



# Immunization Information System (IIS) Help Desk Specialist II

**Sample role description**

January 2023

This sample role description identifies typical duties and responsibilities of an immunization information system (IIS) help desk specialist II and indicates sample competencies of a person fulfilling this role.

*Note: Actual position descriptions should include only the information applicable for the 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.*

## Summary

This role typically requires all the skills of the help desk specialist I but includes the ability to respond to more complex requests, e.g., using the IIS for ordering and management of public and private vaccine inventory, including resolving vaccine lot decrementing issues. The person fulfilling this role is responsible for providing increasingly complex technical assistance and support to internal and external IIS users and partners, including staff of immunization providers, schools, childcare facilities, and health plans as well as the public. This role may also be responsible for maintaining codeset or base table configurations in the IIS, such as modifying forecaster algorithms, maintaining and updating IIS administration settings, and adding newly assigned vaccine codes such as CVX, CPT and NDC.

This role usually reports to the IIS manager and may be the first contact external partners have with an IIS or immunization program. The help desk specialist II exercises considerable independent judgment in carrying out responsibilities within a highly collaborative IIS and immunization program environment. The person in this role may have lead status or be tasked with supervising the help desk I team. Decision making requires knowledge of applicable laws, policies, and available data and resources.

## Alternate role titles

- Help desk supervisor
- Senior technical support representative
- Senior help desk technician
- Senior customer support specialist

## IIS core competencies

This role description is based on PHII's [IIS Core Competency Model](#), which provides functional, behaviorally-based tasks or processes that can be observed or measured and are required at an organizational level for the successful, high-performing functioning of an IIS. Major duties and responsibilities below are organized into the applicable domains from the model.

## Primary duties and responsibilities (as applicable within jurisdiction)

Duties may include but *are not limited* to:



### Leadership and management

- Model professional behavior while providing customer service and technical assistance to internal and external IIS users, including IIS and immunization program staff, immunization providers, schools, childcare facilities, health plans, and other partners as well as the public.
- Act as liaison to the IIS vendor (as applicable) to coordinate assistance to IIS users.
- Contribute to the development of standard operating procedures (SOPs) to guide execution of important technical assistance and support tasks.
- Oversee, mentor, supervise and assign work to help desk specialist I personnel.
- Lead help desk initiatives such as customer satisfaction surveys and user group training.
- Use considerable self-direction as well as team leadership (if applicable) in meeting requests from IIS users and the public.
- Recognize and refer sensitive requests to IIS or immunization program senior staff.



### Law and policy

- Apply knowledge of laws, policies and procedures related to the IIS to determine the allowable level of access to IIS data for individuals and organizations requesting assistance.
- Verify identities of IIS users and other individuals requesting assistance and only release information allowed by the jurisdiction's laws, policies and procedures.
- Ensure that IIS users, including immunization providers and school staff, sign a confidentiality statement and, when appropriate, furnish and verify user access agreements prior to granting IIS access; store and maintain confidentiality statements and user access agreements per record retention requirements.
- Maintain security and confidentiality of data at all times.



### Communication

- Communicate to internal and external IIS users and the public the laws and regulations related to IIS participation (e.g., data access and use, patient opt-in/out, requirements for providers to report to the IIS, data sharing consent requirements, redisclosure limits, emergency powers).
- Assist in updating and maintaining provider and partner contact information necessary for outreach and communications.
- Use information from the help desk issue tracker and reports to identify opportunities for communications or training to address frequently experienced IIS issues.
- Conduct outreach to Vaccines for Children (VFC) and adult vaccination program providers, other immunization providers, and schools to gather information and/or assist them with
- use of specific IIS functions, e.g., ordering and managing public and private vaccine inventory and generating vaccine coverage reports.
- Communicate on a regular basis by phone, fax, email or in writing with IIS users and partners such as VFC and other immunization providers, schools, childcare facilities, health plans and the public to provide

updates on IIS enhancements (e.g., public dashboards and online consumer access) and changes (e.g., new vaccine codes for reporting immunizations).

- Communicate with VFC, adult immunization, surveillance and other immunization program staff to resolve specific organization, provider, and other partner requests or issues.



### Data use

- Fulfill requests received via telephone, fax, email and other modalities from IIS users and the public for immunization records and other information in accordance with laws, policies and procedures; transmit confidential information to requestors using secure data exchange methods.
- Research and recommend IIS consumer access options that adhere to laws, policies and procedures for protecting the confidentiality and security of IIS information.
- Support IIS users to ensure they have appropriate access to IIS information and functions and, when authorized, are able to effectively enter information into the IIS.
- Support use of IIS data for immunization program activities such as VFC and adult vaccine ordering and inventory management, perinatal hepatitis B prevention, surveillance, outbreak response, and immunization compliance in childcare, school and other congregate settings (e.g., share data with schools and enable parental access to immunization records).
- Collaborate with other IIS staff to conduct centralized reminder and recall for partial or full jurisdictional population.
- Support facility-driven patient reminder and recall among authorized users including immunization providers, schools and health plans.



