



The following tasks are the responsibility of the Facility Contact, who is designated in the WyIR Enrollment Agreement:



- > **Managing User Access**
- > **Setup Lot Numbers**
- > **Setup Physicians/Vaccinators**
- > **Setup Facility Defaults**
- > **Schedule Reports**

## >> **Managing User Access**

This step allows the Facility Contact to assign and/or remove registry permissions for users at his or her facility based on their needed level of access.

## >> **Setup Lot Numbers**

This step allows for the addition of the vaccine lot numbers within the facility's inventory in order to avoid error and redundancy when entering data.

## >> **Setup Physicians/Vaccinators**

This step allows for the addition of physicians (for the patient record) and vaccinators (for the vaccination record) in order to avoid error and redundancy when entering data.

## >> **Setup Facility Defaults**

This step allows a facility to define its defaults for mass immunizations so that all users linked to that facility have the same defaults.

## >> **Schedule Reports**

It is the responsibility of the Facility Contact to schedule all necessary and recommended reports for his or her facility.

User access may be assigned and removed by the Facility Contact as necessary.

## >> Managing User Access

The Facility Contact is responsible for granting and removing WyIR user access as necessary for employees with his or her facility. The Facility Contact may do the following:

- > **Search for User**
- > **Add New User**
- > **Update User**
- > **Inactivate/Reactivate User**

## >> Getting Started

The Facility Contact and all WyIR users to be added and/or updated must ensure that their email service is not filtering/blocking emails sent by the **WyIR Scheduler (do-not-reply@stchome.com)**. These emails will contain URLs necessary for password setup and reset.

**The Facility Contact MUST inactivate users no longer needing WyIR access immediately.**

## >> Search for Users

Before adding or updating a user account, the Facility Contact must perform a search to determine if the user account already exists.

1. On the left-side panel of the WyIR, select **Administration**.
2. From the Administration Main Menu, select **Search/Add User** under User Management.
3. Enter the last name of the user in question into the **Last Name** field. Click the Search button. The **Search Results** area below will populate with all users for the facility with the last name entered. If no results are found, the Search Results area will not populate and the Add button will .
  - \* To ensure that the user did not have a previously existing account that has since been inactivated, be sure to select **All** from the Inactive dropdown menu.
4. If the user exists, click on the User Name to view details. If not, click the **Add** button to add.



User access may be assigned and removed by the Facility Contact as necessary.



## >> Managing User Access (Continued)

### >> Add a VIEW ONLY User

View Only users may search for and view patient records for their facility, and create and print Official Records of Immunization. Users with this access level may not add or edit any information.

1. From the Web User Maintenance [Add] page, enter information into all required fields, which are highlighted in red:
  - > **User Name** should be the first initial of the first name with the full last name.
  - > **First Name** should be the full legal first name.
  - > **Last Name** should be the full legal last name.
  - > **Access Level** should be set to **Facility View**.
  - > **Email** should be an email address **unique to only that user**. Shared accounts violate HIPAA privacy policies.
  - > Additional **Permissions** selected: **View User Reports Access, Vaccination Access**. Hold CTRL to select multiple.
2. Click the **Save** button. The Web User Maintenance [Detail] page will display with a message that the web user record was added successfully.

\*If a warning message appears that the User Name already exists, use the following schema: if JDOE is taken, use JDOE2. If JDOE2 is taken, take JDOE3, and so on.

Web User Maintenance [Detail]	
User Name:	A TEST
Inactive:	
First Name:	ALFRED
Middle Name:	
Last Name:	TEST
Credentials:	
Street:	
City:	
State:	
Zip Code:	
County:	All Counties
Work Phone:	ext.
Email:	ALFRED.TEST@TESTFACILITY.ORG
Access Level:	FACILITY VIEW
Organization (IRMS):	105050 - TEST ORGANIZATION
Facility:	TEST FACILITY
Comments:	
User Last Updated Date:	12/01/2015 02:22:54 PM
User Last Updated By:	(ABUCK)
User Created Date:	06/01/2015 04:14:29 PM
User Created By:	
Permissions:	View User Reports Access Vaccination Access



User access may be assigned and removed by the Facility Contact as necessary.



