VIIS User Guide

VIIS Administrator

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Introduction

The "VIIS User Guide: VIIS Administrator" is a simplified instructional for common tasks within VIIS for Administrators. The VIIS Administrator Role enables you to look up, modify, and print patient records, add inventory, and mange user accounts in VIIS. All sites must have at least a minimum of *one* VIIS Administrator who is responsible for the site's annual registration and maintenance of site's user accounts. If the current VIIS Administrator plans to change roles, leave the organization, or discontinue access to VIIS, please contact your regional VIIS consultant or VIIS helpdesk to set up a replacement administrator.

We recommend that any personnel who is **managing the site's organization and inventory information** (e.g., Office Manager) be assigned to the "VIIS Administrator" role.

If you are interested in or currently sending immunization data electronically to VIIS, be sure to complete a Memorandum of Agreement (MOA) during VERIP registration. MOAs must be updated if you switch Electronic Medical Record (EMR) platform.

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.

It is time to renew the Information System Security Access agreement and the User Confidentiality agreement for VIIS. Users are required to sign the agreement forms every 365 days. The following is the Information System Security Access agreement. Please read. Once completed, you will be automatically directed to the User Confidentiality agreement.

Information Systems Security Access Agreement

As a user of the Virginia Department of Health (VDH) information systems, I understand and agree to abide by VDH Security Policy and the following terms which govern my access to and use of the information and computer services of VDH.

Access has been granted to me by VDH as a necessary privilege in order to perform my authorized job functions for VDH. Passwords and logon IDs should not be shared. I am prohibited from using or knowingly permitting use of any assigned or entrusted access control mechanisms (such as Logon IDs, passwords, terminal IDs or file protection) for any purposes other than those required to perform my authorized employment functions. I agree to change passwords immediately if they are compromised. I will not incorporate passwords into any sign on software.

If, due to my authorized job functions, I require access to information on VDH information systems which are not owned by my organization, I must obtain authorized access to that information from the information owner and present access documentation to the data owner at VDH.

I will not disclose any confidential, restricted or sensitive data to unauthorized persons. I will not disclose information concerning any access control mechanism of which I have knowledge unless properly authorized to do so, and I will not use access mechanisms which have not been expressly assigned to me. I will not use VDH system(s) for commercial or partisan political purposes, such as using electronic mail to circulate advertising for products or for political candidates or issues.

I agree to abide by all applicable Federal, Commonwealth of Virginia, and VDH agency policies, procedures and standards which relate to the security of VDH information systems and the data contained therein.

If I observe incidents of non-compliance or data breech with the terms of this agreement, I am responsible for immediately reporting them to the management of VDH.

I give consent to the monitoring of my activities on the VDH information systems, and other systems accessed through VDH systems.

By signing this agreement, I hereby certify that I understand the preceding terms and provisions and that I accept the responsibility of adhering to the same. I further acknowledge that any infractions of this agreement will result in disciplinary action according to the State Employee Rules of Conduct, including but not limited to the termination of my access privileges.

Click the "I agree" button to abide by the terms of the Information System Security Access agreement. Once clicked, you will be directed to the User Confidentiality Agreement. If you do not agree to the terms of the Information System Security Access agreement, close your browser to exit VIIS. Users that don't agree to both access forms will not be able to enter VIIS.

[I Agree]

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.

It is time to renew the User Confidentiality agreement for VIIS. Please read. Once completed, click the "I agree" button.

VIIS Security Policy & User Confidentiality Agreement

The Code of Virginia, § 32.1-46.01 authorizes the Virginia Immunization Information System (VIIS), a statewide immunization information system that manages electronic immunization records. This policy states behavior required of VIIS users, Virginia Department of Health (VDH), and Division of Immunization (DOI) to protect the confidentiality, privacy and accuracy of client information. VIIS is consistent with the Department of Health and Human Services and the Health Insurance Portability and Accountability Act (HIPAA) of 1996.
Authorized users of VIIS will include:

- Health care provider or health plans
- Schools or other organizations that provide health care services
- Individuals or organizations as required by law or in the management of a public health crisis
- Other immunization registries

The review of this policy must involve the participation of representatives from the private and public health care sectors.

