IIS System Administrator

What is an IIS System Administrator?

A system administrator is an IIS user who is typically a lead or manager in an organization or facility. This person is able to set up, edit, and inactivate IIS accounts for other users in their organization or facility and run user reports.

How Can I Become an IIS System Administrator?

System Administration is a permission that can be added to IIS user accounts. You may want to check with your organization or a clinic manager to see if this is an appropriate permission for your role. If you would like to become a System Administrator, you can contact the Help Desk to add this permission to your user account.

> 💡 **Tip:** The Help Desk refers users to their System Administrator to set up new user accounts when an organization/facility has a person in this role. This provides an extra level of security to the IIS because the System Administrator can verify employment.

Information in this Guide

Click the links below to jump to a specific section:

- **IIS User Accounts**
- **User Account Permissions**
- **Setting up User Accounts**
- **Updating User Accounts**
- **Inactivating User Accounts**
- **Reactivating User Accounts**
- **Inactivating Multiple Users**
- **Running User Reports**

IIS User Accounts

There are two primary user access levels and types.

Account Access Levels

1. **Organization Level** gives users access to a whole organization and any associated facilities. This account type is best for people who float between or assist users in multiple facilities.
2. **Facility Level** gives users access to one facility. This type of account is best for people who only work in one clinic.

Account Types

1. **Client Accounts** are able to add and edit patient demographics and vaccinations in the IIS.
2. **View Accounts** can only view patient records and reports in the IIS. They cannot add or edit information.

> ## What type of user account should I set up?
> User needs to view and edit records for multiple facilities under the same organization.
> **Answer: Organization Client**

User Account Permissions
You can add various permissions that give users access to different tools in the IIS. Here are the recommended permissions for the most common user types.

Recommended for staff who lookup vaccine records
- **Access Level:** Organization or Facility View
- **Permissions:**
    - **UFM Access:** Lets users schedule reports.

> **Tip:** Users do not need any permissions on their user account to search for patients and view immunizations.

Recommended for staff who lookup & add vaccines to patient records
- **Access Level:** Organization or Facility Client
- **Permissions:**
    - **Run Reminder/Recall:** Lets users run reports showing their patients who are due or overdue for vaccines.
    - **UFM Access:** Lets users schedule reports.

Recommended for primary & backup vaccine coordinators (clinic immunization leads)
- **Access Level:** Organization or Facility Client
- **Permissions:**
    - **Inactivate patients:** Lets users inactivate patients who are no longer being seen at their clinic.
    - **Lot Number Manager Access & Lot Number Manager Edit:** Gives users access to the **Lot Numbers** menu. Lets users manage their vaccine inventory and submit monthly Childhood Vaccine Program (CVP) reports.
    - **Provider Ordering:** Gives users access to the **Orders/Transfers** menu. Lets users order and receive publicly supplied vaccines and complete their Provider Agreement.
    - **Run Reminder/Recall & Manage Reminder/Recall:** It's best to give users the **Manage Reminder/Recall** permission if they oversee reminder/recall activities for their organization or facility.
    - **UFM Access:** Lets users schedule reports.

Other Useful Permissions
- **System Administration:** Lets users manage user accounts for their organization or facility.
- **Physician Administration:** Lets users manage physicians and vaccinators in the IIS for their organization or facility.

Avoid giving these permissions to users:

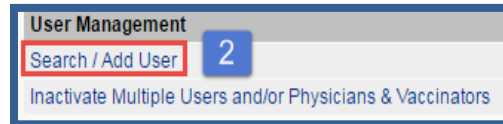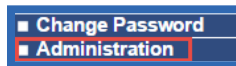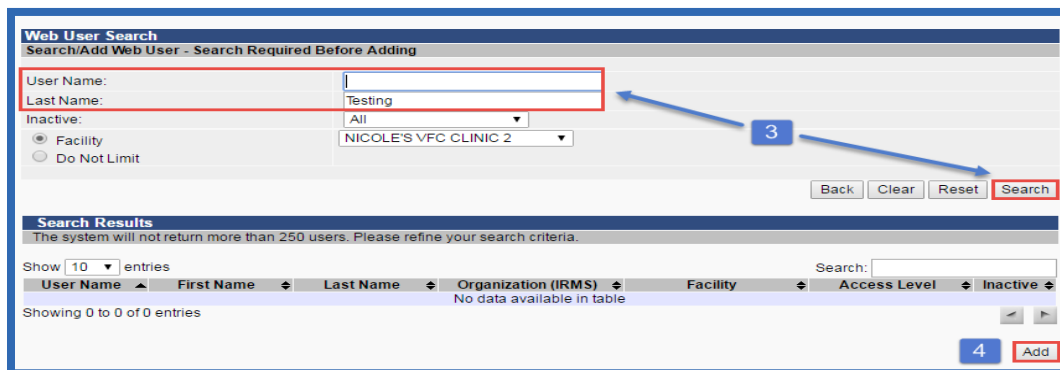Most users do not need or should not have these permissions added to their user account.

