

# ALERT IIS Super User Handout

This is a companion guide to the ALERT IIS Super User Course.

## Table of Contents

Chapter 1: Roles and Responsibilities .....	1
Chapter 2: Steps Before Creating an ALERT IIS User Account .....	2
Chapter 3: ALERT IIS User Accounts .....	3
Brand-New Users - .....	4
Existing Users .....	5
Deactivate and Reactivate Users .....	6
Password Reset .....	6
Chapter 4: Editing Organization Details.....	7
State- Supplied Vaccine Profile <i>*State-Supplied Vaccine Program Organizations Only*</i> .....	8
Delivery Days and Times <i>*State-Supplied Vaccine Program Organizations Only*</i> .....	8
Main Organization Information .....	9
Individual Contacts .....	10
Chapter 5: Clinicians .....	11
Chapter 6: Reports <i>*State-Supplied Vaccine Program Organizations Only*</i> .....	13

## Chapter 1: Roles and Responsibilities

What is a Super User? –

A Super User is a designated person that oversees the access and accounts of an organization’s ALERT IIS users.

Responsibilities –

See the chart below for a comprehensive list of Super User responsibilities.

Maintain User Accounts	Support Staff	Other Responsibilities
<ul style="list-style-type: none"> <li>• Create user accounts</li> <li>• Reactivate and deactivate users</li> <li>• Reset passwords</li> <li>• Keep staff paperwork on file</li> </ul>	<ul style="list-style-type: none"> <li>• Direct users to training material</li> <li>• Talk with staff about interaction with ALERT IIS</li> <li>• Answer basic system questions</li> </ul>	<ul style="list-style-type: none"> <li>• Keep ALERT IIS profile up-to-date</li> <li>• Add clinicians</li> <li>• Run appropriate reports</li> </ul>

### Super User Account –

When your standard account is upgraded to Super User, your role is changed and you will be given an additional organization called "IR Physicians." This is the organization required to maintain query and standard user accounts.

organization ALERT Clinic 2 • user Charly Thomas • role Super User (Provider and LHD)

Status for both organizations need to be maintained to ensure Super User access. If your access is disabled, both your organization and IR Physicians organization need to be reactivated.

Application	Organization	Role	Status	Select
ALERT IIS	ALERT Clinic 2	Super User (Provider and LHD)	Active	<input type="checkbox"/>
PORTAL	IR PHYSICIANS	Portal Super User Role	Active	<input type="checkbox"/>

### Program Enrollment –

Your organization is designated as either ALERT IIS Only or State-Supplied based on your organization's program enrollment.

- **ALERT IIS only** are organizations that have access to ALERT IIS but are not enrolled in state-supplied vaccine programs.
- Organizations that have access to ALERT IIS and are enrolled in **Vaccines for Children (VFC) or Vaccine Access Program (VAP)** which includes VFC, 317 and billables are State-supplied vaccine organizations.

### Support Resources –

There are several resources available to help you answer questions or troubleshoot an issue.

- The Oregon Immunization Partner Update email Listserv. If you're not already signed up, email the Provider Services Help Desk at [vfc.help@odhsoha.oregon.gov](mailto:vfc.help@odhsoha.oregon.gov).
- Visit the [ALERT IIS New User Accounts webpage](#).
- If you need further assistance, contact to the OIP Help Desk 1-800-980-9431 or email [alertiis@odhsoha.oregon.gov](mailto:alertiis@odhsoha.oregon.gov).

## Chapter 2: Steps Before Creating an ALERT IIS User Account

### Step 1. Determine the Level of Access

Depending on your organization's functions, not all users may need the same level of access in ALERT IIS. There are three user roles in ALERT IIS; Query Only, Standard User and Super User.

Super User	Add New User Account Reset Passwords Edit Organization Details Billing & Accountability Report
Standard User	Edit Patient Information Add Immunizations Manage Inventory Ad Hoc Report Reminder/Recall Report
Query Only	Finding Patient Records Reading Patient Records Printing Patient Records

Super Users can only assign the Query Only and Standard User roles but can direct future Super Users to the appropriate training. Pharmacy Super Users can only assign the Query Only Role.

