



# Administrative User Training

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I. Introduction.....	2
II. IRIS Resources .....	2
III. Administrative User Functions .....	2
IV. Managing Access .....	2
V. Maintenance: Managing Schools.....	12
VI. Maintenance: Managing Physicians .....	14
VII. Maintenance: Managing Clinicians .....	17
VIII. How to Setup VFC Contact Information:.....	21
IX. Inventory Not Deducted Report:.....	23
X. VFC Re-Enrollment Form Completion .....	24

## I. Introduction

Welcome to Administrative User Training for Iowa's Immunization Registry Information System.

IRIS, Iowa's Immunization Registry Information System, is a population-based web application containing consolidated demographic and immunization history information. IRIS performs a variety of functions for health care providers including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts
- Producing recall and reminder notices, vaccine usage, and patient reports
- Managing vaccine inventory
- Ordering state supplied vaccines

Access to the web application is available at [www.IRIS.iowa.gov](http://www.IRIS.iowa.gov). By law, only authorized users are allowed to access immunization information in IRIS. Authorized users include health care providers, local health departments, health plans, schools, and child care facilities. Additionally, health care providers may only obtain information specific to their own patients. Schools and childcare facilities may only access records specific to their enrollees.

## II. IRIS Resources

- Help Desk: 1-800-374-3958
- Website: <https://idph.iowa.gov/immtb/immunization/iris>
- Online Help (Light bulb )
- User Manual
- Webinars (Live and Pre-recorded)
- Self-guided online training videos available online at <https://iris.iowa.gov> under the **Training** tab

## III. Administrative User Functions

At least one Administrative user must be designated for an organization. To become an Administrative User, complete the [IRIS Site Enrollment Form](#) on the Forms tab of the [IRIS](#) website.

The Administrative user is responsible for performing the following functions in IRIS:

- Add new and edit existing users' access
- Add new and edit clinicians, physicians, and schools
- Edit VFC contact information and complete yearly VFC re-enrollment
- Manage organization's inventory not deducted report (VFC only)

## IV. Managing Access

### How to Re-Enable or Unlock a User

Administrative users have the ability to unlock standard user and patient query only accounts. To unlock a user account:

1. Click the **manage access/account** button in the menu bar.



2. From the portal page in IRIS, click the **“Edit User”** link under the Manager Access section.



3. On the **Edit User – Search Page**, select the checkmark boxes next to the status of **“Active”** and **“Disabled”** to search for users who may be inactive or locked out. Search for users by entering either their last name, first name, or leave both fields blank. When the appropriate information has been entered, click **“Find”**.

**Edit User - Search**

Application: IRIS

Organization: All Orgs

Status: Active  Disabled  Terminated

Last Name: Zehner First Name:

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

Buttons: Find, Refresh

4. A list of users will display matching the search results. Click the last name link for the disabled or inactive user to edit their user account.

**Search Results**

Last Name	First Name	MI	User Name
<a href="#">Zehner</a>	Joey		jzehner1234
<a href="#">Zehner</a>	Joey		zehner9

5. On the Edit User screen, enter a new password for the user. Confirm the password and click **Save**.

**Edit User** **Modify Access**

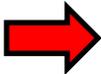
User Id 18281

\* User First Name

\* User Last Name

User Middle Initial

\* Username

 New Password  Confirm New Password

Status  Active  Disabled  Terminated

Street Address

Other Address

P.O. Box

City

State  Zip  -

Email

Phone Number    Ext

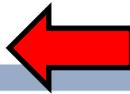


6. A message, “User Updated” displays.

**\*\* User Updated \*\***

**Edit User** **Modify Access**

7. To reactivate the user’s status, click the **Modify Access** tab.

**Edit User** **Modify Access** 

Add or remove applications and organizations to which this user has access.

**User** Joey Zehner

8. Under the Status section, the user’s account may display as Inactive’ or ‘Disabled due to multiple login attempts with the incorrect password’. Select the checkmark box next to the status, and click the **Select** button.

Current list of organizations and applications. *Select user from this list to update their role or status.* 

Application	Organization	Role	Status	Select
IRIS	IR Physicians	Standard User	Disabled due to multiple login attempts with incorrect password.	<input checked="" type="checkbox"/>

- The screen will refresh, and the Status radio buttons appear. Select the **Active** radio button, and click the **Update** button.

App.	Organization	Role	Status	Update
IRIS	IR Physicians	Standard User	<input checked="" type="radio"/> Active <input type="radio"/> Disabled <input type="radio"/> Term	Update

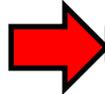


- The message “**Update in progress, press Save to keep**” will appear, and the status field will now say Active. Click **Save** to save changes.

\*\* Update in progress, press Save to keep \*\*

Current list of organizations and applications. Select user from this list to update their role or status. Select

Application	Organization	Role	Status	Select
IRIS	IR Physicians	Standard User	Active	<input type="checkbox"/>


Save Cancel

- The message **User Updated** will appear, and the user will now be able to login using their new password.

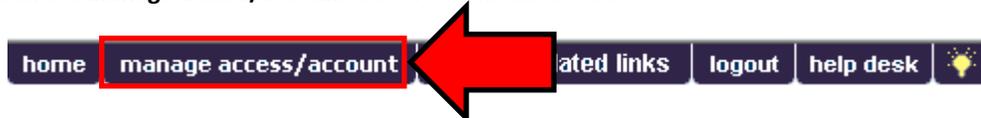
\*\* User Updated \*\*

[Edit User](#) [Modify Access](#)

## Adding an Existing User to an Organization

IRIS allows administrative users to add existing users to their organization in IRIS. To add an existing user:

- Click the **manage access/account** button in the menu bar.



- Click the **Edit User** link under “Manage Access” in the menu panel.



- Click the appropriate Status (Active, Disabled, and Terminated can all be selected) and type the last and/or first name of the user. Click the **'Find'** button.

Application: All Apps   
 Organization Type: All Types  
 Organization: All Orgs

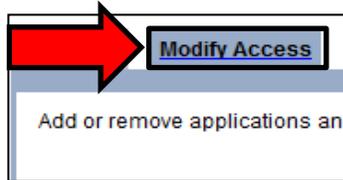
Status  Active   Disabled  Terminated

Last Name: Test First Name: Joey

- Under the search results, click the last name link for the user's account.

Search Results			
Last Name	First Name	MI	User Name
<a href="#">Test</a> 	Sample		tsample

- On the Edit User page, click the **Modify Access** tab.



- Click the appropriate Organization for the user from the **Organization** dropdown list. For administrative users who have access to one organization, only one organization will appear in the Organization field.
- Click the appropriate role for the user from the Role dropdown list. Click the **Add** button under Add Access.

**Edit User** **Modify Access**

---

Add or remove applications and organizations to which this user has access.

