

Quick Tips for Local Organization Administrators

Quick Content Finder

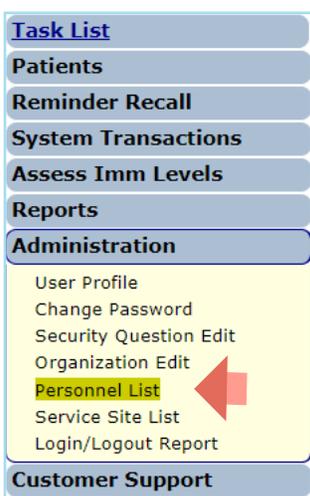
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Enrolled organizations have one or more staff members designated as a Local Organization Administrator (LOA) to maintain their Florida SHOTS account. This includes access to the organization’s Personnel List where other staff members can be added or 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.

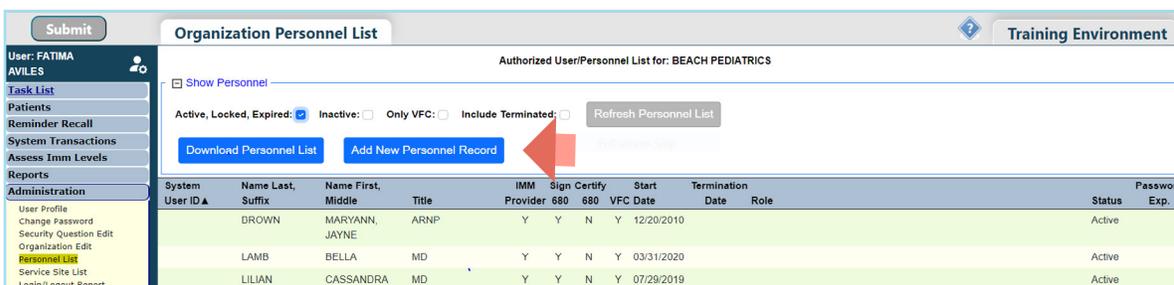
PERSONNEL LIST MAINTENANCE

▶ 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.



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*.

- **Email Address:** Provide user's email address for future communications (such as unlocking account, password resets, user authentication etc.,).
- **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.*
- **Termination Date:** Corresponds to the date when the 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:** Select **"Yes"** for any user who is authorized by Chapter 64D-3.046, Florida Administrative Code to sign and certify the DH Form 680. Click on Help Text Icon  to review conditions.
- **Work Location:** For organizations with multiple service sites, please designate the site(s) 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.
- **Reason for Access:** Provide reason to indicate why this person needs access to Florida SHOTS.
- **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 the permissions for the user. The available permissions are:
 - Local Org Inventory Only – Allows user to see service site list and to have Vaccines for Children (VFC) Program service site responsibilities (such as inventory, vaccine ordering, temp logs).
 - Local Org Staff – General purpose user role. Users may view own organization details, see service site list, transaction statistics, may both view, create, and update patient records, run the PPU Upload Log and Patient Status reports, and have Vaccines for Children (VFC) Program service site responsibilities.
 - Org View Only – View-only user role. Users may view their organization details, see patient data, and run the Patient Status Report.
 - Schedule Override – Allows user to change vaccination schedule for evaluation and forecasting. Requires patient update access to be effective.
 - View Transaction Stats – Allows user to see transaction statistics and Upload Log Report available for organizations that are set up to upload vaccine data.
 - Local Organization Administrator – The highest permission level. In addition to the Local Org Staff role, the user is responsible for granting and managing other user accounts within the organization, view and edit organization details. Local administrators may not assign this role to any other user and will need to contact the Florida SHOTS helpdesk to assign.
- **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.
- **Florida SHOTS training acknowledged:** 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 resources page within Florida SHOTS to acknowledge training. Administrators may also check the box next to Florida SHOTS training acknowledged within the personnel record for the user not to complete the acknowledgment.

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

The user will need to login within three days of the Start Date or the account will inactivate.

