

# North Carolina Immunization Registry (NCIR)

## Manage Inventory

## User Guide

Last Updated: October 2022



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**



# Manage Inventory

## Step 1 of 3: Navigate homepage

There are several inventory alerts that appear on the home page for the Administrator and Inventory Control Users. We are going to look at these alerts and then move on to how to manage your inventory. Keep in mind that any of these alerts can be changed to suit the individual practice by the administrator.

### Audience

Inventory Control

Administrator

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

home | change password | logout | help desk

**announcements:**

- NEW 03/17/2008 ~ [How to Report Duplicate Clients](#)
- NEW 02/13/2008 ~ [Ordering Authority Announcement](#)
- NEW 02/06/2008 ~ [Reminder - Double Surnames](#)
- NEW 02/05/2008 ~ [Hib Recommendations](#)
- NEW 02/05/2008 ~ [Vaccine Doses administered outside of the United States](#)
- NEW 02/04/2008 ~ [Recording Tdap Immunizations](#)
- NEW 01/17/2008 ~ [Local Health Department Users](#)
- NEW 01/08/2008 ~ [Accepting Vaccine Orders](#)
- NEW 12/19/2007 ~ [Hib Announcement](#)
- [more announcements](#)

**release notes:**

- NEW 02/01/2008 ~ [Release Version 7.2.3](#) [NCIR Release Notes Version 7.2.3](#)
- [more release notes](#)

**Vaccine Order/Transfer Notification ...**

Type	Shipped	Awaiting Return Shipment
Order(s)	1	0
Transfer(s)	0	1

**Active Inventory that is Going to Expire ...**

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
TEST ORGANIZATION	Adacel	a456123	43	N	05/27/20
TEST ORGANIZATION	Flu-Mist	K12345	116	Y	06/30/20
TEST ORGANIZATION	LYMERix	1234	492	Y	07/31/20
Test Site 50	Adacel	a456123	1	N	05/27/20
Test Site 50	Boostrix	boo111	1	Y	05/09/20

**Inventory that is Running Low by Vaccine Group ...**

Vaccine Group	Quantity On Hand	Public
HPV	9	

**Inventory that is Running Low by Trade Name ...**

Trade Name	Quantity On Hand	Public
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This alert lets you know the status of orders and transfers that have been placed.

This alert lets you know if you have any active inventory that is going to expire. The default is set to 120 days.

This alert shows any inventory that is running low by the individual trade name. The default for this is set to 10 doses. Now, let's look at your inventory.

This alert shows any inventory that is running low by the vaccine group. The default for this is set to 10 doses.

# Step 2 of 3: Navigate to Inventory

1. On the homepage, click **Manage Inventory**
2. On the Manage Inventory page, click **Show Inventory**

## Audience

Inventory Control

Administrator

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

announcements:

- NEW 03/17/2008 - [How to Report Duplicate Clients](#)
- NEW 02/13/2008 - [Ordering Authority Announcement](#)
- NEW 02/06/2008 - [Reminder - Double Surnames](#)
- NEW 02/05/2008 - [Hib Recommendations](#)
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- NEW 02/04/2008 - [Recording Tdap Immunizations](#)
- NEW 01/17/2008 - [Local Health Department Users](#)
- NEW 01/08/2008 - [Accepting Vaccine Orders](#)
- NEW 12/19/2007 - [Hib Announcement](#)

release notes:

- NEW 02/01/2008 - [Release Version 7.2.3 NCIR Release Notes Version 7.2.3](#)

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	1	0	0
Transfer(s)	0	0	0

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	State	Exp Date
TEST ORGANIZATION	Adacel	a456123			
TEST ORGANIZATION	Flu-Mist	K12345			
TEST ORGANIZATION	LYMERic	1234			
Test Site 50	Adacel	a456123			
Test Site 50	Boostrix	boo111			

Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Quantity On Hand	Public
HPV	9	Y

Inventory that is Running Low by Trade Name ...

Trade Name	Quantity On Hand	Public
Menactra	7	Y

These are the same alerts that appear on the home page for both Administrators and Inventory Control users.

