

VIIS User Guide

VIIS Typical User

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Introduction

The "VIIS User Guide: VIIS Typical User" is a simplified instructional for common tasks within VIIS for users assigned to the Typical User Role. The VIIS Typical User Role enables you to create, update, and print patient records. Typical Users cannot directly modify inventory nor add and/or modify user accounts in VIIS. The site's VIIS Administrator has the ability to create and modify accounts for Typical Users.

For organizations manually entering data in VIIS: It is recommended that any personnel who is responsible for **uploading patient immunization information into VIIS** (e.g., Front Desk personnel, Nurses, Technicians, Doctors) be assigned to the Typical User Role.

For organizations exchanging data with VIIS via EMR: It is recommended that any personnel responsible for entering missing data and/or correcting data in VIIS (e.g., Front Desk personnel, Nurses, Technicians, Doctors) be assigned to the Typical User Role.

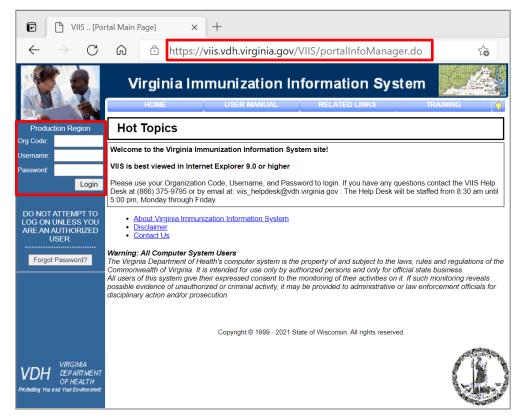
VIIS Help Desk:

Monday-Friday 8:30 am – 5:00 pm (866) 375-9795 VIIS HelpDesk@vdh.virginia.gov



Set up VIIS Account (for First Time Users)

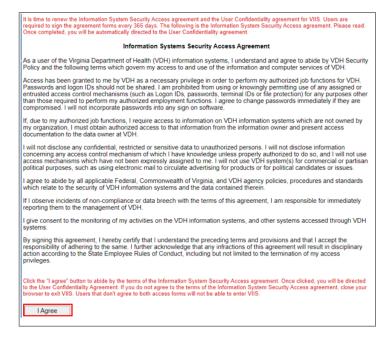
- 1. Enter the following URL into your browser: https://viis.vdh.virginia.gov/VIIS/portalInfoManager.do
- 2. On the left-hand side of the VIIS Homepage, enter the following information:
 - a. Organization Code ("Org Code")
 - i. Org Code is case sensitive with a capital letter
 - b. Username
 - i. Username typically is first initial and last name in lower-case letters
 - c. Password
 - i. A temporary password should be provided to you by your site's VIIS Administrator
- 3. Once you have filled in your Org Code, Username and Temporary Password, click "Login."



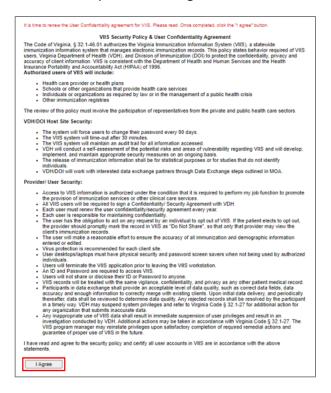
- 4. You will then be redirected to a new page with the note "Validation Errors: Your password has expired. Please update before continuing" to change your password.
 - a. Passwords are case sensitive and must be between 12-20 characters in length
 - b. Users cannot repeat the last 24 passwords
 - c. Passwords must contain at least 3 of the following criteria:
 - i. Special Characters such as @#\$%
 - ii. Alphabetic Characters
 - iii. Numeric Characters
 - iv. Combination of upper- and lower-case letters
- 5. Once you've created your new password, click "Save."



6. Once you save your password, you will be prompted to accept VIIS Information Systems Security Access Agreement. Review the terms and, once complete, click "I Agree" at the bottom of the page.

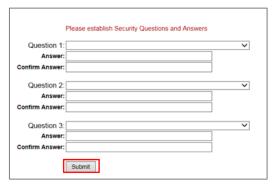


7. You will be prompted to accept the VIIS Security Policy & User Confidentiality Agreement. Review the terms and, once complete, click "I Agree" at the bottom of the page.





