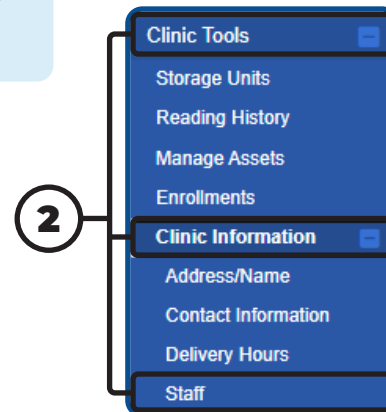


# Staff Changes Guide

Ensure that your site is getting the most up to date information from the Immunization Program by keeping your staff contact information up to date in PhilaVax.

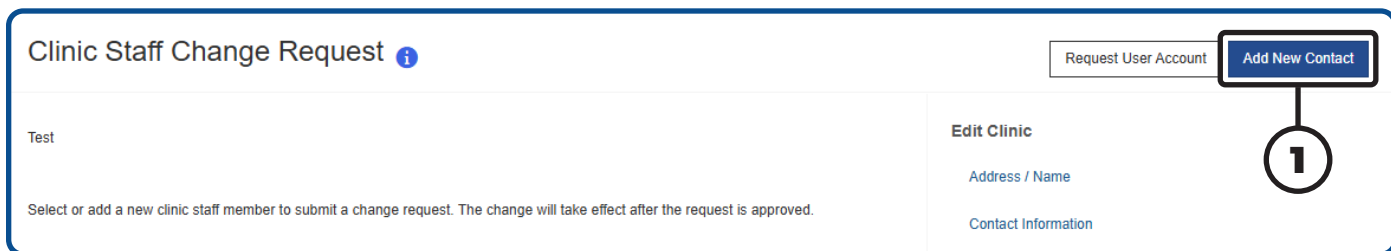
1. Login to [PhilaVax](#)
2. In the left-hand menu select **Clinic Tools > Clinic Information > Staff**.

Once on the **Clinic Staff Change Request** page, follow the steps in the section below that outlines the change you need to complete.



## Adding Staff

1. Click on **Add New Contact** in the upper right-hand corner of the screen.



2. Choose the appropriate **Contact Type** from the drop-down menu.
  - Use the [Staff Contact Types and Required Fields Table](#) below as a guide.
  - **Do not** select an **Alternate Contact Type**

## Staff Contact Types and Required Fields

Staff Member	PhilaVax Contact Type	Required Fields
Prescribing Clinician (i.e. MD, DO, PA, NP, CRNP)	PHYSICIAN CONTACT (Z2 - VFC/VTRCKS)	License Number, Specialty, Title
Medical director (or equivalent)	PHYSICIAN SIGNING AGREEMENT (Z3 - VFC/VTRCKS)	Email, Phone number, License Number, Specialty, Title
Primary Vaccine Coordinator	NON-PHYSICIAN CONTACT (PRIMARY) (Z4 - VFC/VTRCKS)	Email, Phone number
Back-up Vaccine Coordinator	NON-PHYSICIAN CONTACT (BACK-UP) (Z5 - VFC/VTRCKS)	Email, Phone number

- Fill out all the **required fields marked with a red asterisk** and **other required information** based on the contact type as outlined in the [Staff Contact Types and Required Fields Table](#).
- Click **Create** in the upper right-hand corner to save your changes.
  - Allow 1–2 business days for our staff to review and approve the entered changes.

**Clinic Staff Change Request**

Effective Date: MMDD/YYYY

Contact Type \* [Dropdown] Alternate Contact Type [Dropdown]

First Name \* [Text] Middle Name [Text] Last Name \* [Text]

Email [Text] NPI [Text]

Telephone \* [Text] Ext [Text] Fax Number [Text]

License Number [Text] Comments [Text]

Medicaid Provider ID [Text] Employer ID Number [Text]  Administers Immunizations  Prescribes Immunizations

Specialty [Dropdown] Title [Dropdown]

**Edit Clinic**

Address / Name

Contact Information

Delivery Hours

Staff

## Editing Staff Information

- To update a contact's information (name, email address, etc), click on the **View** button to the right of their name and contact type.
- Update their information as needed and include other required information based on the contact type as outlined in the [Staff Contact Types and Required Fields Table](#).
- Click **Update** in the upper right-hand corner to save your changes.
  - Allow 1–2 business days for our staff to review and approve the entered changes.

