IIS Helpdesk Functionality

ALL PHONES ARE IN LISTEN ONLY MODE.

How do I ask a question?

- via WebEx: type your question into the chat box on the WebEx toolbar and send to HOST

- questions will be noted and answered after the presentation, to unmute **press *6**

This WebEx presentation is being recorded and will be posted on the AIRA website.

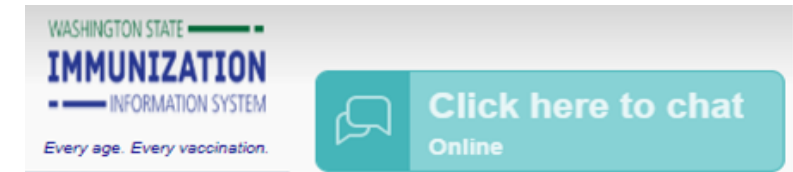# Washington Immunization Information System (WAIIS) Help Desk

Help Desk Features

Customer Relationship Management

Help Desk member is available to accept a call from a provider or a patient.

Help Desk member is entering a ticket or responding to a provider or patient through email.

Chat Feature

Help Desk member is on a call with a provider or patient.

Best Practices
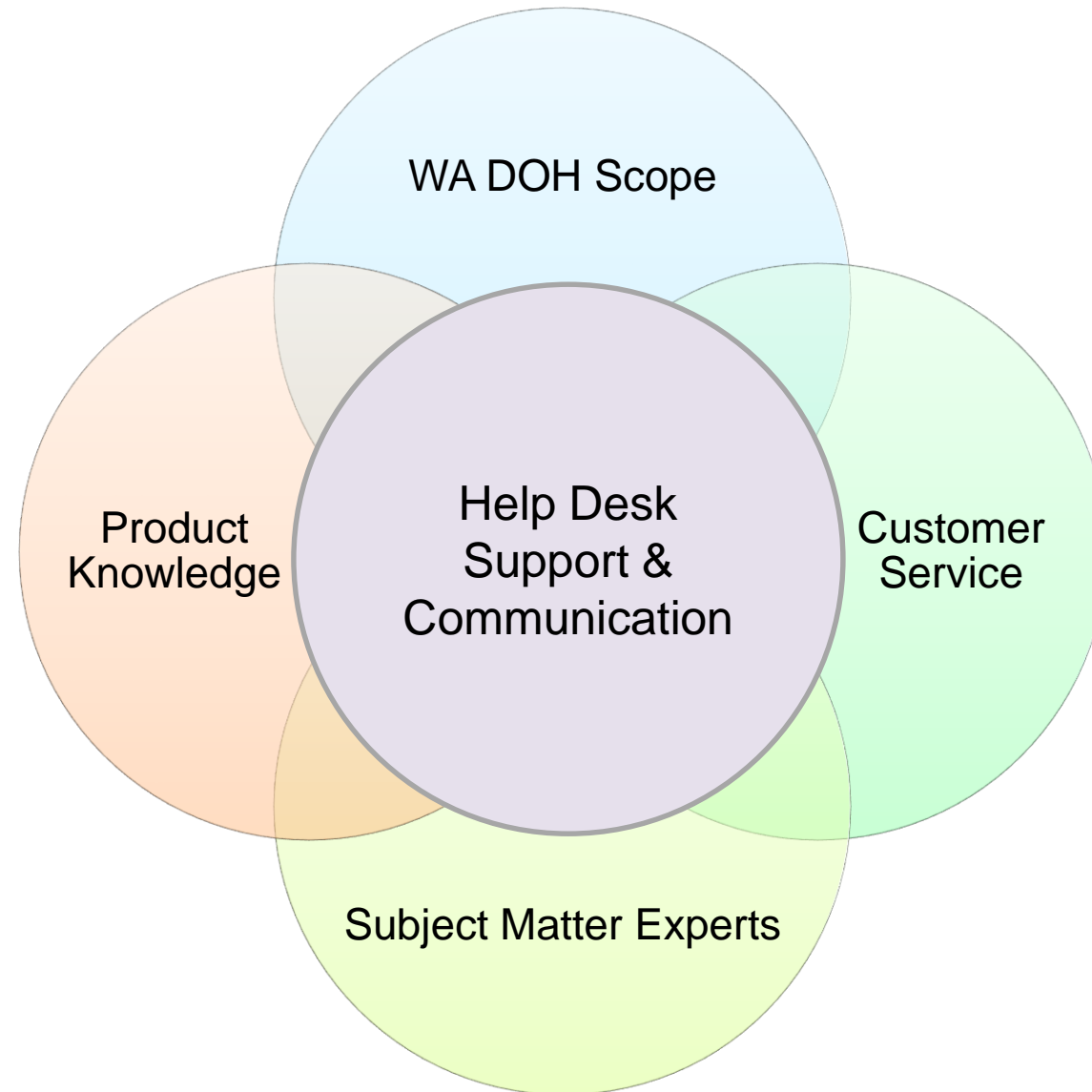
Overview of NYC Citywide Immunization Registry (CIR) Frontline Services

Bureau of Immunization (BOI) Hotline Team

- Handle/route calls from providers and the public to appropriate staff

- Provide program information and issue CIR records via mail, fax, and walk-in

- Track hotline utilization data to improve services

- Other supporting tasks:
  - Manual vaccination data entry, updates, record merging and synchronization
  - Provider enrollment and retention activities