### Step 2. Direct Users to the Correct Trainings

Direct user to the [OIP Training Portal](#) to take the appropriate trainings. There are on-demand trainings available for Query Only and Standard user roles as well as inventory management and report trainings.

### Step 3. Collect User Paperwork

Collect and file your user's paperwork. You can file the paperwork digitally or have physical copies, as long as they are accessible when requested.

1. [Individual User Agreement](#)
2. Certificate of Course completion or proof of training

### Step 4. Create or give ALERT IIS access.

After training and paperwork are completed, you can now create a new user account or give access to your organization for existing users.

## Chapter 3: ALERT IIS User Accounts

Finding User Accounts –

To look up an account:

1. Click on "manage access/account" tab at the top of the screen.



2. On the left-hand menu under the Manage Access section click **Edit User**, this will pull up the search screen.
3. Select **all three status check boxes** to ensure all accounts are searched.
4. Type in the **last and first name** of the user, partial name is also acceptable.
5. Then click **Find** or press **Enter**.
6. Click on the **hyperlink at name** for an existing user or if "No users found matching search criteria" appears, create a new user account.

The screenshot shows the 'Edit User - Search' interface. On the left is a blue sidebar menu with 'Manage Access' selected. The main content area has search filters for 'Application' (ALERT IIS) and 'Organization' (All Orgs). There are 'Find' and 'Refresh' buttons. Below the filters are three status checkboxes: 'Active', 'Disabled', and 'Terminated', all of which are checked. Below the status checkboxes are input fields for 'Last Name' (Wilson) and 'First Name' (Amanda). Below the input fields is a 'Search Results' table with one row containing the user 'Wilson, Amanda' with the username 'awilson'. Numbered callouts (2-6) are placed over the 'Edit User' menu item, the status checkboxes, the name input fields, the 'Find' button, and the user name in the search results table, respectively.

Last Name	First Name	MI	User Name
<a href="#">Wilson</a>	Amanda		awilson

## Brand-New Users -

A brand-new user is someone who's never had an ALERT IIS account. You'll need to verify they don't already have an account to avoid a potential duplicate account, before adding a brand-new user.

To add a new user:

The screenshot shows the 'Add User' form in the ALERT IIS system. The left sidebar contains a 'Manage Access' menu with 'Add User' circled in red. The main form fields are: \* User First Name (Kelly), \* User Last Name (Anderson), Middle Initial, Username (kanderson), \* Password (masked with dots), Street Address, Other Address, P.O. Box, City, State (OR), Zip, Email (kelly.anderson.gov.org), Phone Number, and Ext. At the bottom are 'Save' and 'Cancel' buttons. Six numbered callouts (1-6) point to specific elements: 1. 'Add User' in the sidebar; 2. 'User First Name' field; 3. 'User Last Name' field; 4. 'Password' field; 5. 'Email' field; 6. 'Save' button. Three text boxes provide additional instructions: Box 1: '1. Click **Add User** on the left side menu.' Box 2: '2. Enter in user's **First and Last** name.' Box 3: '3. Enter **Username**. Usernames are generally first initial and last name, if there is already a user in your organization with the same potential username you can swap around last and first name or add numbers to the end. Usernames are case sensitive.' Box 4: '4. Assign a temporary **password**. You can give the same temporary password each time you add a new user.' Box 5: '5. Include the user's **email**. Preferably one they can quickly access so they can reset their own password using the "Forgot Password" function on the log in screen.'

At the top of the screen, we see in red the message "User Added, please proceed to Modify Access Tab. User does not have access until you do!"

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

The user's been added to ALERT IIS, but now you need to give them access to our organization.

To give a new user access:

1. Click the **Modify Access** tab.
2. Choose the **organization** you're giving access to from the drop-down menu. If you have access to only one organization this field will auto populate.
3. Assign either the Patient Query Only or Standard User **role** from the drop-down menu.
4. Click **Add**.
5. Click **Save**.

"User updated" will appear at the top. The account's been created, and access has been given.