**Manage Inventory**

Show Inventory for Sites... **Show Inventory**

Show Transactions for Sites... Show Transactions

Update inventory Alerts... Update Alert Prefs

Return to the Previous Screen... Cancel

**Inventory Alerts**

**Vaccine Order/Transfer Notification ...**

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	2	0	0
Transfer(s)	1	0	0

**Active Inventory that is Going to Expire ...**

Site Name	Trade Name	Lot Number	On Hand	State	Exp Date
NORTH CAROLINA IMMUNIZATION REGISTRY	Acel-Imune	22525	7	Y	07/31/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Fluzone Pres-Free	654-654	10200	Y	06/30/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Gardasil	1234z	89	Y	05/05/2008
NORTH CAROLINA IMMUNIZATION REGISTRY	Tripedia	U1985CA	20	Y	08/06/2008

**Inventory that is Running Low by Vaccine Group ...**

Vaccine Group	Quantity On Hand	State
No vaccine groups have a low inventory.		

**Inventory that is Running Low by Trade Name ...**

Trade Name	Quantity On Hand	State
Menactra	7	Y

## Step 3 of 3: Manage Inventory

From this screen you can add inventory, modify quantity, and show transactions for your inventory

**Manage Inventory**

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site: TEST ORGANIZATION   
Show  Active  Inactive  Non-Expired  Expired  
 Public  Private  All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	<a href="#">ActHib</a>	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	<a href="#">Adacel</a>	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	<a href="#">Adacel</a>	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	<a href="#">Boostrix</a>	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	<a href="#">Certiva</a>	555	279	Y	N	01/31/2009
<input type="checkbox"/>	<a href="#">DECAVAC</a>	05269	10	Y	N	08/28/2008
<input type="checkbox"/>	<a href="#">DECAVAC</a>	AB44	20	Y	N	01/01/2009
<input type="checkbox"/>	<a href="#">DT</a>	121252555	18	Y	N	05/20/2009
<input type="checkbox"/>	<a href="#">DTP</a>	098898	19	Y	N	10/20/2009
<input type="checkbox"/>	<a href="#">Engerix-B Peds</a>	1235N	8	Y	N	12/31/2009
<input type="checkbox"/>	<a href="#">Flu-Mist</a>	K12345	116	Y	Y	06/30/2008

You can look at any combination of inventory in the NCIR by clicking on the radio button next to your selection. For example, if you want to see all your active, public vaccine click on the radio button next to **Active** and **State**.

### Audience

Inventory Control

Administrator

Vaccine's that will expire in less than 120 days will be highlighted in pink.

# Steps for Adding Private Inventory (Non-COVID-19 Vaccine)

## Step 1 of 3: Navigate to Inventory

1. On the homepage, click **Manage Inventory**
2. Click **Show Inventory**
3. Click **Add Inventory**

**Manage Inventory**

Add Inventory for Site (TEST ORGANIZATION).... **Add Inventory**

Modify Quantity On Hand for Selected Sites.... **Modify Quantity**

Show Transactions for Sites.... **Show Transactions**

Return to the Previous Screen.... **Cancel**

**Site:** TEST ORGANIZATION

**Show**  Active  Inactive  Non-Expired  Expired  
 Public  Private  All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input checked="" type="checkbox"/>	<a href="#">ActHib</a>	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	<a href="#">Adacel</a>	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	<a href="#">Adacel</a>	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	<a href="#">Boostrix</a>	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	<a href="#">Certiva</a>	555	279	Y	N	01/31/2009

### Audience

Inventory Control

Administrator

## Step 2 of 3: Complete Inventory Information

1. Choose the **Trade Name**, the Manufacturer will automatically populate
2. Enter the **NDC** (noted on the outside of the vaccine box)
3. Enter the **Lot Number** (use the number on the vaccine box, NOT the vial)
4. Verify the **Dose** size from the drop-down menu
5. Verify the **Units** (will always be mL unless you are administering a vaccine in capsule form)  
NOTE: Tubes are not considered capsules