Allow Provider Manual Dedup	HEDIS Assessment	Serology Management Access
Any of the Block permissions	Inventory Correction	Serology View Access
Bypass Ordering Req.	Map Designer Access	State/Local Order Approver
Correct Lot Decrementing	Master Patient Data Access	Suppress Demog. Address Check
Any of the DTT permissions	MyIR	Update Facil. through DTT/HL7
Default Vaccine Management	PHC-Hub Access	Update Password HL7 Access
Executive Dashboard Access	Query HL7 Access Only	Upload HL7 Access
Facility Administration	Remote Clinic Export	Vaccine Ordering Management
First Responder Access	Security Access	Waitlist Access

Setting-Up User Accounts

Users need a new account when they first start using the IIS **or** when they have an existing IIS account, but start working for a different organization.

1. Click on **Administration** in your left menu.
2. Click on **Search / Add User.**
3. Type in the user you want to look up by username or last name and click the **Search** button. You have to search for a user first, before you can add a new account.
4. If no matching results are found, click the **Add** button to start adding a new account.
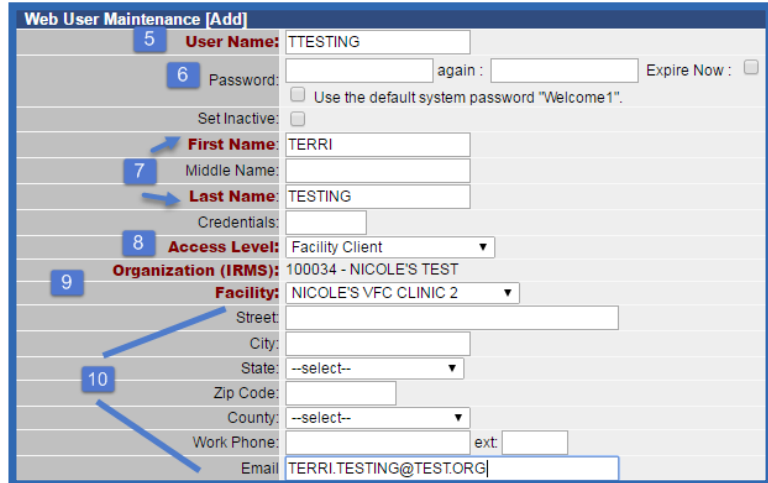
5. Type in a **User Name** for the account. It is recommended to use the first initial of the user's first name followed by their last name. If you type in a username that is already assigned to an IIS user you will receive an error and you will need to type in a different username that is not in use. ***Do not use spaces or special characters in a user name.**
6. Set a temporary password and mark the **Expire Now** checkbox or mark the checkbox to use the default system password (this temporary password will expire after the first login).
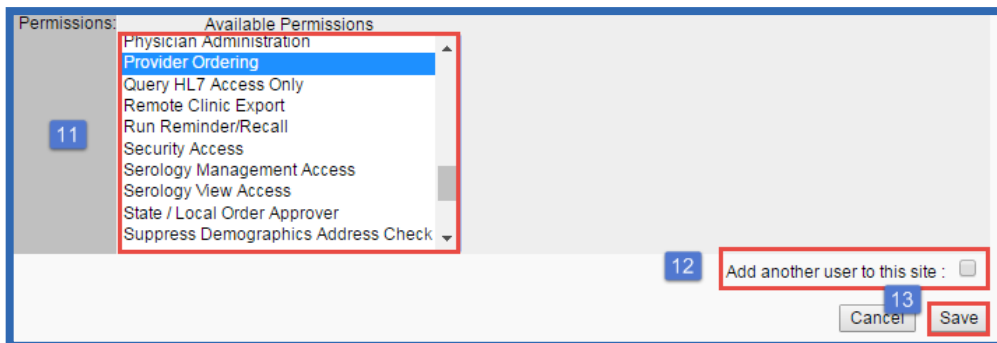
7. Type in the user's **first name** and **last name**.
8. Choose the **Access Level** (e.g. Organization or Facility, Client or View).
   - If you have an Organization Client account with the System Administration permission, you can set up organization and facility level user accounts for any facility under your organization.

