



WASHINGTON STATE
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INFORMATION SYSTEM

The IIS Monthly Webinar Series: The IIS for System Administrators

IIS Provider Training & Outreach Team

PUBLIC HEALTH
ALWAYS WORKING FOR A SAFER AND
HEALTHIER COMMUNITY



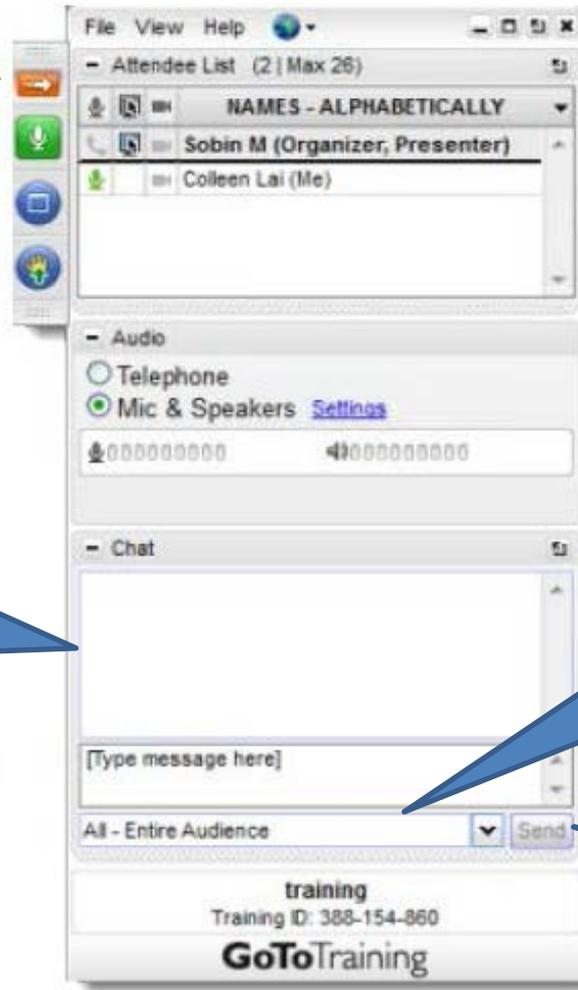
Your GoToTraining Control Panel

Use the arrow to open and close the control panel

Use the chat box to type in questions and comments

Choose the whole audience or a specific person to receive your chat.

