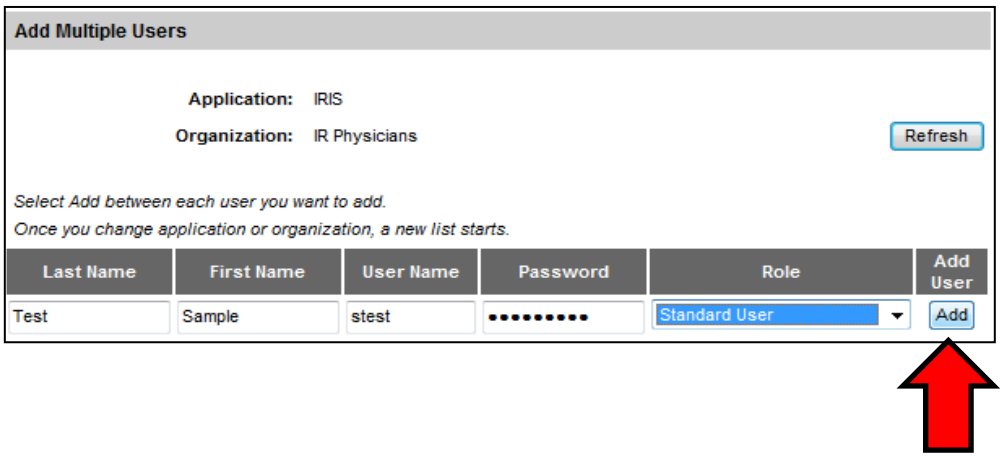
1. Click the **manage access/account** button in the menu bar.



2. Click **Add Multiple Users** underneath “Manage Access” on the menu panel.



3. Click **IRIS** from the Application drop-down menu and click your organization from the Organization drop-down menu.
4. Enter the last name, first name, user name, password, and role for the user.
5. Click the **Add** button.

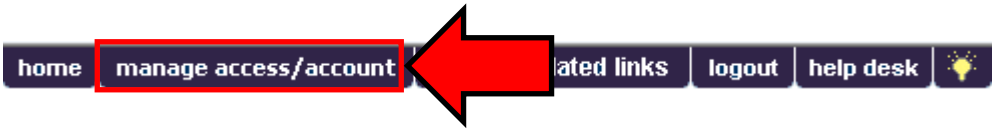


6. You will then see the user added to the list of Current Users in the section below. Repeat steps 3-5 for each additional user.

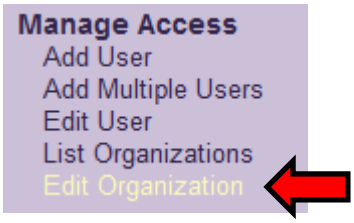
VI. Managing Organizations

Administrative Users also have the ability to edit Organization information. To do this:

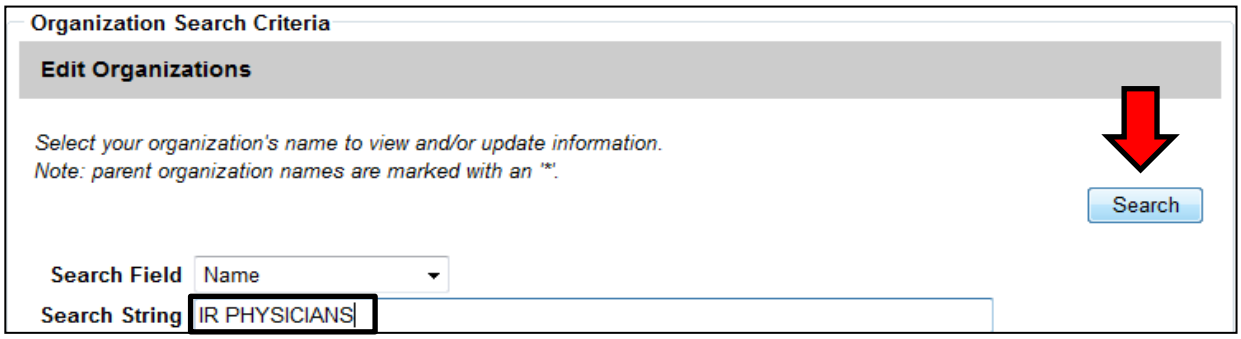
1. Click on the **Manage access/account** button in the menu bar.



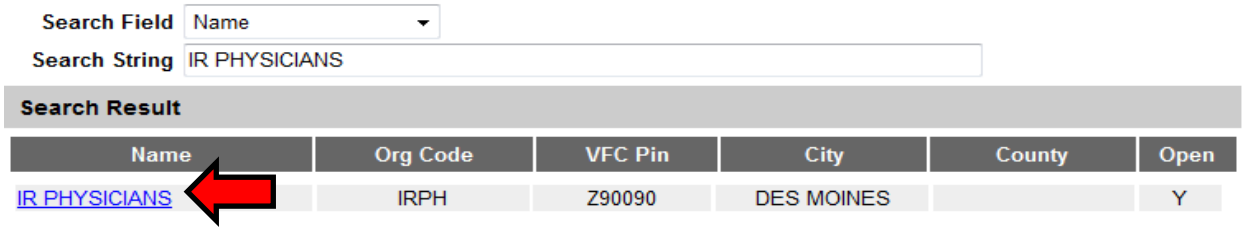
2. Click **Edit Organization** underneath “Manage Access” on the menu panel.



3. In the search **string field** type in your Organization name.
4. Click **Search**. Only organizations you have access to will be searchable.



5. Once you located the organization, click on the **blue hyperlink**



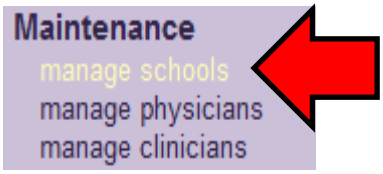
6. You can see the fields you are able to edit. Once you edit the fields, you can click the **Save** button or cancel if you do not want the information to save.

VII. Maintenance: Managing Schools

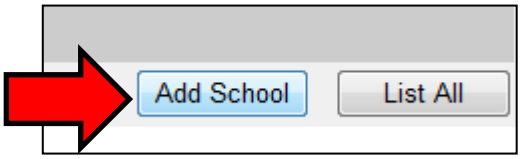
IRIS Administrative users may enter new, and update existing, schools and daycare centers using the Manage Schools function. Schools entered using this function are available for selection from a drop-down menu on the Patient Demographic page. Reports may then be generated by school.

Adding Schools

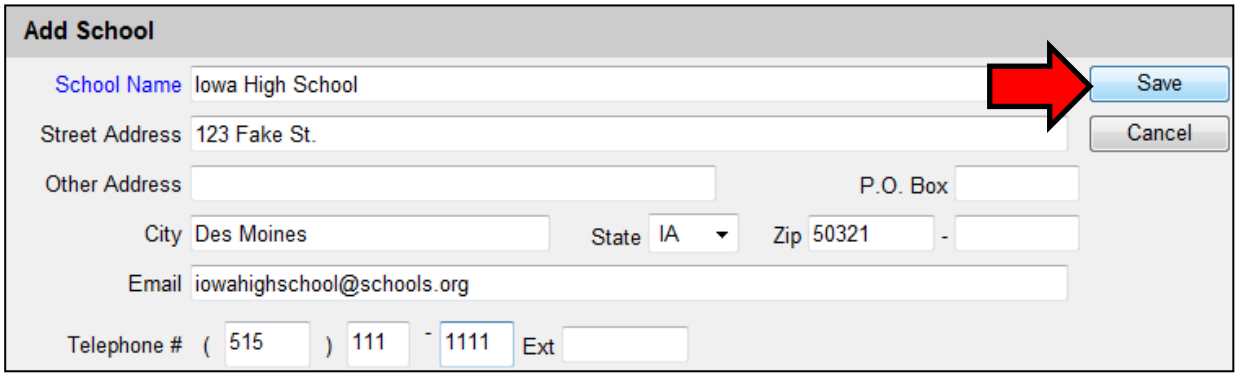
1. Click **Manage Schools** underneath "Maintenance" from the menu panel.