\*\* User Updated \*\*

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

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

User Kelly Anderson

Application	<b>2</b> Organization	<b>3</b> Role	Add Access
ALERT IIS	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/> <b>4</b>

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

Application	Organization	Role	Status	Select
ALERT IIS	ALERT Clinic 2	Standard User	Active	<input type="checkbox"/>

**5**

Give the new user their Username, the temporary Password and Organization Code to log into ALERT IIS and complete the account set up.

## Existing Users

To give an existing user access to your organization, find the user using the same [search method](#) as previously instructed.

With an existing user we need to modify their access before we can edit their account.

1. Click the **Modify Access** tab.
2. Choose the **organization** you're giving access to from the drop-down menu. If you have access to only one organization this field will auto populate.
3. Assign either the Patient Query Only or Standard User **role** from the drop-down menu.
4. Click **Add**.
5. Click **Save**.

Repeat these steps as needed to give access to multiple organizations.

"User updated" will appear at the top. The existing user now has access to your organization. If you need to edit the user information, like update email address, click the Edit User tab. When finished, click Save to permanently save changes.

Existing users can log into ALERT IIS using the new Organization Code and their current Username and Password, if they remember.

## Deactivate and Reactivate Users

One of your Super User responsibilities is to maintain your ALERT IIS user accounts, this includes removing access to ALERT IIS when a user leave's your organizations and reactivating user who may get locked out.

To deactivate a user's access:

1. Find the user's account and go to the **Modify Access** tab.
2. Check the **box** in the correct row.
3. Click **Select**.
4. Select the **radio button** for the correct status.
  - a. Active – User currently working with organization.
  - b. Disabled - Happens automatically when a user doesn't log in for 90 days, after three failed log-in attempts or incorrectly answered security questions. Also labeled Inactive in organization list. This removes access to your ALERT IIS organization.
  - c. Terminated - Used when a user no longer works for an organization. This removes access to your ALERT IIS organization.
5. Click **Update**.
6. Click **Save**.

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

User Kathy Bateman

App.	Organization	Role	Status	Update
ALERT IIS	ALERT Clinic 2	Standard User	<input type="radio"/> Active <input type="radio"/> Disabled <input checked="" type="radio"/> Term	Update

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

Application	Organization	Role	Status	Select
ALERT IIS	ALERT Clinic 2	Standard User	Active	<input checked="" type="checkbox"/>
ALERT IIS	ALERT CLINIC 3	Standard User	Terminated	<input type="checkbox"/>
ALERT IIS	Amjen Medical Clinic	Standard User	Inactive	<input type="checkbox"/>

To reactivate a user, repeat the same steps as deactivating but select "Active" status.

## Password Reset

A user can reset their own password using the "Forgot Password" function. However, if users have three failed login attempts, they'll be locked out of ALERT IIS and a Super User will have to reset their password.

You may need to reactivate their account first on the Modify Access tab before you can reset their password.

To reset passwords:

1. Find the user's account and go to **Edit User** tab
2. Enter the **temporary password** in the New Password field then **confirm** the new password.

\* Username | kanderson

New Password  Confirm New Password

Status  Active  Disabled  Terminated

3. Click **Save**.

Remind the user of their username and Organization code and give the temporary password to log into ALERT IIS. They'll be prompted to reset their password the next time they log in.

## Chapter 4: Editing Organization Details

Another one of your Super User responsibilities is to keep your organization's ALERT IIS profile up-to-date.

To find your organization's details:

1. Click on **Edit Organization** in the Manage Access section on the left side menu.
2. Click the **Search** button. This lists the organizations you have access to as a Super User.
3. Click on the **hyperlink name** of the organization you want to edit.

Welcome  
Charly Thomas  
Logout

**Applications**  
ALERT IIS

**Manage My Account**  
Edit My User Account  
Change My Password  
Security Questions

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

**Organization Search Criteria**

**Edit Organizations**

Select your organization's name to view and/or update information.  
Note: parent organization names are marked with an '\*'.