   - If you have a Facility Client account with the System Administration permission, you can only set up facility level accounts under your assigned facility.
9. Select a **Facility** if you are setting up a facility-level account.
10. Enter address, work phone, and an email address for the user.
11. Add **Permissions** to the user's account. You can add more than one by holding down the **Ctrl** key on your keyboard and clicking on each of the permissions you want to add to the account. The selected permissions show up highlighted in blue.
12. If you want to add another user account for the same organization or facility, click the **Add another user to this site** checkbox. If you just want to add one user, don't mark this checkbox.
13. Click the **Save** button.

14. After you add the new user, a new page opens with a message at the top saying you successfully added the user and you can see a summary of the new account.
15. Click the **Back to Search** button to navigate away from this screen.
16. Click the **Add User as Vaccinator** button if you want to add this user as a vaccinator under your organization or facility in the IIS. If you just need to add a vaccinator (not a new IIS account), you can do this through the **Physicians & Vaccinators** menu item. You only see this menu item if you have the **Physician Administration** permission on your IIS account.
17. Click the **Update** button if you need to make any changes to the user account.

14 Web user record added successfully

Web User Maintenance [Detail]

User Name:	TTESTING
Inactive:	
First Name:	TERRI
Middle Name:	
Last Name:	TESTING
Credentials:	
Street:	
City:	
State:	
Zip Code:	
County:	All Counties
Work Phone:	ext:
Email:	TERRI.TESTING@TEST.ORG
Access Level:	FACILITY CLIENT
Organization (IRMS):	100034 - NICOLE'S TEST
Facility:	NICOLE'S VFC CLINIC 2
Comments:	
User Last Updated Date:	11/04/2016 12:00:00 AM
User Last Updated By:	(NPENDERORG)
User Created Date:	11/04/2016 04:19:50 PM
User Created By:	(NPENDERORG)
HL7 Upload View Clients:	
Permissions:	Provider Ordering

15 **16** **17**

[Back to Search] [Add User as Vaccinator] [Update]

Password Rules

- Passwords are case sensitive.
- They must be at least 8 characters and contain at least one number, one uppercase letter, one lowercase letter, and cannot be your full name or your username.
- Passwords expire every 120 days.

Updating User Accounts

You can update user accounts to change access level, permissions, contact information, or reset passwords. **Organization Client** users with the System Administration permission should update **Facility Client** user accounts as quickly as possible when users move from one facility to another under the same organization. If a user's account is associated with the wrong facility in the IIS, the wrong vaccinating facility shows up on patient records and can cause issues with vaccine inventory in the IIS.

1. Follow the steps in the previous section to search for the user.
2. In the **Search Results** section, find the user account you want to update and click anywhere in the row to select that user.