2. Click the **Add School** button.



3. Enter the name of the school and any additional information in their corresponding fields and click the **Save** button.

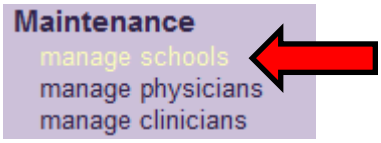


4. A message will display "School Added".
5. Click the **List All** button to return to the Manage Schools page.

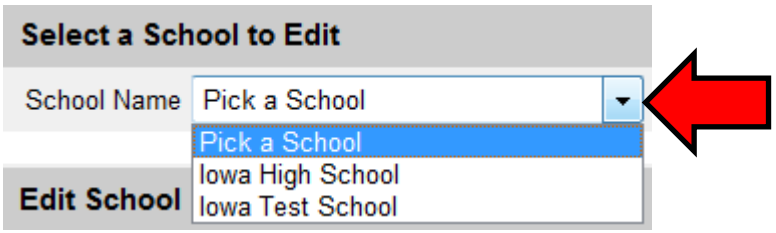
Additional information:
Required fields are shown in blue text as opposed to black text.

Editing School Information

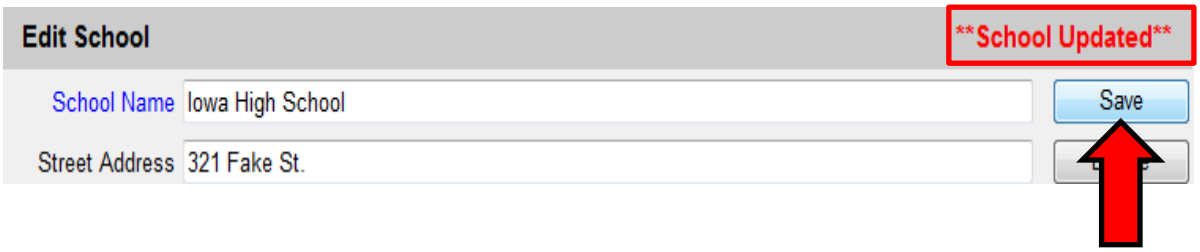
1. Click **Manage Schools** underneath "Maintenance" from the menu panel.



2. Click the school from the School Name drop-down menu.

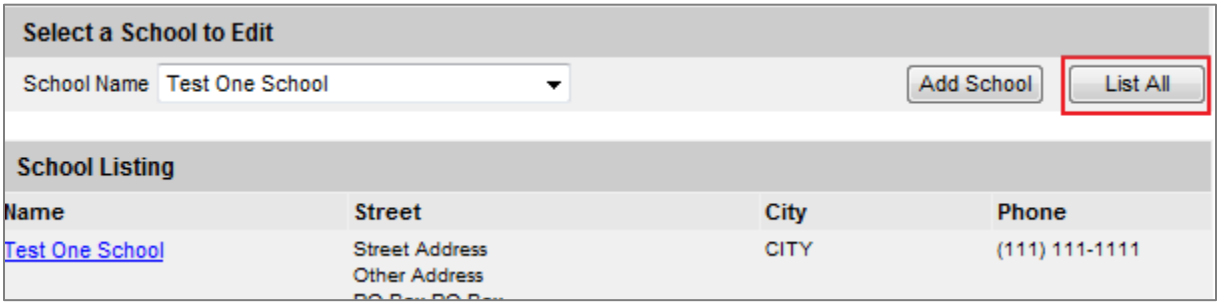


3. Add or change desired information in the Add School table.
4. Click the **Save** button. A message displaying "School Updated" appears.



Listing All Schools

1. Click **Manage Schools** underneath "Maintenance" from the menu panel.
2. Click the **List All** button.



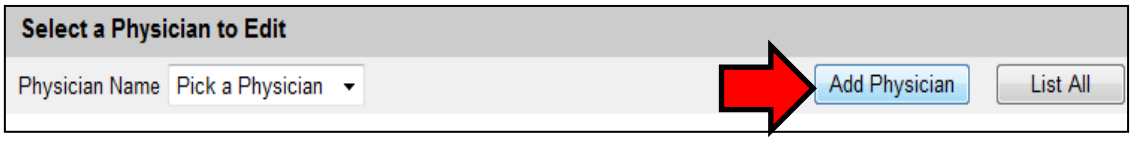
VIII. Maintenance: Managing Physicians

Physicians are considered Primary Care Providers (PCP) in IRIS. Administrative users can utilize the Add Physician/Edit Physician screens to enter new and update existing Primary Care Providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection from the Provider-PCP drop-down menu on the Patient Demographic page. Reports may be generated from this data.

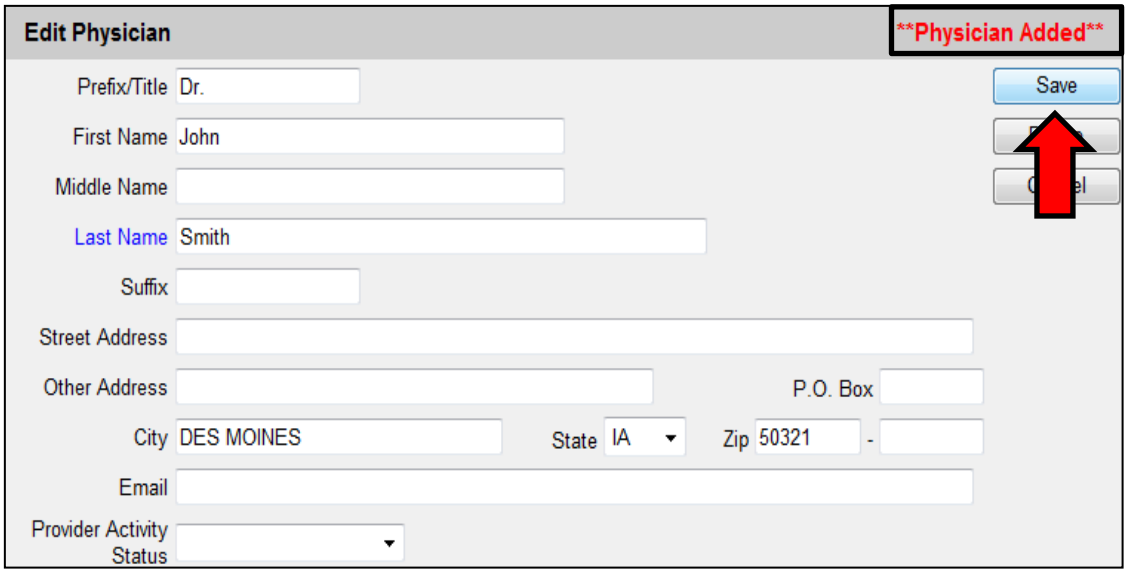
Adding Physicians

1. Click **Manage Physicians** underneath “Maintenance” from the menu panel.

2. Click the **Add Physician** button.



3. Enter the Last Name and any additional information in corresponding fields.
4. Click the **Save** button. A message displaying “Physician Added” appears.