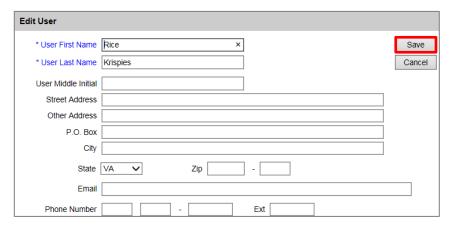
8. You will be prompted to establish your security questions and answers. Once complete, click "Submit."



9. You will be redirected to the homepage. To enter contact information, on the left-hand menu under "Manage My Account," select "Edit My User Account." This will redirect you to the "Edit User" page.



10. Populate the fields, then click "Save."



11. To continue to your site's VIIS account, on left-hand menu under "Applications," select "VIIS."





12. For organizations with multiple sites only: All sites associated to your account will appear as a hyperlink. To enter a specific site's immunization registry, click on that site's hyperlink.



Log into VIIS

- 1. To access VIIS, enter the following URL into your browser: https://viis.vdh.virginia.gov/VIIS/portalInfoManager.do
- 2. On the left-hand side of the VIIS Homepage, enter the following:
 - a. **Organization Code** ("Org Code")
 - i. Org Code is case sensitive with a capital letter
 - b. **Username**
 - i. Username is typically first initial and last name in *lower-case* letters
 - c. Password
- 3. Once you have filled in your Org Code, Username and Password, click "Login." The Homepage will then refresh to reflect your site's VIIS page
 - a. For VIIS Users with multiple sites, click on the hyperlink for the relevant site you wish to access.

Forgot Password

If forgotten password, active users (i.e., users that log into VIIS at least once every 60 days) have the ability to reset their own password provided they have a valid email address and answer the three (3) security questions. If a Typical User's account becomes inactive, they will need to contact their site's VIIS Administrator(s) to reactivate their account and reset their password.

- 1. On the VIIS login screen, click "Forgot Password?"
- 2. Enter your VIIS Org Code, Username, and Email Address.
- Click "Submit," after which a notification will pop up with the statement "A
 password reset link will be sent to the email address associated with your
 account and will be valid for 24 hours."

	er your Org Code, Username, and Email address atted with your VIIS account and click 'Submit'
Org Code: Username:	
Email Address:	
	Submit

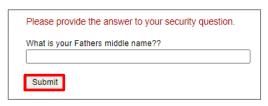
- 4. You should receive an email from <u>VIIS HelpDesk@vdh.virginia.gov</u> with the Subject "Requested Information." Open this email.
 - a. Note: Please check your spam if cannot find email in your Inbox.



5. In the email, click on the password reset link.



- Answer your first security question, then click "Submit."
 - a. Note: If you do not answer your first security question correctly, you will be prompted to answer another security question.
- Once you've successfully answered a security question, the "Change Password" screen will display.
 - a. Enter a new password into the "New Password" field.
 - Re-enter the password into the "Confirm New Password" field.
 - c. Click "Save."
- 8. You will then be redirected to the VIIS homepage.



Ch	ange Password		
	User Username	Minnie Mouse	Save Cancel
	* New Password	Illinouse	
	* Confirm New Password		

Reset Expired Password

VIIS user passwords expire every 90 days. The system will prompt users to change their password at the next log-in. If user does not log into VIIS at least every 60 days, their account will become inactive and will need to contact their site's VIIS Administrator(s) to reset their password. If the administrator is unable to reset the password, then the user should contact their VIIS Consultant or the VIIS Help Desk.

- 1. Access the VIIS Homepage.
- 2. Enter your Org Code and existing login credentials and click "Login."
- You will be redirected to a page that will state "Validation Errors: Your password has expired. Please update before continuing."
- 4. Under the section titled "Change Password," enter your new password in the "New Password" field and re-enter the new password in the "Confirm New Password" field.
- 5. Once the new password has been entered in both fields, click "Save."