Search Results

The system will not return more than 250 users. Please refine your search criteria.
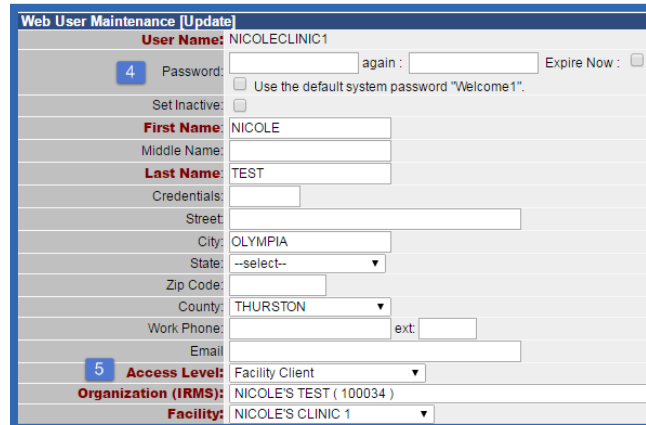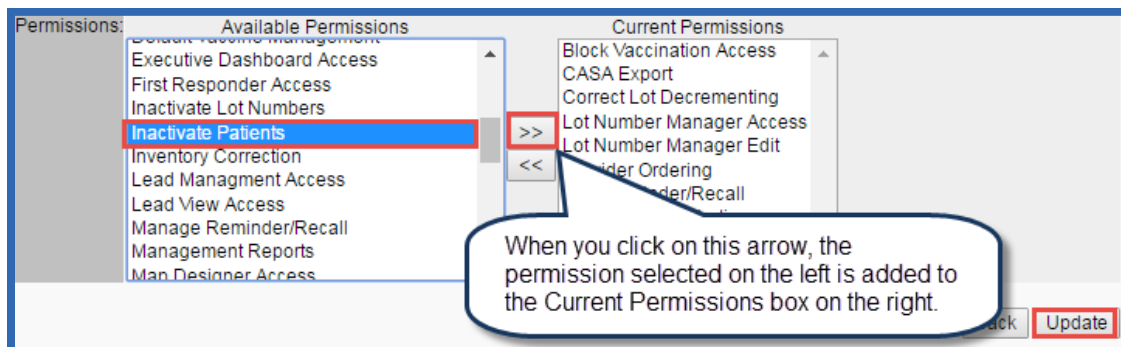
Show [10 ▼] entries

User Name ▲	First Name ◆	Last Name ◆	Organizati...		
FCTEST	FC	TEST	NICOLE'S TES...	CLINIC	
NICOLECLINIC1	NICOLE	TEST	NICOLE'S TEST	NICOLE'S CLINIC 1	Facility Client

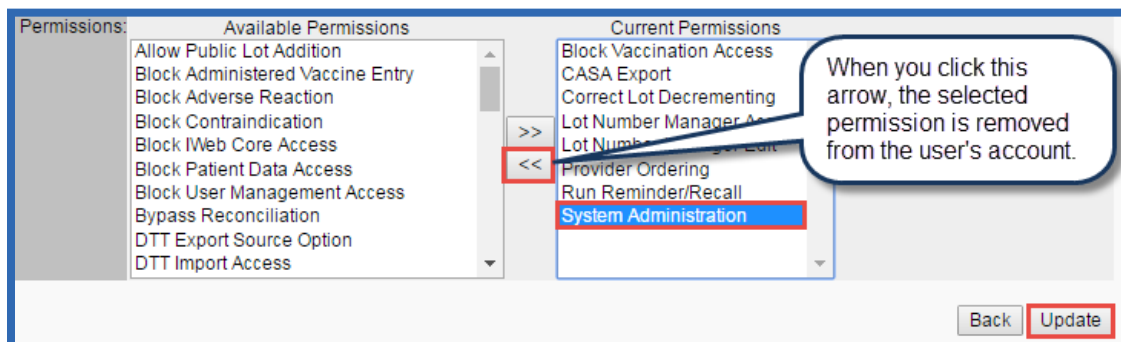*Click anywhere in the row to select the user account you need to update.*

3. In the **User Maintenance screen**, click the **Update** button.

4. To reset a user's password, type in a new password or click on the checkbox to use the default system password.

5. To change the access level, choose a different **Access Level** from the drop down box.

6. To add permissions, click on the permission(s) you want to add from the **Available Permissions** box. Click the arrow button pointing to the right to add the permission to the **Current Permissions** box.

7. To remove permissions, click on the permission you want to remove from the **Current Permissions** box. Click the arrow button pointing to the left. This moves the permission to the **Available Permissions** box.