Search

Search Field | Name |

Search String |

**Search Result**

Name	Org Code	VFC Pin	City	County	Open
<a href="#">ALERT CLINIC 2</a>	AL0022	P02222	PORTLAND	Multnomah	Y
<a href="#">ALERT CLINIC 3</a>	AL1113	P33333	GREENHORN		Y

Edit ALERT IIS Profile –

If your organization has a name change **do not change it here**, you'll need to contact the [OIP Helpdesk](#).

**Edit ALERT IIS PROFILE**

Org Id: 152752

\* Name | ALERT Clinic 2

Org Code: AL0022

Federal Designation: No

Org Type: Local Health Dept

Hospital FPI:

County | Multnomah |

Last Submission Date - You can see here when the last time data was submitted by your organization either through the User Interface (UI) or Data Exchange (DX).

#### Last Submission Dates

Last UI Submission: 11/09/2023

Last DX Submission:

#### Organization Relationships

Data Source: Self

IZGW Org Type: Non-VHA

ALERT Group:

Is Satellite Of:

Is Delegate Of:

Submission Type:

#### Organization Relationship -

The organization relationships detail parent and child relationships for three different programs: ALERT IIS, data exchange and state-supplied vaccine programs.

### State- Supplied Vaccine Profile *\*State-Supplied Vaccine Program Organizations Only\**

This section applies for organizations receiving state-supplied vaccine.

The VFC Pin is your organizations unique identifier, you'll need to know this to participate in state-supplied vaccine programs and processes.

#### State Supplied Vaccine Profile

VFC Pin: P02222

Varicella Certified: No

VFC Status: Active

Tier | Frequency: M1 - Monthly High

Pandemic Vaccine Provider:

Original Certification Date (VFC): 09/22/2021

Tier/frequency tells you when and how often your organization can order state-supplied vaccines. For more information about tier/frequency take the Inventory Management Course in the [OIP Training Portal](#).

### Delivery Days and Times *\*State-Supplied Vaccine Program Organizations Only\**

The delivery days and times section tells OIP when someone is on-site to receive and properly store state-supplied vaccine shipments. You'll want to look at this regularly and update as needed. Please see the [Vaccine Management Guide](#) for additional guidelines.

To make changes:

1. Check the **box** next to the respective day of the week to indicate available day of delivery.
2. Uncheck a day or **leave fields blank** if you are unavailable for deliveries on that day.
3. Choose a **beginning and end time** from the drop downs. There is a second delivery window to indicate if there is a break in the day or unavailable for deliveries.
  - a. Repeat the process for each day of the week you are receiving deliveries.

**Delivery Days and Times**

		Delivery Window 1			Delivery Window 2	
1	<input checked="" type="checkbox"/> Monday	9:00 AM	To 12:00 PM		1:00 PM	To 4:00 PM
	<input checked="" type="checkbox"/> Tuesday	9:00 AM	To 12:00 PM		1:00 PM	To 4:00 PM
	<input checked="" type="checkbox"/> Wednesday	9:00 AM	To 12:00 PM		1:00 PM	To 4:00 PM
	<input checked="" type="checkbox"/> Thursday	9:00 AM	To 12:00 PM		1:00 PM	To 4:00 PM
2	<input type="checkbox"/> Friday		To			To

3

## Main Organization Information

The main organization contact information section applies to the whole organization. This includes your organization's primary phone number, email and/or fax number.

**Main Contact Information**

**Contact Information**

Phone	Telephone	971	352	0625	Extension	
Facsimile	Telephone				Extension	
Email	oip.training@oha.oregon.gc					

It also includes a place to indicate your organization's physical, mailing and vaccine delivery addresses.

The **physical address** is the physical location of your organization. All address can be populated with the physical address if the same.

The **mailing address** is where your organization receives its mail.

The **vaccine delivery address** must be where your vaccine is stored. So that once it's delivered it can be moved into cold storage and not disrupt the cold chain process. This address is required to order state-supplied vaccine.