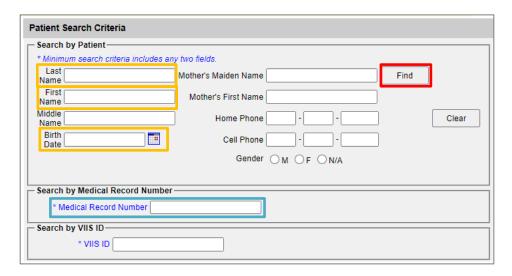
- 6. Once you have saved your password, you will be directed to a new page. Click on the link titled "CLICK HERE TO CONTINUE."
- 7. You will then be redirected to the VIIS Homepage. On the left-hand menu under "Applications," select "VIIS" to continue access to VIIS

Search for Patients in VIIS

- 1. Log into VIIS.
- 2. There are two ways to search for patients depending on what you wish to access:
 - a. To access patient's personal information: On the left-hand menu, under "Patients," select "Patient Search." This will redirect you to the "Patient Search Criteria" page. Follow the rest of the steps to access the patient's personal information.
- Patients
 patient search
 enter new patient
- b. To access patient's immunization record: On the left-hand menu, under "Immunizations," select "Patient Search." This will redirect you to the "Patient Search Criteria" page. Follow the rest of the steps to access the patient's personal information.

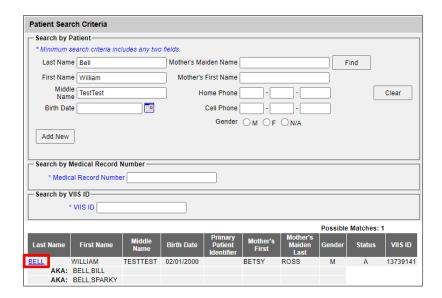


- 3. On the "Patient Search Criteria" page, it is recommended that you search for the specific patient's immunization record using their Medical Record Number, or a combination of last name, first name, and date of birth.
 - a. Note: At least <u>two</u> fields are required when conducting a search using fields other than the VIIS ID or Medical Record Number. Start your search with just a few letters of the patient's first and last name. Too much information at once can decrease the odds of finding the patient.
- 4. Once patient information is entered, click "Find."



5. The results of your search will appear at the bottom of the page, under "Possible Matches." Click on the hyperlink in the patient's last name to access their Patient Information.





- a. If there are multiple results, click on the relevant link by based on the corresponding Date of Birth and/or other information such as Middle Name, Medical Record Number, and/or VIIS ID.
- b. If you see any of the following messages, please take the subsequent steps listed:
 - "Please refine your search criteria to limit your client list" Please enter patient information in the additional fields and search again by clicking on "Find."
 - ii. "No clients were found for the requested search criteria" Please check your spelling and try again, enter information in the additional fields, or search by nicknames, maiden names, or hyphenated names (Note: If you continue to see this message, the patient is not documented in VIIS).

Add a New Patient in VIIS

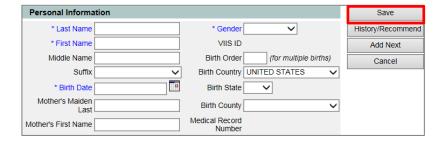
- 1. Once you've logged into VIIS and accessed your specific site's immunization registry, you will be redirected to a new page.
- 2. On the left-hand menu, under "Patients," select "Enter New Patient." This will redirect you to the "Add Patient" page.

Patients
patient search
enter new patient

- 3. On the "Add Patient" page, under "Personal Information", populate the following fields based on the patient's information:
 - a. Last Name



- b. First Name
- c. Mother's Maiden Last Name (Optional)
- d. Mother's First Name (Optional)
- e. Birth Date
- f. Gender
- g. Birth Country (Optional)

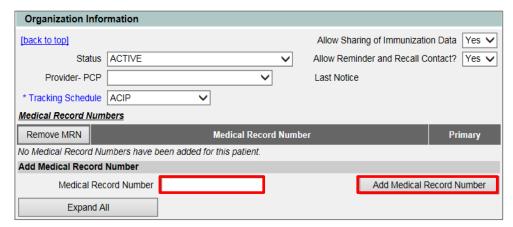


4. Once all patient personal information is entered, click "Save."

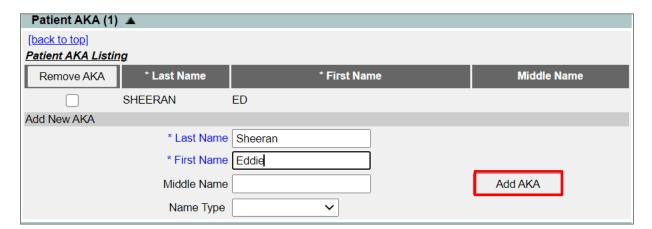
Optional Additional Steps*

Expand the following sections on the "Add Patient" page to complete:

Organization Information: Enter patient Medical Record Number if applicable. This will enable
patients to be searched by their respective medical record number. When complete, click "Add
Medical Record Number." Before moving to the next section, scroll up and click "Save."