User: Joey Zehner

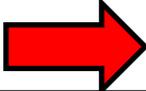
Application	Organization	Role	Add Access
IRIS	<input type="text" value="Iowa Training Org"/> Iowa Training Org IR Physicians Joey Training Org - Test	<input type="text" value="Standard User"/> Standard User	<input type="button" value="Add"/> 

8. The message “Update in progress, press Save to keep” will display. Click **Save**.

**\*\* Update in progress, press Save to keep \*\***

Current list of organizations and applications. *Select user from this list to update their role or status.*

Application	Organization	Role	Status	Select
IRIS	IR Physicians	Standard User	Active	<input type="checkbox"/>



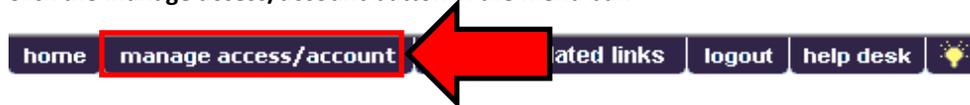
9. The message “**User Updated**” will display at the top of the screen, and the user now has access to the organization.

**\*\* User Updated \*\***

## Adding a New User

To add a new user:

1. Click the **manage access/account** button in the menu bar.



2. Click **Add User** under “Manage Access” in the menu panel.



3. Enter the required information, denoted by an asterisk (\*), as well as the user’s email address. Click **Save**. The message: “**User Added, please proceed to the Modify Access tab. User does not have access until you do!**” will display at the top of the page.

**\*\* User Added, please proceed to Modify Access Tab. User does not have access until you do! \*\***

**Edit User** **Modify Access**

User Id 18301

\* User First Name

\* User Last Name

User Middle Initial

\* Username

New Password  Confirm New Password

Status  Active  Disabled  Terminated

Street Address

Other Address

P.O. Box

City

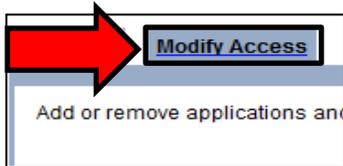
State  Zip  -

Email

Phone Number    Ext



4. Click the **Modify Access** tab.



5. Click the appropriate Organization for the user from the **Organization** dropdown list. For administrative users who have access to one organization, only one organization will appear in the Organization field
6. Click the appropriate role for the new use from the **Role** dropdown list.
7. Click **Add** under Add Access.

**Edit User** **Modify Access**

Add or remove applications and organizations to which this user has access.

User Joey Zehner

Application	Organization	Role	Add Access
IRIS	<input type="text" value="Iowa Training Org"/> <input type="text" value="IR Physicians"/> <input type="text" value="Joey Training Org - Test"/>	<input type="text" value="Standard User"/>	<input type="button" value="Add"/>

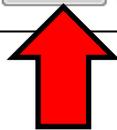


8. Click **Save**.

**\*\* Update in progress, press Save to keep \*\***

Current list of organizations and applications. Select user from this list to update their role or status.

Application	Organization	Role	Status	Select
IRIS	IR Physicians	Standard User	Active	<input type="checkbox"/>



- The message “**User Updated**” will display at the top of the screen, and the user now has access to the organization.

**\*\* User Updated \*\***



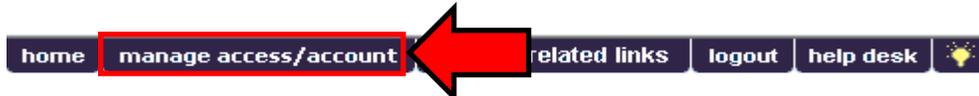
**Additional Information:**

If a user has access to more than one organization, he or she must select the specific organization to access upon logging into IRIS. The user must complete an IRIS Site Agreement for each location where he or she accesses IRIS.

**Adding Multiple Users**

Administrative users have the option to add multiple standard users at once. This is the quickest way to create standard user accounts. To add multiple standard users:

- Click the **manage access/account** button in the menu bar.



- Click **Add Multiple Users** under “Manage Access” on the menu panel.



- Click the organization to give the user access to from the Organization dropdown menu.
- Enter the last name, first name, user name, password, and role for the user.
- Click **Add**.

Application: IRIS

Organization:

Select Add between each user you want to add. Once you change application or organization, you must click Refresh.

Last Name	First Name	User Name	Password	Role	Add User
Test	Joey	jtest	••••	Standard User	Add

- The Newly added user will display. Repeat steps 3-5 for each additional user.

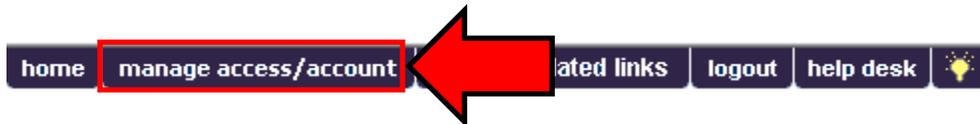
#### Newly added users

Last Name	First Name	User Name	Role
Zehner	Joey	jzehner467	Standard User

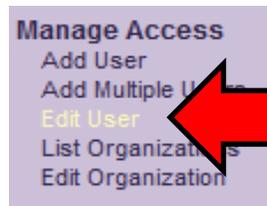
### Maintaining Users

IRIS allows Administrative users to edit user accounts within their organization(s). To edit user accounts, the Administrative user must find the corresponding user account in IRIS prior to editing the account information. To find a user account:

- Click the **manage access/account** button in the menu bar.



- Click **Edit User** under “Manage Access” in the menu panel.



- On the “Edit User – Search” page, click the user’s organization from the Organization dropdown list or leave the field as All Orgs to search all organizations.
- Click all Status options (Active, Disabled, and Terminated).
- Enter the first and last name of the user.
- Click **Find**.

Application: All Apps   
 Organization Type: All Types  
 Organization: All Orgs

Status  Active   Disabled  Terminated

Last Name  First Name

- All user accounts matching are displayed under the "Search Results".
- Click the last name link for the corresponding user account.

Search Results			
Last Name	First Name	MI	User Name
<a href="#">Test</a> 	Sample		tsample

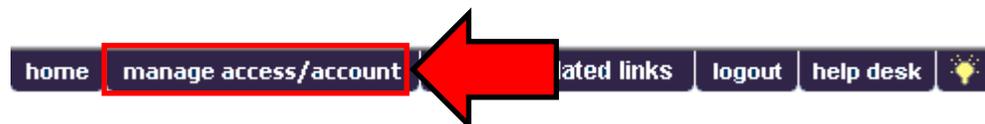
- The user's account information displays. Admin users can edit information, add an email address and modify access.

<a href="#">Edit User</a>	<a href="#">Modify Access</a>
User Id 18109	
* User First Name	<input type="text" value="joey"/>
* User Last Name	<input type="text" value="zehner"/>
User Middle Initial	<input type="text"/>
* Username	<input type="text" value="zehneradmin"/>

## Editing My User Account

IRIS allows all users to manage their own user account information. To verify or edit user account information:

- Click the **manage access/account** button in the menu bar.



2. Click **Edit My User Account** link under “Manage My Account” in the menu panel.



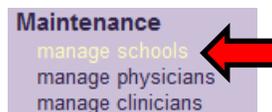
3. On the Edit User page, change all information listed including; user first name, user last name, street address, email address and phone number.
4. Click **Save**. If changes were made, the message “**User Updated**” appears at the top of the page.

