Vaccine Ordering Guide for Provider Staff

Purpose: This guide demonstrates the steps needed for provider staff to place and receive vaccine orders using the Immunization Information System.

Order/Transfers Menu Heading - What it will allow you to do!

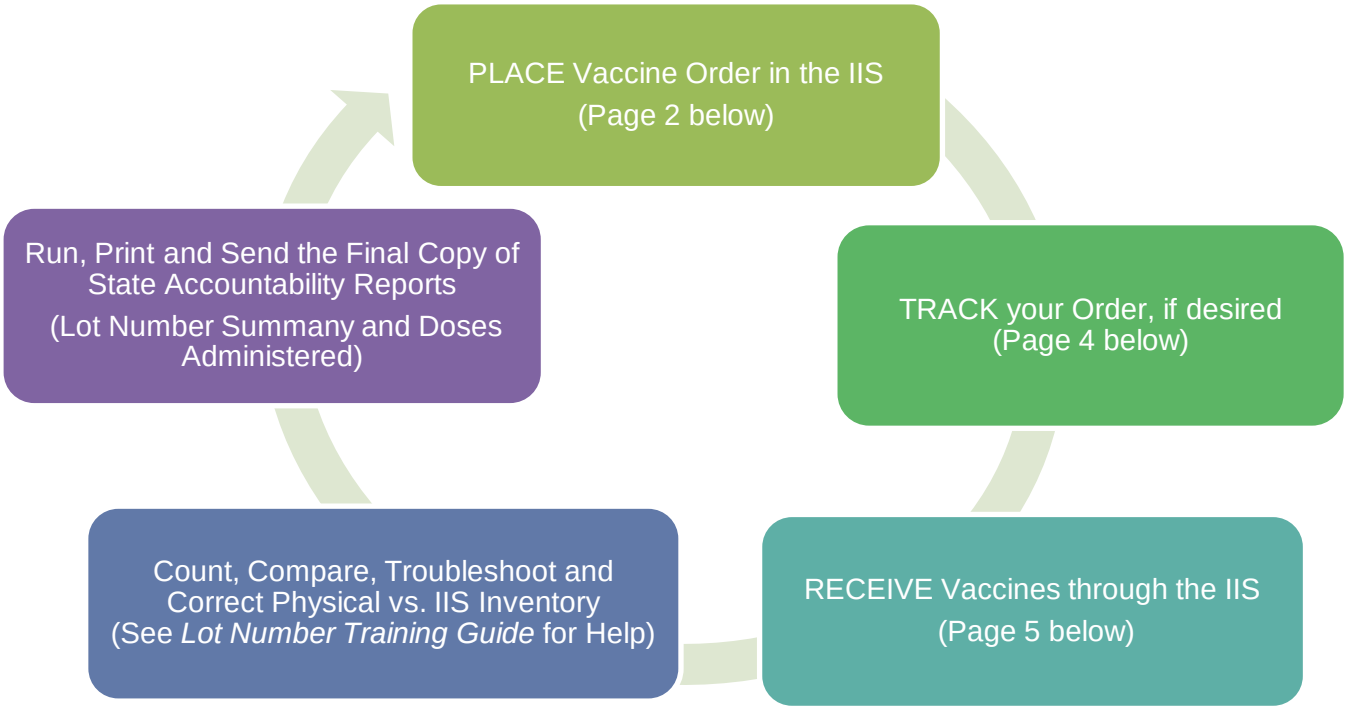
The Order/Transfers Function is a user account permission that can only be granted by Department of Health Staff. Provider staff will either have access to a single facility or multiple facilities, based on their organization structure.

The Order/Transfers Function for providers will allow you to:

- Place orders for your facility (clinic) or IRMS (multiple clinic sites within your organization).
- Track the status of existing vaccine orders.
- View past vaccine order history and details.
- Modify your order set when vaccine choice is open.

Workflow Process for Facilities that Manage their Inventory and use the State Reports!

It is important to follow this process if you actively manage your inventory in the Immunization Information System. This will help ensure that your monthly reports and order information are accurate.