VDH/DOI Host Site Security:

- The system will force users to change their password every 90 days.
- The VIIS system will time-out after 30 minutes.
- The VIIS system will maintain an audit trail for all information accessed.
- VDH will conduct a self-assessment of the potential risks and areas of vulnerability regarding VIIS and will develop, implement, and maintain appropriate security measures on an ongoing basis.
- The release of immunization information shall be for statistical purposes or for studies that do not identify individuals.
- VDH/DOI will work with interested data exchange partners through Data Exchange steps outlined in MOA.

Provider/ User Security:

- Access to VIIS information is authorized under the condition that it is required to perform my job function to promote the provision of immunization services or other clinical care services.
- All VIIS users will be required to sign a Confidentiality/ Security Agreement with VDH.
- Each user must renew the user confidentiality/security agreement every year.
- Each user is responsible for maintaining confidentiality.
- The user has the obligation to act on any request by an individual to opt out of VIIS. If the patient elects to opt out, the provider should promptly mark the record in VIIS as "Do Not Share", so that only that provider may view the client's immunization records.
- The user will make a reasonable effort to ensure the accuracy of all immunization and demographic information entered or edited.
- Virus protection is recommended for each client site.
- User desktops/laptops must have physical security and password screen savers when not being used by authorized individuals.
- Users will terminate the VIIS application prior to leaving the VIIS workstation.
- An ID and Password are required to access VIIS.
- Users will not share or disclose their ID or Password to anyone.
- VIIS records will be treated with the same vigilance, confidentiality, and privacy as any other patient medical record.
- Participants in data exchange shall provide an acceptable level of data quality, such as correct data fields, data accuracy and enough information to correctly merge with existing clients. Upon initial data delivery, and periodically thereafter, data shall be reviewed to determine data quality. Any rejected records shall be resolved by the participant in a timely way. VDH may suspend system privileges and refer to Virginia Code § 32.1-27 for additional action for any organization that submits inaccurate data.
- Any inappropriate use of VIIS data shall result in immediate suspension of user privileges and result in an investigation conducted by VDH. Additional actions may be taken in accordance with Virginia Code § 32.1-27. The VIIS program manager may reinstate privileges upon satisfactory completion of required remedial actions and guarantee of proper use of VIIS in the future.

I have read and agree to the security policy and certify all user accounts in VIIS are in accordance with the above statements.

[I Agree]

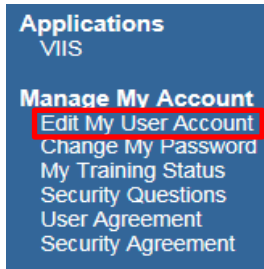8. You will be prompted to establish your security questions and answers. Once complete, click **"Submit."**

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.
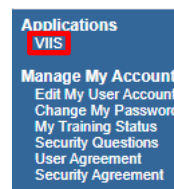

10. Populate the fields, then click "**Save.**"

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 typically is 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 VIIS Administrator account becomes inactive, please reach out the VIIS Help Desk to reactivate account and reset password.

1. On the VIIS login screen, click **"Forgot Password?"**
2. Enter your VIIS **Org Code, Username,** and **Email Address.**
3. 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."

> Please enter your Org Code, Username, and Email address
> associated with your VIIS account and click 'Submit'
>
> Org Code:
> Username:
> Email Address:
>
> Submit

4. You should receive an email from VIIS_HelpDesk@vdh.virginia.gov 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.

> A request has been submitted to change your VIIS password. Please follow the link below to reset your password. This link
> will be available for 24 hours.
>
> https://viis.vdh.virginia.gov/VIIS/securityChallenge.do?token=15992b1023bd0e12a33e047226cf8159d7389dbee97e503b2bbb2a115e92cbb1
>
> **If you did not initiate this request, please contact the VIIS Help Desk.**
>
> VIIS Help Desk | (866) 375-9795 | viis_helpdesk@vdh.virginia.gov

6. 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.

> Please provide the answer to your security question.
>
> What is your Fathers middle name??
>
> Submit

7. Once you've successfully answered a security question, the "Change Password" screen will display.
    a. Enter a new password into the **"New Password"** field.
    b. Re-enter the password into the **"Confirm New Password"** field.
    c. Click **"Save."**

> **Change Password**
>
> User Minnie Mouse
> Username mmouse
>
> * New Password
> * Confirm New Password
>
> Save
> Cancel

8. You will then be redirected to the VIIS homepage.

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."**
3. You will be redirected to a page that will state "Validation Errors: Your password has expired. Please update before continuing."

