

# PHIMS

## Train the Trainer – Immunization & Inventory

### Participant Agenda <date>

#### Day 1

12: 30 – 16:30

- **Welcome and Introductions**
- **General Overview**
  - Review of Education Approach
  - Review of Resources Available
  - Review of what we plan to accomplish over the next 3 days
- **Getting Started and Managing Client Records**
  - How to Log into PHIMS
  - How to Set User Defaults
  - How to Search for a Client
  - How to View a Client Record
  - How to Record and Update Personal Information
  - How to Record and Update Occupation and Language
  - How to Record and Update Health Services
  - How to Record Client Warnings
  - How to Record Consent

#### Day 2

08: 30 – 12:00

- **Recording Individual Immunizations**
  - How to Add Special Considerations
  - How to Create and Update a Note
  - How to Record Historical Immunizations
  - How to Record Non Provider Immunizations
  - How to Record Provider Immunizations
  - How to Update an Immunization that was Incorrectly Recorded

12: 45 – 16:30

- **Mass Immunizations**
  - How to Search for a Mass Imms Event
  - How to Create a Mass Imms Event
  - How to Upload a Class list
  - How to Manage Reject Files
  - How to update a Mass Imms Event
  - How to Add Individuals to a Mass Imms Event
  - How to Add Multiple Students to a Mass Imms Event
  - How to Update a Client Record for a Mass Imms Event
  - How to Apply Consent via a Mass Imms Event

## Day 3

08: 30 – 16:30

- **Mass Immunization**
  - How to Record Historical Imms from a Worksheet
  - How to Record Non Provider Recorded Imms from a Worksheet
  - How to Record Delayed Entry Provider Recorded Imms from a Worksheet
  - How to Record Direct Entry Provider Recorded Imms from a Worksheet
  - How to View Which Individuals Were Immunized by a Provider
  - How to Record Historical Imms from a Worksheet
  - How to Record Non Provider Recorded Imms from a Worksheet
  - How to Record Delayed Entry Provider Recorded Imms from a Worksheet
  - How to Record Direct Entry Provider Recorded Imms from a Worksheet

## Day 4

08: 30 – 12:00

- **Inventory**
  - Definitions
  - Key Concepts
    - Holding Point (HP)
    - Holding Point Location (HPL)
    - Catalogue
    - SKUs
  - How to Search the Vaccine Catalogue
  - How to Search for a Requisition
  - How to Create a Requisition
  - How to Receive a Requisition
  - How to View Inventory
  - How to Adjust Inventory Amounts
  - How to Move Inventory from HPL to HPL

12: 45 – 16:30

- **PHIMS Practice Session**

## Day 5

08: 30 – 12:00

- **Train the Trainer Prep Session**
  - Review of Website
  - How to Prime the Learners
  - How to Set up the Data
  - Troubleshooting Tips
  - FAQs
  - Support Model
  - How to Create Tickets and Screenshots
  - How to Prepare to Teach Inventory