**Add Vaccine Inventory Information**

Site: Forks Primary Care

\* Trade Name: Adacel

\* Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught; Con

\* NDC: 49281-0400-10; Single Dose Vials; 10-PACK; 0.5 mL

\* Lot Number: VAX456 \* Presentation: Vial

\* Dose: .5

\* Units: mL

\* Expiration Date: 02/05/2020

\* Funding Program: Private

\* Lot Active: Yes

\* Quantity on Hand: 30

Cost Per Dose (\$): 17.65

Save Cancel

### Audience

Inventory Control

Administrator

## Step 2 of 3: Complete Inventory Information

6. Enter the **Expiration Date**. **NOTE:** Vaccines with only a month and year should be entered as the last day of the month of expiration
7. Verify the **Funding Program** (should always be **Private**)
8. Lot Active drop-down must be set to **Yes** to be saved. (**Yes** will make the Lot number appear in the drop-down menu under the Lot Number/Trade Name when documenting administration of a dose of vaccine. If you do not want the lot number to appear in the drop-down menu, change the active indicator to **No** after saving the initial information)
9. Enter the **Quantity on Hand** (the number of doses, not boxes or vials)
10. Cost Per Dose is **optional**

### Audience

Inventory Control

Administrator

**Add Vaccine Inventory Information**

Site: Forks Primary Care

\* Trade Name: Adacel

\* Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught, Con

\* NDC: 49281-0400-10, Single Dose Vials; 10-PACK; 0.5 mL

\* Lot Number: VAX456 \* Presentation: Vial

\* Dose: .5

\* Units: mL

\* Expiration Date: 02/05/2020

\* Funding Program: Private

\* Lot Active: Yes

\* Quantity on Hand: 30

Cost Per Dose (\$): 17.65

Save Cancel

## Step 3 of 3: Save

Once complete, click **Save**

**Add Vaccine Inventory Information**

Site: Forks Primary Care

\* Trade Name: Adacel

\* Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught, Con

\* NDC: 49281-0400-10; Single Dose Vials; 10-PACK; 0.5 mL

\* Lot Number: VAX456 \* Presentation: Vial

\* Dose: .5

\* Units: mL

\* Expiration Date: 02/05/2020

\* Funding Program: Private

\* Lot Active: Yes

\* Quantity on Hand: 30

Cost Per Dose (\$): 17.65

**Save** **Cancel**

### Audience

Inventory Control

Administrator

# Steps for Modifying Quantity

## Step 1 of 2: Modify Quantity (Option 1)

1. Click in the box next to the **Trade Name** in blue until the green check appears
2. Click **Modify Quantity**

**Manage Inventory**

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site: TEST ORGANIZATION

Show  Active  Inactive  Non-Expired  Expired  
 Public  Private  All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input checked="" type="checkbox"/>	<a href="#">ActHib</a>	U1234AA	710	Y	Y	05/05/2009
<input type="checkbox"/>	<a href="#">Adacel</a>	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	<a href="#">Adacel</a>	ABC123	14	Y	N	01/01/2009
<input type="checkbox"/>	<a href="#">Boostrix</a>	12351	4	Y	N	10/12/2010
<input type="checkbox"/>	<a href="#">Certiva</a>	555	279	Y	N	01/31/2009

### Audience

Inventory Control

Administrator

## Step 2 of 2: Modify Quantity (Option 1)

1. Choose the **Action** from the drop-down box. Either **Add** or **Subtract**.
2. Enter the **Amount** in doses that is being modified.
3. Choose the reason under the **Category** drop down box. See the next slide for an explanation of each transaction.

**Manage Inventory**

Save Changes to Quantity On Hand for Selected Sites...

Return to the Previous Screen...

**Modify Quantity On Hand for Selected Site(s)**

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	U1234AA	710	Add <input type="button" value="v"/>	<input type="text"/>	Receipt from Inventory <input type="button" value="v"/>

*NOTE: Fields marked with an asterisk \* are required.*

### Audience

Inventory Control

Administrator

This screen will allow you to modify the quantity of as many vaccines as you choose on the previous screen. It is good to use this option if you have several lot numbers to edit.