**Address Information**

Physical	Address 1	Address 2	PO Box
	800 NE OREGON ST.	STE 680	
	City	State	Zip +4
	PORTLAND	OR	97232
	Geocoded: No		
Mailing	Address 1	Address 2	PO Box
Populate With Physical Address	<input type="checkbox"/>	800 NE OREGON ST.	STE 680
	City	State	Zip +4
	PORTLAND	OR	97232
	Geocoded: No		
Vaccine Delivery	Address 1	Address 2	PO Box
Populate With Physical Address	<input type="checkbox"/>	800 NE OREGON ST.	STE 200
	City	State	Zip +4
	PORTLAND	OR	97232
	Geocoded: No		

## Individual Contacts

Individual contact information is used by OIP to communicate important information or questions for your specific organization. If the individual contact information is incorrect or out of date, there may be a delay in communication.

Under "Contact Listing" you will see your organization's current contacts and their assigned roles. These roles are:





- Primary ALERT
- Primary and Backup VFC/AFIX
- ALERT Technical, usually an IT person for data exchange
- Vaccine Delivery, the person responsible for proper vaccine storage.

To switch out an individual contact:

1. Delete the existing contact by clicking the "**Red X**" icon on the far right, click OK in the pop-up.
2. In the Add a contact section, select their **role**.
3. Enter the **contact's information**. Last and first name, phone number, and email address.
4. Click **Apply** to add them to the contact list.

### Individual Contacts

#### Contact Listing

Role	Name	E-Mail	Edit	Del
Primary ALERT	DANA Perez	<a href="mailto:OIP.TRAINING@OHA.OREGON.GOV">OIP.TRAINING@OHA.OREGON.GOV</a>		
Address: 800 NE OREGON ST. STE 680 PORTLAND OR 97232 -		Geocoded: No		
Phone: (971)352-1200x34		Facsimile:		
Primary VFC/AFIX	JOHNSON LEAH	<a href="mailto:OIP.TRAINING@OHA.OREGON.GOV">OIP.TRAINING@OHA.OREGON.GOV</a>		
Address: 800 NE OREGON ST. STE 680 PORTLAND OR 97232 -		Geocoded: No		
Phone: (971)352-0625		Facsimile:		