## >> Managing User Access (Continued)

### >> Add a VIEW/ADD User

View/Add users may search for, view, add and edit patients and patient records, and may add and edit vaccination records.

1. From the Web User Maintenance [Add] page, enter information into all required fields, which are highlighted in red:
  - > **User Name** should be the first initial of the first name with the full last name.
  - > **First Name** should be the full legal first name.
  - > **Last Name** should be the full legal last name.
  - > **Access Level** should be set to **Facility Client**.
  - > **Email** should be an email address **unique to only that user**. Shared accounts violate HIPAA privacy policies.
  - > Additional **Permissions** selected: **Vaccination Access**.
2. Click the **Save** button. The Web User Maintenance [Detail] page will display with a message that the web user record was added successfully.

\*If a warning message appears that the User Name already exists, use the following schema: if JDOE is taken, use JDOE2. If JDOE2 is taken, take JDOE3, and so on.

Web User Maintenance [Detail]	
User Name:	ATEST
Inactive:	
First Name:	ALFRED
Middle Name:	
Last Name:	TEST
Credentials:	
Street:	
City:	
State:	
Zip Code:	
County:	All Counties
Work Phone:	ext
Email:	ALFRED.TEST@TESTFACILITY.ORG
Access Level:	FACILITY CLIENT
Organization (IRMS):	105050 - TEST ORGANIZATION
Facility:	TEST FACILITY
Comments:	
User Last Updated Date:	12/01/2015 02:16:27 PM
User Last Updated By:	(ABUCK)
User Created Date:	06/01/2015 04:14:29 PM
User Created By:	
Permissions:	Vaccination Access

User access may be assigned and removed by the Facility Contact as necessary.

## >> Managing User Access (Continued)

### >> Add a VACCINE COORDINATOR User

Vaccine Coordinators are given all permissions to a View/Add User, and may also manage lot numbers and facility inventory, manage Physicians/Vaccinators, run Reminder/Recall, and receive scheduled reports regarding short-dated vaccine.

1. From the Web User Maintenance [Add] page, enter information into all required fields, which are highlighted in red:
  - > **User Name** should be the first initial of the first name with the full last name.
  - > **First Name** should be the full legal first name.
  - > **Last Name** should be the full legal last name.
  - > **Access Level** should be set to **Facility Client**.
  - > **Email** should be an email address **unique to only that user**. Shared accounts violate HIPAA privacy policies.
  - > Additional **Permissions** selected: **Inactivate Lot Numbers, Lot Number Management Access, Management Reports, Physician Administration, Provider Ordering, Run Reminder/Recall, Vaccination Access, and UFM Access**. Hold CTRL to select multiple.
2. Click the **Save** button. The Web User Maintenance [Detail] page will display with a message that the web user record was added successfully.

\*If a warning message appears that the User Name already exists, use the following schema: if JDOE is taken, use JDOE2. If JDOE2 is taken, take JDOE3, and so on.

Permissions:	Physician Administration Management Reports UFM Access Lot Number Manager Access Provider Ordering Run Reminder/Recall Inactivate Lot Numbers Vaccination Access
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User access may be assigned and removed by the Facility Contact as necessary.

## >> Managing User Access (Continued)

### >> Update a User Account

An update in access type occurs when a user has a change in job duties that requires a change of access in the WyIR. This may include a change in permissions associated with a user type (View Only, View/Add, Vaccine Coordinator) or may include account inactivation/reactivation.

1. On the left-side panel, select **Administration**.
2. From the Administration Main Menu, select **Search/Add User** under User Management. Search for and select a user from the **Search Results** area using their Last Name and/or User Name (if known).
3. Select the user from the Search Results list to view the Web User Maintenance [Detail] page, then click the **Update** button.
4. Change the **Access Level** and **Permissions** as needed to reflect a View Only User, a View/Add User, or a Vaccine Coordinator.
  - \*Permissions may be added/removed using the [<<] and [>>] buttons to move selections between the Available Permissions area and the Current Permissions area.
6. Click the **Generate Password Reset URL and Update** button. A message appears that the user change password email was sent successfully. Click the **Update** button to save.