## Reasons to Modify Quantity (1 of 2)

- 1. Receipt from Inventory:** Select this option to add private inventory received from manufacturer with the same trade name, lot number, funding source and expiration date.
- 2. Receipt from Provider:** Select this option to add inventory received from a provider with the same trade name, lot number, funding source and expiration date. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.
- 3. Return to Provider:** Select this option to add doses are being returned to you from another organization or an external site after your inventory transfer was returned. This is intended for doses returned from providers not in NCIR. For providers in NCIR, use the manage transfer screen to track inventory shipments.

### Audience

Inventory Control

Administrator

**Manage Inventory**

*Save Changes to Quantity On Hand for Selected Sites...* Save

*Return to the Previous Screen...* Cancel

**Modify Quantity On Hand for Selected Site(s)**

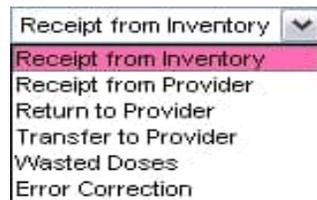
Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	L1234AA	710	Add <span style="font-size: 0.8em;">▼</span>	<input style="width: 60px;" type="text"/>	<div style="border: 1px solid gray; padding: 2px;"> <span style="background-color: #eee; display: block; padding: 2px;">Receipt from Inventory ▼</span> <span style="background-color: #f00; display: block; padding: 2px;">Receipt from Inventory</span> <span style="padding: 2px;">Receipt from Provider</span> <span style="padding: 2px;">Return to Provider</span> <span style="padding: 2px;">Transfer to Provider</span> <span style="padding: 2px;">Wasted Doses</span> <span style="padding: 2px;">Error Correction</span> </div>

*NOTE: Fields marked with an asterisk \* are required.*

## Reasons to Modify Quantity (2 of 2)

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4. **Transfer to Provider:** Select this option if you are transferring doses out of your inventory to an external site.
5. **Wasted Doses:** Select this option if there was any vaccine waste for a particular lot. When you select the Wasted Doses category, you will be required to enter the following:
  - 'Reason': Reason that the doses are marked as wasted
    - *Example:* Tray left out overnight. (verified non-viable with Immunization Branch)
  - 'Preventive Action': Action taken to prevent further wastage
    - *Example:* Return vaccine tray to refrigerator immediately after drawing vaccine
6. **Error Correction:** Select this option if you have made any errors in entry to your private stock of vaccine. For example, you entered 100 instead of 10 for the quantity. You will also be required to enter a reason for error correcting. **\*\*Before you error correct any state supplied vaccines, you should call the NC Help Desk, 1-877-873-6247, so that you may be guided in how to find errors before changing quantities in vaccine lots.**



### Audience

Inventory  
Control

Administrator

# Fixing Errors

- You can modify your private inventory discrepancies on your own.
- Issues with state supplied inventory need to be Error Corrected.

organization TEST ORGANIZATION • user Ashley Graham • role Administrator

**Manage Inventory**

Save Changes to Quantity On Hand for Selected Sites....

Return to the Previous Screen....

**Modify Quantity On Hand for Selected Site(s)**

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
ActHib	abc1233ab	554	Subtract	2	Error Correction

\* Error Reason:

NOTE: Fields marked with an asterisk \* are required.

## Audience

Inventory Control

Administrator

When a State-Supplied lot quantity is modified using the Category “Error Correction,” an **Error Reason** must be entered.