BOI Hotline Tracking Program

Overview of NYC Citywide Immunization Registry (CIR) Frontline Services

IIS-EHR Interoperability Support Team

- Assist practices and EHR vendors connect to CIR's HL7 Web Service

- Provide Meaningful Use program support:
  - communication and outreach, data remediation, and review of activities to ensure Meaningful Use compliance

- Identify/resolve data quality issues related to accuracy and completeness

- Assist in testing and implementation of Web Service enhancements to better align with national standards

Collaboration Between BOI Hotline and Interoperability Teams

- Workflow ensures that IIS issues reported to Hotline staff are communicated to the Interoperability team:
  - Issues include IIS data quality, Web Service connection requests, connectivity, or Meaningful Use
- Hotline staff collect key information necessary to investigate IIS reporting issues and assist in follow up with sites/providers
- Proximity of Interoperability and Hotline team members in the office helps facilitate communication and collaboration
- Trainings and resources for Hotline staff to enable them to assist in triaging IIS issues reported

Minnesota's IIS Help Desk Experience

Angie Felt | MIIC Outreach Coordinator

Elena Rosenberg-Carlson | MIIC Outreach and Communications Lead

June 28, 2018

Agenda

1. Minnesota Immunization Information Connection (MIIC) Help Desk History

2. MIIC Help Desk Model

3. MIIC Help Desk Manual

4. MIIC Help Desk In Practice

MIIC Help Desk History

IT and business staff on one team. Several provided coverage.

2013

Reorganization of IT and business staff. One business staff assigned coverage.

2014

Hired two staff with help desk duties written into positions. Three staff assigned coverage.

2015

Two hired staff provided all coverage.

2016

Two hired staff provide primary coverage. All (nine) staff provide some coverage.

MIIC Help Desk Model
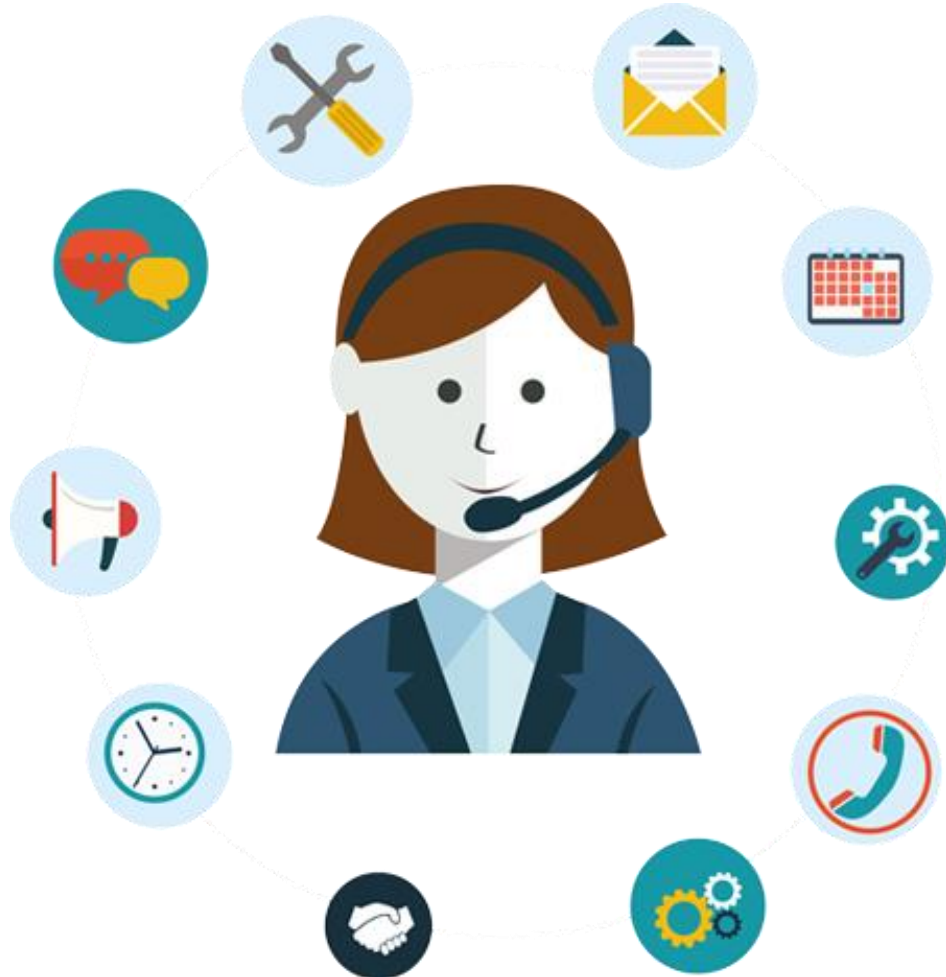
- Listening to the voice of our customers
- Building customer relationships
- Determining customers' level of satisfaction
- Using customer information and feedback to identify and act on opportunities for improvement