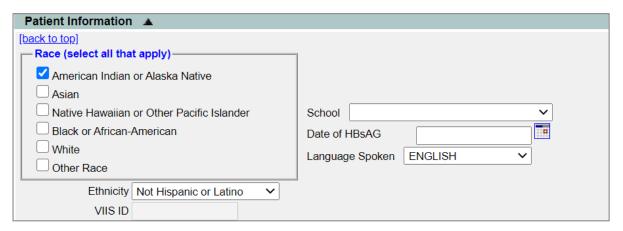


• **Patient AKA**: Enter patient nickname and/or alias if applicable (e.g., "Bill" for William). Click "Add AKA" each time you add a new one. Scroll up and click "Save" when complete.





• **Patient Information**: Enter patient's race and ethnicity. Scroll up and click **"Save"** when complete.

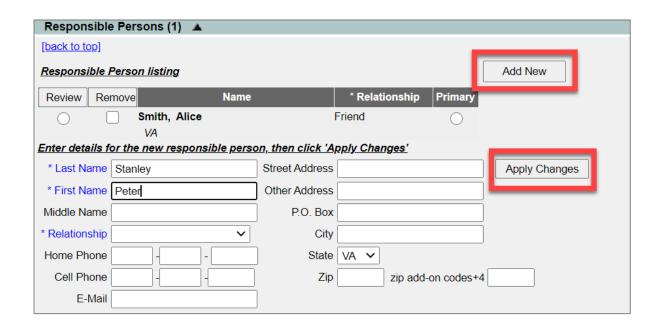


• Address Information: Enter patient's address, telephone number, cell phone number, and email address. Scroll up and click "Save" when complete.

Address Inform	mation 🛦			
[back to top]				
view Patient Addre	ess History			
Last Updated 04	<u>/06/2021</u>			
No Viable Addres	s 🗆			
Start Date	03/26/2021			
Street Address	12358 MAIN RD	Home Phone	666 - 666 - 6666	
Other Address		Cell Phone	555 - 555 - 5555	
P.O. Box		E-Mail	email@gmail.com	
Zip	23503 zip add-on codes+4			
City	HAMPTON State VA 🗸			
County	~			

Responsible Person(s): Add patient's primary point of contact(s). Click "Apply Changes" after
entering personnel information. If entering more than one responsible person, click the "Add
New" button to create a new entry for each new person. Scroll up and click "Save" when
complete.





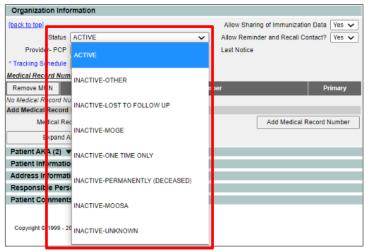
• **Patient Comments**: Add patient immunization-specific comments. All comments will be included in the patient's official immunization record. Click **"Add Comment"** to save each comment after it's been entered. Scroll up and click **"Save"** when complete.



Update Patient Record in VIIS

- 1. Follow the steps listed in **Search for Patients in VIIS.**
- 2. Once you've accessed the correct patient's record, you can update any patient information except for their VIIS ID. Be sure to click "Save" at the top of the page after changes are made.
- 3. If you wish to reactivate or deactivate a patient (i.e., change patient status):
 - a. On the patients record, go the section titled "Organization Information."
 - b. Click on the "Status" dropdown menu to change the active/inactive status of the patient.



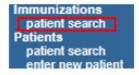


4. When updates are completed, click "Save."

Review Patient Immunization History

There are two ways to access the Patient's Immunization History:

- 1. "Patient Search" function under "Immunizations" (Recommended)
 - Once you've logged into VIIS and accessed your specific site's immunization registry, you will be redirected to a new page.

