



Immunization Information System (IIS) Help Desk Technician, Tier 2

Sample Role Description

March 2016

Note: This role description is meant to offer sample language and a comprehensive list of potential desired responsibilities with corresponding knowledge, skills and abilities (KSAs). Actual position descriptions should filter out information that is not applicable for a specific position or role. Depending on staffing levels, several roles may be combined within a single position, or several positions may fill the same role. The term “Immunization Information System” or “IIS” may be replaced with “Registry” within position titles in some jurisdictions.

Help Desk Technician, Tier 2

Help Desk Technician, Tier 2 is a role typically found in an experienced analyst series. This role typically encompasses all of the skills within the Help Desk Technician, Tier 1 role, but is also able to respond to more complex requests and questions that require a deeper level of analysis or investigation.

Scope

The person fulfilling this role is responsible for providing increasingly complex technical assistance and support to internal users as well as end users. The person in this role may also be responsible for maintaining codeset or base table configurations in the system, such as modifying forecaster algorithms, and introducing newly assigned codes, such as CPT and NDC.

Budget Authority

This role may offer input into budget issues or contribute to grant writing or reporting efforts that involve current or future funding.

Position Titles

The following example job titles were gathered from existing positions at state and local health agencies:

- Advanced Help Desk Technician
- Advanced Customer Support Specialist
- Data Analyst

Relationship

The person in this position typically reports to the IIS Manager. Internally, this position works very closely with the helpdesk team, as well as the rest of the IIS team, and other immunization program staff as needed. Externally, this position works with all end-users of the IIS, including but not limited to public and private providers, school personnel, health plans, parents and other adults requesting records. The person in this role may have lead status or oversight of the Help Desk Team.

Decision Making Authority

This position exercises considerable independent judgment in carrying out responsibilities within a highly collaborative environment. Decision making generally requires substantial negotiation and compromise with a variety of considerations, including the context imposed by applicable laws, statutes, rules, interests of stakeholders, available data and resources. Decision making authority is commonly characterized as follows:

- Authenticates and validates the identity of data and information requesters.
- Applies law and policy to determine level of access to available data.
- Determines requestor’s needs and identifies appropriate resolution of request.

- Gathers additional data and/or information with which to make a decision or determine a course of action.

Major Duties and Responsibilities

This list contains examples of duties and responsibilities that may be associated with a Helpdesk Tier 2 position. This list offers many possible duties and responsibilities from which to select in order to create a position most appropriate to your program needs and your human resources requirements.

Data Quality Resolution

- Provides support for many data quality activities within IIS, with emphasis on improvements that will benefit the authorized users of the data within established laws, policies and procedures.
- Resolves discrepancies by contacting authorized users for information, comparing to IIS data files, and accessing information in the Vital Records birth files.
- Compiles reports on frequent discrepancies and recommends solutions and implements recommendations approved by management.
- Coordinates the resolution of data issues with lead data entry staff and/or technical staff.
- Coordinates with Data Quality Coordinator to determine new approaches and resolutions for data quality issues.
- Resolves duplicate records in the system.
- Investigates data quality issues and discrepancies through data extracts and analysis.
- Presents solutions for resolution of data quality issues for incoming and existing data.
- Work with technical staff to identify issues that arise in IIS, including data quality issues.
- Troubleshoot reported issues within IIS, including investigating potential bugs and connectivity issues.

Provider/Organization Management

- Assists with contact management and maintains provider information necessary for identifying, contacting and linking providers to data.
- Provides design consultation and testing for provider enrollment and onboarding process.
- Assists with the production of provider training materials, and customer service user guides.
- Coordinates with appropriate Vaccines For Children health educator regarding specific organizations and providers.

Technical Assistance/Training/Communications

- Communicates on a regular basis by phone, fax, email or in writing with authorized users of IIS from both public and private sectors: providers, health plans, schools, day care facilities and parents.
- Provides faxed, emailed or postal-mailed immunization records securely and by request.
- Provides primary support for 800-line phone calls and verifies identity of IIS authorized users.
- Provides and interprets information on recommended immunization schedule, recommended vaccines and supports users in ensuring data is entered into IIS effectively.
- Coordinates and provides special assistance and training regarding customer requests.
- Utilizes considerable self-direction as well as team leadership.

- Establishes and maintains procedures and other controls needed to maintain and improve customer service for IIS.
- Conducts outreach to providers to recruit and engage them in IIS participation and/or specific IIS functions, and provides training and support on multiple applications within the immunization program.
- Lead or participate in project team meetings and discussions to arrive at consensus.
- Coach IIS team members on project methodology and processes.
- Lead meetings to provide information and determine project requirements.
- In collaboration with the IIS Director and training lead, coordinate IIS activities with other immunization programs and managers, and community partners and health departments throughout the state.
- Provide updates to IIS external stakeholders and other entities as needed.
- Create and maintain documentation on all projects and project resolution.
- Conduct centralized reminder recall for partial or full jurisdictional population.
- Provide support for organization-driven recall among authorized users.