A screenshot of the "Edit User" form. The form contains several input fields: "\* User First Name" (joey), "\* User Last Name" (zehner), "User Middle Initial", "\* Street Address", "Other Address", "P.O. Box", "\* City", "\* State" (IA), "\* Zip", "\* Email", and "\* Phone Number" with an "Ext" field. A "Save" button is located at the top right of the form, and a red arrow points to it.

## V. Maintenance: Managing Schools

IRIS Administrative users may enter new, and update existing, schools using the Manage Schools function. Schools entered using this function are available for selection from a dropdown menu on the Patient Demographic page. Reports may then be generated by school. To add schools:

1. Click **manage schools** under “Maintenance” from the menu panel.



2. Click the **Add School** button.



3. Enter the name of the school and any additional information in their corresponding fields and click **Save**.

**Add School**

School Name  

Street Address

Other Address  P.O. Box

City  State  Zip  -

Email

Telephone # (  )  -  Ext

4. A message will display “**School Added**”.
5. Click the **List All** button to return to the Manage Schools page.

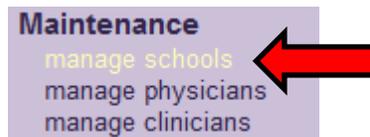
**Select a School to Edit**

School Name   

**Edit School** \*\* School Added \*\*

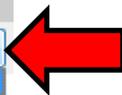
### Editing School Information

1. Click **Manage Schools** under “Maintenance” from the menu panel.



2. Click the school from the School Name dropdown menu.

**Select a School to Edit**

School Name    
 Pick a School  
 Iowa High School  
 Iowa Test School

**Edit School**

3. Add or change desired information in the Edit School table.
4. Click **Save**. A message displaying “School Updated” appears.

**Edit School** \*\* School Updated \*\*

School Name

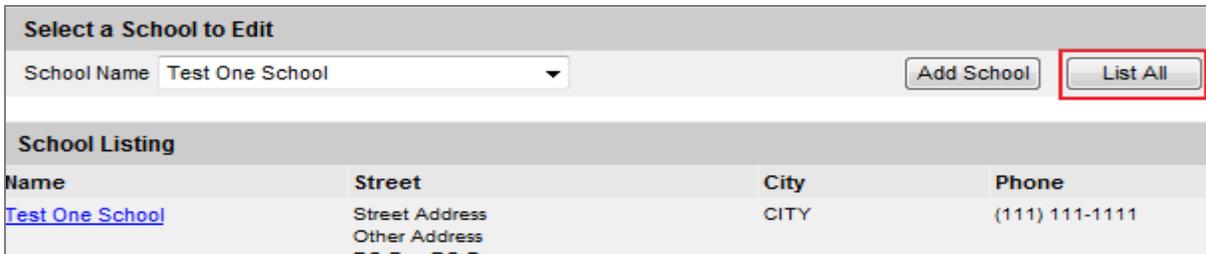
Street Address  

## Listing All Schools

1. Click **Manage Schools** under “Maintenance” from the menu panel.



2. Click the **List All** button.

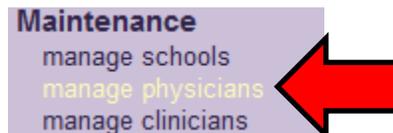
A screenshot of a web form titled "Select a School to Edit". It features a dropdown menu for "School Name" with "Test One School" selected. To the right are two buttons: "Add School" and "List All". The "List All" button is highlighted with a red border. Below the form is a table titled "School Listing" with columns for Name, Street, City, and Phone. The first row shows "Test One School" with a blue link, "Street Address", "CITY", and "(111) 111-1111".

Name	Street	City	Phone
<a href="#">Test One School</a>	Street Address Other Address PO Box PO Box	CITY	(111) 111-1111

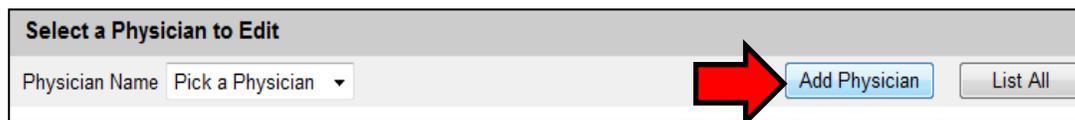
## VI. Maintenance: Managing Physicians

Administrative users can utilize the Add Physician/Edit Physician screens to enter new and update existing Primary Care Providers/Physicians. Physicians or health care organizations entered on this screen will be available for selection from the Provider-PCP dropdown menu on the Patient Demographic page. Reports may be generated from this data. To add Physicians:

1. Click **Manage Physicians** under Maintenance from the menu panel.



2. Click the **Add Physician** button.

A screenshot of a web form titled "Select a Physician to Edit". It features a dropdown menu for "Physician Name" with "Pick a Physician" selected. To the right are two buttons: "Add Physician" and "List All". The "Add Physician" button is highlighted with a red arrow pointing to it from the left.

Physician Name	Street	City	Phone
----------------	--------	------	-------

3. Enter the Last Name and any additional information in the corresponding fields.
4. Click **Save**. A message displaying “**Physician Added**” appears.

**Edit Physician** \*\*Physician Added\*\*

Prefix/Title

First Name

Middle Name

Last Name

Suffix

Street Address

Other Address  P.O. Box

City  State  Zip  -

Email

Provider Activity Status

- Click the **List All** button to return to the Manage Physicians page.

**Select a Physician to Edit**

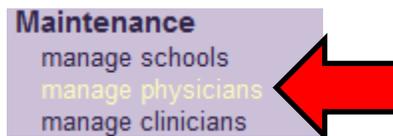
Physician Name

**Additional information:**

Provider-PCP may be used as a filter when running a Reminder/Recall report.

**Editing Physician Information**

- Click **Manage Physicians** under “Maintenance” from the menu panel.



- Using the Physician Name dropdown menu, click the physician’s name. Or click the physician’s name in the “Physician Listing” table on the page.

**Select a Physician to Edit**

Physician Name

Physician Listing

Name	City/State/ZIP	Email	Physician Activity Status
<a href="#">Drawf, Doc</a>			
Duck, Donald			
Jones, Jim			
Smith, John			
White, Snow	DREST CITY, IA 55667		

- Add or change information in the “Edit Physician” box and click **Save**. A message displaying “Physician Updated” appears.



## Deleting Physicians

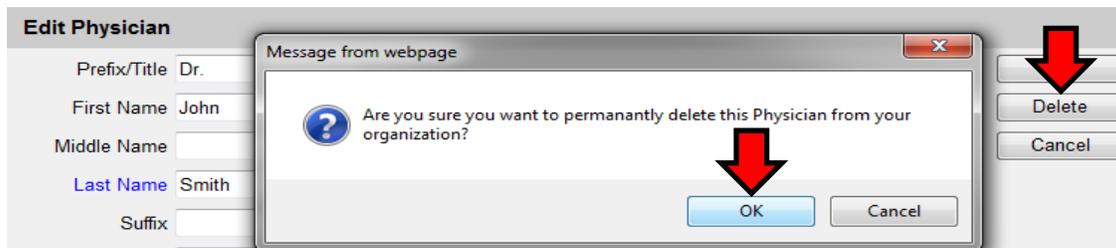
1. Click **Manage Physicians** under “Maintenance” from the menu panel.