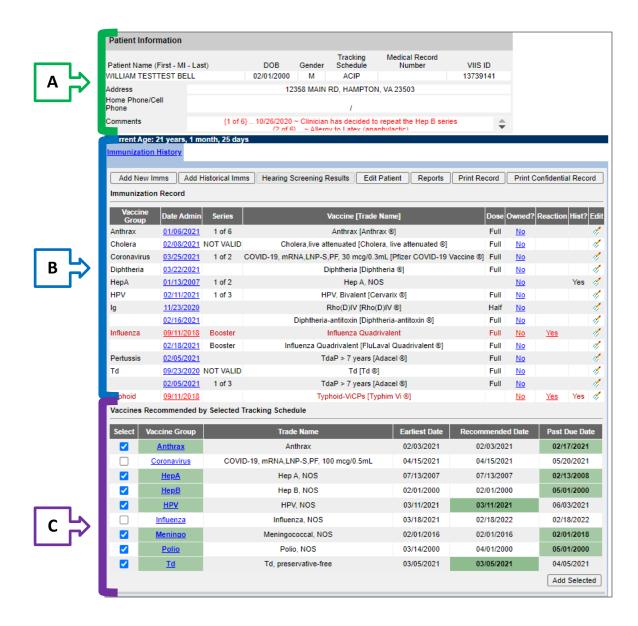


- ii. On the left-hand menu, under "Immunizations", select **"Patient Search."** This will redirect you to the "Patient Search Criteria" page.
- iii. Search for the specific patient (see **Search for Patients in VIIS** Steps 3-5).
- 2. "Patient Search" function under "Patients"
 - i. Follow the steps listed in **Search for Patients in VIIS.**
 - ii. Once you've clicked on the relevant patient's link, click "History/Recommend."

You will then be redirected to the "Patient Information Immunization History" page. On this page, you can view the following three sections:

- A. Patient Information (see section "Patient Information)
- B. Patient's immunization history (See section "Immunization Record")
- C. List of recommended vaccines and dates for immunizations to be administered based off the patient's age and history in VIIS (See section "Vaccines Recommended by Selected Tracking Schedule")



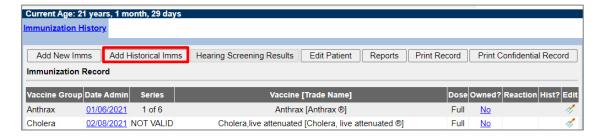


Add Historical Immunizations

Please note that historical immunizations are immunizations that are NOT currently in VIIS Inventory.

- 1. Follow steps listed in <u>Review Patient Immunization History</u>. If no patient record exists, first create a new patient record by following steps listed <u>Add a New Patient in VIIS</u>.
- 2. Under the section titled "Immunization History", click "Add Historical Imms."





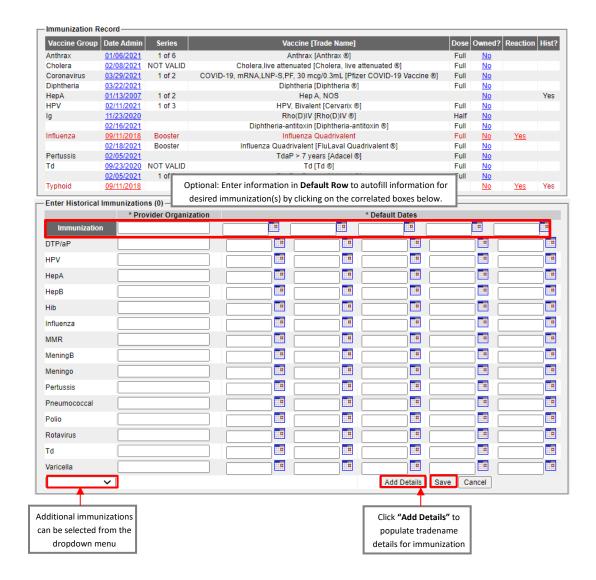
- 3. Add historical immunization by entering the **Provider Organization** and **Date(s) of Administration** by the selected vaccine(s) or in the "Default Row."
 - a. Hint: "Default Row" allows you to enter the information once in the top row that will then autofill the information for your desired immunizations by clicking in the correlated boxes below.
 - b. You can also enter information directly into the grid for the desired vaccine(s).
 - c. Refer to the dropdown menu to search for any immunizations not listed in the table.
 - d. For any historical immunizations where the Provider Organization is unknown, enter "Transcribed" in the "Provider Organization" field.