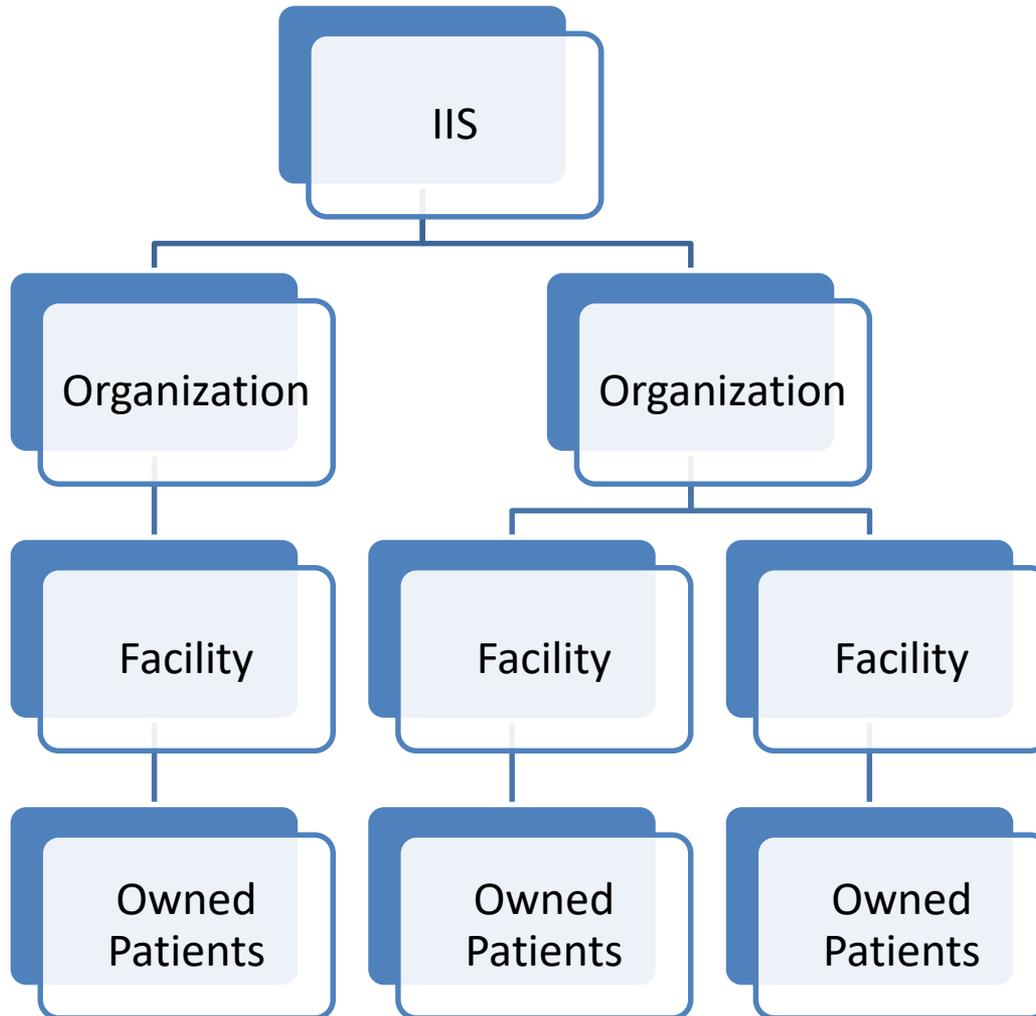
Click Send!



Training Objectives

- Describe the role of a system administrator.
- Identify types of user accounts.
- Identify the recommended permissions for common types of user accounts.
- Explain strategies for maintaining IIS security.

