VIIS QUICK START GUIDES

Quick Start Guides provide simplified steps for common tasks within VIIS.

Contents

Quick Start Guide 1: How to Log In

Step	Action	Notes
Step 1	To access the VIIS system, enter the Internet address (URL) into your browser **https://viis.vdh.virginia.gov**	Internet Explorer is the best browser to use.
Step 2	On the "Portal Main Page," enter the following: • Organization Code • User Name • Password	All Login entries are **case sensitive,** so be sure to enter them exactly as provided to you by VDH.
Step 3	Click on **Login**	
Step 4	The first time you enter the system, you will be prompted to enter another password. Enter your new password, confirm it, and click on **Save**. Then click on: **Click here to continue**.	Passwords expire every **30** days, so you will be prompted to change yours at that time.
Step 5	If you are associated with **only one site**, you will arrive at the "VIIS Home" page. If you are associated with **more than one site,** you will arrive at the "Select Organization" screen. Click on the link of the desired site to go to the "VIIS Home" page.	If you see “Hot Topics” click VIIS on the left hand side and your site will appear to be selected to enter into the “VIIS Home” page.

Quick Start Guide 2: How to Add Clinicians

Step	Action	Notes
Step 1	Select **Manage Clinicians** under Maintenance on the left menu bar.	Only Administrators have access to this feature.
Step 2	Select your site from the **Site List** and select **Add Clinician.**	
Step 3	Select the **Role of the Clinician**, enter the **Last** and **First Name** and enter the **Suffix** (MD, RN etc…). Select your **site** and select **ADD**. This will move your site to the right column. Select **SAVE**.	Clinician Role: Those that administer vaccines. Ordering Authority Role: Those that order the vaccine be administered. Ordering Authority/Clinician Role: Both orders and administers vaccines.

Quick Start Guide 3: Add Users

Step	Action	Notes
Step 1	Click on **Manage Access/Account** tab in the top menu bar.	
Step 2	Under Manage Access, click on **Add Multiple Users** in the left menu bar.	Even if you are only adding one user.
Step 3	Fill in the user's **Last Name, First Name, User Name, Password** and choose their **Role.** Roles: Client Reports Only – can only look up records and cannot modify. Inventory Control – can look up, modify client records and inventory. Typical User – can look up and modify records but cannot see or modify inventory.	User Name Hint – choose first initial and last name as one word. Password – it doesn't matter because the user will change it first thing they sign in anyway.

Quick Start Guide 4: Edit Users

Step	Action	Notes
Step 1	Click on **Manage Access/Account** tab in the top menu bar.	
Step 2	Under Manage Access, click on **Edit User** in the left menu bar.	
Step 3	Search for the user in VIIS.	Hint: Select **Active**, **Disabled** and **Terminated** boxes and click Find. This will pull up all users for your site.
Step 4	Once User is found, click on User's last name.	
Step 5	Click on **Edit User** tab to add or change relevant information	Tab is located at top of screen.
Step 6	Click on **Modify Access** tab	This is where you can change **Role** or **Status**.
Step 7	Check the box of the Role you would like to Modify and then click on **Select**	Box is located on the right-hand side.
Step 8	Change either the **Role** or **Status** of User and click on **Update**.	
Step 9	Click on **Save**.	

Quick Start Guide 5: Renew Expired Password

Step	Action	Notes
Step 1	Your password expires every **30 days**. The system will require you to change your password at the next log-in. It will prompt you to change your password on logging in.	If Users wait **60 days** without logging in, the account will go inactive and will need to contact their administrators. If administrators need a password reset, contact your VIIS Consultant.
Step 2	On the system screen, enter your new password.	Numbers, letters of symbols between 4-15 characters long. Password will be case sensitive.
Step 3	Repeat the new password in the **Confirm New Password** box.	
Step 4	Click on **Save**.	
Step 5	Click on **Click Here to Continue**.	
Step 6	You will be at the "Manage Access/ Account" page. To continue to the "VIIS Home" page click on **VIIS** on the left hand bar menu and then your **site name**.	