Application of Policy

- Interprets laws, rules, policies and procedures, and applies this knowledge to handle customer issues that are both routine and non-routine.
- Maintains security and confidentiality of data at all times.

Functioning within an interdisciplinary team environment

- Consistently treats customers, stakeholders, partners, vendors and co-workers with dignity and respect.
- Creates and maintains a work environment that is welcoming and respectful of diversity.
- Sets clear guidelines and models expected professional behaviors.
- Other tasks as assigned.

Management of Code Sets, Algorithms, Enhancements

- Implements and coordinates the release of new CVX, CPT, NDC codes within the IIS.
- Implements and coordinates modifications to the forecasting algorithms for IIS functions.

Management of Enhancements

- Identify and support the design and implementation of new enhancements to the IIS.
- Work with vendor and internal staff to review functional specifications and provide testing and documentation of changes and improvements.
- Assist with the development and management of project plans and schedules.
- Identify project scope, required training, and resources.
- Participate in meetings with project team, senior managers, community partners and local health departments throughout the state and other stakeholders to define scope, requirements, and other ongoing aspects of the IIS.
- Identify the resources needed to assure project success and monitor timely, appropriate completion of tasks.
- Identify and manage project risks, including mitigation strategies.
- Identify methods to determine effectiveness and assure quality.
- Solve disputes and gain agreement with internal and external constituency and community partners to support policy initiatives.
- Create Maintenance Requests and Change Orders as necessary to address needed functionality.

Maintenance of Immunization Forecaster

- Lead team tasked with assuring that the IIS forecaster assesses immunization histories correctly and returns accurate forecasts of immunizations due.
- Maintain the forecasting tables in all three instances of IIS platform; Production, training and UAT.
- Produce required documentation to describe to end users how IIS calculates the forecast.
- Produce required internal documentation of the forecaster that describes how the set up tables are used and the process for making needed changes.

Key Competencies

This list contains the key competency areas with corresponding examples of knowledge, skills, and abilities that may be associated with the IIS Help Desk Technician, Tier 2 role. It is not all inclusive and may vary from position to position.

Standards and Interoperability

Applies informatics standards to ensure interoperability between disparate information systems.

Knowledge Statements:

- Knowledge of immunization terminology and practices, and the data elements that support them.
- Knowledge of relevant IIS standards, including HL7 2.x and SOAP/Web Services.
- Knowledge of IIS best practice documentation developed by the Modeling of Immunization Registry Operations Workgroup (MIROW).
- Knowledge of national initiatives such as Meaningful Use, and their impact on IIS and health information exchange.
- Knowledge of standardized IIS business rules and best practices.
- Knowledge of public health reporting standards.
- Knowledge of Clinical Decision Support Specifications developed by CDC.

Abilities Statements:

- Ability to apply local and national standards consistently.
- Ability to quickly learn data fields commonly used in clinic practices to record vaccination encounters.
- Ability to quickly learn new terminology.

Project Management

Practices project management and program management techniques to engage stakeholders and team members in achieving goals and expectations.

Knowledge Statements:

- Knowledge of diverse IIS stakeholders and funding mechanisms.
- Knowledge of the outputs of computer query and reporting tools, such as SQL, Crystal Reports, Business Objects or Excel to support technical staff in running reports.

Skills Statements:

- Skill to develop specific goals and plans to prioritize, organize, and accomplish work.
- Skill to document status and outputs of projects and processes.
- Skill to engage in testing of information solutions using appropriate methodologies and techniques.
- Skill in coordinating diverse activities to ensure completion of projects, tasks and assignments.

Abilities Statements:

- Ability to balance multiple, competing program demands.
- Ability to establish long-range objectives and specify the strategies and actions to achieve them.
- Ability to synthesize voluminous and diverse facts, opinions, and materials into usable work plans.

Information Systems

Applies fundamental knowledge of hardware, software (including business rules and algorithms), and network infrastructure essential to ensuring that public health requirements are met.

Knowledge Statements:

- Knowledge of health information systems.
- Knowledge of large databases and database functions/utilities.
- Knowledge of electronic data transfer methods.

Skills Statements:

- Skill in use of common software products such as Word, PowerPoint and Excel.
- Skill to adopt complex, modern information technology and communication tools.
- Skill in drafting end user and technical documentation.

Abilities Statements:

- Ability to solve complex issues requiring coordination, technical ability, and knowledge of computer and information systems to evaluate alternatives.
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Policy

Ensures that information projects adhere to relevant laws, rules, policies, procedures and regulations.