2. Using the Physician Name dropdown menu, click the physician’s name. Or, click the physician’s name in the “Physician Listing” table on the page.

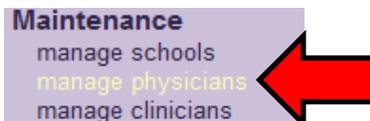


3. Click **Delete**.
4. Click **OK** on the prompt. A message displaying “Physician Deleted” appears.



## Listing All Physicians

1. Click **Manage Physicians** under “Maintenance” from the menu panel.



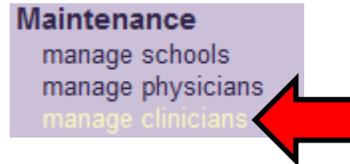
2. Click the **List All** button.



## VII. Maintenance: Managing Clinicians

Clinicians in IRIS are the individuals who administer vaccines to patients and are available to select from a dropdown menu when recording immunizations. IRIS Administrative users can use the Manage Clinicians function to enter new or update existing clinicians within the organization. To add Clinicians:

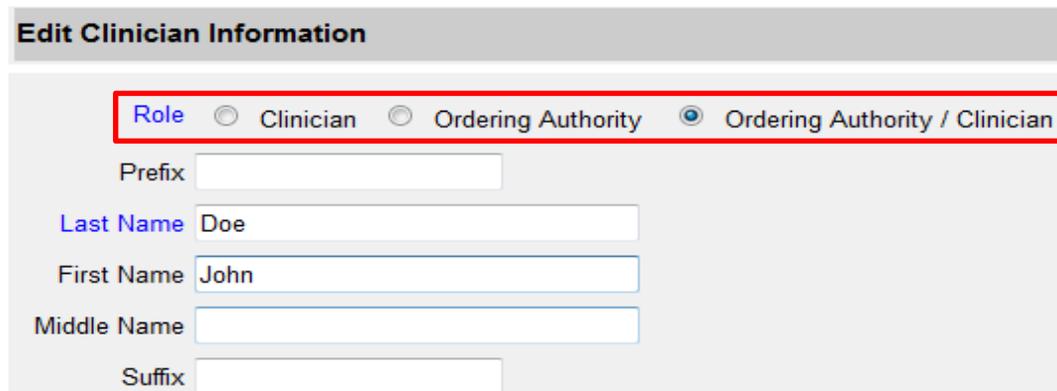
1. Click **Manage Clinicians** under “Maintenance” from the menu panel.



2. Click the **Add Clinician** button.

A screenshot of a web form titled "Organization Name: IR Physicians". Below the title is a "Site List:" dropdown menu with "IR Physicians" selected. To the right of the dropdown are three buttons: "Add Clinician" (highlighted in blue), "Find Clinician", and "Clinician List". A red arrow points from the right towards the "Add Clinician" button.

3. Click the appropriate role and enter the name of the clinician being added.

A screenshot of a web form titled "Edit Clinician Information". The "Role" section is highlighted with a red rectangular box. It contains three radio button options: "Clinician", "Ordering Authority", and "Ordering Authority / Clinician". The "Ordering Authority / Clinician" option is selected. Below the role section are input fields for "Prefix", "Last Name" (containing "Doe"), "First Name" (containing "John"), "Middle Name", and "Suffix".

- a. **Clinician:** the person who administers the vaccination.
  - b. **Ordering Authority:** the individual who authorizes the administration of a vaccine.
  - c. **Ordering Authority/Clinician:** a person who both authorizes and administers vaccines, such as a pediatrician.
4. In the Complete Site Listing field, highlight a site with which the clinician will be associated and click the **Add** button or double click the site name. This action will move the site to the Selected Sites box.

Complete Site Listing		Selected Sites
Iowa Training Org	<input type="button" value="Add &gt;"/> <input type="button" value="Add All &gt;&gt;"/> <input type="button" value="&lt; Remove"/> <input type="button" value="&lt;&lt; Remove All"/>	Iowa Training Org

5. Click **Save**.

**Record Updated**

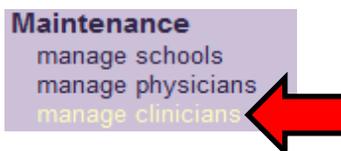
**Edit Clinician Information**

Role  
  Clinician  
  Ordering Authority  
  Ordering Authority / Clinician



### Editing Clinician Information

1. Click **Manage Clinicians** under “Maintenance” from the menu panel.



2. Click the appropriate clinician name in the Clinician Name table:

**Organization Name: Iowa Training Org**

Site List:

Clinician Name	Role	Signature	Status
<a href="#">Sample Joey</a> 	Clinician	N	Inactive

3. Add or change information on the Edit Clinician Information page.

4. Click **Save**. A message displaying “Updated clinician: ‘<last name>, <first name>’” will appear.



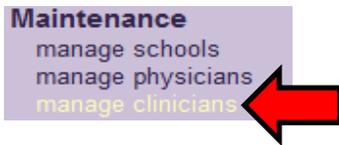
-  Ext.

**Updated clinician: Doe, John**

### Merging Clinicians

To eliminate duplicate clinician names in IRIS:

1. Click **Manage Clinicians** under “Maintenance” from the menu panel.



2. Click the **Find Clinician** button.

**Organization Name: IR Physicians**

Site List:

Add Clinician  
**Find Clinician**  
 Clinician List

3. Enter the last and first names of the clinician and click the **Find** button.
4. Click at least two clinicians from the Search Results table and click the **Merge** button.

**Clinician Search**

Last Name:  First Name:  Find  
 To get a complete list of clinicians, leave both fields blank and press the find button. Merge  
 Cancel

**Search Results** Count: 2

Select	Clinician Name	Role	Active
<input checked="" type="checkbox"/>	<a href="#">test_clinician</a>	Ordering Authority / Clinician	Y
<input checked="" type="checkbox"/>	<a href="#">Test_Clinician</a>	Ordering Authority	Y

5. Click the clinician to keep and click the **Keep Selected** button.

**Clinician Merge**

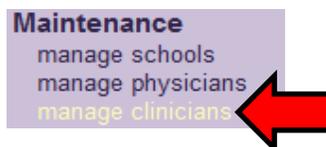
Select the clinician to keep. All references to the other clinicians will be redirected to the kept clinician. Keep Selected  
 Cancel

Select	Clinician Name	Role	Active
<input checked="" type="radio"/>	<a href="#">Test_Clinician</a>	Ordering Authority	Y
<input type="radio"/>	<a href="#">est_clinician</a>	Ordering Authority / Clinician	Y

## Inactivating Clinicians

To inactive a clinician in IRIS and remove them from the Administered By dropdown:

1. Click **Manage Clinicians** under "Maintenance" from the menu panel.



- Click the clinician's name from the clinician list.