SMITH, JOHN	NON-PHYSICIAN CONTACT (BACK-UP) (Z5 - VFC/VTRCKS)	215-500-8000	YES		<b>VIEW</b>
STARK, TONY	NON-PHYSICIAN CONTACT (BACK-UP) (Z5 - VFC/VTRCKS)		NO		<b>VIEW</b>

**Clinic Staff Change Request**

Effective Date: MMDD/YYYY

Contact Type \* [Dropdown] Alternate Contact Type [Dropdown]

First Name \* [Text] Middle Name [Text] Last Name \* [Text]

JOHN [Text] SMITH [Text]

Email [Text] NPI [Text]

Telephone \* [Text] Ext [Text] Fax Number [Text] Assigned User [Text]

999-999-9999 [Text] 99999 [Text] 999-999-9999 [Text] N/A [Text]

The 'Telephone' field is required.

License Number [Text] Comments [Text]

Medicaid Provider ID [Text] Employer ID Number [Text]  Administers Immunizations  Prescribes Immunizations  Main Contact/Shipping Contact

Specialty [Dropdown] Title [Dropdown]

**Edit Clinic**

Address / Name

Contact Information

Delivery Hours

Staff

## Removing Staff

1. Click on the arrow to the right of the **View** button.
2. Click **Remove** from the dropdown.
3. Confirm that you want to remove the selected individual by selecting **OK** in the pop-up.

The screenshot shows a table of staff members. The first row is for SMITH, JOHN, and the second row is for STARK, TONY. To the right of each row is a 'VIEW' button with a dropdown arrow. A circled '1' points to the dropdown arrow on the first row. A circled '2' points to the 'REMOVE' option in the dropdown menu of the first row. Below the table is a 'Remove Staff Member' dialog box. The dialog contains the text: 'You have requested to remove TONY STARK from the clinic staff. Select OK if this is correct and you wish to submit the change request for approval. Select Cancel to return to the Clinic Staff Change Request page.' A circled '3' points to the 'OK' button in the dialog.

SMITH, JOHN	NON-PHYSICIAN CONTACT (BACK-UP) (Z5 - VFC/VTRCKS)	215-500-8000	YES	?	VIEW [dropdown]
STARK, TONY	NON-PHYSICIAN CONTACT (BACK-UP) (Z5 - VFC/VTRCKS)		NO	?	VIEW [dropdown]

Remove Staff Member

You have requested to remove TONY STARK from the clinic staff. Select OK if this is correct and you wish to submit the change request for approval. Select Cancel to return to the Clinic Staff Change Request page.

## Adding Training

### Required trainings for all Vaccine Coordinators:

- [Online Ordering & Clinic Tools Training](#)
- CDC, You Call the Shots modules:
  - [Vaccines for Children](#)
  - [Storage and Handling](#)

### Follow the steps below to document completion.

1. Click on the **View** button to the right of their name and contact type.
2. Click on **Add Training**.
3. In the pop-up window select the training from the **Course Name** dropdown.
4. Double-click in the **date box** and the current date will populate.
5. Click **Save** to add the training to the vaccine coordinator's record.
6. Repeat steps 1–5 as needed to document completed trainings.

The screenshot shows the 'Add Training' dialog box. It has a 'Course Name' dropdown menu, a 'CE Number' text field, a 'Completion Date' field with a calendar icon, and an 'Upload Certificate' section with a 'CHOOSE FILE' button. At the bottom are 'Cancel' and 'Save' buttons. A circled '3' points to the 'Course Name' dropdown. A circled '4' points to the 'Completion Date' field. A circled '5' points to the 'Save' button.

Add Training

Course Name \*

CE Number

Completion Date \* MM/DD/YYYY

Upload Certificate CHOOSE FILE