▶ **Add Service Site Responsibilities to User:**

Users from organizations that participate in the Vaccines for Children (VFC) or Vaccines for Adult (VFA) 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	Name Last	Name First	Title	IMM Provider	Sign 680	Certify 680	VFC Date	Start Date	Termination Date	Role	Status	Password Exp.
	BROWN	MARYANN, JAYNE	ARNP	Y	Y	N	Y	12/20/2010			Active	
	LAMB	BELLA	MD	Y	Y	N	Y	03/31/2020			Active	
	LILLIAN	CASSANDRA	MD	Y	Y	N	Y	07/29/2019			Active	
	MITT	ANNE	APRN	Y	Y	N	Y	03/25/2021			Active	
	PACE	NICOLE, D	ARNP	Y	Y	N	Y	01/01/2011			Active	
	PIETRAS	NICOLE		Y	N	N	N	10/12/2021			Active	
	STARK	ANDREA, J	ARNP-VFC	Y	Y	N	Y	12/20/2010			Active	
	STOUT	STACLY, J	MD VFC	Y	Y	N	Y	12/20/2010			Active	
	THOMPSON	SUZY	MD	Y	Y	N	N	03/22/2022			Active	
	WAYNE	CHERYL, E	MD	Y	N	N	Y	12/20/2010			Active	
AVERYKX	AVERY	KATHY	MA	Y	N	N	N	01/17/2024		Local Org Staff	Active	04/16/2024

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

Reason for Access: Immunization Provider, Vaccine Inventory/Management, Data Entry/Clerical, Record Review, Assessments/Reports

Selected Reasons for Access: Data Entry/Clerical

System User ID: AVERYKX

Password Expiration: 04/16/2024

System User Start Date: 01/17/2024

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

Last Login:

Last Logout:

System Password:

Confirm Password:

Account Locked:

Authorization: Full Access

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: No Is authorized to create a Certified (e-signed) Form 680 in Florida SHOTS

User must change password at next logon Florida SHOTS training acknowledged

* Asterisk indicates a required field

Buttons: Submit, View User Profile, 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.

Service Site Responsibilities Training Environment

BEACH PEDIATRICS Name: KATHY AVERY MA (Medical license not valid for VFC Enrollee)

Show sites: Active Archived All

FLShots Service Site Information			VFC Provider Information										
Site Name	Contact	Can Update Inventory	EID	Pin	Status	Enrollee	Primary Contact	Secondary Contact	Can See Orders	Can Order Vaccines	Can See Temp Log	Can Update Temp Log	Immunization Provider
BEACH PEDS		<input checked="" type="checkbox"/>	1492	501042	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BEACH PEDS WEST		<input type="checkbox"/>	1493	501043	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUNSET PEDS		<input type="checkbox"/>	1494	501044	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Submit, Return to Personnel Maintenance, Return to Personnel Listing, Cancel

▶ **Activate User Account:**

Users who have not changed their password in over 90 days or have not logged in within a 30 day period 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.

Organization Personnel List Training Environment

User: FATIMA AVILES Authorized User/Personnel List for: BEACH PEDIATRICS

Active, Locked, Expired: Inactive: Include Terminated: Refresh Personnel List

System User ID	Name Last, Suffix	Name First, Middle, Title	IMM Provider	Sign 680	Certify 680	Start VFC Date	Termination Date	Role	Status	Password Exp.
ANZALONEN	ANZALONE	NICOLE	N	N	N	01/10/2020		Local Org Staff	Inactive	10/07/2020
ARCHERX	ARCHIE	RAY	Y	N	N	08/23/2011		Local Org Staff	Inactive	10/31/2013
ARROYOV	ARROW	VANESSA	N	N	N	03/17/2020		Local Org Staff	Inactive	03/30/2020
ATKINSI	ATKINS	MELISSA	N	N	Y	05/05/2020		Local Org Staff	Inactive	03/25/2021
AVERYKX	AVERY	KATHY MA	Y	N	N	01/17/2024		Local Org Staff	Inactive	01/17/2024
AVILESE	AVILES	EVELYN	N	N	Y	11/18/2015		Local Org Staff	Inactive	01/03/2018

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.