Basic IIS Structure

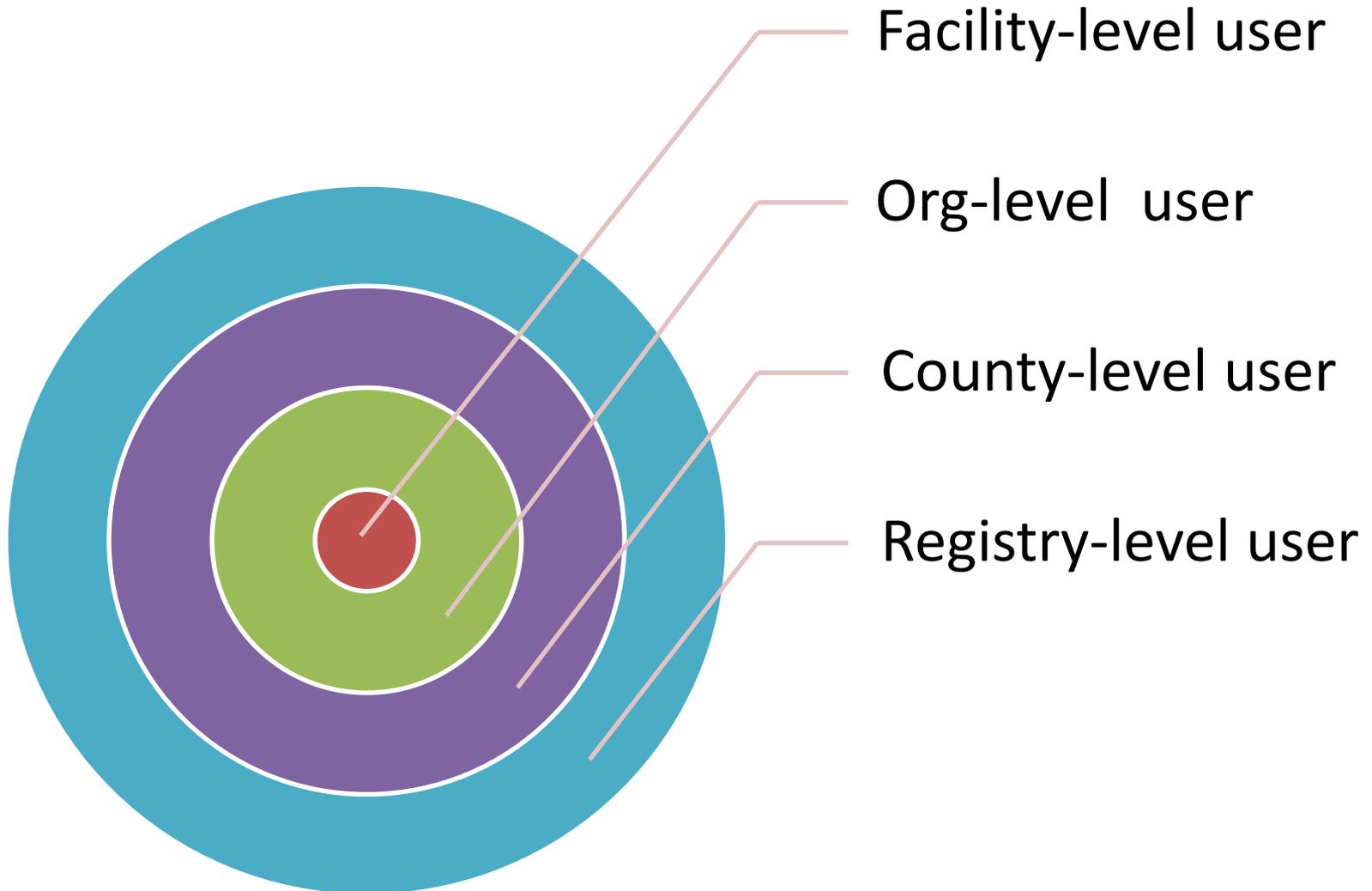


Examples of IIS User Accounts

| Account Types | Description |
|-----------------------------|--|
| Client-type Accounts | Access to view & edit records |
| Registry Client | Access to all orgs/facilities |
| Organization Client | Access to the whole org & all facilities under org |
| Facility Client | Access to one facility |
| View-type Accounts | View-only access |
| Facility View | Access to view immunization records |

Each account type has various permissions to allow the user to perform their specific job functions.

IIS Account Access Levels



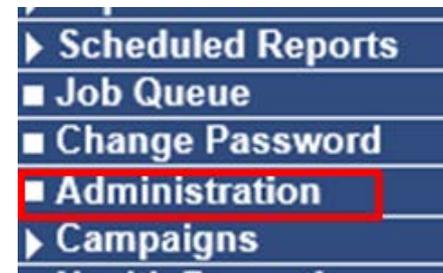
Who is a System Administrator?

- Lead or manager in an organization who is knowledgeable when staff changes.
- This person is responsible for IIS user accounts for the facility or organization depending on access.
- The Help Desk refers users to their System Administrator for verification of employment and to set up/make changes to IIS accounts.
- The System Administration account permission allows the user to complete user management.

What is System Administration Permission?

If a user has the permission they will see **Administration** in their navigation menu.

Allows the user to manage their organization/facility's IIS users:



- Create accounts for new employees that need access.
- Inactivate users that are no longer employed.
- Add permissions if needed for various functions.

Putting It All Together

To set up user accounts you need to determine:

- The appropriate access level for the user (organization or facility).
- The type of account the user needs (view-only or client).
- What permissions the user needs for their job.

What type of account does this user need?

User works in one clinic and needs access to view immunization records.