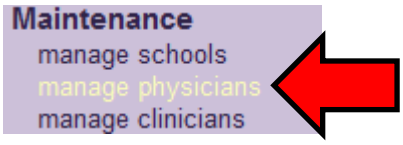


5. Click the **List All** button to return to the Manage Physicians page.

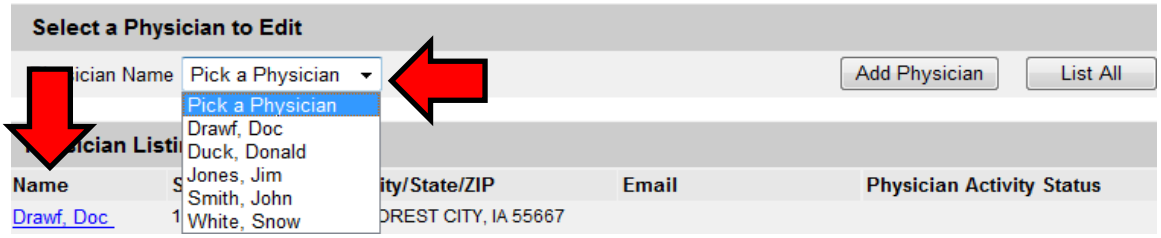
Additional information:
Keep in mind that you are entering a PCP associated with the patient, not to a vaccination. Provider-PCP may be used as a filter when running a Reminder/Recall report.

Editing Physician Information

1. Click **Manage Physicians** underneath "Maintenance" from the menu panel.



2. Using the Physician Name drop-down menu, click the physician's name. Alternative, click the physician's name in the "Physician Listing" table on the page.

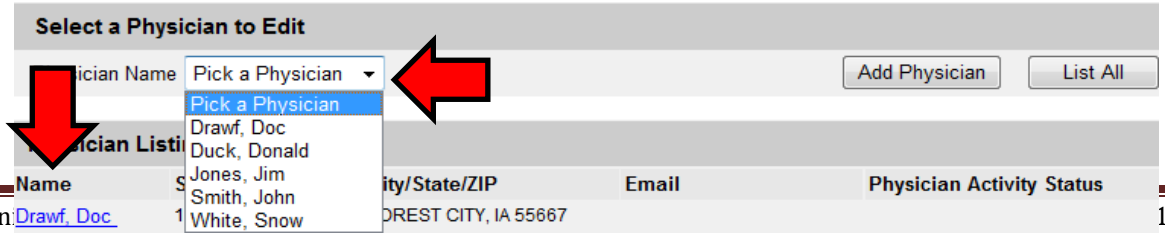


3. Add or change information in the "Edit Physician" box and click the **Save** button. A message displaying "Physician Updated" appears.

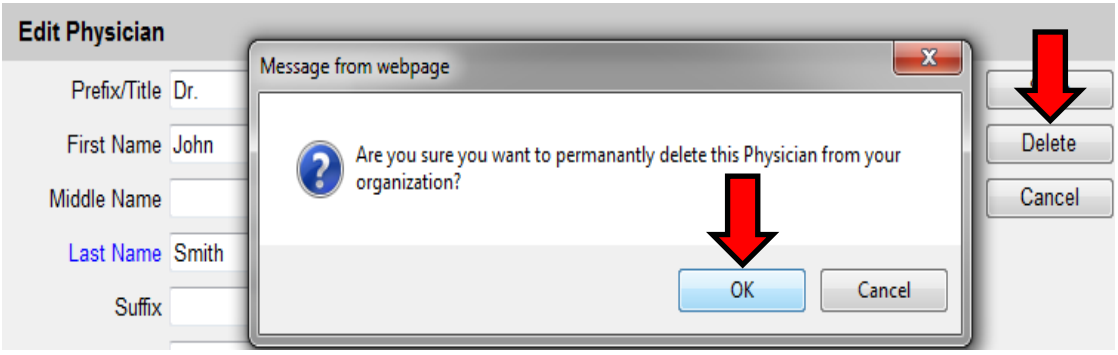
Deleting Physicians

1. Click **Manage Physicians** underneath "Maintenance" from the menu panel.

2. Using the Physician Name drop-down menu, click the physician's name. Alternative, click the physician's name in the "Physician Listing" table on the page.

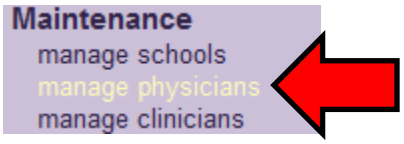


3. Click the **Delete** button.
4. Click the **OK** button on the prompt. A message displaying “Physician Deleted” appears.



Listing All Physicians

1. Click **Manage Physicians** underneath “Maintenance” from the menu panel.



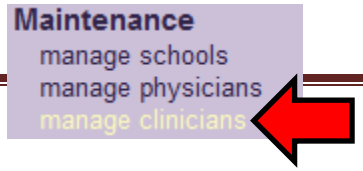
2. Click the **List All** button.

IX. Maintenance: Managing Clinicians

Clinicians are the individuals within the organization who administer vaccines to patients. Ordering Authorities are the individuals who approve the administration of vaccines. A clinician may be associated with one or more clinic sites. Examples of clinicians are physicians, physician assistants, and nurses. IRIS Administrative users use the Manage Clinicians function to enter new, and update existing, clinicians within the organization. Clinicians added to IRIS through this function are available from dropdown menus used for recording immunizations.

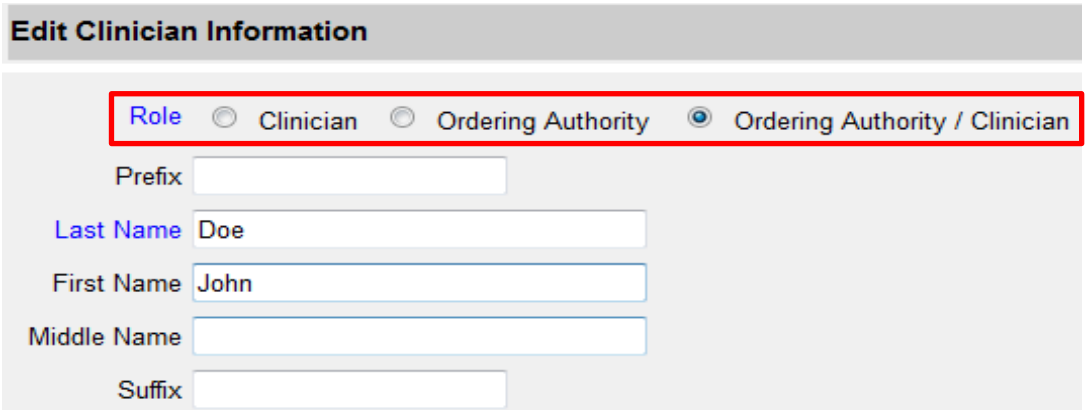
Adding Clinicians

1. Click **Manage Clinicians** underneath “Maintenance” from the menu panel.



2. Click the **Add Clinician** button.

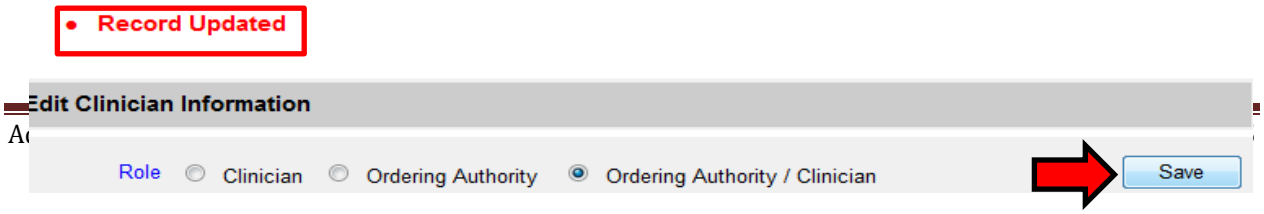
3. Click the appropriate role and enter in the name of the clinician you are adding.



   a. **Clinician**: the person who administers the vaccination
   b. **Ordering Authority**: the individual who authorizes the administration of a vaccine.
   c. **Ordering Authority/Clinician**: a person who both authorizes and administers vaccines, such as a pediatrician.