#### Add Contact

\* Role

\* Last Name

\* First Name

Middle Name

Email

Telephone  -  -

Ext

Address 1

Address 2

PO Box

City

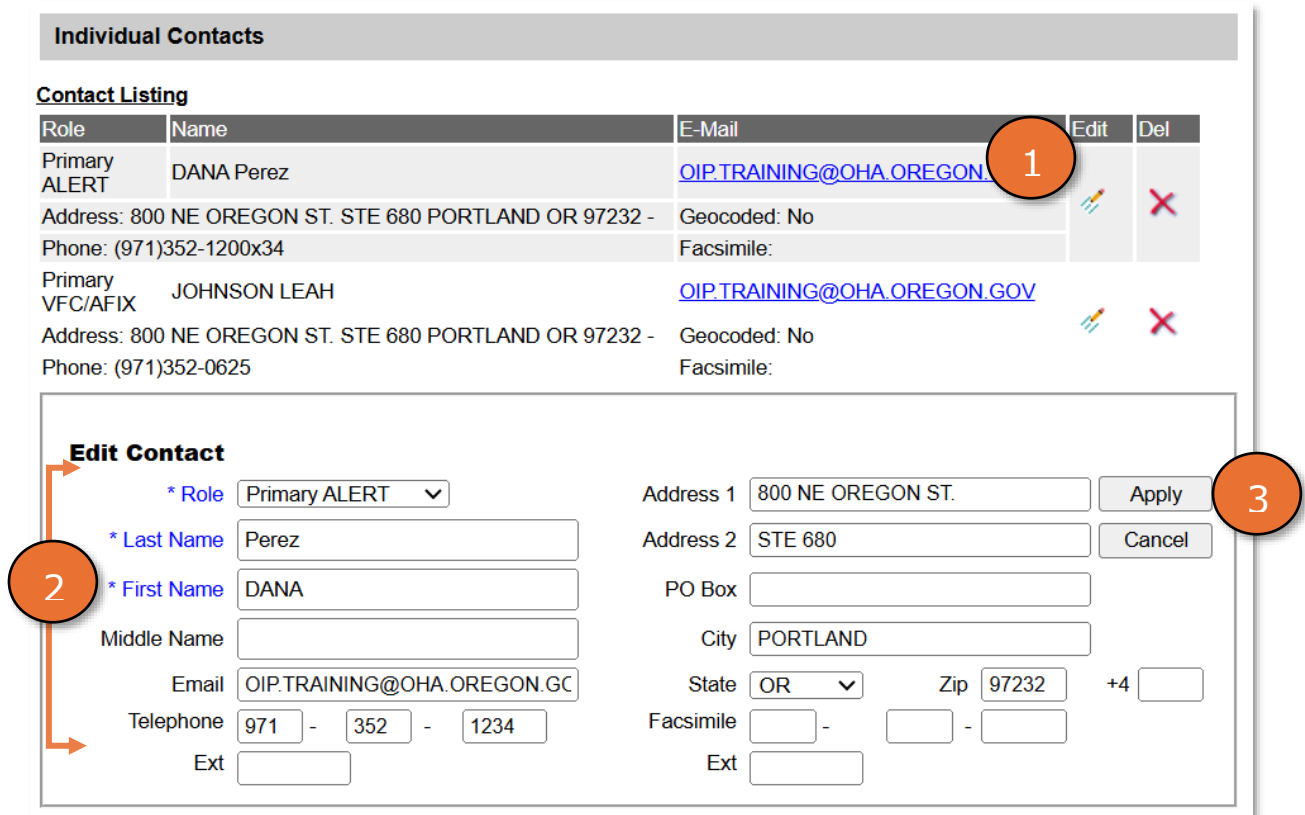
State  Zip  +4

Facsimile  -  -

Ext





To Edit contact information:

1. Click the **"Edit"** icon, this will move their information to the "Edit Contact" box below.
2. Make any necessary **changes**.
3. Then click **"Apply"** to update.



**Individual Contacts**

**Contact Listing**

Role	Name	E-Mail	Edit	Del
Primary ALERT	DANA Perez	<a href="mailto:OIP.TRAINING@OHA.OREGON.GOV">OIP.TRAINING@OHA.OREGON.GOV</a>		
Address: 800 NE OREGON ST. STE 680 PORTLAND OR 97232 -		Geocoded: No		
Phone: (971)352-1200x34		Facsimile:		
Primary VFC/AFIX	JOHNSON LEAH	<a href="mailto:OIP.TRAINING@OHA.OREGON.GOV">OIP.TRAINING@OHA.OREGON.GOV</a>		
Address: 800 NE OREGON ST. STE 680 PORTLAND OR 97232 -		Geocoded: No		
Phone: (971)352-0625		Facsimile:		

**Edit Contact**

\* Role: Primary ALERT

\* Last Name: Perez

\* First Name: DANA

Middle Name:

Email: OIP.TRAINING@OHA.OREGON.GOV

Telephone: 971 - 352 - 1234

Ext:

Address 1: 800 NE OREGON ST.

Address 2: STE 680

PO Box:

City: PORTLAND

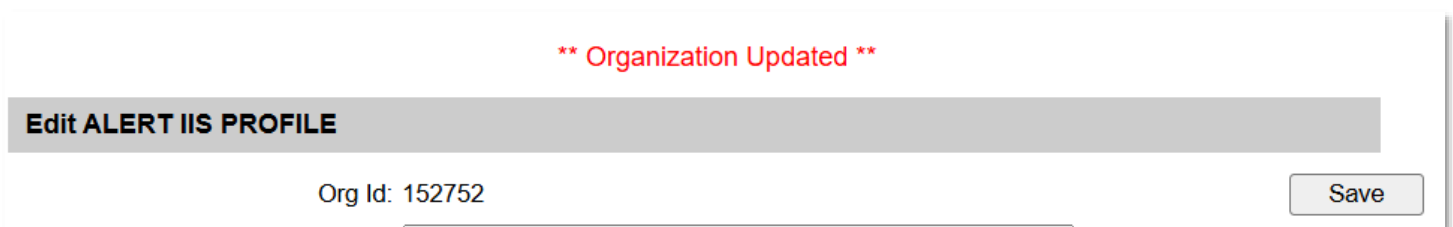
State: OR Zip: 97232 +4:

Facsimile: - -

Ext:

Buttons: Apply, Cancel

After making changes or updates to your organizations ALERT IIS Profile, scroll to the top and click Save to permanently save. "Organization Updated" will appear at the top.



