

Quick Tips for Local Organization Administrators

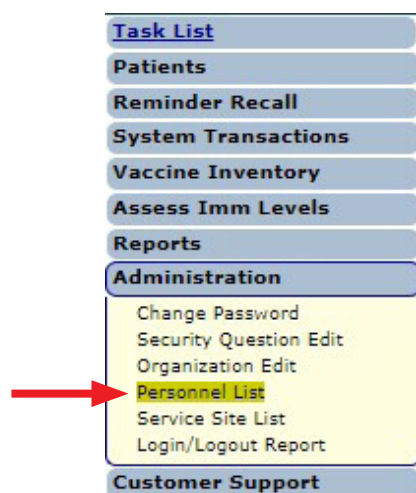


Enrolled organizations have one or more staff members designated as a Local Organization Administrator (LOA) to maintain their Florida SHOTS account. This includes access to the organization’s Personnel List where other staff members can be added or terminated from the account. The Personnel List should be reviewed routinely to ensure only those authorized users have access to Florida SHOTS. This guide provides instructions for completing several important responsibilities for LOAs.

▼ Personnel List Maintenance

ADD NEW USER

LOAs can add new users to the organization account by selecting **“Personnel List”** under the **“Administration”** menu option.



Select the **“Add New Personnel Record”** button from the **“Organization Personnel List”** page.

Organization Personnel List Training Environment

Authorized User/Personnel List for: BEACH MEDICAL

Show Personnel


Active, Locked, Expired: Inactive: Only VFC:


System User ID	Name Last, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC	Start Date	End Date	Role	Status	Password Exp.
	DAVIS	NICOLE, D	ARNP	Y	Y	N	Y	01/01/2011			Active	
	GRACE	STACEY, J	MD VFC	Y	Y	N	Y	12/20/2010			Active	
	MAY	STEPHANIE	APRN	Y	Y	N	Y	03/25/2021			Active	
	RODRIGUEZ	BELLA	MD	Y	Y	N	Y	03/31/2020			Active	
	TAYLOR	VIRGINIA	MD	Y	Y	N	Y	07/29/2019			Active	
	THOMPSON	ANGELA	MD	Y	Y	N	N	03/22/2022			Active	
AVILESF	AVILES	FATIMA		N	N	Y	Y	05/24/2022		Local Org Administrator	Active	04/06/2023
JONESAX	JONES	ALEX	MA	Y	N	Y	N	01/26/2023		Local Org Staff	Active	04/06/2023
KOBALLX	SMITH	MEGAN	LPN	Y	N	Y	Y	08/03/2010		Local Org Administrator	Expired	07/03/2022

Once on this page, administrators can enter the details about the new user. The information for medical providers should be entered in Florida SHOTS exactly how it appears on their medical license.

The screenshot shows the 'Add Authorized User/Personnel Information' form in the Florida SHOTS system. The form is divided into several sections:

- Personal Information:** Fields for Last Name (RIVERS), Prefix, First Name (MARLEY), Middle Name, Suffix, Title, National Provider ID, and Medical ID Number.
- Medical License Data:** Fields for Prefix, Number, and a checked 'Medical Assistant' box.
- Florida SHOTS Applicant/Contact:** Fields for Start Date (02/15/2023), End Date, and Florida SHOTS Contact.
- Immunization Provider:** A dropdown menu for 'Immunization Provider' with a 'Yes' selection, and a 'Certify Form 680' checkbox (checked 'No').
- System User:** Fields for System User ID (RIVERSM), Password Expiration (04/06/2023), System User End Date, Last Login, System Password, and Confirm Password.
- Authorization:** A dropdown menu for 'Authorization' set to 'Full Access'.
- Roles:** A list of roles including 'Local Org Inventory Only', 'Local Org Staff', 'Org View Only', 'Schedule Override', and 'View Transaction Stats'.
- Footer:** Checkboxes for 'Create Certified Form 680' (checked 'No'), 'User must change password at next logon' (checked), and 'Florida SHOTS training acknowledged'.