Quick Start Guide 6: Add Inventory

Step	Action	Notes
Step 1	From the "VIIS Home" page click on **Manage Inventory** in the left bar menu, to go to the "Vaccine Main" screen.	
Step 2	Click on the **Show Inventory** button.	Located on the top right-hand side of screen.
Step 3	Click on the **Add Inventory** button Once you have been using Inventory in VIIS, always make sure you first check your existing Inventory before you add new lots – you may already have them listed and you can modify current lots (see Guide 7) rather than creating a new lot.	Located on the top right-hand side of screen.
Step 4	Choose the vaccine to add from the drop-down menu for **Trade Name.**	**Manufacturer** will automatically pre-populate for you.
Step 5	Fill in the required fields (shown in blue), and click on **Save**.	**Public** funding is for VFC vaccines while **Private** is for all other vaccines.
Step 6	You will see a message, "Inventory was inserted successfully" at the bottom of the screen.	

Quick Start Guide 7: Modify Inventory

Step	Action	Notes
Step 1	From the “VIIS Home" page click on **Manage Inventory** in the left bar menu, to go to the “Vaccine Main” screen.	
Step 2	Click on the **Show Inventory** button.	Located on the top right-hand side of screen.
Step 3	If the lot number you want to add to your inventory is already listed and the **Trade Name** and **Expiration Date** match, click on the corresponding **Trade Name** for that row.	Hold down **Ctrl** and the **F** key button on the keyboard at the same time and release. Or you can click on **Edit** in your browser window and click **Find**. Type the lot number you are searching for in the Find box and hit **Enter** or **Return** on your keyboard. If it does not find the lot number proceed with Adding Inventory according to Guide 6.
Step 4	Under “Modify Quantity on Hand” choose the **Action**, the **Amount of Doses** you are modifying and the **Reason**. Example: If you are Adding 50 doses because you received more of inventory you already have you would select: Action: Add Amount: 50 Reason: Receipt of Inventory. Example: If you are transferring 20 doses to the Health Department you would select: Action: Subtract Amount: 20 Reason: Doses Transferred	Try not to use Error Correction unless there is no other reason to choose.

Quick Start Guide 8: Search for Clients

Step	Action	Notes
Step 1	From the "VIIS Home" page, click on **Manage Clients** in the left menu bar.	All persons in VIIS are called Clients. So patients, students will be referred to as Clients in VIIS.
Step 2	On the "Client Search" screen, you can search using any of the fields.	When searching by **Name**, enter the first 3 letters of the last name and the first 2 letters of the first name for best results.
Step 3	Click on the **Find** button. If more than one name comes up, click on the relevant one by matching **Date of Birth** and other possible information including **Middle Name, Mother's Name** and P**hone Number**.	If you continue to see the **No Clients Found** message, the person you are looking for is not in VIIS and you will need to create a new file. See Guide 8. If you see the message, **Please refine your search criteria to limit your client list** then you need to put in more information and click **Find** again. If you see the message, **No clients were found for the requested search criteria**, check your spelling and try again, or enter other information if you can.
Step 4	You will arrive at the "Update Existing Client" screen, where you can view the client's record.	

Quick Start Guide 9: How to Enter a New Client

Step	Action	Notes
Step 1	From the "VIIS Home" page, click on **Add New Client** in the left menu bar.	
Step 2	On the "Enter New Client" screen, enter the client's **Last Name, First Name, Mother's Maiden Last, Mother's Maiden First, Gender, Birth Date** and the primary location they reside as **Independent City/ County.** Click **Save.**	Although **Mother's Maiden Last** and **Mother's Maiden First** are required, you are able to override these fields. Independent City/County is not required but it is very useful.
Step 3	Enter additional information if it is available: 1. Responsible Person(s) – check **Primary** and **Notices** so the client is included in "Reminder/Recall Reports." 2. Client Comment(s) – Note allergies, contraindications, etc.	This information is not required but is useful information for all VIIS users.
Step 4	Click **Next** and then **Save** after entering data.	