Clinician Name	Role	Signature	Status
<a href="#">Sample, Joey</a>	Clinician	N	Active
<a href="#">Test, Joey</a>	Clinician	N	Inactive

- On the Edit Clinician page, select the Inactive radio button.

**Edit Clinician Information**

Role  Clinician  Ordering Authority  Ordering Authority / Clinician

Prefix

Last Name

First Name

Middle Name

Suffix

Active  Inactive

- Click 'Save'.

**Edit Clinician Information**

Role  Clinician  Ordering Authority  Ordering Authority / Clinician

Prefix

Last Name

First Name

Middle Name

Suffix

Active  Inactive

- The message 'Record Updated' will display, and the clinician will not be on the Administered By dropdown list:

• **Record Updated**

**Edit Clinician Information**

Role  Clinician  Ordering Authority

Prefix

Last Name

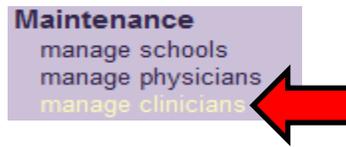
First Name

## Deleting Clinicians

Deleting a clinician removes their name from any immunization where their name was selected under the Administered By field. Rather than deleting the clinician, the clinician should be inactivated as shown above.

## Listing All Clinicians

1. Click **Manage Clinicians** under “Maintenance” from the menu panel.



2. Click the **Clinician List** button.

A screenshot of a web interface for "Organization Name: IR Physicians". It features a "Site List" dropdown menu currently set to "IR Physicians". To the right of the dropdown are three buttons: "Add Clinician", "Find Clinician", and "Clinician List". The "Clinician List" button is highlighted in blue, and a red arrow points to it from the right.

3. The Clinician Listing screen opens, displaying all available clinicians, their organization association(s), and their role(s).
4. Click the **Close** button to return to the Manage Clinicians screen.

## VIII. How to Setup VFC Contact Information:

This information applies only to Vaccines for Children (VFC) Program providers. To setup VFC contact information:

1. Click the “**Edit Organization**” link on the portal page:



2. The **Edit Organization – Search** page will display. The Search Field defaults to search by name. Enter a few letters of the organization’s name and click “**Search**”.

A screenshot of the "Edit Organizations" search page. It has a header "Edit Organizations" and a sub-header "Organization Search Criteria". Below the sub-header is a note: "Select your organization's name to view and/or update information. Note: parent organization names are marked with an '\*'." There is a "Search Field" dropdown menu set to "Name" and a "Search String" input field containing "Delaware County". To the right of the input field is a blue "Search" button, which is highlighted with a red arrow pointing to it from the right.

3. The organization will appear in the search results. Click the blue link under the organization field to edit the organization’s information.

Search Result					
Name	Org Code	VFC Pin	City	County	Open
<a href="#">DELAWARE COUNTY PUBLIC HEALTH</a>	10186	P28001	MANCHESTER	Delaware	Y



4. Scroll to the **Main Contact Information** section. Add or edit the Vaccine Delivery address information (or organization’s address information).

**Main Contact Information**

**Address Information**

Vaccine Delivery  
Populate With Physical Address

Address 1: 709 W MAIN ST  
Address 2:   
PO Box:

City: MANCHESTER State: IA Zip: 52057 +4:  Geocoded: No

5. Scroll down to the Individual Contacts section and add or edit a contact for Vaccine Delivery. Select the Role, **Vaccine Delivery**, and enter the last name and first name of the vaccine delivery contact person. Once the required information has been entered, click **Apply**.

**Individual Contacts**

**Add Contact**

\* Role: Vaccine Delivery  
\* Last Name: Sample  
\* First Name: Test

Address 1: 709 WEST MAIN  
Address 2:   
PO Box:

Buttons: Apply, Cancel



6. The contact will now appear in the Individual Contacts listing section with the role of vaccine delivery.

**Individual Contacts**

**Contact Listing**

Role	Name	E-Mail	Edit	Del
Vaccine Delivery	Test Sample			
Address: 709 WEST MAIN MANCHESTER IA 52057 -		Geocoded:		
Phone: (563)927-7551		Facsimile: (563)927-7444		

7. Scroll to the top of the page and click **Save**.

**Edit IRIS PROFILE**

Org Id: 1346

\* Name: Delaware County Public Health

Buttons: Save, Cancel



- The message **Organization Updated** will display.

**\*\* Organization Updated \*\***

**Edit IRIS PROFILE**

IIS Status  Open  Closed

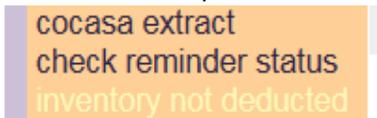
Org Id 2303

\* Name  ✕

## IX. Inventory Not Deducted Report:

The inventory not deducted report allows VFC providers to find unaccounted for VFC doses sent from their electronic medical record (EMR) but did not deduct the organization’s IRIS inventory. This report only allows providers to account for missing VFC doses. To use the inventory not deduct report:

- Click the ‘inventory not deducted’ link on the menu panel under the reports section.



- The page will display all unaccounted for immunizations sent by the provider, ordered by the most recent vaccination date.

Immunizations Not Deducted for Organization - Iowa Training Org - ITO - Z77000								Record Count: 52
Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility	Trade Name	Patient Name	DOB	Actual Lot	Update
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled	<input type="text" value=""/>	INVENTORY, TEST	03/05/2004	<input type="text" value=""/>	<input type="checkbox"/>

- The four columns to the right of the report indicate what was sent by the organization’s EMR: Transaction Date, Vaccination Date, Lot/Vaccine Name, and Eligibility. These columns cannot be altered because they indicate what was sent by the EMR.

Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled

- The Trade Name column allows the user to select the appropriate Trade Name administered to the patient. Select the specific Trade Name administered to the patient.

Immunizations Not Deducted for Organization - Iowa Training Org - ITC				
Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility	Trade Name
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled	<input type="text" value="Gardasil 9"/>
			Medicaid	

- Trade Names available are based off the vaccine name sent to IRIS. For example, if the Vaccine Name sent to IRIS is ‘DTaP’, only single antigen DTaP Trade Names will display.

- 5) The patient's name and birth date will be listed, which can be used to verify the patient being updated.

Patient Name	DOB
INVENTORY, TEST	03/05/2004

- 6) The Actual Lot column will list all the available VFC lot numbers in the organization's inventory for the Trade Name selected. Select the actual lot number that was administered to the patient. Please note expired and inactive lot numbers will not appear on this dropdown.

Immunizations Not Deducted for Organization - Iowa Training Org - ITO - Z77000								Record Count: 52
Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility	Trade Name	Patient Name	DOB	Actual Lot	Update
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled	Gardasil 9	INVENTORY, TEST	03/05/2004	DUPTTEST1/VFC	

- 7) Once a Trade Name and Actual Lot have been selected, the checkmark box under the update column can be selected. To update the patient record, select the checkmark box.