- **Email Address:** Provide user’s email address to receive training resources and important information.
- **Start Date:** Defaults to the date the new user is being added, but this date can be changed. *Example: If you have an immunization provider who participated in an outreach clinic prior to entering the administrations, you may need to change the start date here.*
- **End Date:** This needs to be blank, as it corresponds to the date when this person is no longer associated with the organization. If this field is grayed out, Service Site Responsibilities must be removed before an End Date can be entered.
- **Immunization Provider:** Select “Yes” if this user will administer vaccines to patients.
- **Provider Person ID:** The system will automatically generate an ID when “Yes” is selected for Immunization Provider. This will allow for the user to be identified as the person administering the vaccine within a patient record.
- **Certify Form 680:** Any user who is, by Chapters 458, 459, 460 and 464, Florida statutes, allowed to sign and certify the DH Form 680 should have a “Yes.” Click on Help Text Icon  to review conditions.
- **Work Location:** For organizations with multiple service sites, please designate the site where the user works.
- **System User:** This should only be checked for users who require login access to Florida SHOTS. If the box is left unchecked, the user will not be able to log into Florida SHOTS but will appear on your organization’s list of immunization providers.
- **System User ID:** This is automatically generated but can be changed.
- **Password Expiration:** This is automatically generated each time a new password is created.

- **System User End Date:** Leave this blank as it corresponds to the date the user no longer needs log in to Florida SHOTS.
- **System Password:** A temporary password must be created by the administrator and will need to be entered again in the Confirm Password field. Click on Help Text Icon  to view password parameter requirements.
- **Roles:** This determines some of the permissions for the user. Most users are set to “**Local Org Staff.**” Contact the Florida SHOTS help desk to assign the user as a Local Organization Administrator role.
- **Create Certified Form 680:** Select “**Yes**” to authorize user to create a certified Form 680 with a provider’s electronic signature.
- **User must change password at next logon:** Should be checked to prompt the user to create their own password during the initial login.

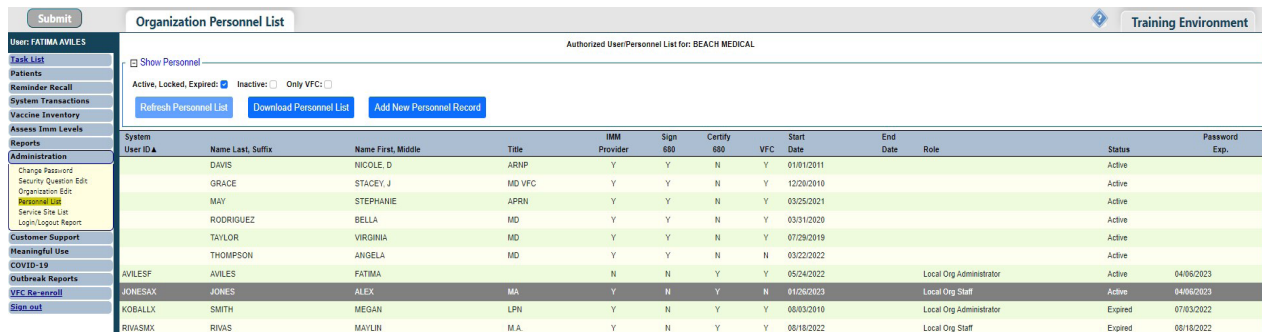
When a new user signs into Florida SHOTS, they will see a task in the “**User Task List**” to acknowledge training. From there, they can link to the training and resources page within Florida SHOTS and check the box to acknowledge training. Administrators may also check the box next to Florida SHOTS training acknowledged within the personnel record.

Click on the “**Submit**” button to save the information.