Facility View

Setting Up a New User Account

1. Click on **Administration** in left menu.
2. Click on **Search / Add User**.
3. Type in user's last name and click **Search**.
4. If no matching results show up, click **Add**.



Web User Search
Search/Add Web User - Search Required Before Adding

User Name:
Last Name:
Inactive:
 Facility
 Do Not Limit

Search Results
The system will not return more than 250 users. Please refine your search criteria.

Show entries

| User Name | First Name | Last Name | Organization (IRMS) | Facility | Access Level | Inactive |
|----------------------------|------------|-----------|---------------------|----------|--------------|----------|
| No data available in table | | | | | | |

Showing 0 to 0 of 0 entries

Setting Up a New User Account

Web User Maintenance [Add]

| | | |
|----|-----------------------------|---|
| 5 | User Name: | TTESTING |
| 6 | Password: | <input type="text"/> again : <input type="text"/> Expire Now : <input type="checkbox"/> |
| | | <input type="checkbox"/> Use the default system password "Welcome1". |
| | Set Inactive: | <input type="checkbox"/> |
| | First Name: | TERRI |
| 7 | Middle Name: | <input type="text"/> |
| | Last Name: | TESTING |
| | Credentials: | <input type="text"/> |
| 8 | Access Level: | Facility Client ▼ |
| 9 | Organization (IRMS): | 100034 - NICOLE'S TEST |
| | Facility: | NICOLE'S VFC CLINIC 2 ▼ |
| | Street: | <input type="text"/> |
| | City: | <input type="text"/> |
| | State: | --select-- ▼ |
| 10 | Zip Code: | <input type="text"/> |
| | County: | --select-- ▼ |
| | Work Phone: | <input type="text"/> ext: <input type="text"/> |
| | Email: | TERRI.TESTING@TEST.ORG |

Setting Up a New User Account

11. Add **Permissions** to the user's account.
12. Check the **Add another user to this site** box, to add multiple users to the same facility.
13. Click **Save**.

The screenshot displays a web-based interface for setting up a new user account. On the left, a grey sidebar contains a blue box with the number '11'. The main area is titled 'Permissions:' and features a list of 'Available Permissions' enclosed in a red rectangular box. The list includes: Physician Administration, Provider Ordering (highlighted in blue), Query HL7 Access Only, Remote Clinic Export, Run Reminder/Recall, Security Access, Serology Management Access, Serology View Access, State / Local Order Approver, and Suppress Demographics Address Check. To the right of the list, a blue box with the number '12' is positioned above a red-bordered checkbox labeled 'Add another user to this site :'. Below this, a blue box with the number '13' is positioned above a red-bordered 'Save' button. A 'Cancel' button is also visible to the left of the 'Save' button.

Password & Login Information

- Passwords must be at least 8 characters and be in a similar format to (Welcome1).
- Passwords need to be updated regularly.
- Make sure email addresses are included in user accounts so employees can use the **Forgot Password** link and receive regular updates about the IIS.

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Every age. Every vaccination.
QA Environment

◀ Main
Home
Login
▶ Patient
▶ Scheduled Reports

WA IIS-Web Login

Username :

Password :

[Forgot Password](#)

Clear Login

Date: December 10, 2015

<<<TEST VERSION>>>

Inactivating/Reactivating Accounts

1. Go to **Administration** → **Search / Add User**.
2. Search for the user.
3. In the **Search Results**, look at the Inactive column to identify active & inactive users.

Search Results
The system will not return more than 250 users. Please refine your search criteria.

Show entries

| User Name ▲ | First Name ◆ | Last Name ◆ | Organization (IRMS) ◆ | Facility ◆ | Access Level ◆ | Inactive ◆ |
|-------------|--------------|-------------|-----------------------|-----------------------|-----------------|------------|
| NICOLEVAX | NICOLE | TEST | NICOLE'S TEST | NICOLE'S VFC CLINIC 2 | Facility Client | Y |
| TTESTING | TERRI | TESTING | NICOLE'S TEST | NICOLE'S VFC CLINIC 2 | Facility Client | |

Showing 1 to 2 of 2 entries

This column shows if the user is Inactive.