Immunizations Not Deducted for Organization - Iowa Training Org - ITO - Z77000								Record Count: 52
Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility	Trade Name	Patient Name	DOB	Actual Lot	Update
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled	Gardasil 9	INVENTORY, TEST	03/05/2004	DUPTTEST	<input checked="" type="checkbox"/>

- 8) After the checkmark box is selected, click the 'Save' button to update the patient's record.

Save  
Cancel

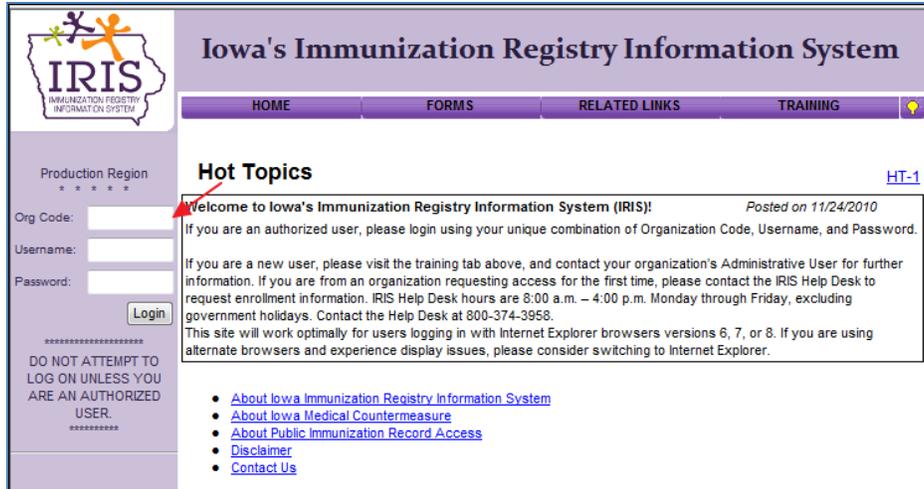
Immunizations Not Deducted for Organization - Iowa Training Org - ITO - Z77000								Record Count: 52
Transaction	Vaccination Date	Lot/Vaccine Name	Eligibility	Trade Name	Patient Name	DOB	Actual Lot	Update
06/05/2017	06/05/2017	FV232/HPV, 9-valent	Medicaid Enrolled	Gardasil 9	INVENTORY, TEST	03/05/2004	DUPTTEST	<input checked="" type="checkbox"/>

- 9) The screen will refresh, and all patients who were selected will no longer appear on this report. Their doses are now accounted for on their patient record(s) in IRIS.

## X. VFC Re-Enrollment Form Completion

The Vaccines for Children (VFC) Program requires all participating VFC providers complete annual re-enrollment, which is completed in IRIS. Only IRIS Admin users have access to complete VFC re-enrollment.

- 1) Log into IRIS at <https://iris.iowa.gov> using the Org Code, Username, and Password. Use Internet Explorer as the web browser.



2) Select the Manage Access/Account link on the menu panel.



3) Select Edit Organization.



4) Enter the organization name in the search string, then select 'search'. Type the full name or just part of the organization name.

5) Select the organization link in the Name column of the search results section.

6) Review the organization's VFC Patient Activity chart, displayed under the State Supplied Vaccine Profile.

**VFC Patient Activity**

	Less than 1 Year	1 through 6 Years	7 through 18 Years	Total
Total number of children that receive vaccinations at this clinic/practice	2	7	7	16
Of the total number of children above how many are VFC eligible due to:				
Medicaid Eligible	1	3	5	9
No Health Insurance	0	0	0	0
American Indian/Alaska Native	1	1	3	5
Underinsured (only for FQHC, RHC, or local public health agencies)	0	0	0	0
<b>Total VFC Eligible Patients</b>	<b>2</b>	<b>4</b>	<b>7</b>	<b>13</b>

Begin Date    
 End Date

- a) If the organization uses IRIS to track VFC vaccine inventory, the VFC Patient Activity chart will be populated, and changes will not need to be made. Proceed to step 7.
- b) If the organization **does not** track VFC vaccine inventory in IRIS, the admin user will need to update the VFC Patient Activity chart manually. An example of the chart is displayed below. The Patient Activity must reflect one year. Enter the number of patients in each cohort that received immunizations at the organization from 4-1-2016 through 3-31-2017. These numbers should represent unduplicated **patients for each age cohort** and not immunizations. Some patients may be counted in multiple categories (for instance, if they received an immunization at age 9 months and another at 14 months).

VFC Patient Activity

For a 12 month period, enter the number of children in each age cohort who will receive vaccinations at your facility

	Less than 1 Year	1 through 6 Years	7 through 18 Years	Total
Total number of children that receive vaccinations at this clinic/practice	16	124	10	150
Of the total number of children above how many are VFC eligible due to:				
Medicaid Eligible	14	122	10	146
No Health Insurance	2	2	0	4
American Indian/Alaska Native	0	0	0	0
Underinsured (only for FQHC, RHC, or local public health agencies)	0	0	0	0
Total VFC Eligible Patients	0	0	0	0

Begin Date    
 End Date

- c) Once the VFC Patient Activity chart is completed, edit the date range below the chart to show the beginning date of 04/01/2016 and ending date of 03/31/2017, and select 'Update' to save the entries.

VFC Patient Activity

For a 12 month period, enter the number of children in each age cohort who will receive vaccinations at your facility

	Less than 1 Year	1 through 6 Years	7 through 18 Years	Total
Total number of children that receive vaccinations at this clinic/practice	16	124	10	150
Of the total number of children above how many are VFC eligible due to:				
Medicaid Eligible	14	122	10	146
No Health Insurance	2	2	0	4
American Indian/Alaska Native	0	0	0	0
Underinsured (only for FQHC, RHC, or local public health agencies)	0	0	0	0
Total VFC Eligible Patients	0	0	0	0

Begin Date    
 End Date

- 7) Review and update the organization's main contact information, including vaccine delivery address.

**Main Contact Information**

**Contact Information**

Telephone: Phone

Facsimile:

Email:

**Address Information**

**Physical**

Address 1:  Address 2:  PO Box:

City:  State:  Zip:  +4:  Geocoded: No

**Mailing**

Populate With Physical Address:

Address 1:  Address 2:  PO Box:

City:  State:  Zip:  +4:  Geocoded:

**Vaccine Delivery**

Populate With Physical Address:

Address 1:  Address 2:  PO Box:

City:  State:  Zip:  +4:  Geocoded: No

- 8) Review the organization's Individual contacts. The following roles are required when completing the re-enrollment process: **Medical Director, Primary Vaccine Coordinator, Back-Up Vaccine Coordinator, and**

**Vaccine Delivery.** The role of Medical Director also requires Title, email address, Medicaid/NPI, and Medical License.