# Error Correction

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## When to Use Error Correction

- Use this category when adding to or subtracting from inventory doses that were keyed or documented incorrectly
  - i.e. if 100 is entered instead of 10

## When NOT to Use Error Correction

- If inventory is expired
- If a storage and handling issue caused the dose to be unusable
- If the vaccine is pre-drawn and not used

### Audience

Inventory  
Control

Administrator

# Avoid Documentation Errors

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- Enter all immunizations administered into the NCIR as soon as possible
- Only enter immunizations administered by you, under your username
- Document all doses that have been administered, transferred, wasted and/or expired in the NCIR

## In Summary

- Error Correction should be used infrequently
- Use best practices to maintain vaccine inventory correctly in the NCIR
- If you are unable to reconcile your inventory error correction should be your last option

### Audience

Inventory  
Control

Administrator

## Step 1 of 3: Modify Quantity (Option 2)

The other way that you can modify a quantity of a vaccine in your inventory is to go through the Trade Name link.

1. Start by finding the Trade Name for the vaccine you want to edit.

### Audience

Inventory Control

Administrator

**Manage Inventory**

Add Inventory for Site (TEST ORGANIZATION)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site:  Show  Active  Inactive  Non-Expired  Expired  
 State  Private  All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	<a href="#">ActHib</a>	U1234AA	700	Y	Y	05/05/2009
<input type="checkbox"/>	<a href="#">Adacel</a>	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	<a href="#">Certiva</a>	555	279	Y	N	01/31/2009
<input type="checkbox"/>	<a href="#">DECAVAC</a>	11233	10	Y	N	08/28/2008
<input type="checkbox"/>	<a href="#">DECAVAC</a>	AB44	20	Y	N	01/01/2009
<input type="checkbox"/>	<a href="#">DT</a>	121252555	18	Y	N	05/20/2009
<input type="checkbox"/>	<a href="#">DTP</a>	098898	19	Y	N	10/20/2009
<input type="checkbox"/>	<a href="#">Engerix-B Peds</a>	1235N	8	Y	N	12/31/2009
<input type="checkbox"/>	<a href="#">Flu-Mist</a>	K12345	116	Y	Y	06/30/2008

Click the Trade Name in blue

## Step 2 of 3: Modify Quantity (Option 2)

1. Choose **Add** or **Subtract** from Inventory.
2. Enter the **Amount** in doses.
3. Choose the reason from the **Category** drop down box.
4. Click **Save** when finished.

### Edit Vaccine Inventory Information

Site: TEST ORGANIZATION

\*Trade Name: DECAVAC

\*Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught; Conn

Lot Number: AB44

\*Dose: .5

\*Units: mL

\*Expiration Date: 01/01/2009

\*Funding Program: Private

\*Lot Active: Yes

Quantity on Hand: 20

Cost Per Dose (\$):

**Modify Quantity On Hand**

Action: Add

Amount:

Category: Receipt from Inventory

*NOTE: Fields marked with an asterisk \* are required.*

Save  
Cancel  
Add New  
Delete

### Audience

Inventory  
Control

Administrator

## Step 3 of 3: View Confirmation or Cancel (Option 2)

**Edit Vaccine Inventory Information**

Site: TEST ORGANIZATION

\*Trade Name: DECAVAC

\*Manufacturer: Sanofi Pasteur (Aventis Pasteur, Pasteur M

\*Lot Number: AB44

\*Dose: .5

\*Units: mL

\*Expiration Date: 01/01/2009

\*Funding Program: Private

\*Lot Active: Yes

Quantity on Hand: 19

Cost Per Dose (\$):

**Modify Quantity On Hand**

Action: Add

Amount:

Category: Receipt from Inventory

**inventory was updated successfully.**

*NOTE: Fields marked with an asterisk \* are required.*

Click **Cancel** to return to the view inventory screen

If you have modified the inventory correctly you will see this message.