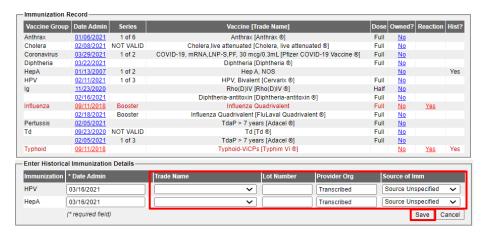
Optional*

To add tradename details (e.g., tradename, lot number) and source of immunization for vaccines, click "Add Details."

• Note: When adding a multi-dose vaccine, enter only one of the antigens. When you select the multi-dose Tradename, VIIS will automatically add the other antigens to the patient's record.





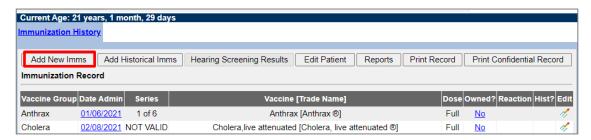


4. Once all historical immunizations are entered, click "Save."

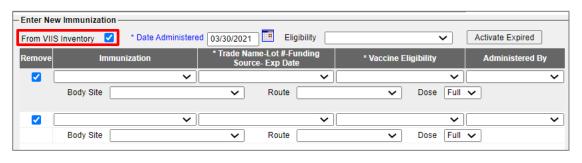


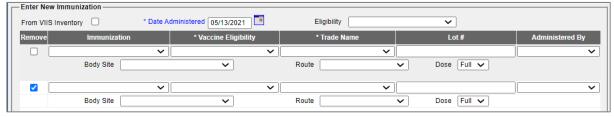
Add Active Immunizations

- 1. Follow steps listed in <u>Review Patient Immunization History</u>. If no patient record exists, first create a new patient record by following steps listed <u>Add a New Patient in VIIS</u>.
- 2. Under the section titled "Immunization History", click "Add New Imms" to display the "Enter New Immunization" page.



- 3. To add immunizations from your VIIS Inventory, check the "From VIIS Inventory" box.
 - a. Note: This will deduct the immunization from your vaccine inventory. If NOT using the VIIS Inventory feature, do not check the "From VIIS Inventory" box. In this case, you will be required to enter the Trade Name (Required) and Lot Number (Optional) separately.

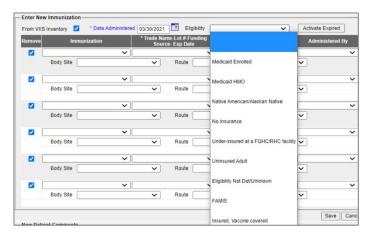




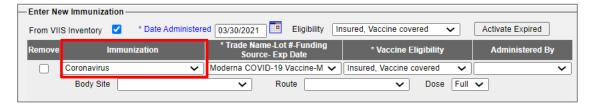
4. Enter the following information in the top section before entering any vaccines:



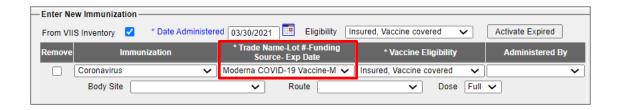
- Date Administered (Note: date will default to today's date unless changed, and only one date can be entered for Active Immunizations)
- Eligibility (Note: this refers to the client's insurance status, which is required for patients 18 years old or younger)



- 5. To add an Active Immunization, populate the following information:
 - a. **Immunization:** Click the "Immunization" dropdown menu to select an immunization from the list.
 - i. Note: Selecting an immunization will uncheck the "Remove" box.
 - ii. Note: When adding a multi-dose vaccine to a patient's record, only enter one of the antigens in the dose. When you click on the multi-dose Tradename, VIIS automatically knows to add the other antigens to the patient's immunization record.