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

**Edit ALERT IIS PROFILE**

Org Id: 152752

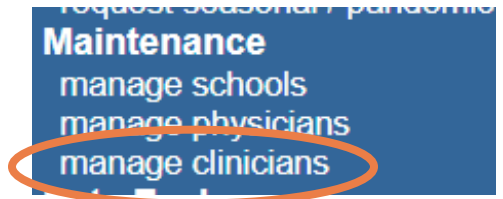
Save

## Chapter 5: Clinicians

ALERT IIS uses the term "clinician" to designate anyone who is authorized to administer an immunization.

The clinicians list populates the "administered by" drop-down menu on the recording immunization page. When adding immunization records that were provided by your organization, you'll need to include the name of the person who administered the immunization.

To find your clinicians list, click on "Manage Clinician" on the left side menu under Maintenance on the home screen. This will bring you to your clinician's list.



To add a clinician:

A screenshot of the 'Edit Clinician Information' form. The form has several fields and buttons. Callout 1 points to the 'Add Clinician' button in a side menu. Callout 2 points to the 'Clinician' radio button. Callout 3 points to the 'Last Name' and 'First Name' fields. Callout 4 points to the 'Add >' button in the 'Complete Site Listing' section. Callout 5 points to the 'Save' button. The form contains the following text: 'Edit Clinician Information', 'Role: Clinician (selected), Ordering Authority, Ordering Authority / Clinician', 'Prefix: [empty]', 'Last Name: Adams', 'First Name: Rachel', 'Middle Name: [empty]', 'Suffix: [empty]', 'Complete Site Listing: [empty]', 'Selected Sites: ALERT Clinic 2', 'Add >', 'Add All >>', '< Remove', '<< Remove All', 'Save', 'Delete', 'Cancel'.

1. Click **Add Clinician**.

2. Select the **radio button** to assign the Clinician role.

3. Fill out the **first and last name**.

4. In the Complete Site Listing box select the **site name then click Add** to move it to the Selected Sites box.

5. Click **Save**.

"Record updated" in red will appear in the top left-hand corner. The person is now listed as a clinician in the administered by drop-down when entering vaccines records. Click Cancel to return the main clinicians list.

When a clinician leaves your organization remove them from the list to reduce potential errors.

To delete a clinician,

1. Click on the blue **hyperlink clinician's name**.
2. Click **Delete**.
  - a. A pop up will appear saying "Are you sure you want to delete this record?" click **OK**.

The clinician's is now removed from the administered by drop-down but their name will still be on the immunization record.

## Chapter 6: Reports *\*State-Supplied Vaccine Program Organizations Only\**

The Super User role grants access to two reports, accountability and billing, these reports are used by clinics participating in state-supplied vaccine programs.

You can find both the Accountability and Billing Reports in the Report section on the left side menu.

The Billing Report:

- is used only by VAP organizations.
- identifies all vaccines with eligibility code "B" for invoices.
- should be reviewed quarterly.

For a closer look check out the [Billing Report tipsheet](#).

-----  
The Accountability Report:

- is an accounting of every vaccine transaction.
- determines percentage of all accounted vaccine.
- a compliance tool for Oregon's Vaccine Stewardship Law.
- recommended to run monthly.

For a closer look take the [Accountability Report Training](#) in the OIP Training Portal.

### Reports

reminder / recall  
check reminder status  
check reminder list  
manage custom letters  
the iqip product  
vaccine eligibility  
group patients  
check group status  
assessment report  
check assessment  
benchmark report  
check benchmark  
ad hoc list report  
ad hoc count report  
ad hoc report status  
billing report request  
check billing report  
accountability report request  
check accountability report  
data exchange report  
check dx report status