

Approve Vaccine Order

Local health jurisdiction staff approve and submit provider vaccine orders using the Approve Orders function.

Process to review and approve orders:

- 1) Using the navigation menu click on the **Orders/Transfers** menu heading. Click **Approve Orders** under the menu.
- 2) Open orders in the **Reviewed for Approval** section (orders with status of *In Manual Review*) to review exception reason(s) and approve:
 1. Click the desired **Order Number** to open the order details.
 2. **Verify** the Dose Used Last Month and Physical Inventory is entered for all vaccine products and enter any missing information.
 3. **Verify** the Order Quantity is appropriate. Use your Recommended Order Quantity Calculation Guidelines or Calculator to determine the appropriate order quantity based on the provider's order frequency.
 4. **Change** the order quantities if needed as described below.
 5. **Review** exception reason(s) if present. See page 2 of this quick reference for more information on exception reasons.
 6. To approve: Click the **Approve** button to save any changes and exit the order details. The order status changes to *Pending Local Approval* and moves to the Ready for LHJ Approval section.
 7. To leave for later approval: Click the **Cancel** button to exit the order details. Any changes will not be saved. The order stays in the Reviewed for Approval section. You can open the order to approve, change or deny at any time.
 8. To Deny the entire order: See page 2 of this guide.
- 3) Open orders in the **Ready for LHJ Approval** section (orders with status of *Pending Local Approval*) for further review and submit to the state:
 1. Click the desired **Order Number** to open the order details.
 2. **Review**, and **change** or **deny** the order if needed as described below.

3. Click the **Approve** button to save any changes and exit the order details.
4. Click the **Cancel** button to exit the order details without saving changes.
5. **Check** the checkbox next to the order number to select individual orders or click the **Select All** button to select all the orders in the Ready for LHJ Approval section.
6. Click the **Send to State** button. The orders are submitted to the state and leave the local approver queue.

To make changes to orders:

(orders under **Reviewed for Approval** or **Ready for LHJ Approval** sections)

To **ADD** a vaccine to an order:

1. Locate the vaccine under the **Optionally add vaccines to order by changing order quantity** section.
2. Enter values in the **Dose Used Last Month** and **Physical Inventory** fields.
3. Enter the desired quantity in both the **Order Quantity** and **Approved Quantity** fields. The values must be equal.
4. Add a **Comment** about why the vaccine was added to the order.
5. Repeat for each vaccine being added to the order.
6. Click the **Approve** button.

Important: The values in the **Approved Quantity + Backordered Quantity + Denied Quantity** fields must equal the value in the **Order Quantity** field for each vaccine.

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To **INCREASE** the order quantity of a vaccine in the order:

1. Enter the new (higher) quantity in both the **Order Quantity** and **Approved Quantity** fields. The order and approved quantities must equal.
2. Add a **Comment** about why the vaccine quantity was increased.
3. Repeat for each vaccine to increase the order quantity.
4. Click the **Approve** button.

To **DECREASE (Deny)** the order quantity of a vaccine in the order:

1. Enter the new (lower) quantity in the **Approved Quantity** field.
2. **Do Not change** the original **Order Quantity**.
3. Enter the amount of vaccine being denied in the **Denied Quantity**. The approved quantities + the denied quantity must equal the original order quantity.
4. Select a **Denial Reason** from the dropdown menu.
5. Add a **Comment** about why the vaccine quantity was denied.
6. Repeat for each vaccine to reduce (deny) the order quantity.
7. Click the **Approve** button.

To **DENY an entire order** so none of the requested vaccines are ordered:

1. Select an **“Entire Order Denial Reason”** from the dropdown menu at the bottom of the page.
2. Click the **Deny Order** button.

To **BACKORDER a vaccine or entire order**: Orders or vaccines backordered are not tracked or processed by the state. See the Approve Order User Guide for important information about using this function.

URGENT order requests: Urgent orders should be pre-approved by the LHJ. Providers can then request individual vaccines be processed as Urgent in CHILD Profile. Review the Priority Reason when deciding to approve or deny an urgent order request.

- a. To **approve an urgent** request, leave the Urgent checkbox checked.
- b. To **deny an urgent** request, uncheck the Urgent checkbox. Add a **Comment** about why the urgent request was denied.
- c. To **mark an order urgent**, select a Priority Reason from the dropdown menu.

Exception reasons: The exception reason shows whether the order is outside the provider’s assigned frequency, timing, recommended order quantity, allocation or is urgent. Orders can have more than one exception reason.

Exception reason	What it means
Outside Assigned Order Timing	The whole order is placed outside the provider’s assigned half of the month (1 st -15 th or 16 th -end of month).
Outside Assigned Order Schedule	The whole order is placed in a month that is not part of the provider’s schedule.
Outside Recommended Order Quantity	The order quantity of a specified vaccine is more or less than the provider’s recommended quantity based on their order history.
Outside of allocation range	The order quantity of a specified vaccine is more than the provider’s allocation.
Urgent	The provider requests priority processing for specified vaccines.