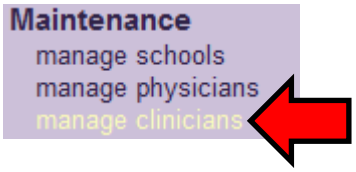
4. In the **Complete Site** Listing field, highlight a site with which the clinician will be associated and click the **Add** button. Do this for each site at which the clinician may practice.

5. Click the **Save** button.

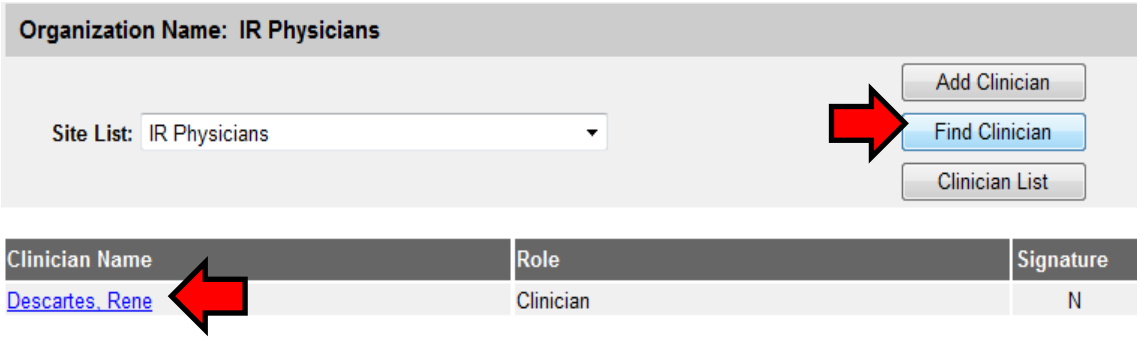


Editing Clinician Information

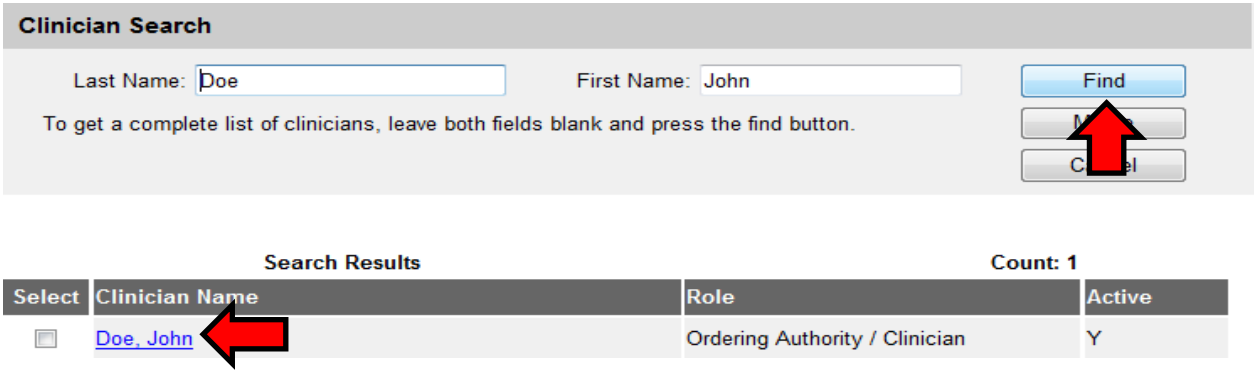
1. Click **Manage Clinicians** underneath “Maintenance” from the menu panel.



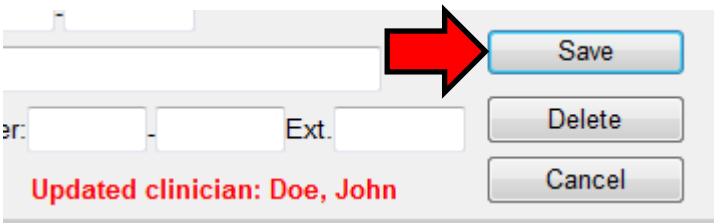
2. Click the **Find Clinician** button or click the appropriate clinician name in the table on the page. If you choose the latter option, skip to step 4.



3. On the Clinician Search page, enter the last and first name of the clinician and click the **Find** button. Then, click his or her last name in the Search Results table.



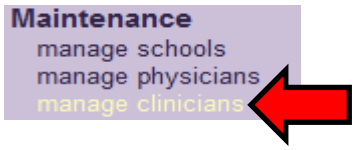
4. Add or change information on the Edit Clinician Information page.
5. Click the **Save** button. A message displaying “Updated clinician: ‘<last name>, <first name>’” will appear.



Merging Clinicians

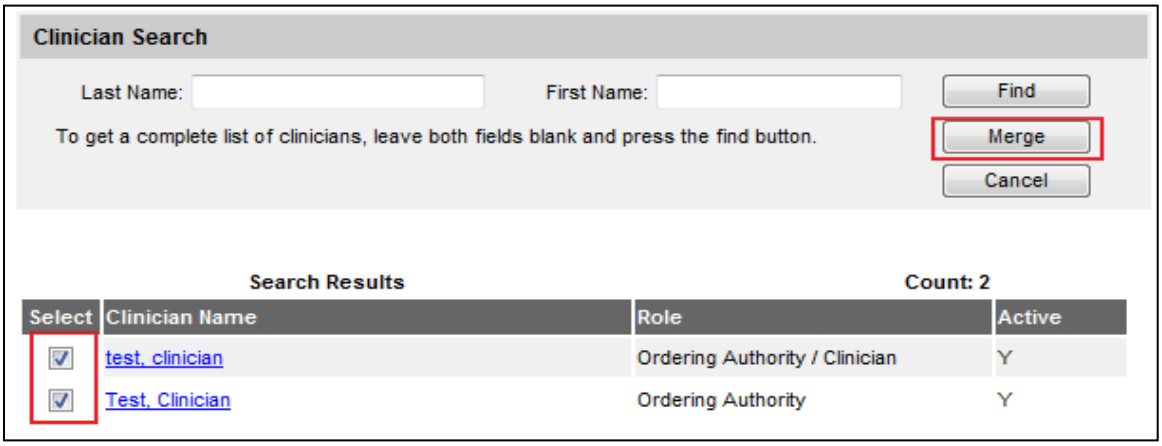
Occasionally, clinicians are entered more than once in IRIS, creating duplicate records. To eliminate extraneous records using IRIS' Merge Clinician feature:

1. Click **Manage Clinicians** underneath "Maintenance" from the menu panel.

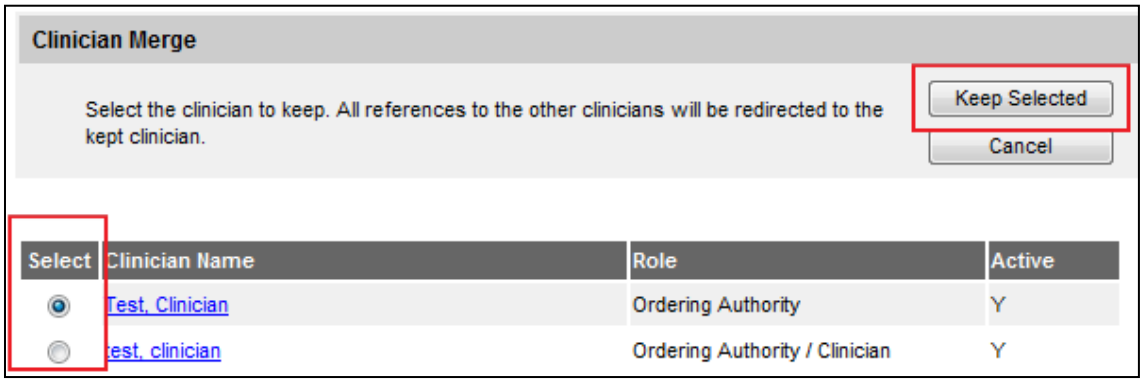


2. Click the **Find Clinician** button.

3. Enter the last and first names of the clinician and click the **Find** button.
4. Click at least two clinicians from the Search Results table and click the **Merge** button.