Save  
Cancel  
Add New

### Audience

Inventory Control

Administrator

# Steps to Run a Transaction Report

## Step 1 of 2: Navigate to Transactions

1. From the home page, click **Manage Inventory**.
2. Click **Show Inventory**.
3. Click **Show Transactions**.

### Manage Inventory

*Add Inventory for Site (TEST ORGANIZATION)...*

*Modify Quantity On Hand for Selected Sites...*

*Show Transactions for Sites...*

*Return to the Previous Screen...*

Site:

Show  Active  Inactive  Non-Expired  Expired  
 State  Private  All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	<a href="#">ActHib</a>	U1234AA	700	Y	Y	05/05/2009
<input type="checkbox"/>	<a href="#">Adacel</a>	a456123	43	Y	N	05/27/2008
<input type="checkbox"/>	<a href="#">Adacel</a>	ABC123	14	Y	N	01/01/2009

### Audience

Inventory Control

Administrator

## Step 2 of 2: Select Specifications for Transaction Report

1. Enter the **To** and **From dates** for the transaction needed.
2. You can also choose the **To** and **From dates** for the date that an actual shot was given.
3. You can choose one user-name or all user-names.
4. You can choose the **Transaction Type** or look at them all
5. If your organization has more than one **site** established, you can look at the transactions for one site or for them all.
6. You can choose the **Trade Name** or look at them all.
7. You can choose **how many records** you want to see.

### Audience

Inventory  
Control

Administrator

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

**Vaccine Transactions for: TEST ORGANIZATION**

\*Date Entered [From]: 03/01/2008 [calendar icon] \*To: 04/01/2008 [calendar icon]

\*Date shot was given [From]: [calendar icon] \*To: [calendar icon]

User Name: All User Names [dropdown arrow]

Transaction Type: All Transaction Types [dropdown arrow]

Site Name: All Sites with Inventory [dropdown arrow]

Trade Name/Lot Number: All Lot Numbers [dropdown arrow]

Display Last 200 Records

*NOTE: Fields marked with an asterisk \* are required.*

# Transaction Report

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

To print landscape, select File, Page Setup, and under Orientation select the Landscape option.

Vaccine Transactions for Organization: TEST ORGANIZATION								Record Count: 117
Site Name	Date Given	Trans Date	Lot \ Trade Name	Type	Qty	Client Name	DOB	User Name
TEST ORGANIZATION		03/03/2008	98778 \Prevnar	REC	500			Caroline Helton
TEST ORGANIZATION		03/03/2008	321321321 \ROTATEG	REC	500			Caroline Helton
TEST ORGANIZATION	04/01/2008	04/01/2008	555 \ Certiva	Immunize	-1	LARSEN, ERIC	06/06/2005	Lisa Erickson
TEST ORGANIZATION	03/31/2008	03/31/2008	555 \ Certiva	Immunize	-1	LARSEN, ERIC	06/06/2005	Lisa Erickson
TEST ORGANIZATION		03/31/2008	FLU234 \Flu-Mist	Immunize	-1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION	03/31/2008	03/31/2008	9897654 \Td-MassBioLab	Immunize	-1	LARSEN, ERIC	06/06/2005	Jason Suchon
TEST ORGANIZATION		03/31/2008	98778 \Prevnar	Immunize	-1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION		03/31/2008	98778 \Prevnar	Delete	1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION		03/31/2008	FLU234 \Flu-Mist	Delete	1	LARSON, ERIC	02/15/1987	Jason Suchon
TEST ORGANIZATION	03/31/2008	03/31/2008	FLU234 \Flu-Mist	Immunize	-1	LARSEN, ERIC	06/06/2005	Jason Suchon
TEST ORGANIZATION		03/31/2008	UA13245 \Tripedia	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	AHA VB163AB \Havrix-Peds 2 Dose	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	GRD234 \Gardasil	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	ABC234 \Pediarix	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	U1234AA \ActHib	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	UA13245 \Tripedia	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION	03/31/2008	03/31/2008	Z-2341 \IPOL	Immunize	-1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb
TEST ORGANIZATION		03/31/2008	ABC234 \Pediarix	Delete	1	FUDD RODRIGUEZ, ELME	05/01/2006	Lindsay Newcomb