> **Validation Errors**
> • Your password has expired. Please update before continuing.
>
> **Change Password**
>
> User Lucky Charms
> Username lcharms
> * New Password
> * Confirm New Password
>
> Save
> Cancel

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

Add User Accounts

1. Log into VIIS.
2. Go to the menu bar at the top of the page and click "**Manage Access/Account**" tab.
3. On the left-hand menu, under "Manage Access," click "**Add Multiple Users**" to add one or more users.
   a. Note: Using the "Add Multiple Users" option offers multiple benefits:
      i. Streamlined entry system for creating a new account.
      ii. Provides list of all current and previous users for your site.
4. Fill in the user's **Last Name, First Name, User Name, Password,** and choose their **Role.**
   a. User Name: VDH recommends that usernames follow the format of first initial and last name in *lower-case letters* (e.g., Jennifer Smith's username is jsmith).
      i. Note: If another user in your organization already exists with this username, create the new user name using the middle initial (instead of first initial) and last name.
   b. Password: You can assign any temporary password (minimum of 5 characters) as the user will prompted to reset the first time they log into VIIS.
   c. Role Descriptions:
      i. **Administrator:** User can look up, modify, and print patient records, add inventory, and mange user accounts in VIIS.
      ii. **Inventory Control:** User can look up, modify, and print patient records, and add inventory. They cannot manage user accounts in VIIS.
      iii. **Client Reports Only:** User can look up and print patient records. They cannot modify patient records.
      iv. **Typical User:** User can look up, modify, and print patient records. They cannot directly modify inventory nor add and/or modify user accounts in VIIS.
      v. **School User:** *To be used by school personnel only.* User can look up, modify, and print patient records. Additionally, they can create reports for students of a particular cohort.They cannot directly modify inventory nor add and/or modify user accounts in VIIS.
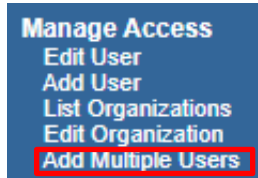
Add Multiple Users

Application:	VIIS
Organization:	123 Pediatrics

Refresh

Select Add between each user you want to add.
Once you change application or organization, a new list starts.

Last Name	First Name	User Name	Password	Role	Add User
				▾	Add

5. Once user information is inputted, click **"Add."**
6. Repeat Steps 4 & 5 for any additional users.

Search User Account

1. Log into VIIS.
2. Go to the menu bar at the top of the page and click **"Manage Access/Account"** tab.
3. On the left-hand menu, under "Manage Access," click **"Edit User"** to edit a user's access.
4. Search for the user in VIIS.
   a. Hint: Select **Active**, **Disabled** and **Terminated** boxes and click **"Find."** This will display all users for your site.

Manage Access
Edit User
Add User
List Organizations
Edit Organization
Add Multiple Users

Edit User - Search

Application: VIIS
Organization: 123 Pediatrics

Find
Refresh

Status   Active ☑   Disabled ☑   Terminated ☑

Last Name [   ]   First Name [   ]

To get a complete list of users, leave both fields blank and click the find button.

Search Results

Last Name	First Name	MI	User Name
Jones	Jenny		jjones
Jones	Johnny		jjones123
Patel	Vimal		vpatel
Smith	John		jsmith

5. Click on the hyperlink in the user's last name to access their user account.

Reset User Passwords

1. Follow steps listed in **Search User Account.**
2. Under the "Edit User" tab, reset password by typing a temporary password into "New Password" and "Confirm New Password" fields.

3. Click **"Save."**

Edit User Access

1. Follow steps listed in **Search User Account.**
2. Click on the "Modify Access" tab.
3. Check the box under the "Select" column for the role you want to modify.
4. Click on the **"Select"** button above the table.

5. Scroll up and change either the **Role** and/or **Status** (e.g., Active or Disabled) of the role.
6. Click on **"Update"** and then **"Save."**

Add Inventory

1. Log into VIIS.
2. On the left-hand menu, under "Inventory", click **"Mange Inventory."**
3. Click **"Show Inventory"** at the top right corner.

4. Click "**Add Inventory**" at the top right corner.
   a. Note: Once you have been using Inventory in VIIS, always check **"All Inv"** before adding new lots to avoid duplications. See **Modify Existing Inventory** for details.