Quick Start Guide 10: Look Up Immunizations

Step	Action	Notes
Step 1	On the “VIIS home” page, click on **Manage Immunizations** in the left menu bar.	
Step 2	Search for the specific client.	See Guide 8
Step 3	On the “View Client Schedule” screen you will see Client Information, Immunization History for the client, and a list of recommended vaccines and dates for immunizations to be administered based off of History in VIIS and age of Client.	
Step 4	Depending on your VIIS access level, you may be able to add immunizations, edit the client’s information, run reports, and print the information on the screen.	
Step 5	For a more detailed explanation of how to use this screen, see the “Look Up Information in VIIS” and/or “Manage Immunizations Training” modules or contact your VIIS Consultant.	

Quick Start Guide 11: Add Historical Immunizations

Step	Action	Notes
Step 1	Search for the client. Add as a new client if no record exists.	See Guide 10 or Guide 9
Step 2	On the “View Client Schedule” screen, click on **Historical Immunization.**	
Step 3	On the "Select Immunizations" screen, **Historical Vaccines** (vaccines NOT in inventory) can be added by entering the Provider Organization and dates immunizations were given in the top row. This is the default row.	*Transcribed* can be inserted into the Provider Organization name. If you need to record more than five historical dates, enter the first five dates and repeat the steps to enter the remaining dates.
Step 4	For each vaccine that you want to record, click in the Provider Organization column and the date it was provided. The information from the default row will populate in the selected field. Once all selections are made, click on the **Tradename Details** button.	
Step 5	On the “Add Historical Immunization” screen, enter the **Trade Name** and **Lot Number** if available. Then click the **Save** button.	Although the minimum required information for this page is the **Date Provided**, enter as much information as you can. If the vaccine is over a year old then you can just enter **Trade Name** information**.**
Step 6	You will see the “View Client Schedule” screen which shows your most recent updates.	

Quick Start Guide 12: Add Active Immunizations

Step	Action	Notes
Step 1	Search for the client. Add as a new client if no record exists.	See Guide 10 or Guide 9
Step 2	On the “View Client Schedule” screen, click on **New Immunization Entry.**	
Step 3	Check the **New** box of the appropriate vaccine(s) you want to add from your inventory, and use the drop-down menus to complete the **Ordering Authority**, and **Administered By** and **Date Administered** fields. Click the **OK** button to move forward.	**Ordering Authority** and **Administered By** fields are not required and are pre-populated by administrators from Guide 2. If you are entering in two different dates of vaccines, do not enter **Date Administered** on this page.
Step 4	On the “Add Client Immunizations” screen, select **Eligibility** and **Trade Name-Lot**. Click the **OK** button to move forward.	**Eligibility** refers to a client’s insurance status. This information is required for clients 18 years of age or under.
Step 5	You will see the “View Client Schedule” screen which shows your most recent updates.	
Step 6	If you first receive a pop-up window asking if you meant to give a public vaccine to a private client or vice versa, double check that you selected the right **Trade Name-Lot** and correct **Eligibility**. If you did select the right one, click **OK**. If not, click **Cancel** and choose the correct **Trade Name-Lot** and/or **Eligibility**.	

Quick Start Guide 13: Print the Official Immunization Report

Step	Action	Notes
Step 1	Search for the client or add the client.	See Guide 10
Step 2	On the "View Client Schedule" screen, click on the **Reports** button.	**Note:** You can also reach the “View Client Reports" screen by following Guide 8 then click on **Reports.**
Step 3	Click on **Official Immunization**. This will open up a pdf document you can print. The Official Immunization Record can be used as a substitute for Part II of the School Entrance Health Form (MCV213F)	You will need Adobe Reader Capability that you can download from a link at the bottom of this page.
Step 4	To return to Client’s record click your browser’s **Back** button.	