Knowledge Statements:

- Knowledge of applicable laws, statutes, policies and procedures regarding public health and health information.
- Knowledge of types of agreements such as data use agreements and memorandums of understanding that govern data access and sharing.
- Knowledge of policies and Standard Operating Procedures (SOPs) specific to IIS operations.
- Knowledge of records management.
- Knowledge of recommended schedules.

Skills Statements:

- Skill in appropriately applying IIS policies and procedures to specific situations.
- Skill to use relevant information to determine whether events or processes comply with laws, regulations, standards or procedures.
- Skill to develop standard operating procedures.
- Skill in interpreting laws, rules, policies and procedures and applying interpretations to specific situations.
- Skill in use of contact management software and applications.

Abilities Statements:

- Ability to apply public health laws, regulations, and policies specific to the Immunization Program.
 - Ability to quickly learn processes, and practices.
 - Ability to recommend modifications or enhancements to systems and policies.
 - Ability to use relevant information and individual judgment to determine whether events or processes comply with laws, regulations, or standards.
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Communication

Practices active, effective communication between IT, public health and other relevant stakeholders.

Skills Statements:

- Skill in use of phone, email, FAX, text messaging, instant messaging, and other telecommunications methods.
- Skill in communicating in writing, orally, electronically and in person with linguistic and cultural proficiency.
- Skill in applying effective communication and group dynamic strategies in interactions with individuals and groups.
- Skill in communicating the role of public health within the health system and community to diverse audiences.
- Skill in effectively communicating the capabilities and limitations of information systems.
- Skill in communicating orally to explain decisions, services, or programs.
- Skill in resolving problems through negotiation.
- Skill in managing a high-volume of incoming calls and requests from diverse stakeholders and populations.

Abilities Statements:

- Ability to build mutual trust, respect and cooperation among team members.
- Ability to communicate effectively to technical and non-technical audiences in both written and oral methods.
- Ability to contribute as a strong member of a self-directed work team.
- Ability to develop constructive and cooperative working relationships with others, and maintain them over time.
- Ability to effectively express ideas orally and in writing using appropriate language and organizing ideas in an objective manner.
- Ability to translate or explain what information means and how it can be used.
- Ability to effectively communicate the capabilities and limitations of information technologies.
- Ability to represent the Program as a staff person for project, advisory, or technical committees.

 **Analysis, Visualization & Reporting**

Translates data to information and knowledge that leads to action using consistent analytic and reporting tools and techniques.

Knowledge Statements:

- Knowledge of techniques sufficient to collect, analyze, interpret and summarize data in a narrative or graphical format.

Skills Statements:

- Skill to analyze business needs and product requirements to create or design a system enhancement.
- Skill to analyze business needs and product requirements to create or design a system enhancement.
- Skill in writing clear and concise narratives and statistical summaries.
- Skill in composing written and oral responses to inquiries, narrative reports, instructional materials.

Abilities Statements:

- Ability to apply general rules to specific problems.
- Ability to exercise appropriate judgment in determining when an issue or problem needs referral to management or other staff.
- Ability to analyze, evaluate and solve procedural problems.
- Ability to interpret technical materials to evaluate alternative technical solutions to address agency needs.

- Ability to research and design the techniques, methods, and principles used in complex data analysis.
 - Ability to read and interpret technical materials to better assist end users.
 - Ability to understand the implications of new information for both current and future problem-solving and decision-making.
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Evaluation

Applies rigorous methods to evaluate the effectiveness of workflows and information technology.

Knowledge Statements:

- Knowledge of general data quality concepts.

Skills Statements:

- Skill to identify complex problems and review related information to develop and evaluate options and implement solutions.

Abilities Statements:

- Ability to use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
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Principles & Strategy

Applies informatics principles, strategic thinking, and leadership techniques to public health information needs.

Knowledge Statements:

- Knowledge of the development of IIS systems over time.
- Knowledge of the multiple purposes and audiences that leverage IIS data and functionality, and the methods by which they access IIS data.
- Knowledge of the basic concepts of vaccine management, such as inventory and accountability.
- Knowledge of healthcare systems and practices.

Abilities Statements:

- Ability to work independently with little or no supervision.
 - Ability to work well in a high-pressure environment.
 - Ability to apply high attention to detail to work products.
 - Ability to use independent judgment, decision making and problem resolution to perform technical, operational, or administrative functions.
 - Ability to learn the organizational structures, roles, and interrelationships of local public health agencies, private health care organizations, private practices, school health and health plans.
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Training

Effectively applies concepts of adult learning theory to educating a broad range of technical, programmatic and clinical audiences.

Knowledge Statements:

- Knowledge of techniques and methods of disseminating technical and programmatic information with external partners and stakeholders.

Abilities Statements:

- Ability to prepare, present and train on highly complex technical material and issues to non-specialists.