1. Ensure consistency in help desk services

2. Act as reference for staff who infrequently cover help desk

3. Support business continuity
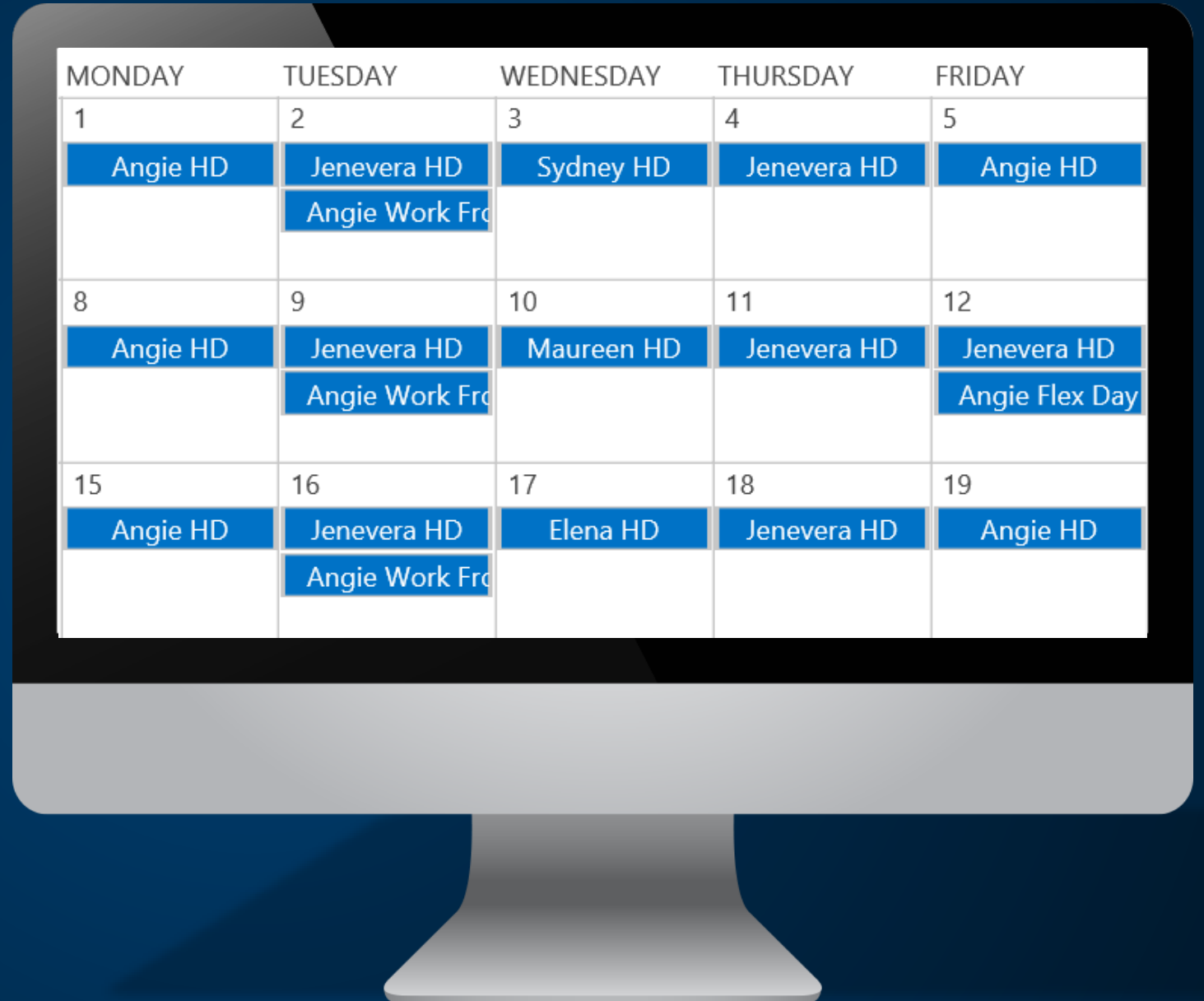
Table of Contents

MIIC Help Desk In Practice

- Schedule

- Inbox organization

- Triage system

- Relationships with other help desks

- Staff training

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	2	3	4	5
Angie HD	Jenevera HD	Sydney HD	Jenevera HD	Angie HD
	Angie Work Fr			
8	9	10	11	12
Angie HD	Jenevera HD	Maureen HD	Jenevera HD	Jenevera HD
	Angie Work Fr			Angie Flex Day
15	16	17	18	19
Angie HD	Jenevera HD	Elena HD	Jenevera HD	Angie HD
	Angie Work Fr			

- Consistency

- Response time

- No staff's ONLY job

- Regional services transition

MIIC Help Desk: What Works Well?

- Central line

- Help desk manual

- Relationship with providers

- Less burnout

- Training mechanism

![Minnesota Department of Health logo]

Thank you!

Angie Felt: Angela.Felt@state.mn.us

Elena Rosenberg-Carlson: Elena.Rosenberg-Carlson@state.mn.us

IIS Helpdesk Functionality – California's Perspective

Cecilia Sandoval, MPH
Chief, Provider Support Supervisor
June 28, 2018

Overview

- How do we function?
- CAIR Help Desk Statistics
- Tools Used by the CAIR Help Desk
- User Training Registration
- Upcoming Model
- Training Internal Help Desk Staff
- Questions?

How do we Function?

- 1 Supervisor
  - HR Issues
  - Liaison between help desk and technical team and between help desk and Training Coordinator
  - Address issues Lead HD staff unable to address

- 1 Lead (new position as of late 2017)
  - Work distribution and flow
  - Address issues the agents are unable to assist with
  - Answer calls
  - Process email and new user account requests

How do we Function?

