



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# INFORMATION REQUEST

Topic: User Manual/Individual Training Materials

**Request Date:** December 10, 2018

**Information Requested:**

Does your IIS provide users with a comprehensive instruction/user manual or do you provide individual training materials targeted to specific areas of the system or both? If you offer a comprehensive user manual, how detailed is it? Do you provide step-by-step instructions or is it more general in nature?

**Requesting Member:** Tricia Charles (MA)

**Responding Member(s):** Valentin Shoshtarikj (AZ), Phyllis Bourassa (CO), Kimbra Nemmers (KS), Patricia Swartz (MD), Sherri Dunton (ME), Elena Rosenberg-Carlson (MN), Debbie Bonchonsky (MO), Mary Woinarowicz (ND), Alok Patra (NJ), Raymond Gallegos (NM), Amanda Harris (NV), AJ Thomas (OK), Kerry Lionadh (OR), Verónica Rodríguez (PR), Janet Limoges (RI)

**Results:**

**AZ:**

The Arizona State Immunization Information System (ASIIS) provides users with comprehensive user instructions and we also provide training materials catered to mastering specific tasks. Our comprehensive user instructions are within the portal and easily accessible from the "Help Menu." This instruction manual is very thorough and hits each check point for users with beginner to advanced skill levels.

We also provide one on one training to highlight the various functions of our IIS via the classroom setting (webinar, web-based, and in-person). This allows the users to ask questions that may be specific to their site while having one of our staff members provide various steps to troubleshoot the issue.

The comprehensive manual within the online user portal is detailed in that it provides step-by-step instructions as well as definitions of jargon used within the portal and descriptions of scenarios. Our online training (web-based) is somewhat general in nature. There are screenshots that show how to perform basic tasks. The webinar and the classroom session provide the in-person approach that most of our providers desire when questions present.



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# INFORMATION REQUEST

## **CO:**

In general, the Colorado Immunization Information System (CIIS) uses individual training materials that target specific features/modules within our IIS. For example, we have a wide range of cheat sheets/job aids that are categorized by topic and contain step-by-step instructions and screen shots. The three-page user quick guide provides steps to the most frequently used CIIS features (e.g., how to search for a patient, update patient demographics, add immunization data, view and print a patient immunization record). The quick guide is especially handy for new CIIS users.

The CIIS video library offers two dozen short, demonstration videos each covering a specific topic (e.g., how to login to CIIS, enter immunization data, run a Reminder Recall report.)

In addition to our job aids being available on the CIIS public website, our IIS vendor added the *Learn More* feature in the CIIS Application. This feature allows us to upload training resources that correspond to a particular CIIS screen or module, thereby enabling CIIS users to access training resources at the time they are needed (just-in-time training).

We also offer several online courses that are hosted on CO.TRAIN, our learning management system. Some of these courses are required before a new user can access CIIS. For example, all new CIIS users are required to take the General User course. We have one General User course for providers who enter immunization data directly into CIIS and another for electronic reporters. VFC providers must also take the CIIS Inventory and Ordering module courses.

Below is a list of our training delivery methods:

- Live monthly webinars
- Customized webinars
- Online Courses
- Pre-recorded webinars
- Video Library
- First Friday Newsletter is emailed to all CIIS users and contains monthly training tips and links to job aids.
- CIIS Learn More Feature – allows for just-in-time training upon logging into CIIS

If you would like more information about CIIS training resources, please contact us at [CDPHE.CIIS@state.co.us](mailto:CDPHE.CIIS@state.co.us).



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# INFORMATION REQUEST

## **KS:**

Kansas trains users in person or on a webinar. We also have a user manual with step by step instructions on how to use the system.

## **MD:**

Maryland's IIS vendor provided a comprehensive user manual when we started using the WIR-based system back in 2011. The user manual has been in need of updates to reflect the many enhancements to our IIS since 2011 but we have not been able to prioritize it yet. We also created several short 'Quick Reference Guides' targeted to specific areas of the system a couple of years ago when we implemented our VFC mandate to use and report to our IIS. Please feel free to view Maryland's IIS user guides on our website [here](#).

## **ME:**

We do provide an online user manual which can be downloaded. It is updated by the vendor after any new release. It does provide step by step instructions but there are sections that could use some improvement.

We do provide individual training targeted to specific areas of the system upon provider request. These are generally done via a webinar.

## **MN:**

Our IIS provides individual training materials targeted to specific areas of the system – primarily written user guidance, but also complementary e-learning modules, recorded demos, and fact sheets, in some cases.

## **MO:**

Missouri requires users to complete online training modules prior to access being granted. We also have a step by step user manual located under Help within our IIS that can be downloaded and referenced. When requested by provider, onsite training is provided by our registry staff. Below are our roles and trainings associated to the roles for which users must complete prior to submitting a request for access.

Each User must complete any required online training(s) prior to access being granted. Depending on the type of access needed, the following trainings must be completed and failure to follow all instructions exactly will cause their request to be either rejected or delayed:

For looking up clients and printing immunization records only, there is no training required and medical providers will request the SMV Read Only Healthcare Provider, no reports role



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# INFORMATION REQUEST

and schools and childcare facilities will request the SMV Read Only Non Healthcare Provider, no reports role. There is a short tutorial that would be helpful in learning how to search in this role <http://health.mo.gov/living/wellness/immunizations/pdf/tutorial.pdf>.