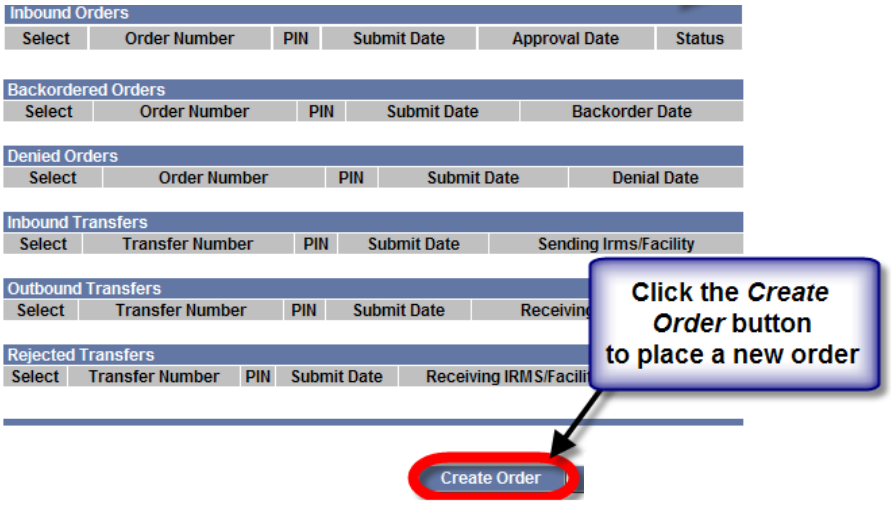


*IMPORTANT: Do NOT inactivate any inventory until AFTER you have run your reports and placed your order online

Step by Step Directions for Placing a Vaccine Order in the System

1. Log into the IIS.
2. Using the navigation menu click on the **Orders/Transfers Menu Heading.**
3. Click on *Create/View Orders.* You are now on the *Create/View Orders* screen.
4. On the bottom of the screen, click on the **Create Order** button.

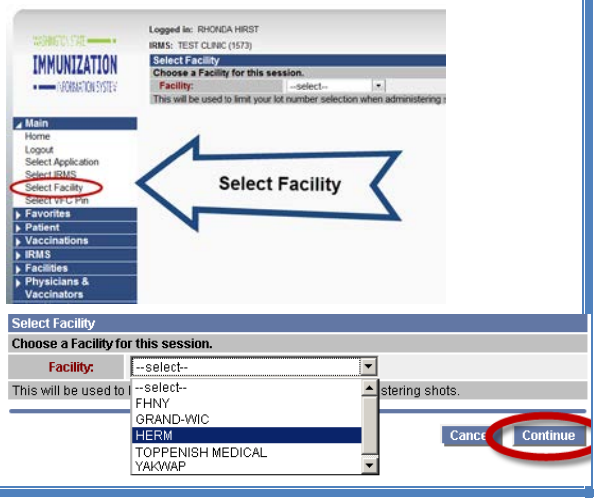
Create/View Orders – Step 1, Click Create Order



Directions for People that Order Vaccine for Multiple Locations

If you place orders for multiple locations you must select the facility you wish to place an order for by using the following directions (otherwise the create order button will NOT appear).

1. Using the left navigation menu, under the **Main Menu Heading**, click *Select Facility.*
2. Use the dropdown menu to select the facility you want to place your order for.
3. Click the **Continue** button
4. Under the **Orders/Transfers Menu Heading**, click *Create/View Orders.*
5. The **Create Order** button should now appear



5. From the *Create Orders Screen,* make sure to review all of your demographic information; make appropriate changes and notify your vaccine ordering contact of the changes.

> Note: the **Save** button only saves the updated shipping information, not the order details.