5. Fill out all required fields for vaccine inventory (in blue font), then click **"Save."**
   a. **Trade Name**: Choose the vaccine to add from the drop-down menu.
   b. **Manufacturer**: This will be automatically pre-populated.
   c. **Funding Program**: Public Funding is for Federally funded vaccines (e.g., Coronavirus Vaccine) whereas Private Funding is for all other vaccines.

Modify Existing Inventory

1. Log into VIIS.
2. On the left-hand menu, under "Inventory," click **"Mange Inventory."**
3. Click **"Show Inventory"** at the top right corner.

4. Check the **"All Inv"** button in the section titled "Show."
   a. Note: You <u>always</u> want to check **"All Inv"** before adding new lots to avoid duplications.

5. If the lot number(s) you want to modify to your inventory is/are already listed and the Trade Name and Expiration Date match, check the box(es) under **"Select"** on the row(s) corresponding to the appropriate Lot Number(s).
   a. Hint: To avoid manually searching for the lot number, press **CTRL-F** on your keyboard to utilize the shortcut for finding works or phrases. Type in the lot number you wish to modify, and your web browser will highlight it on the page if there is a match.

6. Click **"Modify Quantity"** at the top right.

7. Under "Modify Quantity on Hand for Selected Site(s)," select the **Action**, the **Amount** of Doses you are modifying, and the **Reason** for modification.

Manage Inventory					
Save Changes to Quantity On Hand for Selected Sites....					Save
Return to the Previous Screen....					Cancel

Modify Quantity On Hand for Selected Site(s)					
Trade Name	Lot Number	Inv On Hand	Action	Amount	Reason
Adacel	U5378AA	20	Add ▾		Receipt of Inventory ▾
Gardasil 9	M018810	29	Add ▾		Receipt of Inventory ▾

   a. Note: Only use reason "Error Correction" for subtracting vaccines if no other option applies. Do NOT use "Error Correction" for adding to a lot number.

   b. Note: For the scenario in which your site receives multi-dose vials and need to add to your inventory additional doses in vials, please select reason "Other" and then enter "Additional Doses in Vials."

8. Click **"Save"** on the top right corner.

Modify Existing Inventory: Reactivate Inventory

For new inventory with the same Lot Number as an existing inventory in VIIS that has expired *(note: when an existing Lot Number Inventory drops down to 0, VIIS will automatically flag this lot as expired), you will need to reactivate the Inventory Lot in order to add additional inventory.*

1. Log into VIIS.
2. On the left-hand menu, under "Inventory", click **"Mange Inventory."**
3. Click **"Show Inventory,"** found at the top right corner.

Inventory
manage inventory
manage transfers
doses administered
transaction summary
inventory count list

Manage Inventory	
Show Inventory for Sites....	Show Inventory
Show Transactions for Sites....	Show Transactions
Update inventory Alerts....	Update Alert Prefs
Return to the Previous Screen....	Cancel

4. Under "Funding Source," identify the **Lot Number** of the inactive inventory (identified as "N" under the column titled "Active") that you wish to reactivate, then click on the corresponding immunization Trade Name's hyperlink.

Funding Source:	ALL ˅		Show ◉ Active ◯ Inactive w/Qnty ◯ Depleted Inv ◯ All Inv ◯ Expired					
Select	**Trade Name**	**Public**	**Lot Number**	**Packaging**	**NDC**	**Inv On Hand**	**Active**	**Exp Date**
☐	ActHib	Y	dg6789			50	Y	11/30/2021
☐	ActHib	N	pl456789			0	N	09/30/2021
☐	Adacel	N	HG12345			0	N	12/28/2021
☐	Afluria Quadrivalent	N	NH524635			0	N	07/31/2021
☐	Boostrix	N	NG12458			0	N	07/31/2021
☐	Cholera, live attenuated	Y	po789125			0	N	07/31/2021
☐	Engerix-B Adult	N	tr54231			0	N	09/30/2021

5.   Update the **Expiration Date** and **Lot Active** to reflect active status.

6.   Click **"Save."**

Optional Inventory Feature: Add Clinicians

*Adding clinicians allows you to select the clinician(s) name when adding active vaccines to the patient's chart (see **Add Active Immunizations**).*