ADD VFC RESPONSIBILITY TO USER

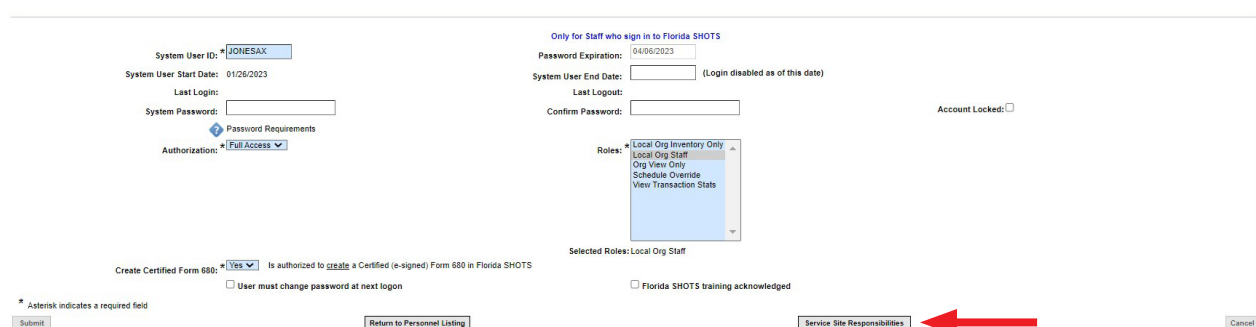
Users from organizations that participate in the Vaccines for Children (VFC) Program and have been designated as a VFC Enrollee, Primary, or Secondary Contact within the organization can assign selected staff record various responsibilities (inventory access, ordering vaccines, and temperature logs).

Select the user from the **Organization Personnel List** to access the **Personnel Maintenance**.



System	User ID	Name Last, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC	Start Date	End Date	Role	Status	Password Exp.
	DAVIS	NICOLE, D	ARNP		Y	Y	N	Y	01/01/2011			Active	
	GRACE	STACEY, J	MD VFC		Y	Y	N	Y	12/20/2010			Active	
	MAY	STEPHANIE	APRN		Y	Y	N	Y	03/25/2021			Active	
	RODRIGUEZ	BELLA	MD		Y	Y	N	Y	03/31/2020			Active	
	TAYLOR	VIRGINIA	MD		Y	Y	N	Y	07/29/2019			Active	
	THOMPSON	ANGELA	MD		Y	Y	N	N	03/22/2022			Active	
	AVILES	AVILES	FATIMA		N	N	Y	Y	05/24/2022		Local Org Administrator	Active	04/06/2023
	JONES	ALEX	MA		Y	N	Y	N	01/26/2023		Local Org Staff	Active	04/06/2023
	KOBALLX	SMITH	MEGAN	LPN	Y	N	Y	Y	08/03/2010		Local Org Administrator	Expired	07/03/2022
	RIVASMX	RIVAS	MAYLIN	M.A.	Y	N	Y	Y	08/18/2022		Local Org Staff	Expired	08/18/2022

Click on the “**Service Site Responsibilities**” button.



System User ID: JONESAX

System User Start Date: 01/26/2023

Last Login: []

System Password: []

Authorization: Full Access

Only for Staff who sign in to Florida SHOTS

Password Expiration: 04/06/2023

System User End Date: [] (Login disabled as of this date)

Last Logout: []

Confirm Password: []

Account Locked: []

Roles: Local Org Inventory Only, Local Org Staff, Org View Only, Schedule Override, View Transaction Stats

Selected Roles: Local Org Staff

Create Certified Form 680: Yes Is authorized to create a Certified (e-signed) Form 680 in Florida SHOTS

User must change password at next logon

Florida SHOTS training acknowledged

Submit Return to Personnel Listing Service Site Responsibilities Cancel

Select any responsibility to grant the user permissions for each associated service site if applicable. Click on the **“Submit”** button to save.

ACTIVATE USER ACCOUNT

Users who have not changed their password in 90 days or more will be set to Inactive. Upon login, inactive users will be instructed to contact their LOA for assistance.

From the Personnel List, check the **“Inactive”** box and click on **“Refresh Personnel List”** to find the user. Select the user from the List to access the Personnel Maintenance.

Remove the date from the **System User End Date** field and leave it blank. A new password should be created for the user by entering in the **System Password** and **Confirm Password** fields.

Click on the **“Submit”** button to save.

TERMINATE USER ACCESS

Users that have left the organizations or no longer need to access to the system should be terminated in Florida SHOTS.

From the **Organization Personnel List** select the user to access the **Personnel Maintenance**.