- 4 Agents
  - Answer calls coming in via 800 line
    - Login issues
    - Patient search
    - Inventory and reporting questions
    - Training questions
    - Questions and requests from the general public

  - Process email requests to CAIRHelpDesk@cdph.ca.gov
    - Immunization record requests
    - Merge duplicate patients
    - Bug reporting and enhancement ideas

  - Process Account Updates in internal CATS system
    - Manually process new clinicians requested to a site (up to 10 per submission)
    - Process new user requests (up to 10 per submission)
    - Process user transfers from site A to site B
    - Inactivate/reactivate users

CAIR Help Desk Calls 2017

- Incoming Calls September to December 2017: 7,462

Call Center Activity

Calls Stranded, 178, 2.4% Calls Escaped, 468, 6.3%

Calls Abandoned, 1211, 16.2%

Calls Answered, 5605, 75.1%
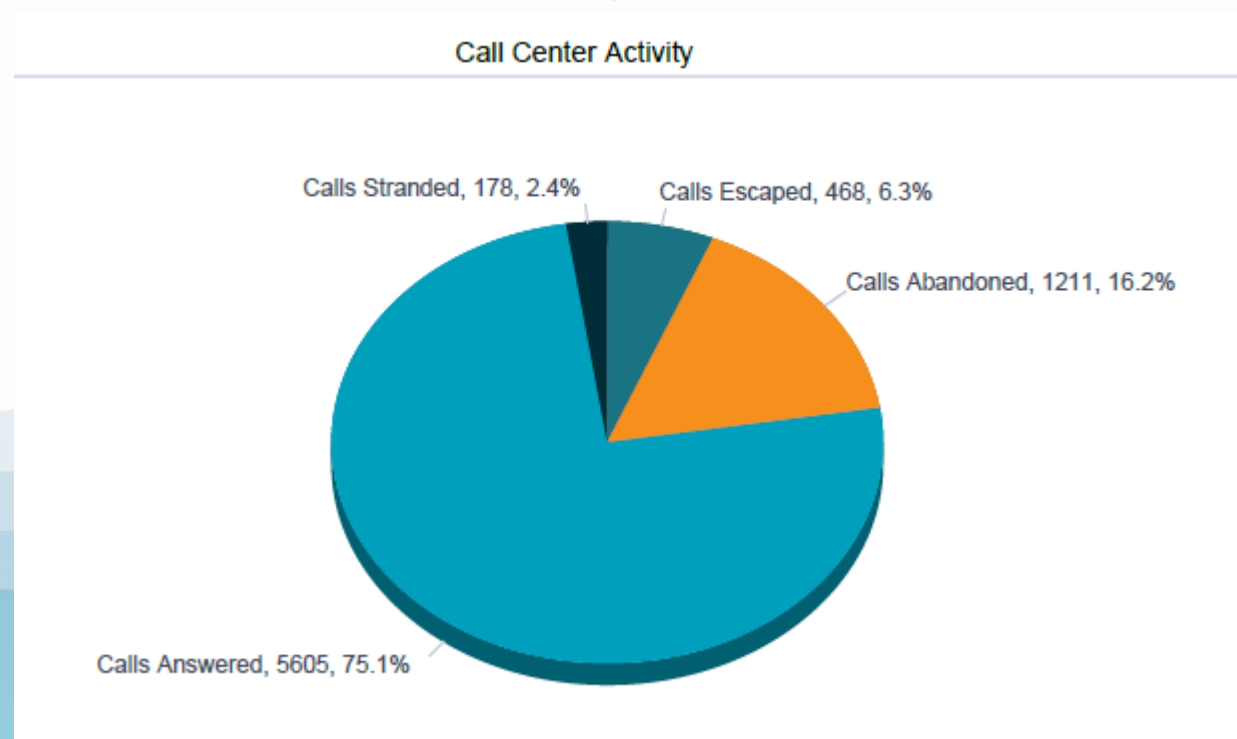
- Please note: data prior to 09/2017 unavailable due to lack of features is existing telephone system at that time.

CAIR Help Desk Calls 2018

- Incoming Calls January 1st to June 21st 2018: 10,709

Call Center Activity

Calls Stranded - Unavailable, 60, 0.6%
Calls Stranded, 190, 1.8%
Calls Bounced - Transferred, 53, 0.5%
Calls Overflowed - Time, 135, 1.3%
Calls Escaped, 170, 1.6%
Calls Abandoned, 395, 3.7%
Calls Transferred, 3, 0.0%
Calls Answered, 9683, 90.6%
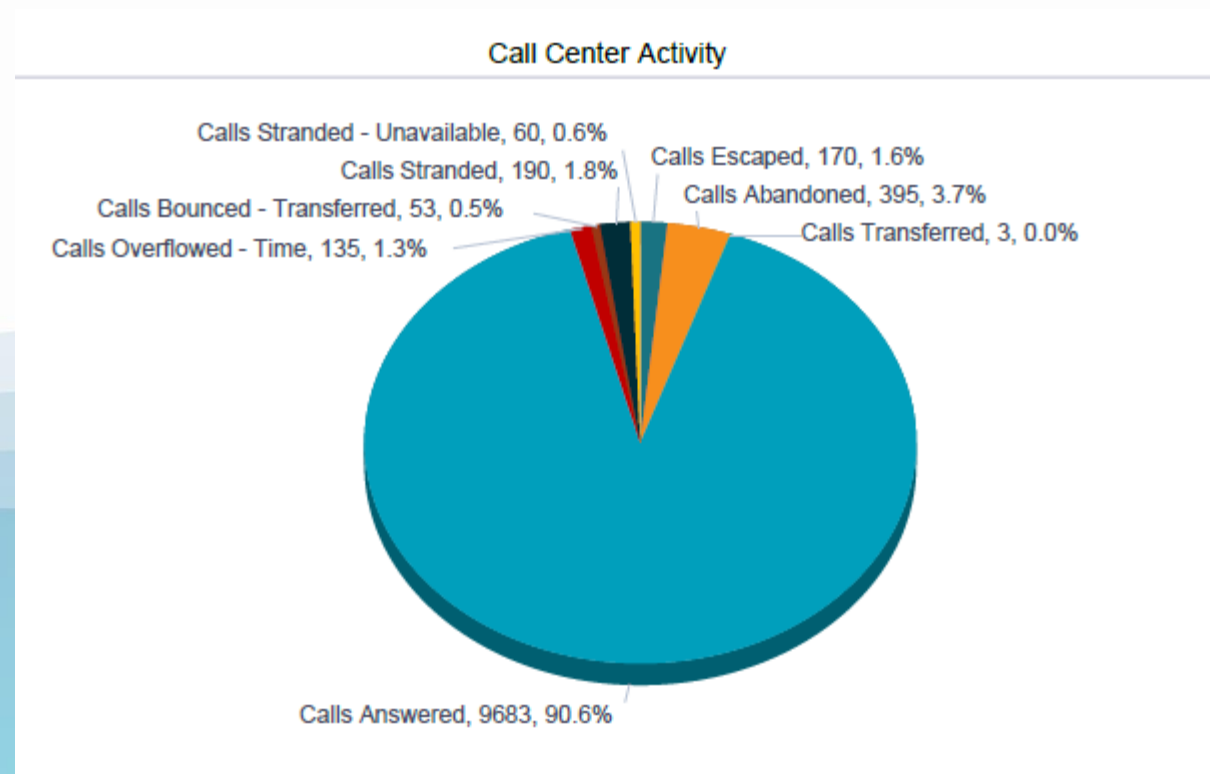
Tickets Submitted via ZenDesk