## Audience

Inventory Control

Administrator

# Transaction Codes

Code	Meaning
REC	Receipt from Inventory
RECS	Receipt from State
RECT	Receipt from Provider
Immunize	Immunizations Given
Delete	Immunizations Deleted
TRA	Transfer to Provider
TRAX	Transfer to State: Expired
TRAV	Transfer to State: Viable
WAS	Wasted Doses
RET	Return to Provider
RETV	Return to State: Viable
RETX	Return to State: Expired
ERR	Error Correction
EXPR	Remove- Expired Private
EXPU	Remove- Expired State

## Audience

Inventory Control

Administrator

# Steps to Run an Inventory Reconciliation Report

## Step 1 of 3: Navigate to Inventory Report

An inventory reconciliation report will show you what the NCIR says you have in your inventory and give you room to write your actual count from your refrigerator so that you can begin to balance your inventory.

1. From the homepage, click **Inventory Report**.

The screenshot shows the NCIR homepage for a user named REBECCA SWEENEY, Administrator. The page features a navigation menu on the left and a main content area with announcements and release notes. The 'Inventory' section in the navigation menu is highlighted, and 'inventory report' is selected. The announcements list includes items such as 'Transfer of Expired Vaccine', 'New Immunization Requirements', and 'Delayed Transfers from Vaccine Distribution'. The release notes section includes 'Release Version 7.4.0 NCIR Release Notes Version 7.4.0'.

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## Step 2 of 3: Select Criteria

1. Choose your **Site**.
2. Choose your **Funding Source**.
3. Click **Generate Report** when finished.



The screenshot shows a web interface for generating an inventory report. At the top, a yellow banner displays the user's context: "organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator". Below this, the main section is titled "Inventory Reconciliation Report Criteria". It features two dropdown menus: "Site" (set to "TEST ORGANIZATION") and "Funding Source" (with a dropdown menu open showing "STATE", "PRIVATE", and "STATE AND PRIVATE"). A "Generate Report" button is positioned to the right of the "Site" dropdown.

- Once you click on Inventory Report, you have the choice of what you want to appear in the report itself.
- Make sure that if your organization has multiple sites that you have the correct site selected or you can run the report for all the sites in a single organization.
- You can run the report for all private, all state supplied or both.
- These options give you a wider variety of ways to keep your inventory balanced.

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## Step 3 of 3: Generate Report

Report Date: 07/01/2008

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### Inventory Reconciliation Report / Worksheet

#### TEST ORGANIZATION

Funding Source	Vaccine Group	Trade Name	Lot Number	Expiration Date	NCIR Reported Doses On Hand	Actual Count of Doses On Hand
Private	Anthrax	Anthrax	FDD70019 Private	01/01/2010	98	
Private	DTP/aP	Certiva	555	01/31/2009	274	
Private	DTP/aP	DT	121252555	05/20/2009	18	
Private	DTP/aP	DTP	098898	10/20/2009	19	
Private	DTP/aP	Pediarix	ABC234	01/01/2009		
Private	DTP/aP	Pediarix	UA2345	01/01/2009		
Private	HepA	Havrix-Adult	8585	01/01/2009		
State	HepB	Recombivax-Adult	REC234	01/01/2009		
State	Hib	ActHib	U1234	01/01/2009		
State	Hib	PedvaxHIB	0259U	01/01/2009		
State	Influenza	Flu-Mist	FLU234	01/01/2009		

**NCIR Reported Doses On Hand** shows the doses that the NCIR reports that you have in your inventory.

**Actual Count of Doses on Hand** gives you room to count out your vaccine in your fridge and then write the actual amount here in this column

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Once you have counted the actual vaccine in your fridge and you compare it to what the NCIR says you have on hand, both columns should match. If they do not you need to run down the list of possible inventory discrepancies. (see next slide)



# Possible NCIR Inventory Discrepancies

## **Initial Inventory:**

- Initially mis-keying inventory into the NCIR
- Giving immunizations after physical count is completed and before going live with the NCIR