### Data quality

- Collaborate with IIS data quality analyst and/or other IIS staff to identify, document and resolve data quality issues with incoming data and data at rest.
- Conduct data quality assurance activities in accordance with jurisdiction policies and procedures.
- Assist with extracting IIS data and conducting analyses to investigate data quality issues.
- Collaborate with data quality analyst and interoperability analyst to compile reports on frequent data discrepancies; recommend solutions to data quality problems and implement recommendations approved by management.
- Resolve data discrepancies by contacting authorized users for information and correcting IIS records.
- Apply knowledge and training in manual IIS record matching and merging to resolve duplicate and fragmented patient records.



### Interoperability

- Work with interoperability analyst to improve the quality of incoming data and reduce creation of duplicate patient records and vaccination events.
- Conduct provider and partner enrollment and onboarding for IIS reporting and/or access, i.e., follow protocols for setting up accounts and assigning facility codes for Health Level 7 (HL7) reporting to the IIS.

- Implement testing of IIS functions for provider enrollment and onboarding for IIS reporting and access.
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### Information systems management

- Collaborate with help desk I and other IIS staff, IIS vendor and the jurisdiction's IT staff to troubleshoot reported issues with the IIS, including investigating potential bugs and connectivity issues.
  - Assist with provider enrollment into the IIS.
  - Implement account management policies and practices that address both individual user and organization accounts that are consistent with the jurisdiction's policies.
  - Create and manage individual user and facility accounts consistent with jurisdiction policies; inactivate accounts for users who are no longer authorized to access the IIS.
  - Implement and coordinate the release of new CVX, CPT and NDC codes within the IIS.
  - Lead team or coordinate with vendor/internal team tasked with assuring that the IIS forecaster assesses immunization histories correctly and returns accurate forecasts of immunizations due.
  - Implement and/or coordinate modifications to the forecasting algorithms for IIS functions; maintain the forecasting tables in all three instances of IIS platform: production, training and user acceptance testing (UAT).
  - Develop required documentation to describe to end users how IIS calculates the forecast.
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### Project management

- Participate in meetings with project/IIS team, senior managers, project manager (if applicable), community partners and local health departments throughout the jurisdiction to define scope and requirements for IIS enhancements.
  - Assist with the development and management of project plans and schedules for IIS enhancements.
  - Assist with identifying required training and resources needed for IIS enhancements.
  - Work with the IIS vendor, project manager (if applicable), and internal IT and/or IIS staff to review IIS functional specifications and provide testing and documentation of changes and improvements.
  - Assist with the creation of maintenance requests and change orders as necessary to address needed IIS functionality.
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### Change management

- Identify opportunities for constructive change in IIS policies, processes and/or technologies, and communicate the value case for change to IIS senior staff.
  - Assist internal and external IIS users in implementing IIS and immunization program change initiatives.
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## Training

- Assist with the development, production and distribution of IIS training materials, user guides and frequently asked questions (FAQ) sheets.
- Facilitate enrollment of IIS users in online training.
- Provide one-on-one training on IIS functions to internal and external users as needed.

## Evaluation

- Compile data and reports on services provided and issues encountered; recommend service improvements and implement recommendations approved by management.

## Background and qualifications

### Successful candidates should have:

- Bachelor's degree (preferably in computer science or other relevant field) with a minimum of 1 year of professional experience in technical assistance and support, preferably in a public health or health care setting

OR

- High school degree with a minimum of 2 years of professional experience in technical assistance and support, preferably in a public health or health care setting

### Preferred knowledge, skills and abilities include:

- Knowledge of health information systems
- Knowledge of secure data and information transmission methods
- Knowledge of IIS standards including HL7 and SOAP web services
- Strong oral and written communication and interpersonal skills
- Ability to effectively supervise staff
- Ability to apply knowledge of laws and policies in responding to requests for access to IIS data
- Ability to exercise appropriate judgment in determining when an issue or problem needs referral to management or other staff
- Proficiency or fluency in Microsoft Office Suite, e.g., Outlook, Word, Excel, PowerPoint
- Ability to apply high attention to detail
- Ability to understand and train on technical material to technical and non-technical IIS staff and data exchange partners
- Ability to work independently and well in a high-pressure environment
- Ability to develop and maintain constructive and cooperative relationships among staff and partners