- 2017: 8332
- 2018: 7802

- Items ticketed:
  - 1 ticket daily for merged patients
  - 1 ticket daily for locking/unlocking patient records
  - Calls requiring work to be done by the agent
    - Example – if someone calls to request website information, a ticket is **not** created
    - Example – if a supervisor calls needing assistance with creating a new user account, a ticket is created
  - Processing new user accounts via Account Update
  - Training questions
  - Immunization requests from parents, the general public, and non-CAIR regions.
  - CAIR software bugs

Tools used by the helpdesk

- Phone system: Mitel VoIP
  - When users dial in they can opt to be directed to a help desk agent, the data exchange team, or statewide trainers.

- Ticketing system: ZenDesk
  - As of July 1st we will start using AMCI
  - Data exchange has been using AMCI since May 1st
  - Trainers to being using by January 2019
  - In the future: Resource Center for CAIR users to submit their own tickets.
    - TBD – still being built

Tools used by the help desk

- CATS (CAIR Administrative Tracking System)
  - An internal system that allows:
    - New sites to enroll in CAIR (non-data exchange sites)
    - Existing sites to add/remove users, transfer users from other CAIR sites, add new clinicians, and update site contact information.
    - Tracks training information for all CAIR users
    - Allows new CAIR users to sign up for training
    - Once training completed, the trainer marks users as complete and the system sends them their password
    - If training is not completed or failed, this is also documented here and no login information is sent out

View Enrollments

Search by County: [ALL ▾] Search by LCR: [ALL ▾] [Submit]

Expand ☐

Pending Enrollments			
Date Submitted	Organization Name	County	Enrollment Information

Expand ☐

Hold Enrollments				
Date Updated	Organization Name	County	Approver	Enrollment Information

Expand ☐

Approved Enrollments				
Date Approved	Organization Name	County	Approver	Enrollment Information

Expand ☐

Submitted To CAIR2					
Date Submitted	Organization Code	Organization Name	County	Submitter	Enrollment Information

Expand ☐

Denied Enrollments				
Date Denied	Organization Name	County	Approver	Enrollment Information

Provider Updates

Provider Lookup **Change Org Type** **Inactive User(s)**

Search updates by status: [dropdown] **Search updates by region:** [dropdown]

Search updates by Date Range: If you want to see report for all records, leave these fields blank.

From (month/day/year): [dropdown] [dropdown] [___] To (month/day/year): [dropdown] [dropdown] [___] [Search]

Number of rows per page: [200 ▾]

Provider ID ▲	Provider Group ID	Provider Name	Date Submitted	Date Verified	Zip	County	Region	Verified By	Action Needed

Training Registration

Search Attendees   Search Training   + Training

Search trainings by Date Range:

From (month/day/year): [June ▼] [25 ▼] [2018]   To (month/day/year): [July ▼] [25 ▼] [2018]   [Search]

Number of rows per page: [200 ▼]