8. Click the Update button to save all changes to the user account.

9. After saving changes, click the **Back to Search** button to return to the **Web User Search** screen.
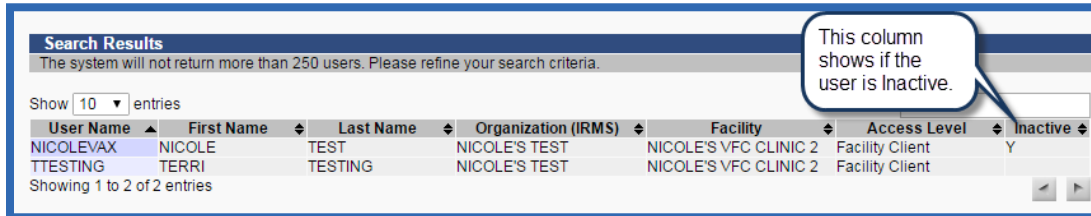
Inactivating User Accounts

Inactivating user accounts is one way to maintain the security of the IIS because it blocks access for any staff that leaves your organization or facility.

![Washington State Department of Health logo]

Washington State Immunization Information System
Reference Guide

IIS System Administrator

WASHINGTON STATE
IMMUNIZATION
INFORMATION SYSTEM

1. Follow the steps in the **Setting-Up User Accounts** section to search for a user. You can also leave all the search criteria blank to see all users associated with your organization or facility.
2. In the **Search Results**, look at the **Inactive** column to identify active and inactive users. **Y** means the user is inactive. No character in this column means the user is active.

3. Click anywhere in the row to select the user you want to inactivate.
4. When the **User Maintenance** screen opens, click on the **Set Inactive** checkbox. Click the **Update** button.
5. Click the **Back to Search** button and notice that this user now has a **Y** in the **Inactive** column of the search results. This indicates you successfully inactivated the user.
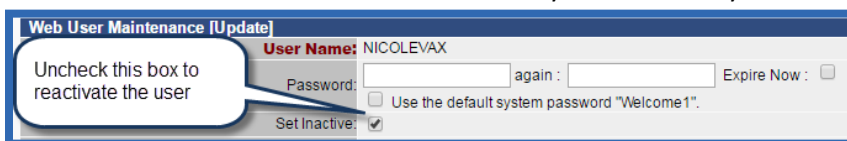

Reactivating User Accounts

You can reactivate user accounts if a user is inactivated due to not using their account or if they return to your organization or facility.

1. Follow the steps in the **Setting-Up User Accounts** section to search for and select a user.
2. On the **User Maintenance** screen, click the **Update** button.
3. Click on the **Set Inactive** box to remove the check mark. Click the **Update** button.
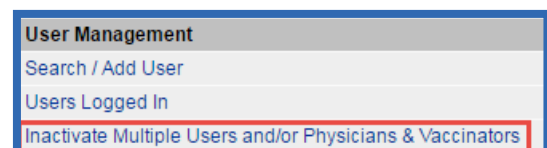4. Click the **Back to Search** button and notice that the **Y** was removed from the **Inactive** column of the search results for this user. This indicates you successfully reactivated the user.

Inactivating Multiple Users

If you want to clean up user accounts for your organization or facility, you can review all your users and inactivate or reactivate several users at the same time.

1. Click on **Administration** in your left navigation menu.
2. In the **User Management** section, click on **Inactivate Multiple Users and/or Physicians & Vaccinators**.
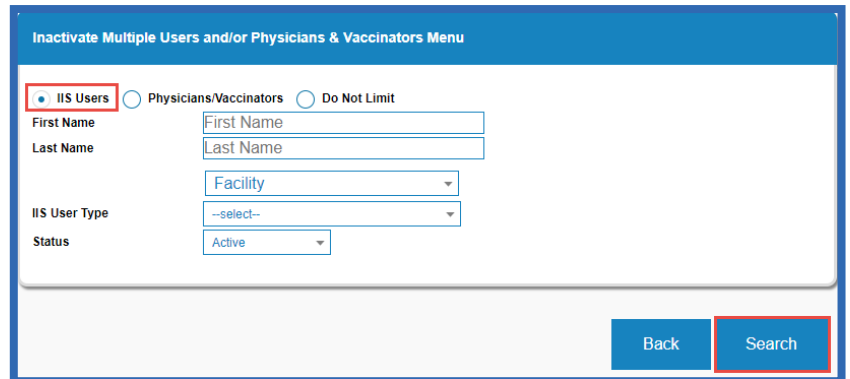
3. On the **Inactivate Multiple Users and/or Physicians & Vaccinators** screen, click on the **IIS Users** radio button.