### >> Inactivate/Reactivate a User Account

If an account has not been accessed within 30 days, it will be inactivated by WyIR Administration. When this occurs, the WyIR Facility Contact is responsible for reactivation of the user account.

1. After searching for and selecting a user, click the **Update** button.
2. To **Inactivate**, click the **Set Inactive** checkbox so that it is checked. To **Reactivate**, click the **Set Inactive** checkbox so that it is NO LONGER checked.
3. Click the **Generate Password Reset URL and Update** button. A message appears that the user change password email was sent successfully. Click the **Update** button to save. Accounts that are inactive will appear with a **Y** in the Inactive row. Accounts that are active will appear blank in the Inactive row.



Lot numbers may be entered as an aggregate count or individually.



## >> Setup Lot Numbers

To add multiple numbers as an aggregate vaccine count:

1. From the home page of the WyIR, locate the **Lot Numbers** menu on the left-side panel and click to expand.
2. Under the Lot Numbers menu, click **Aggregate Vaccine Counts** and fill out all fields. For each new vaccine being entered, click **Add Row**. A new row will appear below.
3. When all vaccines have been entered, click **Save**. A message will display, confirming that the lots have been saved successfully.

Aggregate Vaccine Counts								
Vaccine	Manufacturer	Lot Number	Exp Date	Physical Inventory	Reason	NDC Number	Public	Date of Transaction
DTaP	BAYER CORPORATION-	000001	01/01/2016	30.0	Received from WyVIP prc	DT--Generic (49281-027)	<input checked="" type="checkbox"/>	02/24/2015
Varicella	GLAXOSMITHKLINE-SKI	xxxxx2	01/16/2015	20	Received from another pi	VUA-Varivax (00006-482)	<input checked="" type="checkbox"/>	02/24/2015

Add Row Save

To add an individual lot number:

1. From the home page of the WyIR, locate the **Lot Numbers** menu on the left-side panel and click to expand.
2. Under the Lot Numbers menu, click **Search/Add** and fill out all known fields. Click **Search**.
3. The **Search Results** area will populate with all lot numbers previously added matching the criteria entered or will display a message that no results were found. After confirming that the lot number has not already been entered, click the **Add** button that appears below the **Search Results** area.
4. Fill out all required fields, which appear in red, and any additional information, and then click the **Add** button.
5. The **Lot Number Maintenance [Detail]** page will display, confirming that the vaccine has been successfully added.

Lot Number Maintenance [Add]	
<b>Vaccine:</b>	Rotavirus, NOS
<b>Manufacturer:</b>	MSD
<b>Lot Number:</b>	00000
Facility:	IMMUNIZATION UNIT
<b>Expiration Date:</b>	05/01/2015
<b>Publicly Supplied:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Inactive:	<input type="checkbox"/>
Reason Categories:	--All Categories--
<b>Reason for Change:</b>	Matches Physical Inventory
<b>Date of Transaction:</b>	02/18/2015
<b>Number of Doses Added:</b>	30
NDC Number:	--select--
WyVIP PIN of other party (if applicable):	

Cancel Add



Adding a physician and/or vaccinator allows this information to automatically populate in the patient record and/or vaccination record, respectively.



## >> Setup Physicians/Vaccinators

To search Physicians/Vaccinators already entered for the facility:

1. From the home page of the WyIR, locate the **Physicians & Vaccinators** menu on the left-side panel and click to expand.
2. Under the Physicians & Vaccinators menu, click **Search/Add** and fill out all known fields. Click **Search**.
3. The **Search Results** area will populate with all physicians/vaccinators previously added matching the criteria entered or will display a message that no results were found.

To add new Physicians/Vaccinators for the facility:

1. After completing a search to confirm that the physician/vaccinator does not already exist for the facility, click the **Add** button that appears below the **Search Results** area.
2. Fill out all required fields, which appear in red, and any additional information, and then click the **Save** button.

3. The **Physician/Vaccinator Maintenance [Detail]** page will display, confirming that the physician/vaccinator has been successfully added.



A Facility Contact may define defaults for users of their facility by setting **Facility Defaults**. Once the Facility Contact defines the defaults for the entire Facility, all users linked to that Facility will have the same defaults.