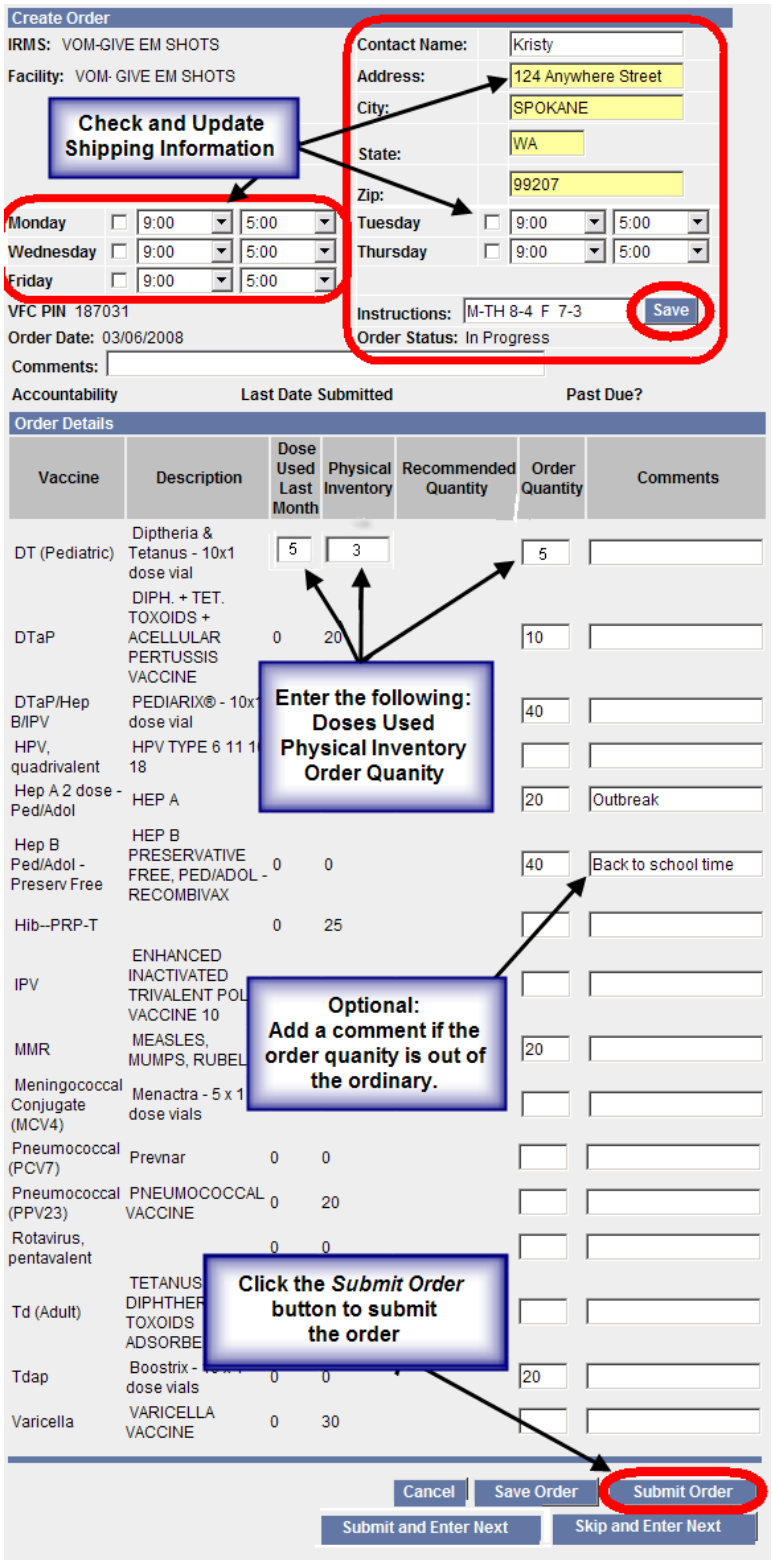
6. To place an order, enter the following information next to each applicable vaccine name:
   - Doses Used Last Month (required)
   - Physical Inventory (required)
   - Order Quantity – the number of vaccine doses the provider office is requesting to be ordered. (required)
   - Any Comments (if needed)

> Note: if you are actively managing your inventory using the system, you will need to make any changes to the total inventory counts by using the Lot Number Menu Heading functions – please contact the Help Desk if you need help with this

7. Double check your entries and click one of the following buttons to complete the order:
   - Click on the **Submit Order** button to send the order to your local health jurisdiction for approval.
   - Click **Save Order** to save the order if you want to stop entering but are not ready to submit.
   - Click on the **Cancel** button to cancel the order.

8. Once you click the **Submit Order** button, the order has been submitted for approval by your local health jurisdiction and you will be able to track the order's status.

Create Order Screen



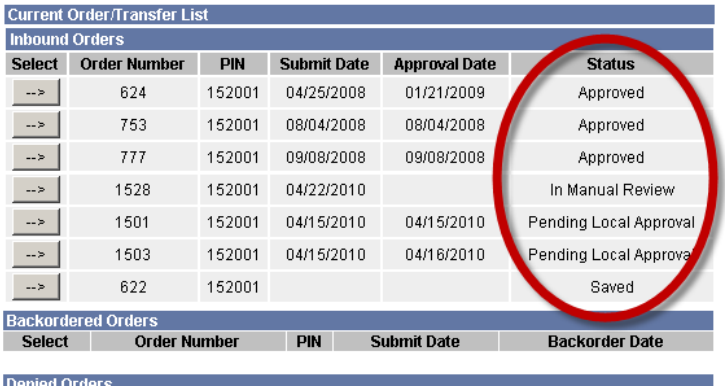
Step by Step Directions for Tracking Your Vaccine Order in the System

Providers can track the status of their order through each stage of the order process after an order has been submitted. The Immunization Information System will automatically update the order status as orders are approved at the local and state level and when the order is finally shipped. The order status can be tracked at the top section of the "create / view," order screen.