4. Enter additional search criteria or you can leave everything blank and click the **Search** button.

5. If you have more than 100 users, use the **Next** button at the bottom of the search results to view the next set of users.
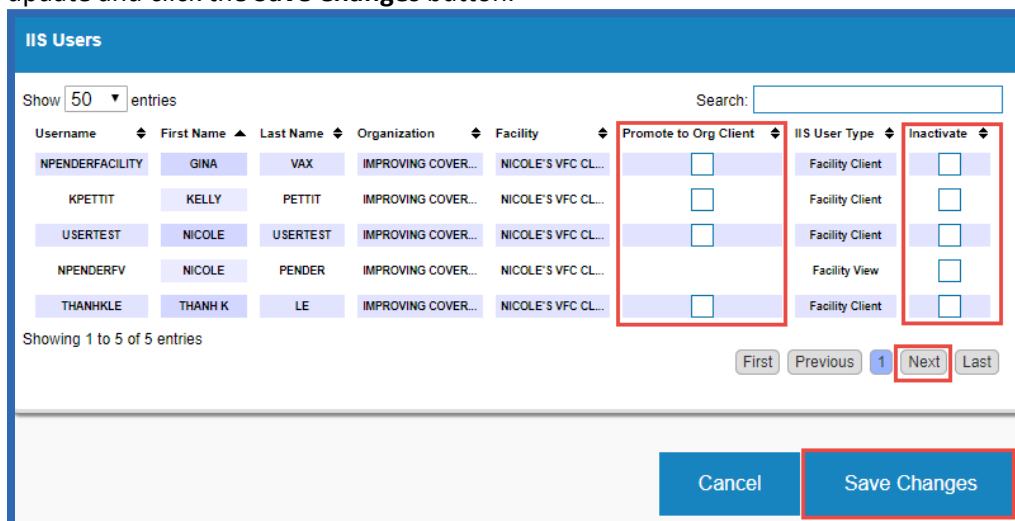

6. Click the **Inactivate** checkbox in the row of any users you want to inactivate.

7. Click the **Save Changes** button to inactivate all the selected users.

8. You can also change multiple users from Facility Client to Organization Client accounts through this screen. Click on the **Promote to Org Client** checkbox for the user accounts you want to update and click the **Save Changes** button.

Running User Reports

System Administrators can run user reports to see all the users in their organization or facility and identify users with certain access levels or permissions.

1. Click on the **Administration** menu item.

2. In the **User Management** section, click on **User Reports.**

User Management	
Search / Add User	User Reports
Users Logged In	
Inactivate Multiple Users and/or Physicians & Vaccinators	

3. To run a report showing all users with the same access level, select an account type from the **Access Level** drop down box. Click the **Multiple Users Report** button.
4. To see which users have certain permissions on their user account, select an item from the **Permissions** drop down box. Click the **Multiple Users Report** button.
5. To run a report showing all users associated with your organization or facility, leave the report criteria blank and click the **Multiple Users Report** button. This report provides a list of all your active and inactive users.
   - Click the **Active Only** radio button under the **Active Status** section to run a report of all active users.
   - Click the **Inactive Only** radio button to run a report of all inactive users.

Multiple Users Report

● Organization (IRMS)	NICOLE'S TEST (100034) ▼
○ Organization (IRMS) Group	--select-- ▼
○ Do Not Limit	
○ Facility	--select-- ▼
○ Facility Group	--select-- ▼
● Do Not Limit	
☐ VFC PIN	--select-- ▼
☐ Access Level	--select-- ▼ [3]
☐ Permission	--select-- ▼ [4]
☐ County/Parish	All Counties ▼
☐ District/Region (by User Organization (IRMS))	
☐ District/Region (by User County)	

Active Status
- ● Active and Inactive
- ○ Active Only [5]
- ○ Inactive Only

Sort Order
- ● Organization (IRMS) Name, Facility, Last Name, First Name
- ○ Last Name, First Name
- ○ Organization (IRMS) Name, Facility, Username
- ○ Username

Column Detail
- ● Standard Detail
- ○ Extended Detail

Back   Multiple Users Report
Export Report

Questions? Contact the IIS Help Desk at 1-800-325-5599 or WAIISHelpDesk@doh.wa.gov