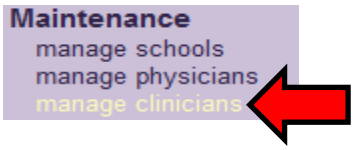


5. Click the clinician you wish to keep and click the **Keep Selected** button.

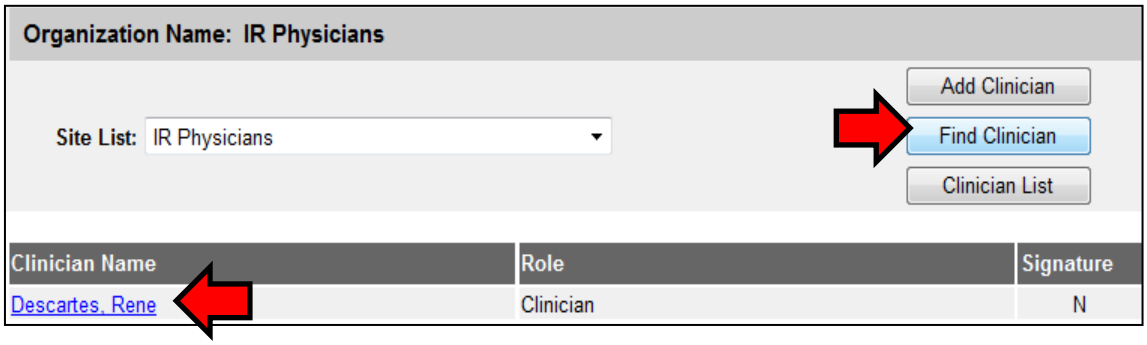


Deleting Clinicians

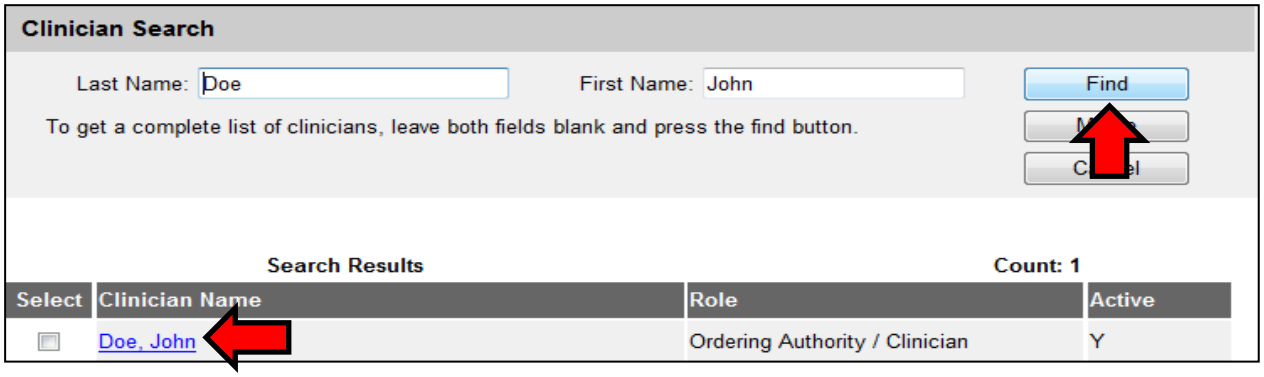
1. Click **Manage Clinicians** underneath “Maintenance” from the menu panel.



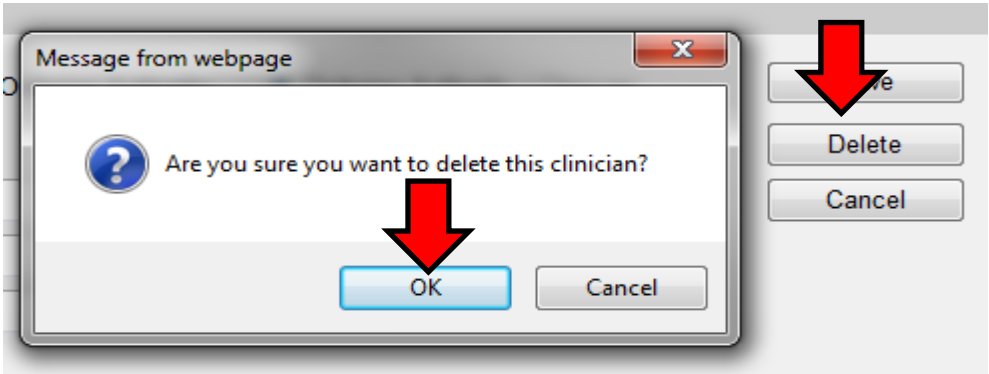
2. Click the **Find Clinician** button or click the appropriate clinician name in the table on the page. If you choose the latter option, skip to step 4.



3. On the Clinician Search page, enter the last and first name of the clinician and click the **Find** button. Then, click his or her last name in the Search Results table.

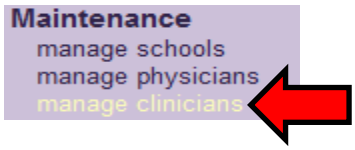


4. Click the **Delete** button and click the **OK** button on the prompt.

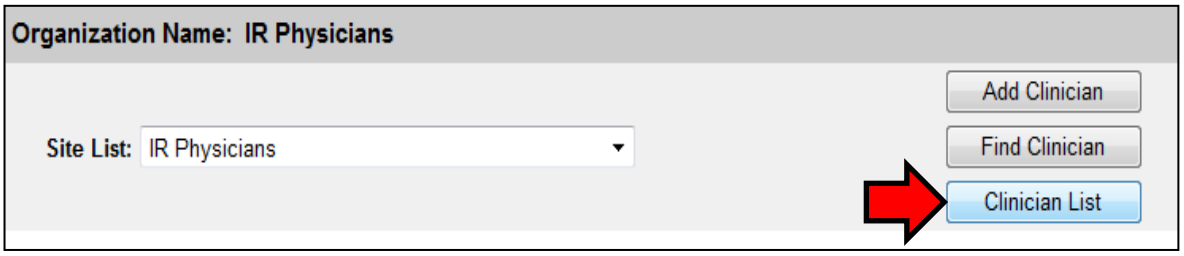


Listing All Clinicians

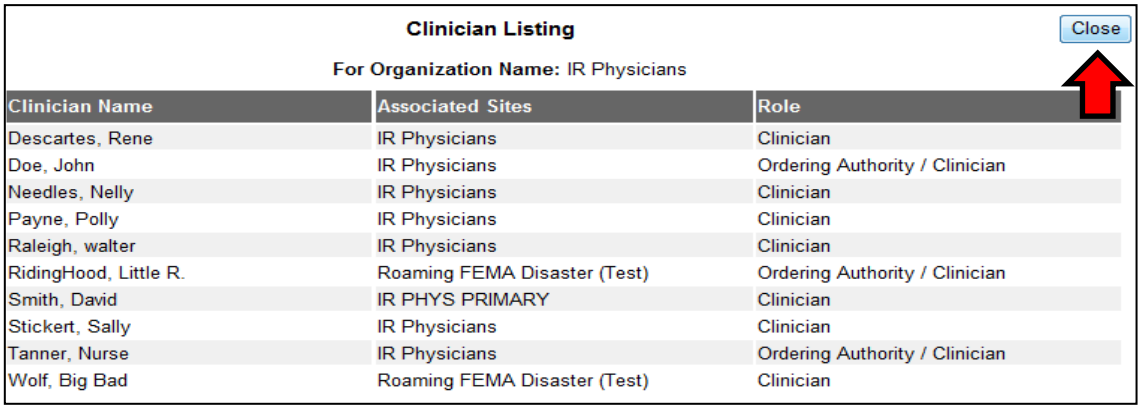
1. Click **Manage Clinicians** underneath “Maintenance” from the menu panel.