1.   Log into VIIS.
2.   On the left-hand menu, under "Maintenance", click **"Mange Clinicians."**
3.   Select your site from the "Site List" dropdown menu and select "**Add Clinician.**"

4.   Under "Add Clinician Information," complete the following steps:

a. Select **Role** of the Clinician
    i. *Clinician*: Those that administer vaccines.
    ii. *Ordering Authority*: Those that order the vaccine be administered.
    iii. *Ordering Authority/Clinician*: Both orders and administers vaccines.
b. **Last & First Name**
c. **Suffix** (MD, RN, etc.)
d. Select your site and click **"Add>"** (or, if adding all sites, click **"Add All>>"**). This will move your site(s) to the right column.
e. Click **"Save."**

5. To add another Clinician, click **"Cancel"** to return to the previous page and repeat Steps #3-4.

Optional Inventory Feature: Set Up Inventory Alerts

"Inventory Alerts" are automatic notifications for when certain vaccines are running low are about to expire. VIIS default settings are 30 days from expiration and 5 doses for low level alerts. These alerts can be customized to your preferences.

1. Log into VIIS.
2. On the left-hand menu, under "Inventory," click **"Mange Inventory."**
3. Click **"Update Alert Prefs"** on the right-hand side.

4. Complete the following fields:
   a. **Inventory Expiration Alerts:** Enter the number of days from the lot expiration date that you wish to be notified.
   b. **Update Low-Level Alert Details:** You can designate whether you wish to be notified of low-level doses by the vaccine name (e.g., COVID) or the vaccine's trade name (e.g., Moderna) by selecting **"Vaccine Group"** or **"Trade Name."** You can also modify the number of doses that your site interprets to be low-level.
   c. **Update Low-Level Alerts by Vaccine Group/Trade Name**: Based on what you select in "Update Low-Level Alert Details," you can designate whether you wish to receive Low-Level Alerts for ALL Vaccine Groups/Trade Names or only for specific vaccines groups or trade names. If you wish to do the latter, please populate the boxes under "Combined," "Public" and/or "Private" with the number of doses that Vaccine Group or Trade Name must reach before alerting.

5. Update your preferences accordingly and click **"Save."**

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.
   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.
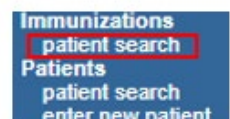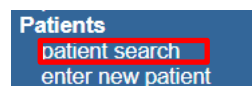
3. On the "Patient Search Criteria" page, it is recommended that you search for the specific patient's immunization record using their Medical Record Number, or a combination of last name, first name, and date of birth.
    a. Note: At least <u>two</u> fields are required when conducting a search using 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:

i. *"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.

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.

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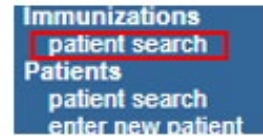
You will then be redirected to the "Patient Information Immunization History" page. On this page, you can view the following three sections:

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")

Patient Information

Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Medical Record Number	VIIS ID
WILLIAM TESTTEST BELL	02/01/2000	M	ACIP		13739141

Address	12358 MAIN RD, HAMPTON, VA 23503
Home Phone/Cell Phone	/
Comments	{1 of 6} .. 10/26/2020 ~ Clinician has decided to repeat the Hep B series {2 of 6} ~ Allergy to Latex (anaphylactic)

rrent Age: 21 years, 1 month, 25 days

Immunization History

| Add New Imms | Add Historical Imms | Hearing Screening Results | Edit Patient | Reports | Print Record | Print Confidential Record |

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
Anthrax	01/06/2021	1 of 6	Anthrax [Anthrax ®]	Full	No			✎
Cholera	02/08/2021	NOT VALID	Cholera,live attenuated [Cholera, live attenuated ®]	Full	No			✎
Coronavirus	03/25/2021	1 of 2	COVID-19, mRNA,LNP-S,PF, 30 mcg/0.3mL [Pfizer COVID-19 Vaccine ®]	Full	No			✎
Diphtheria	03/22/2021		Diphtheria [Diphtheria ®]	Full	No			✎
HepA	01/13/2007	1 of 2	Hep A, NOS		No		Yes	✎
HPV	02/11/2021	1 of 3	HPV, Bivalent [Cervarix ®]	Full	No			✎
Ig	11/23/2020		Rho(D)IV [Rho(D)IV ®]	Half	No			✎
	02/16/2021		Diphtheria-antitoxin [Diphtheria-antitoxin ®]	Full	No			✎
Influenza	09/11/2018	Booster	Influenza Quadrivalent	Full	No	Yes		✎
	02/18/2021	Booster	Influenza Quadrivalent [FluLaval Quadrivalent ®]	Full	No			✎
Pertussis	02/05/2021		TdaP > 7 years [Adacel ®]	Full	No			✎
Td	09/23/2020	NOT VALID	Td [Td ®]	Full	No			✎
	02/05/2021	1 of 3	TdaP > 7 years [Adacel ®]	Full	No			✎
phoid	09/11/2018		Typhoid-ViCPs [Typhim Vi ®]		No	Yes	Yes	✎

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Trade Name	Earliest Date	Recommended Date	Past Due Date
☑	Anthrax	Anthrax	02/03/2021	02/03/2021	02/17/2021
☐	Coronavirus	COVID-19, mRNA,LNP-S,PF, 100 mcg/0.5mL	04/15/2021	04/15/2021	05/20/2021
☑	HepA	Hep A, NOS	07/13/2007	07/13/2007	02/13/2008
☑	HepB	Hep B, NOS	02/01/2000	02/01/2000	05/01/2000
☑	HPV	HPV, NOS	03/11/2021	03/11/2021	06/03/2021
☐	Influenza	Influenza, NOS	03/18/2021	02/18/2022	02/18/2022
☑	Meningo	Meningococcal, NOS	02/01/2016	02/01/2016	02/01/2018
☑	Polio	Polio, NOS	03/14/2000	04/01/2000	05/01/2000
☑	Td	Td, preservative-free	03/05/2021	03/05/2021	04/05/2021

| Add Selected |

A

B

C

Add Historical Immunizations

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

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

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
Anthrax	01/06/2021	1 of 6	Anthrax [Anthrax ®]	Full	No			
Cholera	02/08/2021	NOT VALID	Cholera,live attenuated [Cholera, live attenuated ®]	Full	No			

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.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?
Anthrax	01/06/2021	1 of 6	Anthrax [Anthrax ®]	Full	No		
Cholera	02/08/2021	NOT VALID	Cholera,live attenuated [Cholera, live attenuated ®]	Full	No		
Coronavirus	03/29/2021	1 of 2	COVID-19, mRNA,LNP-S,PF, 30 mcg/0.3mL [Pfizer COVID-19 Vaccine ®]	Full	No		
Diphtheria	03/22/2021		Diphtheria [Diphtheria ®]	Full	No		
HepA	01/13/2007	1 of 2	Hep A, NOS		No		Yes
HPV	02/11/2021	1 of 3	HPV, Bivalent [Cervarix ®]	Full	No		
Ig	11/23/2020		Rho(D)IV [Rho(D)IV ®]	Half	No		
	02/16/2021		Diphtheria-antitoxin [Diphtheria-antitoxin ®]	Full	No		
Influenza	09/11/2018	Booster	Influenza Quadrivalent	Full	No	Yes	
	02/18/2021	Booster	Influenza Quadrivalent [FluLaval Quadrivalent ®]	Full	No		
Pertussis	02/05/2021		TdaP > 7 years [Adacel ®]	Full	No		
Td	09/23/2020	NOT VALID	Td [Td ®]	Full	No		
	02/05/2021	1 of		Full	No		
Typhoid	09/11/2018				No	Yes	Yes

Optional: Enter information in **Default Row** to autofill information for desired immunization(s) by clicking on the correlated boxes below.

Enter Historical Immunizations (0)

	* Provider Organization				* Default Dates					
Immunization										
DTP/aP										
HPV										
HepA										
HepB										
Hib										
Influenza										
MMR										
MeningB										
Meningo										
Pertussis										
Pneumococcal										
Polio										
Rotavirus										
Td										
Varicella										