	Training ID	Training Date	Type	#Users	Trainer	Action
1	3180	Jun 28 2018 9:00AM Cancel	Regular Webinar	21	Giselle Garcia Reassign	View Registered Users
2	3181	Jun 28 2018 1:00PM Cancel	Regular Webinar	16	Brian Wylie Reassign	View Registered Users
3	3182	Jun 28 2018 3:30PM Cancel	Regular Webinar	16	Jerad Timmons Reassign	View Registered Users
4	3183	Jun 29 2018 9:00AM Cancel	Regular Webinar	17	Brian Wylie Reassign	View Registered Users
5	3184	Jun 29 2018 1:00PM Cancel	Regular Webinar	17	Brian Wylie Reassign	View Registered Users
6	3185	Jul 3 2018 1:00PM Cancel	Regular Webinar	16	Jennifer Toten Reassign	View Registered Users
7	3186	Jul 5 2018 9:00AM Cancel	Regular Webinar	17	Jennifer Toten Reassign	View Registered Users
8	3187	Jul 5 2018 1:00PM Cancel	Regular Webinar	16	Brian Wylie Reassign	View Registered Users
9	3188	Jul 6 2018 9:00AM Cancel	Inventory Webinar	15	Monique Crespo Reassign	View Registered Users
10	3189	Jul 6 2018 1:00PM Cancel	Regular Webinar	16	Jerad Timmons Reassign	View Registered Users
11	3190	Jul 9 2018 3:00PM Cancel	Regular Webinar	16	Monica Hernandez Reassign	View Registered Users
12	3191	Jul 10 2018 1:00PM Cancel	Regular Webinar	16	Grissel Barrios Reassign	View Registered Users
13	3192	Jul 11 2018 8:00AM Cancel	Regular Webinar	16	Heather Murphy Reassign	View Registered Users
14	3193	Jul 11 2018 10:30AM Cancel	Regular Webinar	16	Brian Wylie Reassign	View Registered Users
15	3194	Jul 11 2018 1:00PM Cancel	Regular Webinar	16	Monique Crespo Reassign	View Registered Users
16	3195	Jul 12 2018 8:00AM Cancel	Regular Webinar	15	Giselle Garcia Reassign	View Registered Users
17	3196	Jul 12 2018 10:30AM Cancel	Regular Webinar	3	Jerad Timmons Reassign	View Registered Users
18	3197	Jul 12 2018 1:00PM Cancel	Regular Webinar	15	Monica Hernandez Reassign	View Registered Users
19	3198	Jul 13 2018 8:00AM Cancel	Regular Webinar	13	Giselle Garcia Reassign	View Registered Users
20	3199	Jul 13 2018 10:30AM Cancel	Regular Webinar	6	Janet Ajao Reassign	View Registered Users
21	3200	Jul 13 2018 1:00PM Cancel	Regular Webinar	7	Heather Murphy Reassign	View Registered Users
22	3201	Jul 16 2018 1:00PM Cancel	Regular Webinar	6	Grissel Barrios Reassign	View Registered Users
23	3202	Jul 17 2018 11:00AM Cancel	Inventory Webinar	15	Jerad Timmons Reassign	View Registered Users
24	3203	Jul 17 2018 1:00PM Cancel	Regular Webinar	2	Heather Murphy Reassign	View Registered Users

CAIR 2 Attendee List

Training ID: 3145   Training Date: 06-01-2018
Trainer Type: Inventory   Trainer Name: Monique Crespo
Live Training: No   Original Trainer: Monique Crespo

Attendee(s)

◉ **COMPLETED** Training ○ **FAILED** to Complete Training

Search CAIR2 Training Registration

Please enter any of the following information to search for a User

Org Code: `07ctest`
Username:

[Search]

	Org Code	Username	Full Name	UserLevel	Training Date	Trainer	Type	Status	E
1	07CTEST	2137	CHRISTI REGULAR	Regular				Register	MEGAN.MOJIC/
2	07CTEST	BSMITH	BOB SMITH	Regular				Register	DEEPA.AUTI@(
3	07CTEST	CALUG	CHUG ALUG	Regular	Apr 24 2018 6:00AM	Megan Mojica	Regular	COMPLETED	Megan.mojica@
4	07CTEST	CGARRETT	CELINE GARRETT	Regular	Feb 20 2018 6:00AM	Megan Mojica	Regular	COMPLETED	CHERYL.SCOT
5	07CTEST	CGARRETT	CELINE GARRETT	Power	Feb 20 2018 8:30AM	Heather Murphy	Inventory	COMPLETED	CHERYL.SCOT
6	07CTEST	CLUG	CHUG ALUG	Regular				Register	CHERYL.SCOT
7	07CTEST	CREGULAR	CHRISTI REGULAR	Regular				Register	MEGAN.MOJIC/
8	07CTEST	CREGULAR	REGULAR CREGULAR	Power				Register	MEGAN.MOJIC/
9	07CTEST	DAUTI	DEEPA AUTI	Power				Register	DEEPA.AUTI@(
10	07CTEST	DAUTI	DEEPA AUTI	Regular				Register	DEEPA.AUTI@(
11	07CTEST	DJONES	DALE JONES	Power				Register	CECILIA.SAND(
12	07CTEST	DJONES	DALE JONES	Regular				Register	CECILIA.SAND(

User Training Registration

Welcome to the CAIR2 Training Registration website

Note: **You must have a CAIR Username (User Account) to register**

If you have a CAIR Username (User Account), please log in below using your site's CAIR Org Code and your CAIR Username.

Not able to log in below? Click here for more information.

If you don't have a CAIR Username (User Account) you will need your supervisor to go to the CAIR Account Update website to request one for your.

CAIR2 ORGANIZATION CODE:	
CAIR2 USERNAME:	

Sign On

Welcome to the CAIR2 Training Registration Site

ORG CODE: 07CTEST   USERNAME: CREGULAR

Please register for the following required training(s) in order to access CAIR.

Regular Training	Click Here to Register
Power Training	Not Authorized until Regular training completed

** If you have completed training under a different Org Code or feel that this information is incorrect please contact your **Local CAIR Representative.**

User Training Registration

Welcome to the CAIR2 Training Registration Site

You will need to attend a Regular training before being given access to CAIR2. Register for a training by clicking on an available date below.