## **Keying Errors:**

- Doses keyed as historical (which does not subtract from your inventory) instead of doses keyed as new immunization given (which does subtract from your inventory)
- Trouble with data entry of combination drugs (i.e. Pediarix)
- Certain nurses not entering all the shots that were administered
- Clicking the back button when administering shots (which creates a double entry of those shots)
- Picking the wrong site from the site drop down box or not changing the site when entering shots from inventory
- Mixing up State and Private vaccine doses
- Clicking the “Remove” button when entering doses from inventory
- Not entering the data in a timely manner
- Reporting on Vaccine Administered Logs and not in the NCIR
- Server problems at the provider’s office- not able to key immunizations or place an order

## **Managing Orders, Transfers, Wastage:**

- Calling to place a vaccine order after going live with the NCIR instead of placing your order through the NCIR
- Manually entering inventory instead of accepting transfers prior to it being mandatory to accept transfers from the state
- Not reporting wastage
- Not reporting transfers

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# Steps to Run a Vaccine Usage Report

## Step 1 of 3: Navigate to Vaccine Usage

A Vaccine Usage Report is going to give you a break down of the total number of vaccines used per Trade Name and Age Group.

1. Start by clicking **request vaccine usage**.

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The screenshot displays the NCIR web application interface. At the top, there is a navigation bar with links for 'home', 'change password', 'logout', and 'help desk'. Below this, the user's current session is shown: 'organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator'. The main content area is divided into two sections: 'announcements' and 'release notes'. The 'announcements' section lists several recent updates, each starting with 'NEW' and a date, followed by a link to the announcement. The 'release notes' section lists a release for 'Release Version 7.4.0' dated 06/16/2008. On the left side, there is a vertical navigation menu with various options. The option 'request vaccine usage' is highlighted with a red rectangular box. Other options in the menu include 'Production Region 7.4.0', 'General', 'Maintenance', 'Inventory', 'Clients', 'Immunizations', and 'Reports'.

## Step 2 of 3: Select Criteria

1. Choose your **Site** from the site drop down box. If you have more than one site you can choose, however, if there is only one site associated with your organization the box will default to your site.
2. Choose your **From** and **To** dates for when you want the report to show.
3. Click **Generate** when you are ready to run the report. When you click this, you will notice that a status update will appear under the report screen.
4. Your status will read **Queue** and you will need to click **Refresh**. This refresh button will update your status
5. When your report is ready to view the status will read **100%** and the report name will be displayed in blue. Just click on the report name and you can view the vaccine usage report.

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

### Vaccine Usage Report Criteria

Site(s): TEST ORGANIZATION

Report Date Range:

From: 04/01/2008 To: 05/01/2008

*NOTE: Fields marked with an asterisk are required.*

### Vaccine Usage Request Status

Report Name	Status	Target From	Target To	
Vaccine Usage Report	QUEUE	04/01/2008	05/01/2008	<input type="button" value="Refresh"/> <input type="button" value="Cancel"/>

### Vaccine Usage Request Status

Report Name	Status	Target From	Target To	
<a href="#">Site: TEST ORGANIZATION</a>	100 %	04/01/2008	05/01/2008	<input type="button" value="Refresh"/> <input type="button" value="Cancel"/>

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# Step 3 of 3: Generate Report

Shows age categories for clients

## Vaccine Usage Report

Vaccination Period: 04/01/2008 to 05/01/2008

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Site Name: TEST ORGANIZATION

Group Name	Trade Name	Funding	<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Totals
DIP/aP	Certiva	PRIVATE			1						1				2
HepA	Havrix-Peds 2 Dose	STATE						1							1
HepA - HepB	Twinnix	STATE									1				1
Influenza	Flu-Mist	STATE		1											1
Totals:				1	1			1			2				5
Client Counts:				1	1			1			1				4

Total number of doses per age group

Total number of clients served

Complete total for trade name

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# Where to Go for More Help?



## Questions?

### **Contact your Regional Immunization Program Consultant (RIC)**

The RIC Coverage Map with contact information is located on the Immunization Branch website:

<https://www.immunize.nc.gov/contacts.htm>

### **NC Vaccines Help Desk**

1-877-873-6247

For help desk hours or to submit a ticket, please click the link below:

[https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

# Appendix

## NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager