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Introduction
The “VIIS User Guide: VIIS Inventory Control” is a simplified instructional for common tasks within VIIS for users assigned to the Inventory Control Role. The VIIS Inventory Control Role enables you to look up, modify, and print patient records, and add and edit inventory. Inventory Control Users cannot manage user accounts in VIIS.

It is recommended that any personnel who needs full VIIS access but will be managing only the site's inventory information (e.g., add and edit vaccine inventory in VIIS), be assigned to the Inventory Control role. If they wish to manage the site's user accounts as well, they should be assigned to the VIIS Administrator 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 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.”

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.

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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=19962b10233e01e12a33e0f722b8159d738dbee97e503b2862a11e52db1

If you did not initiate this request, please contact the VIIS Help Desk.
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.

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.”

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.”
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 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 “Manage Inventory.”
3. Click “Show Inventory” at the top right corner.
4. Check the “All Inv” button in the section titled “Show.”
   a. Note: You always 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.
   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” at the top right corner.

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.

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

6. Click “Save.”

Optional Inventory Feature: Set Up Inventory Alerts

“Inventory Alerts” are automatic notifications for when certain vaccines are running low or 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 “Manage Inventory.”
3. Click “Update AlertPrefs” 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 two 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.

  ![Patient Information](image)

- **Address Information**: Enter patient’s address, telephone number, cell phone number, and email address. Scroll up and click “Save” when complete.

  ![Address Information](image)

- **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.

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**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”)
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.”
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 **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.

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:
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.

![Image of vaccine administration form]

- **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.”)
- **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).
- **Route (Optional):** Click the “Route” dropdown menu to select the vaccine administration route (e.g. intramuscular).
- **Dose:** The “Dose” dropdown menu automatically defaults to “Full.” Click on the dropdown menu to change the dose as needed.
  - Note: Most doses are likely to be full, with the exception of child immunizations, which can be “half” doses.
  - 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.

3. There are two reports listed on this page:

   ![Personal Information](image)

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Immunization</td>
<td>Displays demographics and detailed immunization history. No address or contact information is displayed.</td>
<td>None</td>
</tr>
<tr>
<td>Immunizations Needed</td>
<td>Displays demographics, contact information, immunization history, as well as immunizations needed.</td>
<td>None</td>
</tr>
</tbody>
</table>

   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.

   ![Official Immunization Report](image)

   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.

   ![Immunizations Needed Report](image)
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 to view in the report.

2. Click “Generate.”

3. On the “Ad Hoc Eligibility Report Status” page, the status will show as “Processing.” Click “Refresh” until the status shows as “Done.”

4. 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.

5. 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.
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?

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.

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.