Training ID	Training Type	Location	Training Date	Space Available
3196	Regular Webinar	N/A	Thursday Jul 12 2018 10:30AM-12:30 PM	12
3198	Regular Webinar	N/A	Friday Jul 13 2018 8:00AM-10:00 AM	2
3199	Regular Webinar	N/A	Friday Jul 13 2018 10:30AM-12:30 PM	10
3200	Regular Webinar	N/A	Friday Jul 13 2018 1:00PM-03:00 PM	9
3201	Regular Webinar	N/A	Monday Jul 16 2018 1:00PM-03:00 PM	10
3203	Regular Webinar	N/A	Tuesday Jul 17 2018 1:00PM-03:00 PM	14
3204	Regular Webinar	N/A	Wednesday Jul 18 2018 8:00AM-10:00 AM	12
3205	Regular Webinar	N/A	Wednesday Jul 18 2018 10:30AM-12:30 PM	15
3206	Regular Webinar	N/A	Wednesday Jul 18 2018 1:00PM-03:00 PM	15
3207	Regular Webinar	N/A	Thursday Jul 19 2018 8:00AM-10:00 AM	16
3208	Regular Webinar	N/A	Thursday Jul 19 2018 10:30AM-12:30 PM	15
3209	Regular Webinar	N/A	Thursday Jul 19 2018 1:00PM-03:00 PM	14
3210	Regular Webinar	N/A	Friday Jul 20 2018 8:00AM-10:00 AM	15
3211	Regular Webinar	N/A	Friday Jul 20 2018 10:30AM-12:30 PM	16

Upcoming Model

- One-stop shop for all!
- Will allow users to:
  - Submit tickets to report bugs, login issues, enhancements, etc.
  - Submit new enrollments for new sites
  - Submit new account updates
  - Request further training
- Internally, it will:
  - Help keep everyone on the same page
  - Allow help desk, data exchange, and trainers to see why the site has contacted CAIR and discover any ongoing issues that may require training.

Training Internal Staff

- New help desk staff is trained by the Lead Help Desk Technician
- Training typically takes 2 to 3 weeks, depending on the person's learning curve
- With new software in place, we are currently working on new training materials and manuals
  - To be joining forces with VFC help desk staff
- The software vendor has developed training manuals and videos for CAIR users, which are also used for our staff

CAIR California Immunization Registry
Connected & Protected

CDPH California Department of **PublicHealth**

CAIR2 User Guides and Training Videos

CAIR2 User Guides	CAIR2 Training Videos (minutes)
CAIR2 Regular User Guide	Accessing CAIR (6:32)
CAIR2 Inventory User (Power) Guide	Managing Patients (10:58)
CAIR2 Organizational Reports Guide	Understanding the History/Recommend Page (8:14)
CAIR2 Read-Only User Guide	Adding New Immunization (8:51)
CAIR2 Read-Only User Quick Guide	Adding Historical Immunizations (6:18)
CAIR2 TB User Guide	Generating Patient-Specific Reports (5:43)
CAIR2 School User Guide	Vaccine Inventory (12:13)
CAIR2 Complete User Manual	Vaccine Transfers (11:35)
CAIR2 Manual Entry Guide (Sites not using inventory)	Generating Reminder and Recall Reports (11:01)
	Generating and Understanding Ad Hoc Reports (12:34)
	Generating Benchmark and Assessment Reports (19:52)
	School and Child Care User (11:56)

Questions?

NJIIS Helpdesk (Online Intake Form)

PRESENTED BY:-

ALOK PATRA

NJIIS DATA COORDINATOR

VACCINE PREVENTABLE DISEASE PROGRAM

NEW JERSEY STATE DEPARTMENT OF HEALTH

Need for a Help Desk Solution

- More information about the issue upfront
- Streamline workflow and address issues/questions with limited staff resources
  - Reduce reliance on phone calls/voicemails
- A secure way to share documents or screenshots of the issues
- A systematic way to track all issues
- Admin capabilities to assess productivity, outstanding issues, identify areas for improvement in NJIIS
- Ensure continuity of service (issue handling) when staff members are out of the office

Criteria

▶ No additional cost!

    ▶ Leverage existing tools if possible

▶ All NJIIS team members can access and use the system to review/resolve issues

    ▶ Internal NJDOH staff (Coordinators, Interoperability Staff, VFC Staff)

    ▶ Field/contract staff (Trainers, Data Quality Team)

▶ Ability to automatically route tickets to appropriate team member based on:

    ▶ Topic area

    ▶ County

Solution

- Leverage existing tools available to NJDOH Health Information Technology
  - Survey software
  - Issue tracking application (Track-it!)