2. Click the **Clinician List** button.



3. The Clinician Listing screen opens, displaying all available clinicians, their organization association(s), and their role(s).
4. Click the **Close** button to return to the Manage Clinicians screen.

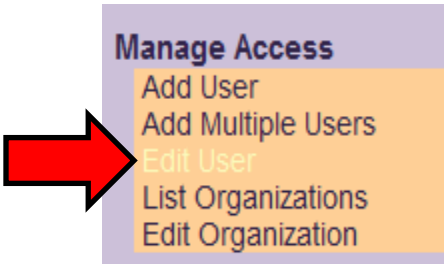


Clinician Name	Associated Sites	Role
Descartes, Rene	IR Physicians	Clinician
Doe, John	IR Physicians	Ordering Authority / Clinician
Needles, Nelly	IR Physicians	Clinician
Payne, Polly	IR Physicians	Clinician
Raleigh, walter	IR Physicians	Clinician
RidingHood, Little R.	Roaming FEMA Disaster (Test)	Ordering Authority / Clinician
Smith, David	IR PHYS PRIMARY	Clinician
Stickert, Sally	IR Physicians	Clinician
Tanner, Nurse	IR Physicians	Ordering Authority / Clinician
Wolf, Big Bad	Roaming FEMA Disaster (Test)	Clinician

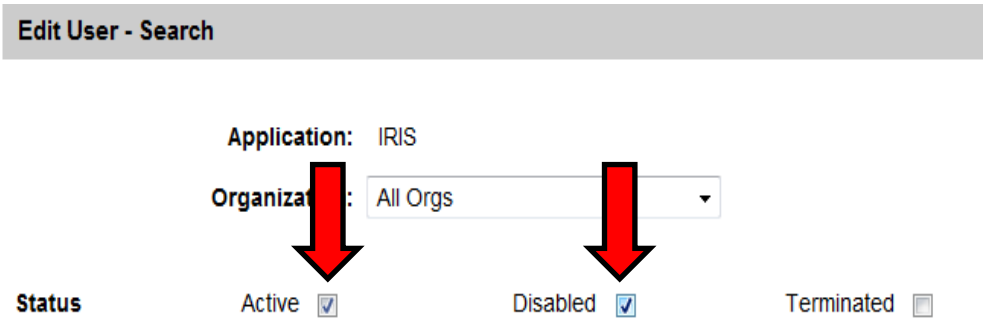
X. How to Re-Enable or Unlock a User

Administrative users have the ability to unlock standard user accounts. Please follow these steps to unlock a user account:

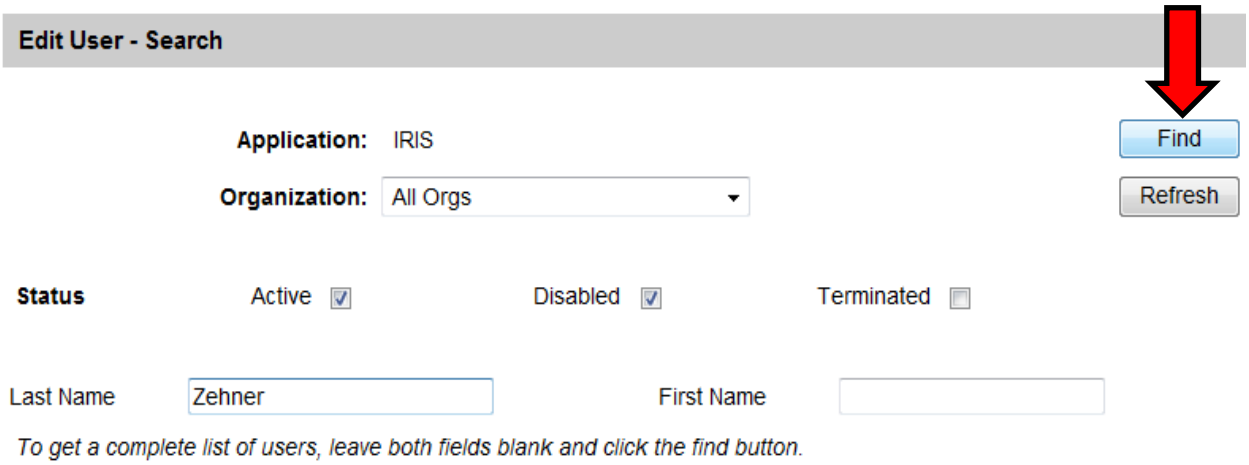
1. From the portal page in IRIS, click on the "**Edit User**" link under the Manager Access section.



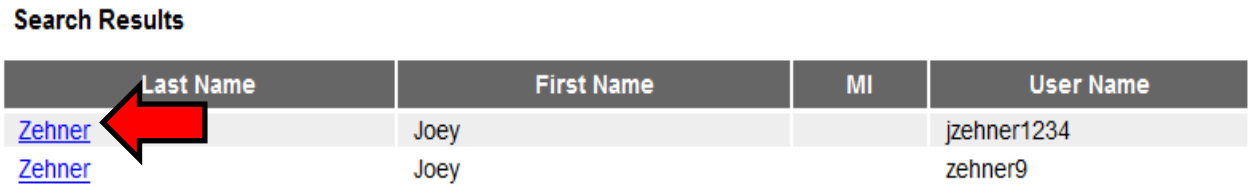
2. You will then come to the **Edit User – Search Page**. From there, you will want to select the checkmark boxes next to the status of "**Active**" and "**Disabled**" to search for users who may be inactive or locked out.