FOR ACCESS:

System User ID: *AVERYKX Password Expiration: 01/17/2024

System User Start Date: 01/17/2024 System User End Date: [] End Date: AVILES, FATIMA

Last Login: [] Last Logout: []

System Password: * [] Confirm Password: * [] Account Locked:

Authorization: * [Full Access] 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: * [No] Is authorized to create a Certified (e-signed) Form 680 in Florida SHOTS

User must change password at next logon Florida SHOTS training acknowledged

* Asterisk indicates a required field

Buttons: Submit, View User Profile, Return to Personnel Listing, Service Site Responsibilities, Cancel

▶ **Terminate User Access:**

Users that have left the organization or no longer need to access to the system must be terminated in Florida SHOTS immediately.

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

System User ID	Name Last, Middle	Name First	Title	IMM Provider	Sign 680	Certify 680	VFC Date	Start Date	Termination Date	Role	Status	Password Exp.
	BROWN	MARYANN, JAYNE	ARNP	Y	Y	N	Y	12/20/2010			Active	
	LAMB	BELLA	MD	Y	Y	N	Y	03/31/2020			Active	
	LILIAN	CASSANDRA	MD	Y	Y	N	Y	07/29/2019			Active	
	MITT	ANNF	APRN	Y	Y	N	Y	03/25/2021			Active	
	PACE	NICOLE, D	ARNP	Y	Y	N	Y	01/01/2011			Active	
AVERYKX	AVERY	KATHY	MA	Y	N	N	Y	01/17/2024		Local Org Staff	Expired	01/17/2024
AVILESF	AVILES	FATIMA	TRAINING - BG	N	N	N	Y	01/12/2024		Local Org Administrator, Schedule Override	Active	04/16/2024

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

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

NOTE: The **“Termination 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: Florida SHOTS Contact:

Start Date: Termination Date: (Red arrow points to this field)

Immunization Provider: (Displays as Provider ID for adverse events and shots given)

Certify Form 680: Medical professional is authorized to e-sign a Form 680

Work Location: Site where the staff member usually works

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

Reason for Access: (Dropdown menu includes: Immunization Provider, Vaccine Inventory/Management, Data Entry/Clerical, Record Review, Assessments/Reports)

Selected Reasons for Access: (Dropdown menu)

System User ID:

System User Start Date: 01/17/2024

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

Last Login:

Last Logout:

System Password: Password Requirements

Confirm Password: Account Locked:

Authorization: Roles:

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 Date	Start Date	Termination Date	Role	Status	Password Exp.
	BROWN	MARYANN, JAYNE	ARNP	Y	Y	N	Y	12/20/2010			Active	
	LAMB	BELLA	MD	Y	Y	N	Y	03/31/2020			Active	
	LILIAN	CASSANDRA	MD	Y	Y	N	Y	07/29/2019			Active	
	MITT	ANNE	APRN	Y	Y	N	Y	03/25/2021			Active	
	PACE	NICOLE, D	ARNP	Y	Y	N	Y	01/01/2011			Active	
AVERYKX	AVERY	KATHY	MA	Y	N	N	N	01/17/2024		Local Org Staff	Locked	04/16/2024
AVILESF	AVILES	FATIMA	TRAINING BG	N	N	N	Y	01/12/2024		Local Org Administrator, Schedule Override	Active	04/16/2024

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.

Reason for Access: Immunization Provider, Vaccine Inventory/Management, Data Entry/Clerical, Record Review, Assessments/Reports

Selected Reasons for Access: Data Entry/Clerical

System User ID: AVERYKX

System User Start Date: 01/17/2024

Last Login:

System Password:

Authorization: Full Access

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

Selected Roles: Local Org Staff

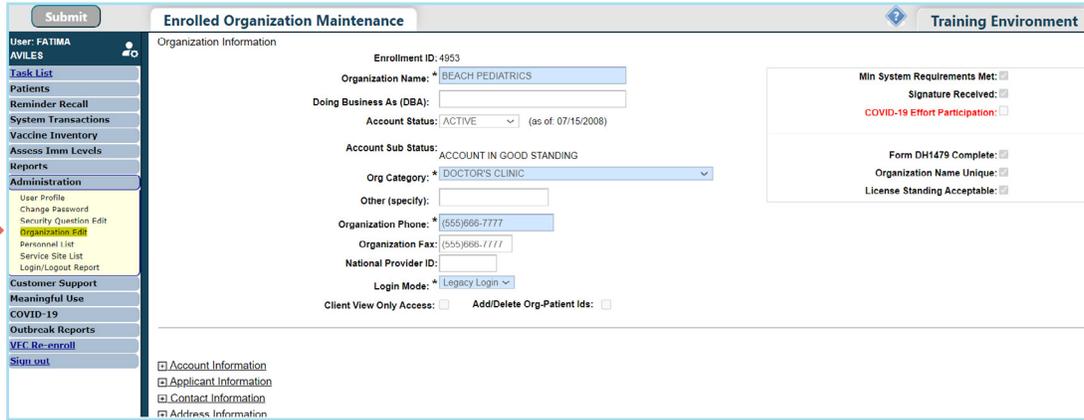
Create Certified Form 680: No (Is authorized to create a Certified (e-signed) Form 680 in Florida SHOTS)

Account Locked: (indicated by a red arrow)

Buttons: Submit, View User Profile, Return to Personnel Listing, Service Site Responsibilities, Cancel

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.



USER CONFIRMATION

In an effort to increase security and only allow authorized users to access Florida SHOTS, Local Organization Administrators (LOA) will need to confirm users within their organization who need access. Seven days prior to the user confirmation period starting, an alert will be displayed when the LOA logs in to Florida SHOTS and will receive an email notification the day before. LOA(s) will have a 90-day period to complete the confirmation within Florida SHOTS. Users that are not confirmed will no longer have access to Florida SHOTS.

Confirmation period alert with date of when it will start.



NOTE: You can click on the bell icon to hide/show the notification and on Help Text icon find additional information.

The User Confirmation page will appear under the Task List once the confirmation period begins or can be accessed under the **“Administration”** menu option.

The User Confirmation page header displays:



Confirmation Pd: Date of confirmation period in progress.

Next Conf Period: Next scheduled confirmation period.

My Sites' User: Unconfirmed users that match at least one of your Associated Service Sites.

Unclaimed Users: Unconfirmed users that have no Associated Service Sites or do not match with any LOA.

Other Users: Unconfirmed users that have Associated Service Sites, but you are not the LOA for the site(s).

Local Org Admin Users: Unconfirmed LOA users (Your account must be confirmed by another LOA or the Help Desk).

Confirmed Users: Users that have been confirmed during the current confirmation period.

A total of users under each section is provided.

Search Icon  : Search for user within the Confirmation page regardless of section or rows displayed.

Refresh Button  : Refreshes page to reorganize users into the appropriate section once they have been confirmed/unconfirmed.

PDF Icon  : Opens user guide for further assistance.

Each section will display:

My Sites' Users						
The following users selected a service site where you are a Local Org Administrator.						
Last Name, Suffix	First / Middle Name	System User Id	Status	Last Login	Email Address	
BRIAN	AMBER	BRIANAM	Active	2024-01-26 15:21:00	BRIANA@INVALID.COM	Confirm User  
USER	TEST	TESTUSER	Active	2024-01-16 15:34:33		Confirm User  
VERNOT	JANAYA	VERNOTJ	Expired	2022-04-25 18:30:37	NOTVALID@FLSHOTS.COM	Confirm User  
WILKERSON	ASHLEY	WILKERSONA	Expired	2022-04-25 18:26:29	NOTVALID@FLSHOTS.COM	Confirm User  

Page 1 of 1
Total Records found: 4

- **User Last Name, Suffix**
- **First/Middle Name**
- **System User ID**
- **User Account Status**
- **User Last Login**
- **User Email Address** – can enter if missing by clicking on User Profile or Personnel Maintenance icon.
- **Confirm/Unconfirm User button**
- **Personnel Maintenance** – access user’s account to complete any updates.
- **User Profile** – access the user’s Profile page that they have to review and provide email address and select Associate Service Site(s).

Navigation buttons at the bottom of each section to display any additional rows beyond the 10 that appear.

