

# Quick Tips for Local Organization Administrators

## Quick Content Finder

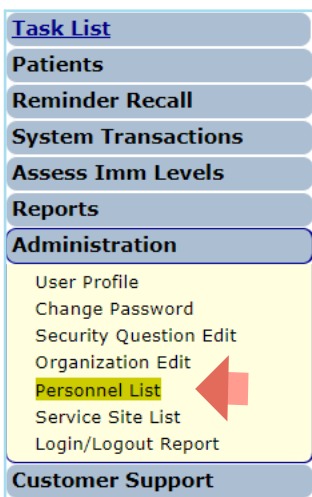
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Enrolled organizations have one or more staff members designated as a Local Organization Administrator (LOA) to maintain their Florida SHOTS account. This includes access to the organization’s Personnel List where other staff members can be added or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

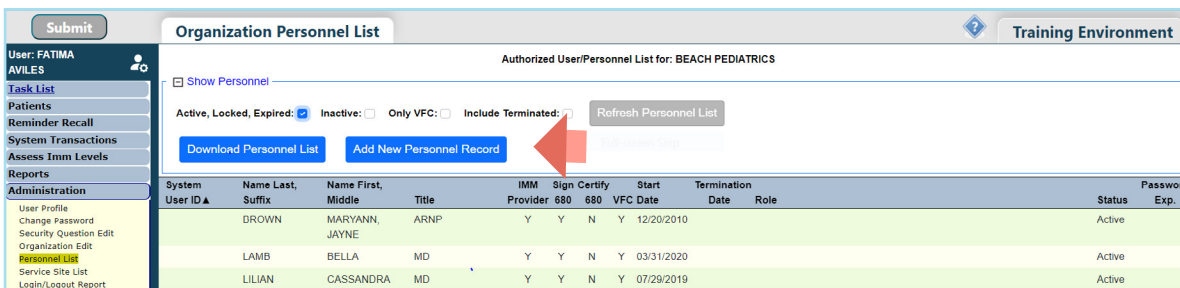
**PERSONNEL LIST MAINTENANCE**

**▶ 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*.

**Personnel Maintenance** Training Environment

BEACH PEDIATRICS Org Login Mode: Legacy Login

**Add Authorized User/Personnel Information**

Florida SHOTS is a confidential system. Only the name of a person is to be entered.

Last Name: MOSS First Name: KATHY Middle Name:

Prefix: --select-- Title: MA Suffix:

Email Address: KMOSS@INVALID.COM National Provider ID:

Specialty: --select-- Other (specify):  Medicaid Number:

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**Medical License Data**

Prefix:  Number:  Medical Assistant:

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Florida SHOTS Applicant:  Florida SHOTS Contact:

Start Date: 01/17/2024 Termination Date:

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

Certify Form 680: No Medical professional is authorized to e-sign a Form 680

Work Location: BEACH PEDS Site where the staff member usually works

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

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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: MOSSKXX Password Expiration: 04/10/2024

System User Start Date: 01/17/2024 System User End Date:  (Login disabled as of this date)

Last Login:  Last Logout:  Account Locked:

System Password:  Confirm 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

User must change password at next logon  Florida SHOTS training acknowledged

\* Asterisk indicates a required field

- **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 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.

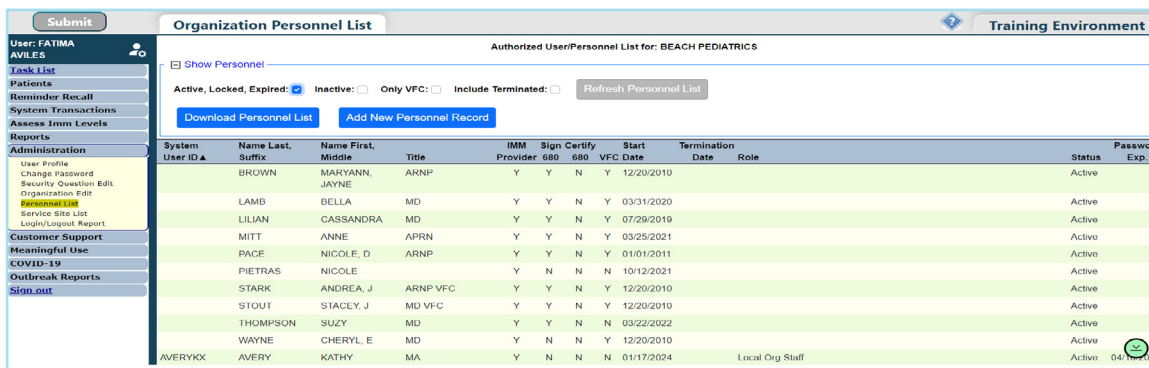
Click on the **“Submit”** button to save the information.