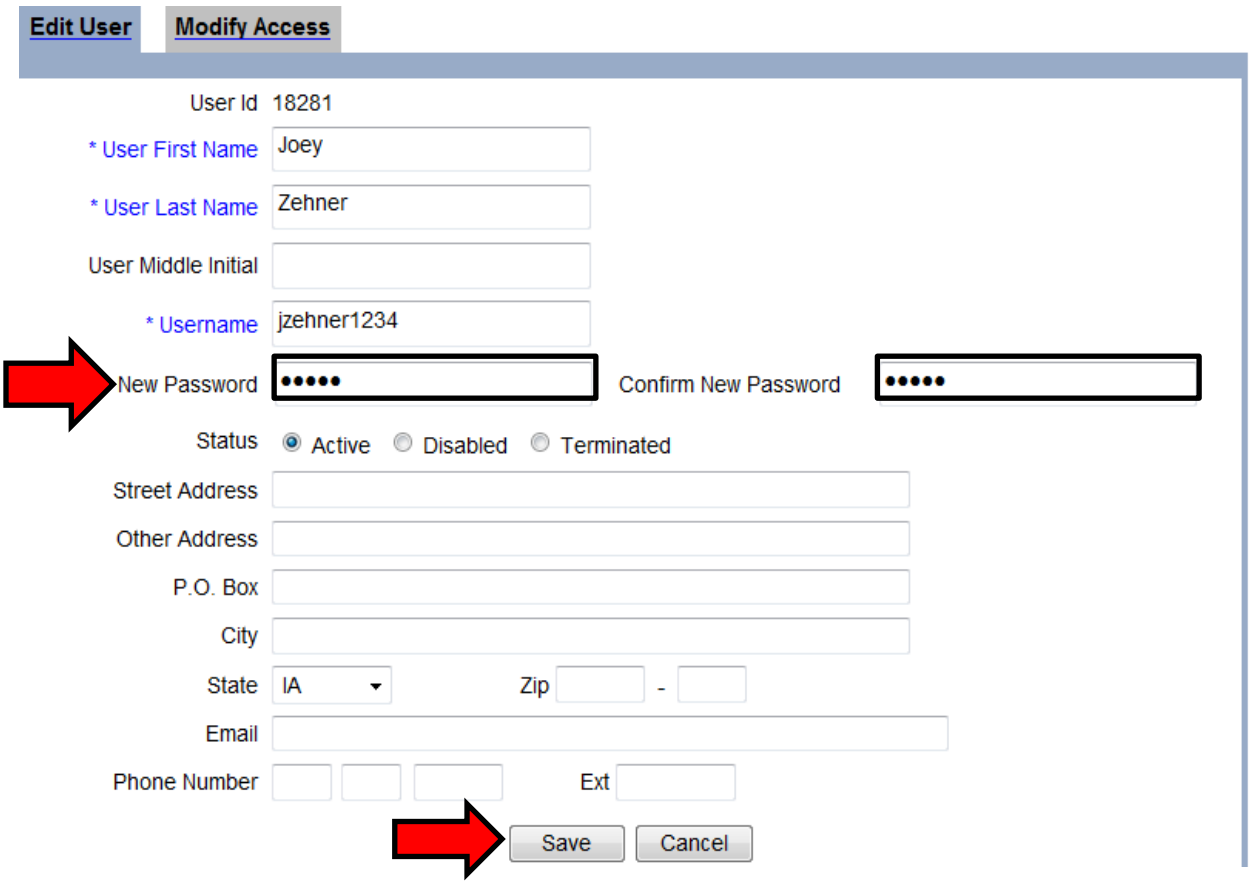
3. You can then search for users by entering either their last name, first name, or you can leave both fields blank to show your organization's list of users. When the appropriate information has been entered, click on "**Find**".



4. A list of users will display matching your searching results. Click on the hyperlink for the locked out user's last name to edit their user account.

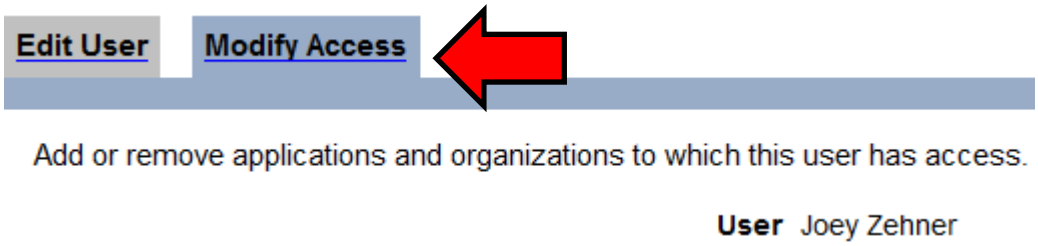


5. You will then come to the **Edit User** section. Here, you can enter in a new password for the user if they have forgotten theirs or need a new one. You will need to confirm the password and click on "**Save**".

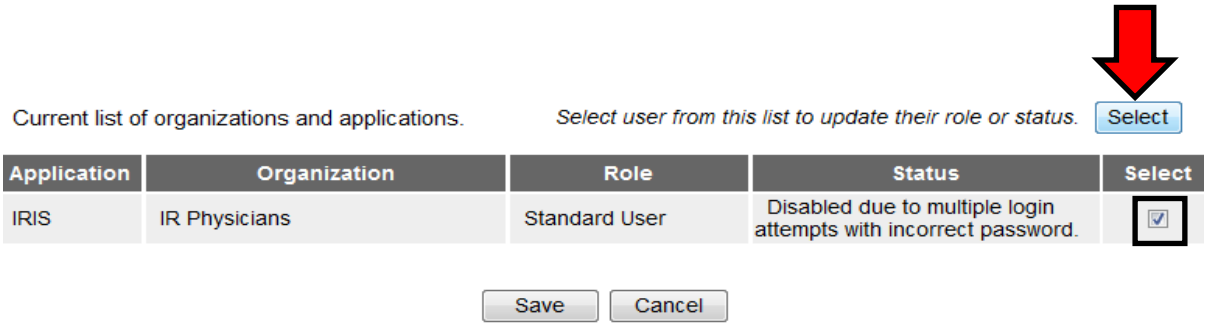


6. You will then see a "**User Updated**" message and you have successfully updated the user's password.

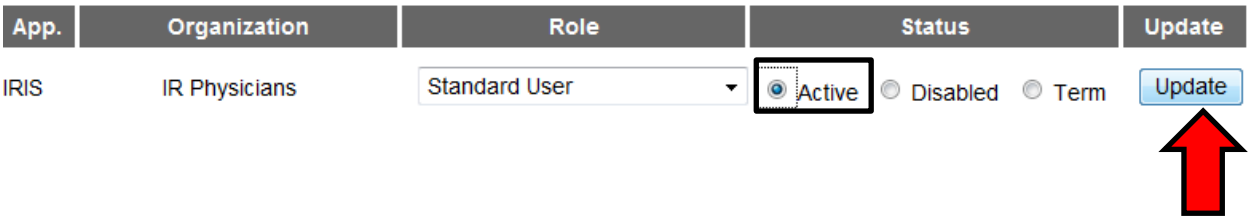
7. You will also need to modify the user's access and re-grant them access to the organization. To do this, click on the "**Modify Access**" tab.



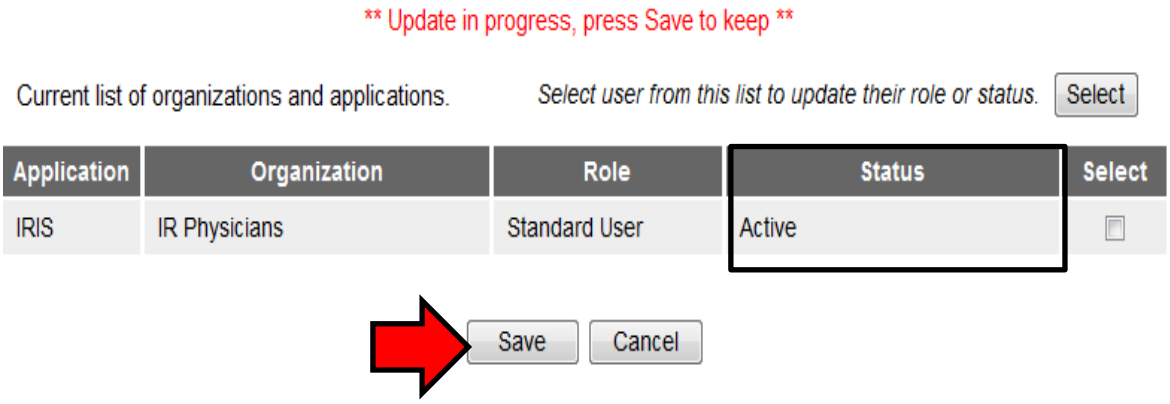
8. You will then see under the Status section that the user's account has been disabled due to multiple login attempts with the incorrect password. Another possibility is the user is 'inactive'. Select the checkmark box next to the status you want to modify and click on the "**Select**" button.



9. You will then see the Status come up as Disabled on the radio button dial. Select the **Active** radio dial and click on the "**Update**" button.



10. You will then see the message "**Update in progress, press Save to keep**" and the status field will now say Active. Click on the "**Save"** button to save your changes.