System	User ID	Name Last, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC	Start Date	End Date	Role	Status	Password Exp.
	TAYLORA	TAYLOR	ANDREA		N	N	N	N	06/28/2022		Local Org Staff	Active	04/06/2023
	SMITHMX	SMITH	MARYANNE	MA	Y	N	Y	Y	06/09/2022		Local Org Staff	Active	04/06/2023
	RIVASMX	RIVAS	MAYLIN	M.A	Y	N	Y	Y	05/18/2022		Local Org Staff	Expired	05/18/2022
	KOBALLX	SMITH	MEGAN	LPN	Y	N	Y	Y	05/03/2010		Local Org Administrator	Expired	07/03/2022

For users that were associated with the organization but were not system users, enter the termination in the **“End Date”** field immediately.

For users who did have system user access, enter the end date in the **“System User End Date”** field.

NOTE: The **“End Date”** may not be set if the staff has any VFC site responsibilities. The VFC Enrollee, Primary or Secondary contacts can remove these by clicking on **“Service Site Responsibilities”** button first. Uncheck the assigned responsibility and click on **“Submit”** to save. Then return to the Personnel Maintenance to terminate.

Florida SHOTS Applicant: [Dropdown] Start Date: [06/30/2022] Florida SHOTS Contact: [Dropdown] End Date: [Dropdown]

Immunization Provider: [Yes] Provider Person ID: [SMITHMX] (Displays as Provider ID for adverse events and shots given)

Certify Form 680: [No] Medical professional is authorized to submit a Form 680

Work Location: [Select] Site where the staff member usually works

System User: [Checked] (Check the box if the Staff member will be signing in to Florida SHOTS)

System User ID: [SMITHMX] Only for Staff who sign in to Florida SHOTS

System User Start Date: [06/30/2022] Password Expiration: [02/16/2023]

Last Login: [] System User End Date: [02/16/2023] (Login disabled as of this date)

System Password: [] Last Logout: [] Confirm Password: [] Account Locked: []

Authorization: [Full Access] Roles: [Local Org Inventory Only, Local Org Staff, Org View Only, Schedule Override, View Transaction Stats]

Create Certified Form 680: [Yes] Is authorized to create a Certified (e-signed) Form 680 in Florida SHOTS

Selected Roles: Local Org Staff

* Asterisk indicates a required field

[Submit] [Return to Personnel Listing] [Service Site Responsibilities] [Cancel]

Click on the **“Submit”** button to save.

▼ Unlock User Account

Users have three opportunities to successfully login to Florida SHOTS. After a third failed attempt, their account will be locked. They will receive a message alerting them that their account is disabled and to either use the **“Need Password Assistance”** feature to reset the password or contact the Administrator.

From the **Organization Personnel List** select the user to access the **Personnel Maintenance**.

System User ID	Name Last, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC	Start Date	End Date	Role	Status	Password Exp.
TAYLORA	TAYLOR	ANDREA		N	N	N	N	06/28/2022		Local Org Staff	Locked	04/06/2023
SMITHMX	SMITH	MARYANNE	MA	Y	N	Y	Y	08/30/2022		Local Org Staff	Expired	11/28/2022
RIVASMX	RIVAS	MAYLIN	M.A.	Y	N	Y	Y	08/18/2022		Local Org Staff	Expired	08/18/2022
ROBALLX	SMITH	MEGAN	LPN	Y	N	Y	Y	08/03/2010		Local Org Administrator	Expired	07/03/2022

Remove the check mark from the **“Account Locked”** box. A new password may be created for the user by entering it in the **System Password** and **Confirm Password** fields. Click on the **“Submit”** button to save.

System User ID: TAYLORA

System User Start Date: 06/28/2022

Last Login: 2022-07-26 14:29:55

System Password: [Field]

Confirm Password: [Field]

Account Locked: (Red arrow points here)

Roles: Local Org Inventory Only, Local Org Staff, Org View Only, Schedule Override, View Transaction Stats

Selected Roles: Local Org Staff

Florida SHOTS training acknowledged on 06/29/2022

EDIT CONTACT INFORMATION

Local Organization Administrators can edit contact information on the **“Enrolled Organization Maintenance”** page by choosing **“Organization Edit”** under the **“Administration”** menu option. If any other information is incorrect, please send an email to the Florida SHOTS help desk (flshots@flhealth.gov) for assistance.