## >> Setup Facility Defaults

To set facility defaults:

1. From the Home page of the WYIR, locate the **Settings** menu on the left-side panel and click to expand.
2. Under the Settings menu, click **Facility**.

Facility Settings				
<b>Patient Defaults</b> <a href="#">click to update</a>				
Primary Care Physician:	City:			
Facility:	State:			
Language:	County/Parish:			
Phone Area Code:	Zip Code:			
Birth State:	District/Region:			
Birth Country:				
<b>Vaccination Defaults</b> <a href="#">click to update</a>				
Vaccinator:	Facility:			
District/Region:				
<b>Anatomical Injection Site Defaults</b> <a href="#">click to add</a>				
Vaccine/Med Name	Anatomical Site	Anatomical Route	Min Age	Max Age
<b>Lot Defaults</b> <a href="#">Default Lot Numbers</a>				
Vaccine/Med Name	Manufacturer / Lot Number / Facility / Pub Supp / Exp Date			
<b>VIS Publication Date Defaults</b> <a href="#">click to add</a>				
Vaccine/Med Name	Pub Date1	Pub Date2	Pub Date3	Pub Date4
<b>Vaccine Default Volume</b> <a href="#">click to add</a>				
Vaccine/Med Name	Default Volume			

The following facility defaults may be created by following the blue hyperlinks displayed on the **Facility Settings** page:

- > **Patient Defaults** allows a Facility Contact to choose a physician from the Physicians/Vaccinators added for the facility to be used as the default physician in the patient record.
- > **Vaccination Defaults** allows a Facility Contact to choose a vaccinator from the Physicians/Vaccinators added for the facility to be used as the default vaccinator in the vaccination record.
- > **Anatomical Injection Site Defaults** allows a Facility Contact to set a default anatomical route and injection site based upon vaccine type and age range.
- > **Lot Defaults** allows a Facility Contact to set default lot numbers based upon vaccine type.
- > **VIS Publication Date Defaults** should not be needed, as the default dates are assigned to all facilities under an Organization as part of the enrollment process.
- > **Vaccine Default Volume** allows a Facility Contact to set a default dosage amount based upon vaccine type.



A Facility Contact may schedule selected reports to arrive in their email inbox.



## >> Schedule Reports

To schedule reports

1. From the Home page of the WylR, locate the **Reports** menu on the left-side panel and click to expand.
2. Under the Reports menu, click **Report Module**. A screen similar to the following will appear:

The screenshot shows a web interface with a 'Reports' menu. The menu is organized into several sections:

- Vaccinations:** Vaccination Totals, Vaccinations Breakdown, Lot Number Summary, Lot Usage and Recall Report, Vaccine Deferrals, Vaccine Lots to Expire (with a 'Schedule' button), Daily Inventory Report, Reminder/Recall Success (with a 'Schedule' button).
- Patients:** Daily Patient Immunization List, Patient Detail, Patient Totals, Recall for Inactivation, Updated Patients Labels, Clinical Notes, Contraindication Report, Aggregate Contraindication report (with a 'Schedule' button).
- Wyoming Vaccinates Important People:** WYVIP Vaccinations Breakdown, Vaccine Administered (with a 'Schedule' button), WYVIP Eligibility Log (with a 'Schedule' button), VFC Profile Report.
- Registry:** Provider Submission Detail (with a 'Schedule' button), Coverage Rate Report (with a 'Schedule' button).
- Vaccine Management:** Inventory Transaction Report, Cost Report By Lot Number, Cold Chain Tolerance Exception Report (with a 'Schedule' button), Vaccine Return Adjustment Notification, Aggregate Wastage Report, Inventory Adjustment Report, Vaccine Dispensed Report (with a 'Schedule' button).
- Quality:** Patient Data Quality Detail, Vaccination Data Quality Detail, Administrator Data Quality (with a 'Schedule' button), Pre and Post Enhancement Benchmark Report.
- Site Information:** Provider Contact, Physician/Vaccinator Detail, Vaccination Route Barcodes, Vaccination Site Barcodes.