Individual Contacts						
Contact Listing						
Role	Title	Name	E-Mail	Edit	Del	
Vaccine Delivery		DOW CHARLES	<a href="mailto:NOONE@NOPLACE.COM">NOONE@NOPLACE.COM</a>			
Address: 321 E 12TH ST PHY DES MOINES IA 50319 -			Geocoded: No			
Phone: (800)374-3958			Facsimile:			
Medicaid/NPI:			Medical License:			
Medical Director	MD	DOLPHINS WALES	<a href="mailto:ADMIN@IRPHYSICIANS.ORG">ADMIN@IRPHYSICIANS.ORG</a>			
Address: 321 E 12TH ST SUITE 400 DES MOINES IA 50319 -			Geocoded: No			
Phone: (800)374-3958			Facsimile:			
Medicaid/NPI: 1234212			Medical License: 7693293			
Primary VFC Vaccine Coordinator		ALPHA TANGO	<a href="mailto:ADMIN@IRPHYSICIANS.ORG">ADMIN@IRPHYSICIANS.ORG</a>			
Address: 321 E 12TH ST SUITE 400 DES MOINES IA 50319 -			Geocoded: No			
Phone: (800)374-3958			Facsimile:			
Medicaid/NPI:			Medical License:			
Back-Up VFC Vaccine Coordinator	NP	ROSE TERMEN	<a href="mailto:ADMIN@IRPHYSICIANS.ORG">ADMIN@IRPHYSICIANS.ORG</a>			
Address: 321 E 12TH ST SUITE 400 DES MOINES IA 50319 -			Geocoded: No			
Phone: (800)374-3958			Facsimile:			
Medicaid/NPI:			Medical License:			

a) To add a contact, complete the 'Add Contact' box below the Contact Listing, then select 'Apply'.

**Add Contact**

\* Role: Primary VFC Vaccine Coordinator

Title:

\* Last Name:

\* First Name:

Middle Name:

Email:

Telephone:  -  -

Ext:

Medicaid/NPI:

Address 1:

Address 2:

PO Box:

City:

State:  Zip:  +4

Facsimile:  -  -

Ext:

Medical License:

b) The Medical Director's email address must be included.

Medical Director	DO	BOB DOBBS	<a href="mailto:bob.dobbs@NOPLACE.COM">bob.dobbs@NOPLACE.COM</a>	
Address: 321 E 12TH ST SUITE 100 DES MOINES IA 50319 -			Geocoded:	
Phone: (515)555-5555			Facsimile:	
Medicaid/NPI: 48934			Medical License: 27834934	

c) To update or change a contact, select the Edit icon for the entry.

Contact Listing						
Role	Title	Name	E-Mail	Edit	Del	
Vaccine Delivery		CASEY WALLACE	<a href="mailto:ADMIN@IRPHYSICIANS.ORG">ADMIN@IRPHYSICIANS.ORG</a>			
Address: 15 SOUTHERN AVE DES MOINES IA 50311 - 2345			Geocoded: No			
Phone: (555)342-665x3444			Facsimile: (123)456-7890			
Medicaid/NPI:			Medical License:			
Medical Director	MD	RICHARD M EXAMPLE				
Address: 4321 MAIN DES MOINES IA 50310 -			Geocoded: No			
Phone: (444)555-6644			Facsimile: (123)456-7890			
Medicaid/NPI: 983785048928			Medical License: 83478403023			

- d) The contact's details will be displayed in the Edit Contact section. Make necessary changes, then select 'Apply'. Repeat as necessary for all contacts.

- e) Once the necessary updates have been made, select the 'Save' button at the top of the Edit Organization page. A red message will display at the top of the page to confirm changes were saved.

- 9) Return to IRIS by selecting the word 'IRIS' from the left menu panel.

- 10) Select the blue link for the organization to return to the IRIS home page.

- From the IRIS home page, select the VFC Re-Enrollment Form link from the left menu panel, under the Maintenance menu.

The screenshot shows the IRIS application interface. On the left is a navigation menu with categories: 'check reminder list', 'manage custom letters', 'vaccine eligibility', 'doses administered', 'group patients', 'check group status', 'cocasa extract', 'check request status', 'assessment report', 'check assessment', 'benchmark report', 'check benchmark', 'ad hoc list report', 'ad hoc count report', 'ad hoc report status', 'reminder / recall', 'Inventory', 'manage inventory', 'manage orders', 'manage transfers', 'shipping documents', 'transaction summary', 'Maintenance', 'manage schools', 'manage physicians', 'manage clinicians', and 'vfc.re-enrollment.form'. A red arrow points to the 'vfc.re-enrollment.form' link. The main content area shows 'Active Inventory that is Going to Expire ...' with a table of inventory items. Below that, it shows 'Inventory that is Running Low by Vaccine Group ...' and 'Inventory that is Running Low by Trade Name ...'.

Site Name	Trade Name	Lot Number	On Hand	VFC	Exp Date
IR Physicians	IPOL	1249AA	49	Y	05/13/2013

Vaccine Group	Quantity On Hand	VFC
No vaccine groups have a low inventory.		

Trade Name	Quantity On Hand	VFC
Pentacel	3	N
Tubersol	10	N

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- Confirm the data saved on the Edit Organization page appears on the VFC Provider Enrollment Form. If changes are needed in the sections labeled Facility Information, Medical Director or Equivalent, VFC Vaccine Coordinator, or Backup Vaccine Coordinator, return to step 2 and make the necessary corrections.

The screenshot shows the 'Iowa Department of Public Health Vaccines for Children Program Provider Enrollment Form'. The top navigation bar includes 'home', 'manage access/account', 'forms', 'related links', 'logout', and 'help desk'. The user is logged in as 'Matt Jacobs' with the role 'IRIS Admin (Org)'. The form is for the organization 'IR Physicians'.

**Facility Information**

- \* Facility Name: IR Physicians
- \* Facility Address: 15 SOUTHERN AVE, DES MOINES IA, 50311-2345
- \* Phone Number: (555)342-6655
- Fax Number: (123)456-7890

**Medical Director or Equivalent**

Primary

- \* Title MD
- \* Last Name EXAMPLE
- \* First Name RICHARD
- Middle Name M
- \* Medicaid/NPI # 983785048928
- \* Medical License # 83478403023

Secondary

- \* Title MD
- \* Last Name SMITH
- \* First Name JANE
- Middle Name EUNICE
- \* Medicaid/NPI # 1234566
- \* Medical License # 2345764

- Review the section for Providers Practicing at this facility and edit as needed (see a.-e. below for more details). Confirm all providers with the organization are listed, including Title, Last Name, First Name, Medicaid/NPI number, and Medical License number. These fields are required for all providers. If necessary, use the navigation buttons at the bottom of the chart to review the entire provider list. Completion of this form for the first time will require adding all participating providers (physicians, physician assistants and nurse practitioners). See below for more details.