Enrolled Organization Maintenance

Organization Name: BEACH MEDICAL

Doing Business As (DBA): [Field]

Account Status: ACTIVE (as of: 07/15/2008)

Account Sub Status: MEDICAL LICENSE STANDING HAS CHANGED TO UNACCEPTABLE VALUES

Org Category: DOCTOR'S CLINIC

Organization Phone: (555)555-5555

Organization Fax: (555)555-5555

National Provider ID: [Field]

Client View Only Access: Add/Delete Org-Patient Ids:

Name: MEGAN SMITH (Change)

Title: LPN

Email Address: [INVALID]@FLSHOTS.COM

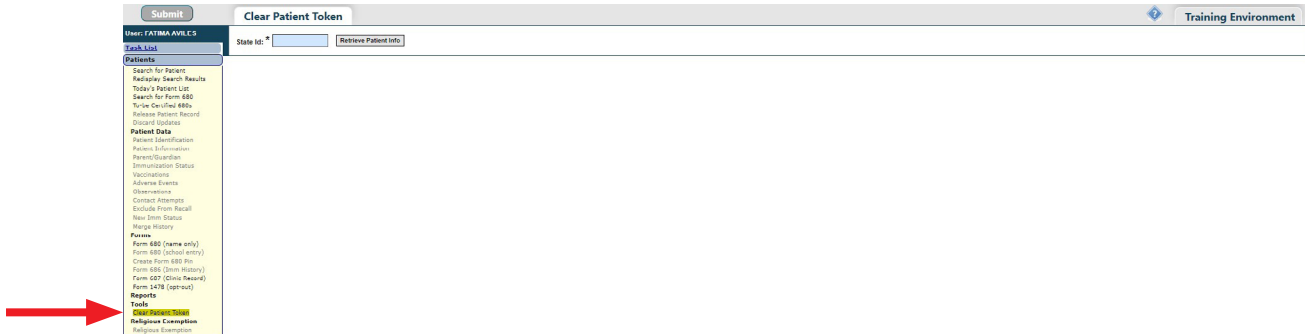
Telephone: (555)555-5555

Fax: (666)666-6666

Buttons: Print DH1479, Edit User Personnel, View Service Sites, Submit, Cancel

▼ Unlocking Patient Records

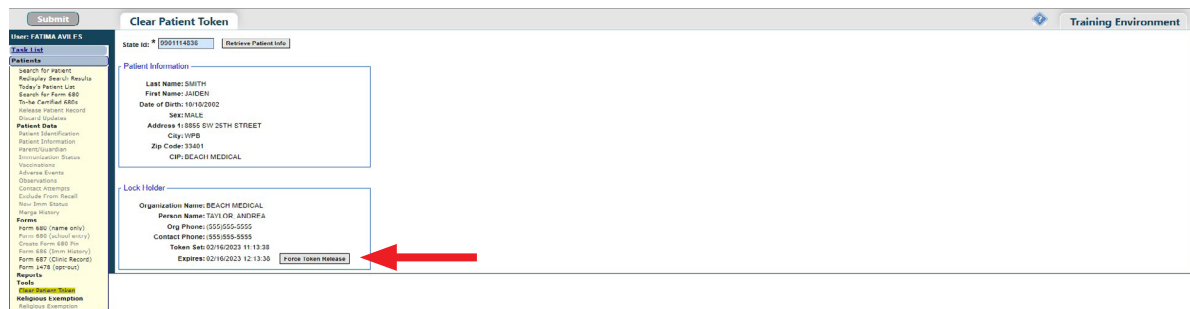
LOAs can unlock patient records that have been locked by a user within their organization. To do so, click on **“Clear Patient Token”** under **“Patients”** in the sidebar menu.



Enter the patient's Florida SHOTS record ID and click on **“Retrieve Patient Info.”**



Click on **“Force Token Release”** to complete and clear the lock.



HELP DESK

FREE TECHNICAL SUPPORT:

877-888-7468 (SHOT)

MONDAY – FRIDAY, 8 A.M. TO 5 P.M. EASTERN

INCLUDING:

- Merging duplicate patient records
- Adding account administrators
- Unlocking Florida SHOTS accounts
- Questions about any Florida SHOTS features
- Requesting Florida SHOTS materials