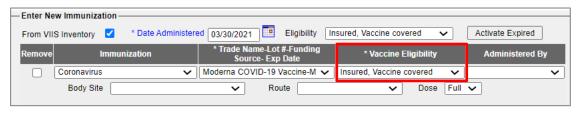


- b. **Trade Name-Lot #-Funding Source-Exp Date (*Required):** Click the "Trade Name-Lot #-Funding Source-Exp Date" dropdown menu to select appropriate trade name.
 - Note: If using vaccines from your VIIS inventory, trade names and lot numbers will be listed in the dropdown menu. If not, you will select the Trade Name from the dropdown menu and manually enter the Lot Number.
 - ii. Note: If you see 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.

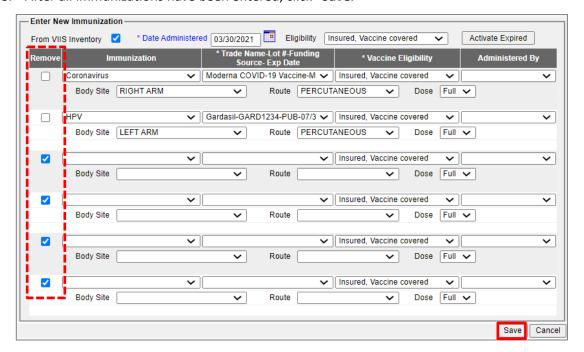




- c. Vaccine Eligibility (*Required for patients ages 18 and under): Click the "Vaccine Eligibility" dropdown menu to select the appropriate vaccine eligibility for each immunization.
 - i. Note: For Federally Funded vaccines, it is advised that you do NOT select option "Eligibility Not Det/Unknown" for CDC tracking purposes.



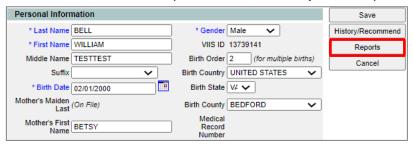
- d. **Administered By (Optional):** Click the "Administered By" dropdown menu to select the POC who did the administering (Note: VIIS Administrators can edit the POCs through "Manage Clinicians.")
- e. **Body Site (Optional):** Click the "Body Site" dropdown menu to select the location on the patient's body where the vaccine was administered (e.g. right arm).
- f. **Route (Optional):** Click the "Route" dropdown menu to select the vaccine administration route (e.g. intramuscular).
- g. **Dose:** The "Dose" dropdown menu automatically defaults to "Full." Click on the dropdown menu to change the dose as needed.
 - i. Note: Most doses are likely to be full, with the exception of child immunizations, which can be "half" doses.
 - ii. Note: Dosage size is based on the dosage entered in the inventory (e.g., In inventory, 0.5mL is classified as one (1) dose. Patients who receive 0.5mL should be identified as receiving a "Full" dose).
- 6. Repeat Step 5 for all Active Immunizations entered
- 7. To remove an immunization you listed, check the "Remove" box for that immunization.
- 8. After all immunizations have been entered, click "Save."





Print the Official Immunization Report

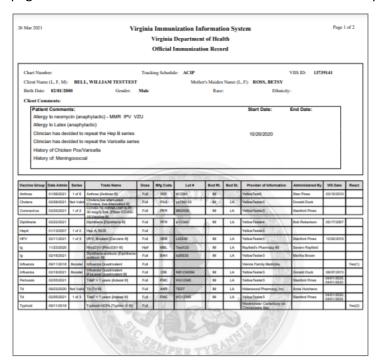
- Follow steps listed in <u>Search for Patients in VIIS</u>. If no patient record exists, first create a new patient record by following steps listed <u>Add a New Patient in VIIS</u>.
- 2. Once you've clicked on the relevant patient's link, click "Reports" to open the Reports page.



3. There are two reports listed on this page:

Report	Description	Additional Information
Official Immunization	Displays demographics and detailed immunization history. No address or contact information is displayed.	None
Immunizations Needed	Displays demographics, contact information, immunization history, as well as immunizations needed.	None

- a. **Official Immunization**: An official copy of the patient's immunization history.
 - i. Note: The official record can be identified by the state seal in the center of the page and the words "Official Immunization Record" at the top of the page.



b. **Immunizations Needed:** An unofficial report as well as a Reminder" report that serves as an unofficial copy of the patient's immunization history and includes a list of immunizations not yet received.