Add Details | Save | Cancel

Additional immunizations can be selected from the dropdown menu

Click **"Add Details"** to populate tradename details for immunization

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?
Anthrax	01/06/2021	1 of 6	Anthrax [Anthrax ®]	Full	No		
Cholera	02/08/2021	NOT VALID	Cholera,live attenuated [Cholera, live attenuated ®]	Full	No		
Coronavirus	03/29/2021	1 of 2	COVID-19, mRNA,LNP-S,PF, 30 mcg/0.3mL [Pfizer COVID-19 Vaccine ®]	Full	No		
Diphtheria	03/22/2021		Diphtheria [Diphtheria ®]	Full	No		
HepA	01/13/2007	1 of 2	Hep A, NOS		No		Yes
HPV	02/11/2021	1 of 3	HPV, Bivalent [Cervarix ®]	Full	No		
Ig	11/23/2020		Rho(D)IV [Rho(D)IV ®]	Half	No		
	02/16/2021		Diphtheria-antitoxin [Diphtheria-antitoxin ®]	Full	No		
Influenza	09/11/2018	Booster	Influenza Quadrivalent	Full	No	Yes	
	02/18/2021	Booster	Influenza Quadrivalent [FluLaval Quadrivalent ®]	Full	No		
Pertussis	02/05/2021		TdaP > 7 years [Adacel ®]	Full	No		
Td	09/23/2020	NOT VALID	Td [Td ®]	Full	No		
	02/05/2021	1 of 3	TdaP > 7 years [Adacel ®]	Full	No		
Typhoid	09/11/2018		Typhoid-ViCPs [Typhim Vi ®]		No	Yes	Yes

Enter Historical Immunization Details

Immunization	* Date Admin	Trade Name	Lot Number	Provider Org	Source of Imm
HPV	03/16/2021			Transcribed	Source Unspecified
HepA	03/16/2021			Transcribed	Source Unspecified

(* required field)

Save | Cancel

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

Add Active Immunizations

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

Current Age: 21 years, 1 month, 29 days									
Immunization History									

Add New Imms	Add Historical Imms	Hearing Screening Results		Edit Patient	Reports	Print Record		Print Confidential Record	
Immunization Record									

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
Anthrax	01/06/2021	1 of 6	Anthrax [Anthrax ®]	Full	No			✎
Cholera	02/08/2021	NOT VALID	Cholera,live attenuated [Cholera, live attenuated ®]	Full	No			✎

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.

— Enter New Immunization —

From VIIS Inventory ☑	* Date Administered 03/30/2021 📅	Eligibility ▼		Activate Expired

Remove	Immunization	* Trade Name-Lot #-Funding Source- Exp Date	* Vaccine Eligibility	Administered By
☑	▼	▼	▼	▼
	Body Site ▼	Route ▼	Dose Full ▼	
☑	▼	▼	▼	▼
	Body Site ▼	Route ▼	Dose Full ▼	

— Enter New Immunization —

From VIIS Inventory ☐	* Date Administered 05/13/2021 📅	Eligibility ▼	

Remove	Immunization	* Vaccine Eligibility	* Trade Name	Lot #	Administered By
☐	▼	▼	▼		▼
	Body Site ▼	Route ▼	Dose Full ▼		
☑	▼	▼	▼		▼
	Body Site ▼	Route ▼	Dose Full ▼		

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

a. **Date Administered** (Note: date will default to today's date unless changed, and only one date can be entered for Active Immunizations)

b. **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.
      i. 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

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

Personal Information		
* Last Name BELL	* Gender Male ⌄	Save
* First Name WILLIAM	VIIS ID 13739141	History/Recommend
Middle Name TESTTEST	Birth Order 2 (for multiple births)	**Reports**
Suffix ⌄	Birth Country UNITED STATES ⌄	Cancel
* Birth Date 02/01/2000 📅	Birth State VA ⌄	
Mother's Maiden Last (On File)	Birth County BEDFORD ⌄	
Mother's First Name BETSY	Medical Record Number	

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.

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.

Run the Ad Hoc Eligibility Report

The Ad Hoc Eligibility Report is used to compile specific clients, based on age and/or vaccine administration dates. Only active clients that received new immunizations or have had historical immunizations entered by the organization running the report will appear. Additionally, only immunizations belonging to the organization running the report will be displayed. Please note that this report can only be run by VIIS Administrator and Inventory Control Users.

1. Log into VIIS.
2. On the left-hand menu, under "Reports", click **"Ad Hoc Eligibility Report."**
3. At the top of the page, populate the **From** and **To** dates for either birth dates and/or vaccine dates.
   a. Note: While both the Birth Date and Vaccine Date Range functions can be used, at least one Range must be completed.