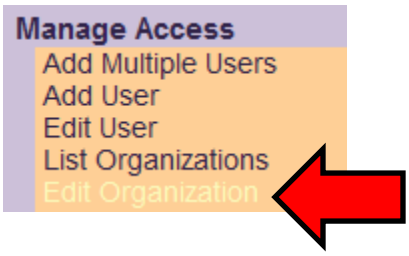


11. Once you click on **Save**, you will see a User Updated message and the user will now be able to login using their new password.

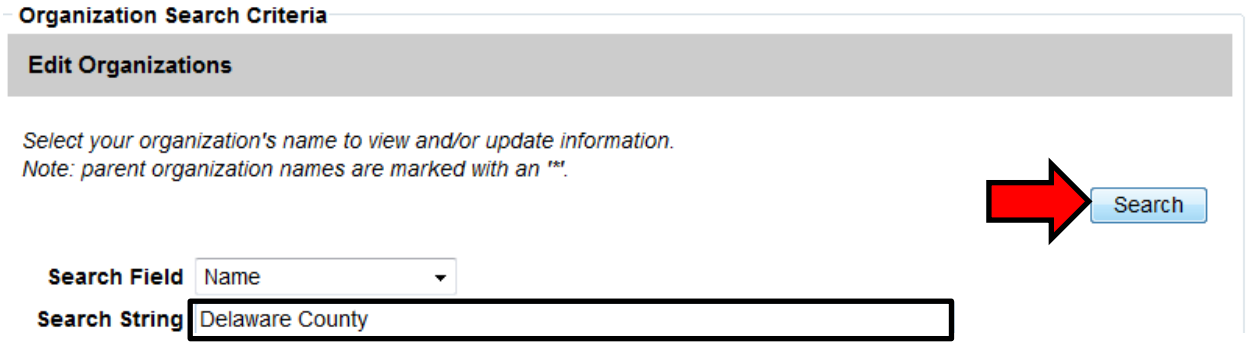
XI. How to Setup VFC Contact Information:

This information applies only to Vaccines for Children (VFC) Program providers. To setup your VFC contact information to complete a VFC order, please follow these steps:

1. Click on the "**Edit Organization**" link on your portal page:



2. You will then come to the **Edit Organization – Search page**. The Search Field defaults to search by name so you can begin entering in a few letters of your organization's name and then click on the "**Search**" button.



3. Your organization will then appear in the search results. Click the blue hyperlink under the organization field to edit your organization's information.

Search Result

Name	Org Code	VFC Pin	City	County	Open
DELAWARE COUNTY PUBLIC HEALTH	10186	P28001	MANCHESTER	Delaware	Y

4. You will then come to the **Edit Organization** information. You can scroll down to the State Supplied Vaccine Profile section and you will need to make sure your organization has a VFC pin. Also, you will need setup your Delivery Dates and Times:

State Supplied Vaccine Profile:

VFC Pin: P28001
Varicella Certified: Yes
VFC Active: Yes
Frequency:

Delivery Days and Times

	Delivery Window 1		
☑ Monday	9:00 AM	To	5:00 PM
☑ Tuesday	9:00 AM	To	5:00 PM
☑ Wednesday	9:00 AM	To	5:00 PM
☑ Thursday	9:00 AM	To	5:00 PM
☑ Friday	9:00 AM	To	1:00 PM
☐ Saturday		To	
☐ Sunday		To	

5. You can then scroll down to the **Main Contact Information** section. There you will need to add the Vaccine Delivery address information (or organization's address information).

Main Contact Information

Address Information

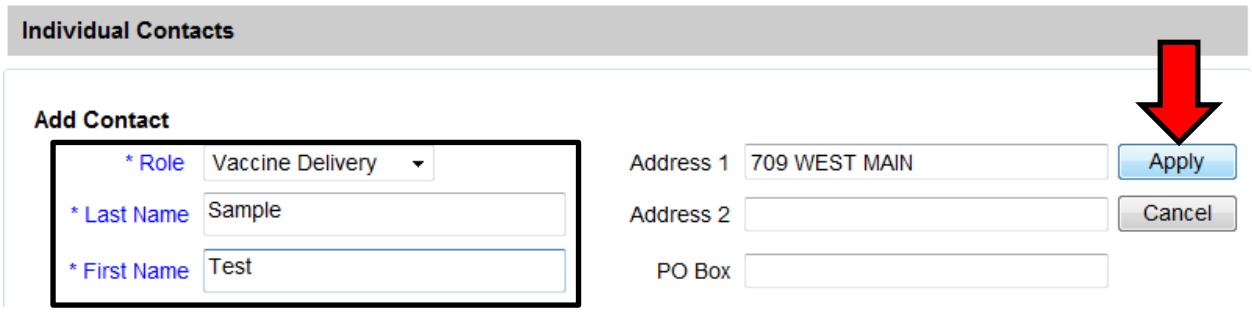
Vaccine Delivery
Populate With Physical Address ☐

Address 1	*Address 2*	*PO Box*
709 W MAIN ST		

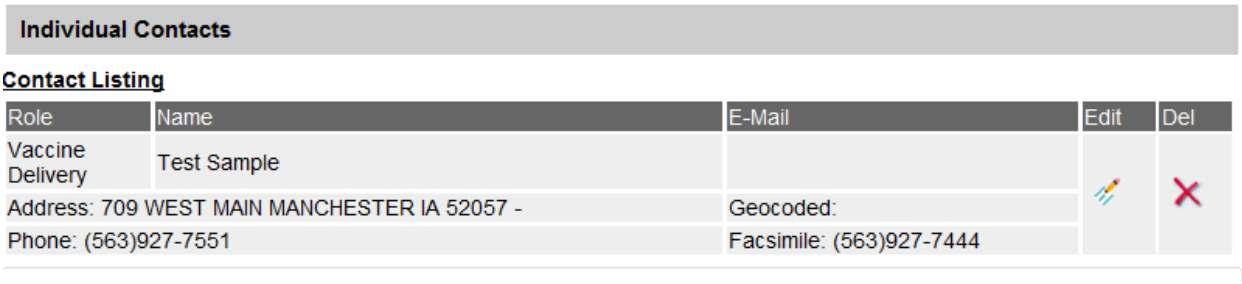
City	*State*	*Zip*	*+4*	
MANCHESTER	IA	52057		*Geocoded:* No

6. You will then need to scroll down to the Individual Contacts section and add a contact for VFC orders. In the Add Contact area, select from the Role dropdown list the **Vaccine Delivery** role as

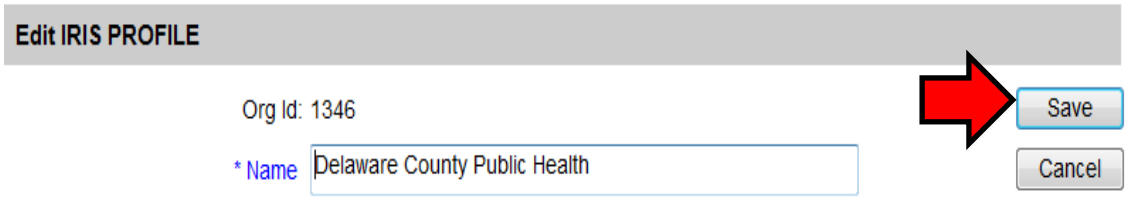
well as enter the last name and first name of the vaccine delivery contact person. Once the required information has been entered, click on the "**Apply"** button.



7. The individual contact you added will now appear in the Individual Contacts listing section with the role of vaccine delivery.



8. You will then need to scroll to the top of the page and click on the "**Save**" button to save your changes.



9. You will then see the message **Organization Updated** message. You can now go back into your organization and create a VFC order.