



Immunization Information System (IIS) Help Desk Specialist I

Sample role description

May 2025

This sample role description identifies typical duties and responsibilities of an immunization information system (IIS) help desk specialist I 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 is responsible for providing information, technical assistance and support, account creation, and account management support to internal and external IIS users and partners, including immunization providers, schools, childcare facilities and health plans, as well as the public. Data entry tasks may also be performed based on program needs. The person in this role usually reports to the help desk specialist II/help desk supervisor and may be the first contact external partners and the public have with an IIS or immunization program. The help desk specialist I exercises independent judgment in carrying out responsibilities within a highly collaborative IIS and immunization program environment. Decision making requires knowledge of applicable laws, policies, and available data and resources.

Alternate role titles

- Technical support representative
- Help desk technician
- Customer service representative

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.
- Contribute to the development of standard operating procedures (SOPs) to support execution of important customer service and technical assistance tasks.
- Use considerable self-direction as well as team leadership (if applicable) in meeting requests from IIS users and the public.
- Recognize and refer complicated and/or 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).
- Update and maintain immunization provider and partner contact information necessary for outreach and communications.
- Engage with Vaccines for Children (VFC) and adult vaccination program 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 parents to provide updates on IIS enhancements (e.g., public dashboards, 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.
- Support IIS users to ensure they have appropriate access to IIS information and functions and 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 school staff and enable parental access to immunization records).
- Use the help desk issue tracker and associated reports to identify opportunities for communications or training based on frequently experienced IIS issues.
- Support facility-driven patient reminder and recall among authorized IIS users including immunization providers, schools and health plans.

Data quality

- Conduct data quality assurance activities in accordance with jurisdiction policies and procedures.
- Collaborate with the IIS data quality team 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 patient records.
- Perform data entry tasks based on program needs.
- Apply knowledge and training in manual IIS record matching and merging to resolve duplicate and fragmented patient records.

Interoperability

- 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.
- Work with interoperability analyst to improve the quality of incoming data and reduce creation of duplicate patient records and vaccination events.

Information systems management

- Assist with provider enrollment into the IIS.
- Create and manage individual user and facility accounts consistent with jurisdiction policies; deactivate accounts for users who are no longer authorized to access the IIS.
- Reset account passwords in accordance with jurisdiction policy and practice.
- Collaborate with IIS staff, IIS vendor and jurisdiction IT staff to troubleshoot reported issues with the IIS, including investigating potential bugs and connectivity issues.

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.

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.

Evaluation

- Compile data and reports on services provided, issues encountered and feedback received from users and the public; recommend service improvements and implement recommendations approved by management.

Background and qualifications

Successful candidates should have:

- Bachelor's degree (preferably in public health or other relevant field) with a minimum of 1 year of professional experience in customer service and technical assistance, preferably in a public health or health care setting
OR
- High school degree with a minimum of 2 years of professional experience in customer service and technical assistance, 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
- Strong oral and written communication and interpersonal skills
- Ability to provide exceptional customer service
- Strong organizational skills and ability to follow up on tasks
- Ability to apply knowledge of laws and policies in responding to requests for IIS accounts and information
- 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 train internal and external IIS users
- Ability to work independently and well in a high-pressure environment
- Ability to develop and maintain constructive and cooperative relationships among staff and partners