4. In the "Select by Vaccine Administration Type" section, check the box for **"Administered Vaccines"** and/or **"Historical Vaccines."**

5. In the "Select by Vaccine Group(s)…" section, you can either select **"Use All Vaccine Groups"** to pull a report of all administered and/or historical vaccines within the designated range, or select **"Use Vaccine Groups Selected"** to pull a report of administered and/or historical vaccines of a specific vaccine.
    a. For the "Use Vaccine Groups Selected" option, you will need to select the specific vaccine and click **"Add>"**. This will move the vaccine to the right column. Repeat for all vaccines you wish you view in the report.

6. Click **"Generate."**
7. On the "Ad Hoc Eligibility Report Status" page, the status will show as "Processing." Click **"Refresh"** until the status shows as "Done."

8. Once the report is complete, the status will show as "Done" and the report will show as a hyperlink. Click on the hyperlink to view report.

9. To export the report, you can do one of the following:
    a. Click **"Export as Text"** to open a new window that will show the report in text format.
    b. Click **"Export as a Spreadsheet"** to download the report in spreadsheet format.
    c. Click **"Print"** to open a new window that will show the report in print view.

Ad Hoc Eligibility Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet   Print

Run the Doses Administered Report

The Doses Administered Report is used to compile a list of all vaccines administered by the site within a certain time frame, including the patients who received the vaccines. The report also provides a patient demographic overview for each vaccine, showing how many individuals in each age group received the vaccine within the designated timeframe. Please note that this report can only be run by VIIS Administrator and Inventory Control Users.

1. Log into VIIS
2. On the left-hand menu, under "Inventory," click **"Doses Administered."**
3. On the "Doses Administered Report Criteria" page:
    a. Keep **"Funding Source"** set to **"All."**
    b. Populate the **From** and **To** fields with the date range you wish to pull report for.
    c. Click **"Generate Report."**

Inventory
manage inventory
manage transfers
doses administered
transaction summary
inventory count list

Doses Administered Report Criteria

Funding Source: | All   ▾ | Generate Report

Report Date Range:

* From [▦]   * To [▦]

4. The generated report will open in a new window that you can then download or print. The report will a table at the top with patient demographic information for each vaccine administered.

Date Report Generated: 03/30/2021
Report Title: Doses Administered
Filters: Virginia Department of Health
Detail of Summary: Detail
Date Range: 03/01/2021 to 03/30/2021
Funding Source: All

Vaccine	Age Group (months)					Unique Clients
	<1	1 to 6	7 to 18	19+		
HPV	0	0	0	1		1
Pertussis	0	0	1	0		1
Td	0	0	1	0		1
					Total	3
	0	0	2	1	3	3	Unique Client Total

Date Administered	Vaccine Group	VIIS ID	Patient Name	DOB	Lot#	Expiration	Trade Name	Funding Source	Patient Eligibility
03/05/2021	Pertussis	14406412	Testy Tester	01/12/2012	abc111	08/31/2021	Boostrix	Private	V01 - Insured, Vaccine covered
03/05/2021	Td	14406412	Testy Tester	01/12/2012	abc111	08/31/2021	Boostrix	Private	V01 - Insured, Vaccine covered
03/06/2021	HPV	14033412	Melissa Berry	01/01/1960	GARD1234	07/31/2025	Gardasil	Public	

Frequently Asked Questions (FAQs)

I forgot my password, how do I reset it?

Follow the steps listed in **Forgot Password**. 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 **Search for Patients in VIIS**. 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.

I'm trying to add inventory to existing lot but it's showing as inactive, how do I reactivate it?

Follow the steps listed in **Modify Existing Inventory: Reactivate Inventory** to reactivate an existing lot so that you can then add to that lot's inventory.

How can I see all vaccines administered at my site within a certain time frame?

There are two reports you can run. The Ad Hoc Eligibility Report will show a list of clients that received a specific vaccine within a designated time frame or age group. Follow the steps listed in **Run the Ad Hoc Eligibility Report** to access this report. The Doses Administered Report will show a list of all vaccines administered by the site and their corresponding patients within a designated time frame. Follow the steps listed in the **Run the Doses Administered Report** to access this report.

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

Follow the steps listed in **Print the Official Immunization Report.** 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.