3. At a minimum, the **Vaccine Lots to Expire** report should be scheduled. This report may be helpful in notifying the WylR Facility Contact of vaccines that are set to expire shortly, and thus assist in preventing vaccine wastage. After clicking the **[Schedule]** button beside the report, the following screen presents:

The screenshot shows the configuration screen for the 'Vaccine Lots to Expire Report'. It includes the following sections:

- Vaccine Lots to Expire Report:** # of Days to Expire (input field), Facility (radio button), District/Region (radio button), Publicly Supplied Vaccine (radio button), IMMUNIZATION UNIT (dropdown menu), Public Only (checkbox).
- View By:** District/Region (radio button), County/Parish (radio button), ZIP Code (radio button), Facility (radio button).
- Scheduler:** Select Schedule Parameters, Run now: (checkbox), (Report will run now and will not be scheduled for additional runs), Minute: (dropdown), Hour: (dropdown), Day of Month: (dropdown), Month: (dropdown), Day of Week: (dropdown), Run once: (checkbox), (Report will run once as specified and then be removed from scheduling).
- Report can be accessed by:** Search User: (input field), First Name: (input field), Last Name: (input field), Search: (button), Search Results (Select the users listed below and click on 'Select Users'): Show 10 entries, No data available in table, First, Previous, Next, Last, Select Users (button).
- Selected Users (Report will be sent to users listed below):** Show 10 entries, No data available in table, First, Previous, Next, Last, Remove Users (button), Back, Reset, Schedule (button).

A Facility Contact may schedule selected reports to arrive in their email inbox.

## >> Schedule Reports

To schedule reports (*continued*)

4. Enter/Select the following criteria for the report:
  - > In the **Vaccine Lots to Expire Report** section, for the **# of Days to Expire**—enter “90”
  - > In the **Vaccine Lots to Expire Report** section, for the **Publicly Supplied Vaccines**—select “All”
  - > In the **Vaccine Lots to Expire Report** section, for **View By**—select “Facility”
  - > In the **Scheduler/Select Scheduler Parameters** section, for **Day of Month**—select “1”
  - > In the **Report can be accessed by** section, enter the user’s first and last name, click the search button; possible matches appear. Select the correct User by clicking in the checkbox beside their user information, and then click upon the **[Select Users]** button. A screen similar to the following presents:

**Vaccine Lots to Expire Report**

# of Days to Expire: 90

Facility: IMMUNIZATION UNIT

District/Region: --select--

Publicly Supplied Vaccine: All

**View By**

District/Region

County/Parish

ZIP Code

Facility

**Scheduler**

Select Schedule Parameters

Run now:  (Report will run now and will not be scheduled for additional runs)

Minute: :00

Hour: Ho

Day of Month: 1

Month: [dropdown]

Day of Week: [dropdown]

Run once:  (Report will run once as specified and then be removed from scheduling)

**Report can be accessed by:**

Search User:

First Name: facility

Last Name: contact

Search

Search Results (Select the users listed below and click on 'Select Users):

Select User	First Name	Last Name	Organization	Facility	Email Address
<input type="checkbox"/>	FACILITY	CONTACT	WYOMING DEPARTMENT OF HEALTH	IMMUNIZATION UNIT	JOHN.ANDERSON@WYO.GOV
<input type="checkbox"/>	FACILITY	CONTACT	WYOMING DEPARTMENT OF HEALTH	IMMUNIZATION UNIT	ALLISON.BUCK@WYO.GOV

Showing 1 to 2 of 2 entries

Select Users

Selected Users (Report will be sent to users listed below):

Select User	First Name	Last Name	Organization	Facility	Email Address
<input checked="" type="checkbox"/>	FACILITY	CONTACT	WYOMING DEPARTMENT OF HEALTH	IMMUNIZATION UNIT	JOHN.ANDERSON@WYO.GOV

Showing 1 to 1 of 1 entries

Remove Users

Back Reset Schedule

5. Next, select the **[Schedule]** button. The **Reports/Reports Module** page will present once the scheduling is complete.
6. It is recommended that users should **NOT** schedule reports that contain Protected Health Information in order to avoid any potential HIPAA issues. as the information being sent in the scheduled reports is not encrypted.