TO CONFIRM THE USER:

Locate the user on the User Confirmation page and click on the “**Confirm User**” button.

Last Name, Suffix	First / Middle Name	System User id	Status	Last Login	Email Address
BRIAN	AMBER	BRIANAM	Active	2024-01-26 15:21:00	BRIANA@INVALID.COM

Confirm User



The Confirm button will change to Unconfirm User and can be moved to Confirmed Users section by clicking on “**Refresh**” icon.

Last Name, Suffix	First / Middle Name	System User id	Status	Last Login	Email Address
BRIAN	AMBER	BRIANAM	Active	2024-01-26 15:21:00	BRIANA@INVALID.COM

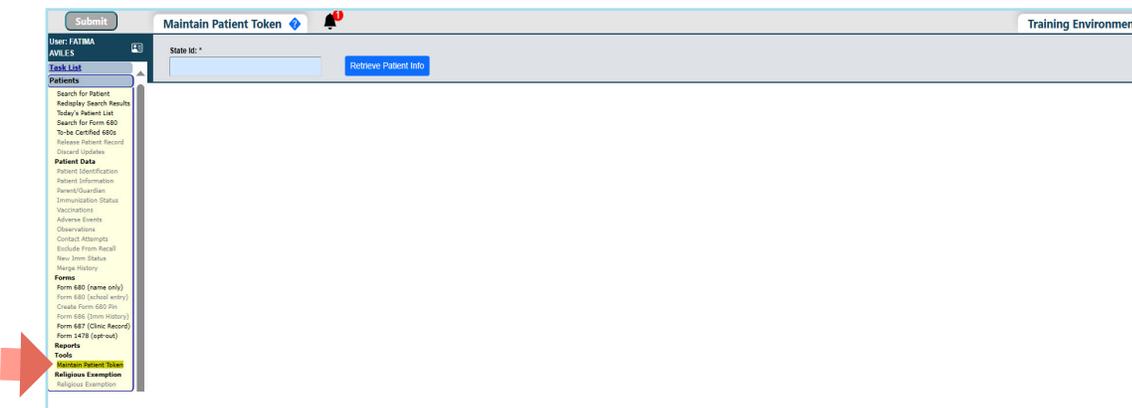
Unconfirm User



A user can be unconfirmed by clicking on the “**Unconfirm User**” button.

UNLOCKING PATIENT RECORDS

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



Submit | Maintain Patient Token | Training Environment

User: FATIMA AWLES | State Id: *

Retrieve Patient Info

Task List

- Search for Patient
- Redisplay Search Results
- Today's Patient List
- Search for Form 680
- To-be Certified 680s
- Release Patient Record
- Disband Update
- Patient Data
 - Patient Identification
 - Patient Information
 - Parent/Guardian
 - Immunization Status
 - Vaccinations
 - Adverse Events
 - Observations
 - Contact Attempts
 - Exclude From Recall
 - New Imm Status
 - Usage History
- Forms
 - Form 680 (name only)
 - Form 680 (school entry)
 - Create Form 680 Pin
 - Form 680 (School entry)
 - Form 687 (Clinic Record)
 - Form 1478 (opt-out)
- Reports
- Tools
 - Maintain Patient Token**
 - Religious Exemption
 - Religious Exemption

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



Maintain Patient Token | Training Environment

State Id: *

9901437471 | Retrieve Patient Info

Patient Information

Last Name: SMITH	First Name: JUSTIN
Date of Birth: 06/05/2007	Sex: MALE
Address 1: 123 SW GARDENIA ST	City: WPB
Zip Code: 33401	CIP: BEACH MEDICAL

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

Patient Information	
Last Name: SMITH	First Name: JUSTIN
Date of Birth: 06/05/2007	Sex: MALE
Address 1: 123 SW GARDENIA ST	City: WPB
Zip Code: 33401	CIP: BEACH MEDICAL
Lock Holder	
Organization Name: BEACH MEDICAL	Person Name: AUSTIN, ANNE
Org Phone: (555)555-5555	Contact Phone: (555)555-5555
Token Set: 04/02/2025 11:48:52	Expires: 04/02/2025 12:48:52
	Force Token Release 

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