Chart Number: Client Name (L, F, M): BE Birth Date: 02/01/2000 Age: 21 years, 1 month, 25 of Name (L, F, M): BELL, WIL Address: 12358 MAIN RD City: HAMPTON Client Comments: Allergy to neomycin (anaphyl Allergy to Latex (anaphylactic Clinician has decided to repea Clinician has decided to repea History of Chicken Pox/Varie	Gen days LLIAM)	ir ipv vzu	Tracking Schedule: AC TEST Mother's M Race: Black State: VA	laiden Name (L, F):		ETSY ty: Hispan	: 13739141 iic or Latino	
Birth Date: 02/01/2000 Age: 21 years, 1 month, 25 or 1 years, 1 month, 25 or 1 years, 1 month, 25 or 1 years, 1 years, 1 years, 1 years, 21 years,	Gen days LLIAM)	ir ipv vzu	Race: Black	ZIP: 23503	Ethnici	ty: Hispan		
Age: 21 years, 1 month, 25 c Name (L, F, M): BELL, WIL Address: 12358 MAIN RD City: HAMPTON Client Comments: Allergy to neomycin (anaphyl Allergy to Latex (anaphylactic Clinician has decided to repea	days LLIAM	IR IPV VZU		ZIP: 23503		e:		
Name (L, F, M): BELL, WIL Address: 12358 MAIN RD City: HAMPTON Client Comments: Allergy to neomycin (anaphyl Allergy to Latex (anaphylactic Clinician has decided to repea	LLIAM presented the second of		State: VA		Phon		'o Date:	
Address: 12358 MAIN RD City: HAMPTON Client Comments: Allergy to neomycin (anaphyl Allergy to Latex (anaphylactic Clinician has decided to repea	rlactic) - MM		State: VA		Phon		o Date:	
				From Date: From Date: From Date: From Date:	10/26/2020) T	o Date: o Date: o Date: o Date:	
History of: Meningococcal				From Date:		Т	o Date:	
Ir	mmunizatio	on History		Tracking	Schedule:	ACIP		
Vaccine Group Dat	te Admin	Series	Trade Na	ame	Dose	Reaction	ı	
Anthrax 01	1/06/2021	1 of 6	Anthra	ix	Full			
Cholera 02	2/08/2021	Not Valid	Cholera,live a	ttenuated	Full			
Coronavirus 03	3/25/2021	1 of 2	COVID-19, mRNA,LN	P-S,PF, 30 mcg/0.	Full			
Diphtheria 03	3/22/2021		Diphthe		Full			

- 4. Click on the report hyperlink, which will automatically open a PDF version of the report that you can print from your computer.
- 5. After printing, the Signature Section needs to be completed by a physician or registered nurse as well as a Vaccination Station Staffer.

Frequently Asked Questions (FAQs)

I forgot my password, how do I reset it?

Follow the steps listed in <u>Forgot Password</u>. Please note that you must be an active user in order to utilize this feature. You can maintain Active status by logging into VIIS at least once every 60 days. If a Typical User's account becomes inactive, they will need to contact their site's VIIS Administrator(s) to reactivate their account and reset their password.

I cannot find a patient that I know exists in VIIS, how can I find that patient's profile?

It is likely that you need to use vaguer criteria when searching for the patient. Too much information at once can decrease the odds of finding the patient. Follow the steps listed in <u>Search for Patients in VIIS</u>. For Step #3, it is recommended that you start your search with just a few letters of the patient's first and last name (e.g., for John Smith, enter "Jo" for first name and "Sm" for last name).

I administered a vaccine to a patient from my site's VIIS inventory, how do I ensure any administered vaccines are subtracted from the inventory?

Follow the steps listed in Add Active Immunizations. You will see in Step 3 that you need to check the box labeled "From VIIS Inventory" when adding patient immunizations in order to deduct the immunization(s) administered from your vaccine inventory. Users assigned to the VIIS Administrator and



Inventory Control roles can also check by navigating to "Manage Inventory" and reviewing Inventory Reports.

How do I print a patient's Official Immunization Record?

Follow the steps listed in <u>Print the Official Immunization Report</u>. Once you've identified the correct patient profile, click "Reports" to access the report page. Be sure to click on the "Official Immunization" hyperlink to access the patient's Official Immunization Record. Clicking on the hyperlink will automatically open a PDF version of the report that you can print from your computer.