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

**▶ 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, 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	
	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	STACEY, 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	04/17/2024

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

System User Start Date: 01/17/2024

System Password: [ ]

Authorization: Full Access

Password Expiration: 04/16/2024

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

Last Login: [ ]

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: 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	Immunization Provider	EID	Pin	Status	Primary Enrollee	Secondary Contact	Can See Orders	Can Order Vaccines	Can See Temp Log	Can Update Temp Log	Immunization Provider
BEACH PEDS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1492	501042	Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BEACH PEDS WEST	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>
SUNSET PEDS	<input type="checkbox"/>	<input type="checkbox"/>	<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"/>

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

Show Personnel

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

Buttons: Download Personnel List, Add New Personnel Record

System User ID	Name Last, Suffix	Name First, Middle, Title	IMM Provider	Sign 880	Certify 880	VFC Date	Start Date	Termination Date	Role	Status	Password Exp.
ANZALONEN	ANZALONE	NICOLE	N	N	N	N	01/10/2020		Local Org Staff	Inactive	10/07/2020
ARCHERX	ARCHIE	RAY	Y	N	N	N	08/23/2011		Local Org Staff	Inactive	10/31/2013
ARROYOV	ARROW	VANESSA	N	N	N	N	03/17/2020		Local Org Staff	Inactive	03/30/2020
ATKINSI	ATKINS	MFI ISSA	N	N	Y	N	05/05/2020		Local Org Staff	Inactive	03/25/2021
AVERYKX	AVERY	KATHY MA	Y	N	N	N	01/17/2024		Local Org Staff	Inactive	01/17/2024
AVILESE	AVILES	EVELYN	N	N	Y	N	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.

▶ **Terminate User Access:**

Users that have left the organizations 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, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC Date	Start	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: 01/17/2024 Termination Date: 01/17/2024

Immunization Provider:  Yes  No  Medical professional is authorized to e-sign a Form 680

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

Work Location: BEACH PEDS 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: 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: 01/17/2024

System User Start Date: 01/17/2024 System User End Date: 01/17/2024 (Login disabled as of this date)

Last Login: System Password: Confirm Password: Account Locked:

Authorization: Full Access Roles: Local Org Inventory Only

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**.

Organization Personnel List

Authorized User/Personnel List for: BEACH PEDIATRICS

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

Download Personnel List Add New Personnel Record

System User ID	Name Last, Suffix	Name First, Middle	Title	IMM Provider	Sign 680	Certify 680	VFC	Start Date	Termination Date	Role	Status	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 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: Account Locked:

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

Authorization: Full Access Selected Roles: Local Org Staff

Create Certified Form 680:  No  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 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](mailto:flshots@flhealth.gov)) for assistance.

The screenshot shows the 'Enrolled Organization Maintenance' page in a 'Training Environment'. The sidebar menu on the left has 'Organization Edit' highlighted under the 'Administration' section. A red arrow points to this menu item. The main content area shows the 'Organization Information' form for 'BEACH PEDIATRICS'. Fields include Enrollment ID (4953), Organization Name (BEACH PEDIATRICS), Doing Business As (DBA), Account Status (ACTIVE), Account Sub Status (ACCOUNT IN GOOD STANDING), Org Category (DOCTOR'S CLINIC), Organization Phone ((555)986-7777), and Organization Fax ((555)986-7777). There are also checkboxes for 'Client View Only Access' and 'Add/Delete Org-Patient Ids'. On the right, there are sections for 'Min System Requirements Met' and 'Form DH1479 Complete'.

**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.

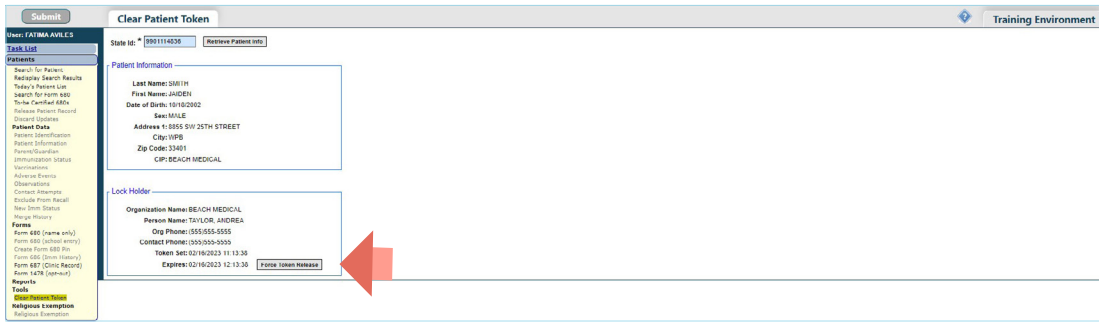
The screenshot shows the 'Clear Patient Token' page. The sidebar menu on the left has 'Clear Patient Token' highlighted under the 'Patients' section. A red arrow points to this menu item. The main content area shows a form with a 'State Id' field and a 'Retrieve Patient Info' button.

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

The screenshot shows the 'Clear Patient Token' page with the 'State Id' field filled with '993114938'. The 'Retrieve Patient Info' button has been clicked, and the patient information is displayed. The information includes: Last Name: SMITH, First Name: JADEN, Date of Birth: 10/10/2002, Sex: MALE, Address: 1855 SW 25TH STREET, City: WPA, Zip: 32086-2901, and Org: BACH MEDICAL. There is also a 'Lock Holder' field which is currently empty and a 'Lock is not held.' message.



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