For entering immunization records, registering new clients and running reports, users must complete Module Two and the survey at the end of each module to document completion of the training. They select the SMV Administrative Management, View Reports role. Module Three and Four are recommended for tracking inventory and entering immunizations.

For the Vaccines For Children online vaccine ordering and accountability, users must complete Module Five and the survey at the end of the module to document completion of the training. They select both the SMV Administrative Management and VFC SMV Vaccine Purchaser, View Reports roles.

For Pharmacies Only, users must complete Module Seven and the survey at the end of the module to document completion of the training. They select the SMV Administrative Management, View Reports role.

Training Modules can be found at <http://health.mo.gov/living/wellness/immunizations/showmevaxu/index.php>.

## **ND:**

North Dakota provides both a comprehensive IIS training manual and shorter training documents targeted at specific areas of the IIS. The shorter, targeted training documents are available publicly on our website (<http://www.ndhealth.gov/Immunize/NDIIS/Training.aspx>). The comprehensive training manual is available within the IIS help menu. We can provide a copy of our IIS help manual upon request. The shorter, targeted training documents get to the level of providing step-by-step instructions for the specific IIS functionality. The larger, comprehensive help manual goes through the different areas, functions, reports, etc. in detail but does not get to the level of step-by-step instructions.

## **NJ:**

1. Does your IIS provide users with a comprehensive instruction/user manual or do you provide individual training materials targeted to specific areas of the system or both? Yes, NJIIS offers both in-person and webinar-based training to our users. If it is a new user, then it is mandatory to take the in-person training with a regional trainer. We also



post webinars in the website in case any user wants to revisit. We also have few topic-specific webinars like Reminder/Recall, HEDIS, and Interface training.

As we have launched a new system, we are preparing our new help guide which will have instructions for the entire application. We also have separate specific training manuals for Interface, Reminder/Recall, and HEDIS Upload.

2. If you offer a comprehensive user manual, how detailed is it do you provide step-by-step instructions or is it more general in nature?

All our manuals have detailed step-by-step instructions for the users.

**NM:**

The New Mexico SIIS team provides both micro learning video modules and downloadable participant/user guides. The learners are able to retain and use these guides as reference material, following any online or on-site training they attend. Our guides do provide step-by-step instructions surrounding specific tasks and a more generalized instruction for more conceptual or process related topics.

**NV:**

In Nevada, these are our main curriculums:

- Viewing & Navigating Basics (for all types of users)
- Data Entry (builds upon Viewing & Navigating; for users that will need to add/update/delete data)
- Inventory Management & Reconciliation (for users working in offices that receive publicly-funded vaccine, or a private-only office that wishes to manage vaccine quantities in the IIS)
- Reports & Data Management (currently under revision; for experienced users that wish to better understand and manage their patients and/or data quality)

For each, we have a detailed user guide, a very brief “quick guide” (last couple pages of the detailed guide), a PowerPoint presentation, and an instructor manual. The curriculum is structured and timed so we can grant continuing education units to nurses, medical assistants, pharmacists, and child care providers.

We also develop a variety of 1-2-page stand-alone guides to specific system functions, such as reminder/recall, inactivating patients, or marking records as duplicates.



We maintain a special curriculum for WIC staff, but have not taught it for a while. There is a feature in our IIS that allows WIC staff to “tag” a patient at their WIC location to generate WIC office coverage rates. We are in the middle of resurrecting this class.

**OR:**

The Oregon Immunization Program provides users with:

1. a user manual (focused on functionality and more general in nature)
2. live, monthly webinars on frequently requested IIS functionality
3. tip sheets targeted to specific uses of certain areas of the system
4. on-demand videos for user role functionality and certain reports.

We have just begun a contract with a training vendor to develop eLearning modules that will address specific user stories for commonly used and newly developed reports and we have plans to update on-demand videos for user role functionality.

**OK:**

In Oklahoma we have a comprehensive user manual for our UI. It walks them through each step of the UI and its functionalities. It talks about each role within a site and what each role has access to. It also has a section for reports, where it describes the options and what can be expected from the report. We update them every 6 months to keep it current.

**PR:**

Puerto Rico provides training and also a user manual with step-by-step instructions. Now we are working to make a small guide. We continue to use the manual. The small guide is only for presenting all screens to indicate where the information is supposed to be completed or selected in each field.

**RI:**

The Rhode Island’s State Immunization Information System, KIDSNET has several resources available for providers to enroll, order vaccine, run reports, view data and assess Immunization rates. Instructions are made available on our States’ website, via detailed guides on how to enroll/order flu vaccine. Information is also shared by e-mailing instructions to providers and posting them to the IIS’s Message of the Day.

Live Enrollment Trainings for all State Supplied Provider offices are held annually.

The Provider Relations Team holds Individual trainings for each provider office that includes a review of the IIS and provider specific reports, including AFIX. Instruction regarding the other health integrated programs within the IIS are also reviewed.



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# INFORMATION REQUEST

Detailed Instructions for enrollment and ordering are available by linking from the State's Health Immunization Web Page. A Provider Specific IIS User Guide is provided at Individual Provider trainings.