Issue Routing

Topic Area	Topic Description	Step 1 (link to URL or systematic routing)	Step 2 (systematic or manual routing)
I have questions about NJIIS reporting requirements/regulations/mandates	NJIIS_Reporting_Requirements	Display Link to NJIIS FAQs	If inquiry/request not answered, route to: Program on Call
How do I enroll my practice in NJIIS?	NJIIS_Practice_Enrollment	Display Links to Instructions, Training, and Form	If inquiry/request not answered, route to: Trainer by County
How do I get a user account in NJIIS?	NJIIS_User_Account	Display Link to NJIIS Training Opportunities	If inquiry/request not answered, route to: Trainer by County
I have questions about Meaningful Use (MU)	NJIIS_Meaningful_Use_Question	Display Link FAQs	If inquiry/request not answered, route to: Program on Call
Getting Started with Interface Enrollment	NJIIS_Interface_Enrollment	Display Links to Getting Started and Form	If inquiry/request not answered, route to: Program on Call
I am experiencing issues with my existing interfaces with NJIIS	NJIIS_Existing_Interface_Issue	Display Link to Getting Started	If inquiry/request not answered, route to: Trainer by County
How do I enroll for training?	NJIIS_Training_Enrollment	Display Link to NJIIS Training Opportunities	If inquiry/request not answered, route to: Trainer by County
My vaccine inventory is not decrementing (depleting)	NJIIS_Vaccine_Inventory_Not_Decrementing	Display Link to VFC FAQs	If inquiry/request not answered, route to: Trainer by County
I am not able to place my VFC order	NJIIS_Placing_VFC_Order	Display Link to VFC FAQs	VFC on Call
I have questions about VFC vaccine management	NJIIS_VFC_Vaccine_Management	Display Link to VFC FAQs	VFC on Call
How do I run reports in NJIIS?	NJIIS_Reports	Trainer by County	Technician on Call
How do I correct data errors?	NJIIS_Data_Corrections	Trainer by County	
How do I report/correct duplicate patient records?	NJIIS_Duplicate_Patient_Records	Display Link to NJIIS Form (IMM-40)	If inquiry/request not answered, route to: Patricia Kaiser (MCHC Trainer)
I am getting a system error	NJIIS_System_Error	Technician on Call	
I want to request a copy of my immunization record from NJIIS	NJIIS_Immunization_Record_Copy	Program on Call	

Statistics

NUMBER OF RESPONSES BY YEAR

Year	Number of Responses
2013	1,651
2014	3,013
2015	3,262
2016	3,713
2017	3,662
2018	4,492
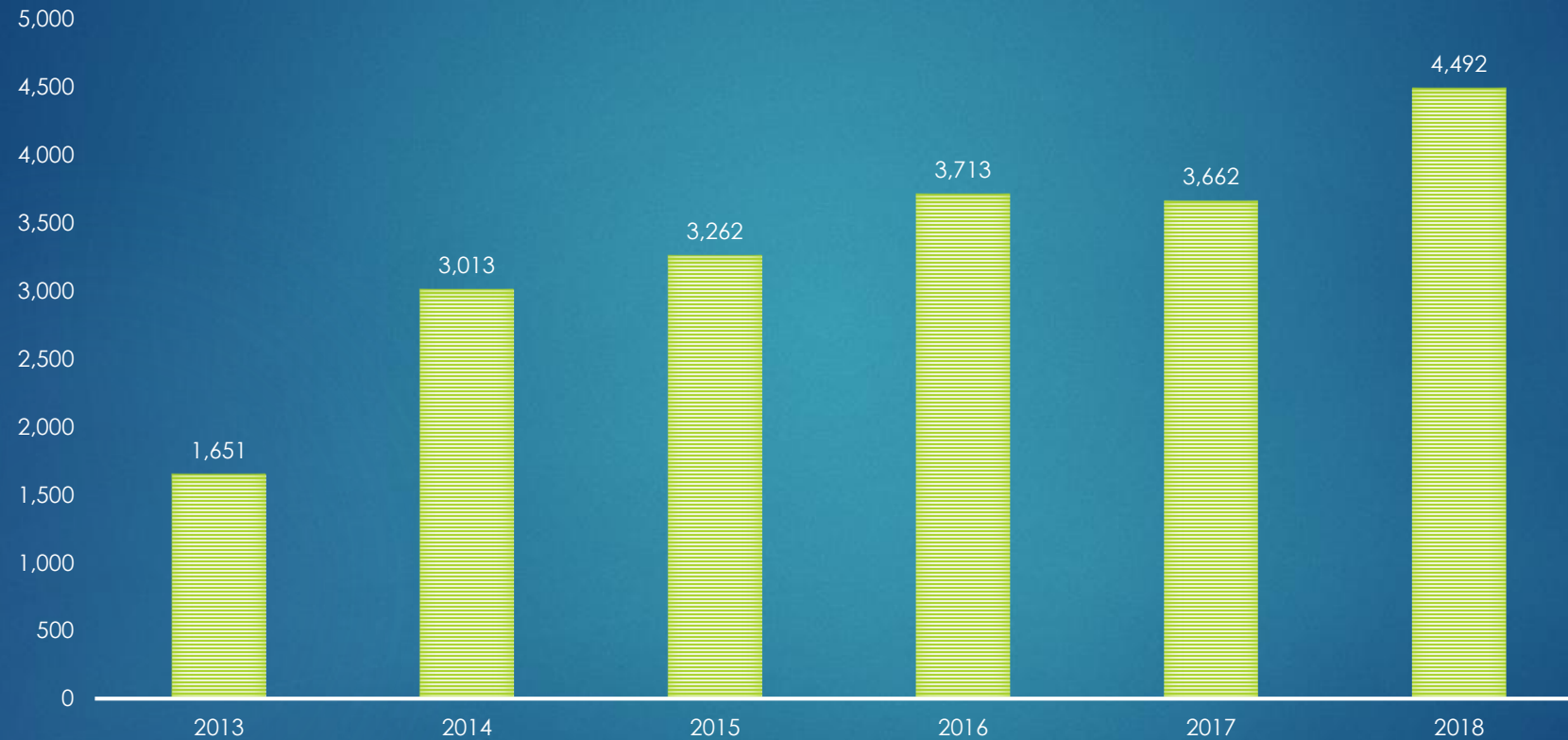
Question & Answer

- Type your question into the **chat** box on the WebEX toolbar and send to HOST
- **Press *6** to unmute your line

THANK YOU

- Your feedback is important to us and we would appreciate a few minutes of your time to complete an evaluation for the webinar.

- An email with a link to the evaluation will be sent out following the webinar.