Reactivating Accounts

- Click on a user to view/update their account.
- On the User Maintenance screen, click **Update**.
- To reactivate an inactive user, uncheck the **Set Inactive** box and click **Update** at the bottom of the screen.

Web User Maintenance [Update]

User Name: NICOLEVAX

Password: again : Expire Now :

Use the default system password "Welcome1".

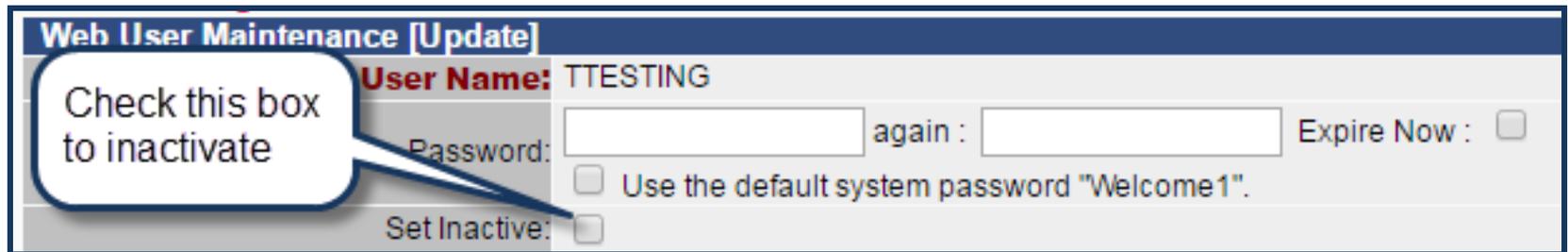
Set Inactive:

Uncheck this box to reactivate the user

Inactivating Accounts

Inactivate users when they leave your organization or facility:

- Follow the steps to search for a user and click Update to make changes.
- On the User Maintenance screen, check the **Set Inactive** box and click **Update**.



Web User Maintenance [Update]

User Name: TTESTING

Password: again : Expire Now :

Use the default system password "Welcome1".

Set Inactive:

Check this box to inactivate

Searching for All Users

Search for all users under your org or facility

1. Go to **Administration** → **Search / Add User**.
2. Limit your search to **All** or just **Inactive** users.
3. Don't enter a username or last name, just click **Search**.



You can also run a report that shows all your users under
Administration → **User Reports**

Common IIS User Roles

Role: **View & Print Records**

Access Level: Organization View or Facility View

Recommended Permissions:

- Run Reminder/Recall (allows user to run reminder/recall reports)
- UFM access (allows user to schedule reports)

Common IIS User Roles

Role: **Vaccine Coordinator**

Access Level: Facility Client (Organization Client if they are over multiple clinics)

Recommended Permissions:

- Inactivate patients
- Lot number manager access & edit
- Provider ordering
- Run reminder/recall
- UFM access

Live Demo

- Search & Add User
- Reactivate User
- Inactivate User

Questions & Resources

IIS Questions & Assistance

Contact the Help Desk

- 1-800-325-5599
- IISHelpDesk@doh.wa.gov

Request IIS Training

Email the IIS Outreach & Training Team

IIS.Training@doh.wa.gov

IIS Training Resources

Visit the IIS Training Materials Portal

www.doh.wa.gov/trainingIIS

Recorded IIS Monthly Webinars on YouTube

Visit the IIS YouTube Channel [here](#)

System Administration Quick Reference Guide [here](#).

For people with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711). DOH 348-670

IIS News
January 2017

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December 2016 Upgrade

On December 8, 2016 the IIS was upgraded. Please review the materials below to see the changes and updates included in the upgrade.

[IIS Upgrade Summary](#)
[IIS Forecast Update](#)



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IIS School Module

The Department of Health is excited to share that we are rolling out a new tool to make



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