**Providers Practicing at this Facility**

Add/Edit Provider

\* Title

\* Last Name  \* Medicaid/NPI #

\* First Name  \* Medical License #

Middle Name

Save Delete Cancel

#	Last Name	First Name	Middle Name	Title	Medicaid/NPI #	Medical License #	
1	Adams	Albert		DO	2696763567	76345237	Edit
2	Barnett	Barry	Green	DO	324899027	643112345128	Edit
3	Chase	Catherine	D	MD	1234112345	2323423456	Edit
4	Davidson	Delta	Y	MD	6547645633	544341100	Edit
5	Engleside	Etta		MD	1185838064	1218939053	Edit
6	Fox	Francis	Kelly	DO	7621237342	234994	Edit
7	Gerhardt	Gertrude		MD	234905642	765123512	Edit
8	Innsmouth	Irene		MD	3450876894	34516562	Edit
9	Konnor	Kappa	A	PA	4567632323	12341223	Edit
10	Lewis	Leonard	P	MD	0983121009	98712632	Edit

Page 1 of 2 << < > >>

- a) To add a new provider to the list, enter their data into fields in the Add/Edit Provider section and select 'Save'. The data will be added to the display with the other providers, and the Add/Edit Provider section will clear.

**Providers Practicing at this Facility**

Add/Edit Provider

\* Title MD

\* Last Name Miller \* Medicaid/NPI # 90234789234

\* First Name Thomas \* Medical License # 42789239423

Middle Name K

Save Delete Cancel

- b) To update or change provider data, select the 'Edit' button for the entry.

**Providers Practicing at this Facility**

Add/Edit Provider

\* Title

\* Last Name  \* Medicaid/NPI #

\* First Name  \* Medical License #

Middle Name

Save Delete Cancel

#	Last Name	First Name	Middle Name	Title	Medicaid/NPI #	Medical License #	
1	Adams	Albert		DO	2696763567	76345237	Edit
2	Barnett	Barry	Green	DO	324899027	643112345128	Edit
3	Chase	Catherine	D	MD	1234112345	2323423456	Edit
4	Davidson	Delta	Y	MD	6547645633	544341100	Edit
5	Engleside	Etta		MD	1185838064	1218939053	Edit
6	Fox	Francis	Kelly	DO	7621237342	234994	Edit
7	Gerhardt	Gertrude		MD	234905642	765123512	Edit
8	Innsmouth	Irene		MD	3450876894	34516562	Edit
9	Konnor	Kappa	A	PA	4567632323	12341223	Edit
10	Lewis	Leonard	P	MD	0983121009	98712632	Edit

Page 1 of 2 << < > >>

- c) With the provider's data in the Add/Edit Provider section, make necessary changes, then select 'Save'. The data will be updated on the chart, and the Add/Edit Provider section will clear.

**Providers Practicing at this Facility**

Add/Edit Provider

\* Title MD

\* Last Name Chase \* Medicaid/NPI # 2323423456

\* First Name Catherine \* Medical License # 1234112345

Middle Name D

Save Delete Cancel

- d) If a provider needs to be removed from the list, select the 'Edit' button for the entry, then select the 'Delete' button in the Add/Edit Provider section.

- e) Confirm the selection to delete the provider by selecting 'OK'.

- i) Note: Some organizations choose to manage the physician dropdown menu within IRIS, which is available under the Manage Physicians link on the left menu panel. Physicians entered in the VFC Re-Enrollment Form are automatically added to an organization's physician dropdown menu.

- 14) Complete the VFC Vaccine Coordinator section. The VFC Vaccine Coordinator and Back-Up Vaccine Coordinator are required to complete the training annually. The training is available at <https://www.cdc.gov/vaccines/ed/youcalltheshots.html>. The following modules are required:
- Vaccine Storage and Handling-(current year)
  - Vaccines for Children (VFC)-(current year)
- After completing the training, check the box confirming completion of the required VFC training modules. Additional staff may also complete the training.

The VFC Vaccine Coordinator and Back-Up Vaccine Coordinator have completed the annual training requirements. The training is available at <http://www.cdc.gov/vaccines/ed/youcalltheshots.htm>. The following modules are required:  
[Vaccine Storage and Handling](#)  
[Vaccines for Children Program](#).

- 15) Read the VFC enrollment requirements. Read and scroll through the entire agreement prior to selecting the 'I accept' check box.

14. I agree to replace vaccine purchased with state or federal funds (VFC, 317) that are deemed non-viable due to provider negligence on a dose-for-dose basis.

15. I understand this facility or the Iowa Immunization Program may terminate this agreement at any time. If I choose to terminate this agreement, I will properly return any unused federal vaccine as directed by the Iowa Immunization Program.

By signing this form, I certify on behalf of myself and all immunization providers in this facility, I have read and agree to the Vaccines for Children enrollment requirements listed above and understand I am accountable (and each listed provider is individually accountable) for compliance with these requirements.

I accept

Medical Director or Equivalent Signature

Date 03/08/2017

- 16) Check the box indicating the user accepts the VFC enrollment requirements.

**Agreement**

14. I agree to replace vaccine purchased with state or federal funds (VFC, 317) that are deemed non-viable due to provider negligence on a dose-for-dose basis.

15. I understand this facility or the Iowa Immunization Program may terminate this agreement at any time. If I choose to terminate this agreement, I will properly return any unused federal vaccine as directed by the Iowa Immunization Program.

By signing this form, I certify on behalf of myself and all immunization providers in this facility, I have read and agree to the Vaccines for Children enrollment requirements listed above and understand I am accountable (and each listed provider is individually accountable) for compliance with these requirements.

I accept

Medical Director or Equivalent Signature: \_\_\_\_\_

Date: 03/08/2017

Submit

17) Type the name as the signature.

**Agreement**

14. I agree to replace vaccine purchased with state or federal funds (VFC, 317) that are deemed non-viable due to provider negligence on a dose-for-dose basis.

15. I understand this facility or the Iowa Immunization Program may terminate this agreement at any time. If I choose to terminate this agreement, I will properly return any unused federal vaccine as directed by the Iowa Immunization Program.

By signing this form, I certify on behalf of myself and all immunization providers in this facility, I have read and agree to the Vaccines for Children enrollment requirements listed above and understand I am accountable (and each listed provider is individually accountable) for compliance with these requirements.

I accept

Medical Director or Equivalent Signature: Susan Anthony

Date: 03/08/2017

Submit

18) Select the 'Submit' button. If any alert messages appear at the top of the page, make the necessary corrections, scroll through and sign the agreement again, and select 'Submit' again.

**Agreement**

14. I agree to replace vaccine purchased with state or federal funds (VFC, 317) that are deemed non-viable due to provider negligence on a dose-for-dose basis.

15. I understand this facility or the Iowa Immunization Program may terminate this agreement at any time. If I choose to terminate this agreement, I will properly return any unused federal vaccine as directed by the Iowa Immunization Program.

By signing this form, I certify on behalf of myself and all immunization providers in this facility, I have read and agree to the Vaccines for Children enrollment requirements listed above and understand I am accountable (and each listed provider is individually accountable) for compliance with these requirements.

I accept

Medical Director or Equivalent Signature: Susan Anthony

Date: 03/08/2017

Submit

19) A screen appears, confirming submission of the VFC Enrollment Form.

home manage access/account forms related links logout help desk

organization IR Physicians • user Matt Jacobs • role IRIS Admin (Org)

VFC Enrollment Form has been submitted

Production Region 3.0

Patients  
manage patient  
enter new patient

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20) Once successfully submitted, the VFC Enrollment Form will be locked until the next renewal period. The VFC Re-Enrollment Form is required annually.