Steps to view the status of a specific order:

1. Log into the IIS.
2. Using the Navigation Menu, click on the **Orders/Transfers Menu Heading.**
3. Click on the words *Create/View Orders.* You are now on the *Create/View Orders* screen.
4. The order status of each order is visible in the right hand column under the Status heading.

Create/View Orders –



Current Order/Transfer List

Inbound Orders

Select	Order Number	PIN	Submit Date	Approval Date	Status
-->	624	152001	04/25/2008	01/21/2009	Approved
-->	753	152001	08/04/2008	08/04/2008	Approved
-->	777	152001	09/08/2008	09/08/2008	Approved
-->	1528	152001	04/22/2010		In Manual Review
-->	1501	152001	04/15/2010	04/15/2010	Pending Local Approval
-->	1503	152001	04/15/2010	04/16/2010	Pending Local Approva
-->	622	152001			Saved

Backordered Orders

Select	Order Number	PIN	Submit Date	Backorder Date

Denied Orders

Status Type	What it Means
Saved	The order has been started and saved, however it has NOT been submitted. Note: Saved orders are not processed.
In Manual Review	The order has been created and submitted to your Local Health Jurisdiction and is waiting for their approval.
Pending Local Approval	The order has been approved by the Local Health Jurisdiction and is waiting to be sent to Department of Health (DOH) for final approval.
Pending State Approval	The order is waiting for DOH approval and process. Note: Call DOH immediately if you have an order with a *"Pending State Approval"* Status after 2 business days.
Approved	The order has been approved by DOH and has been sent to CDC for processing and shipment. Shipments can be received into the lot inventory when an order status is set to "*Approved".*
Shipped	The order has been shipped and is in route to the provider. Shipments can be received into lot inventory when an order status is set to "*Shipped".*
Received	The order has been received by the provider and marked received in the system. The provider lot inventory is automatically updated with the new lot quantities. The order information will also leave the *Create/View Orders Screen* and can be found again by using the Search History function.

Step by Step Directions for Receiving Your Vaccine Order

Once a vaccine order has been physically received by your office, you should electronically receive the vaccine order in the Immunization Information System to move the order out of the inbound order area. Using the Receive function will also automatically load and populate the inventory section in the system. This quick reference describes receiving lots into inventory through the Vaccine Orders/Transfers function.

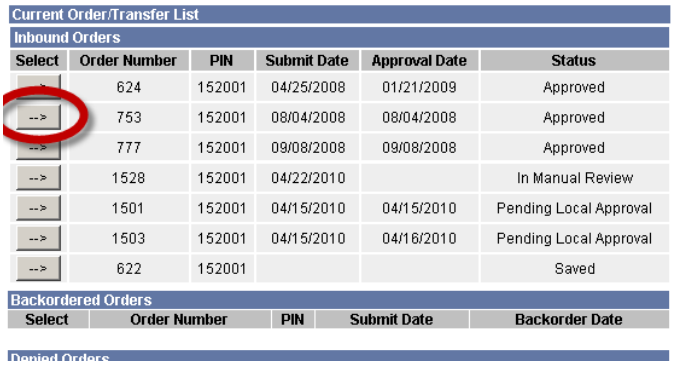
Note: It is suggested that the vaccine shipment packing slip is used to complete the Receive Order function after the vaccine has been checked in and stored properly.

There are several shipment possibilities please see the directions for the scenario that best describes your current shipment for complete instructions on how to receive the vaccines into the system.

Begin by choosing the proper order from your Inbound Orders list:

1. Using the navigation menu click on the **Orders/Transfers Menu Heading.**
2. Click on the words *Create/View Orders.* You are now on the *Create/View Orders* screen.
3. Select desired order from the Inbound Orders list

Note: The order status must be either "Approved" or "Shipped" to be able to receive order into inventory.



Current Order/Transfer List

Inbound Orders

Select	Order Number	PIN	Submit Date	Approval Date	Status
-->	624	152001	04/25/2008	01/21/2009	Approved
-->	753	152001	08/04/2008	08/04/2008	Approved
-->	777	152001	09/08/2008	09/08/2008	Approved
-->	1528	152001	04/22/2010		In Manual Review
-->	1501	152001	04/15/2010	04/15/2010	Pending Local Approval
-->	1503	152001	04/15/2010	04/16/2010	Pending Local Approval
-->	622	152001			Saved

Backordered Orders

Select	Order Number	PIN	Submit Date	Backorder Date

Denied Orders

Shipment possibilities/scenarios: Follow the directions for the appropriate scenario below.

A The order is complete and viable.....Page 6

B The order is a partial order with missing vaccine products (for example, frozen Varicella doses in separate shipment).....Page 6

C The order is not complete or shorted.....Page 7

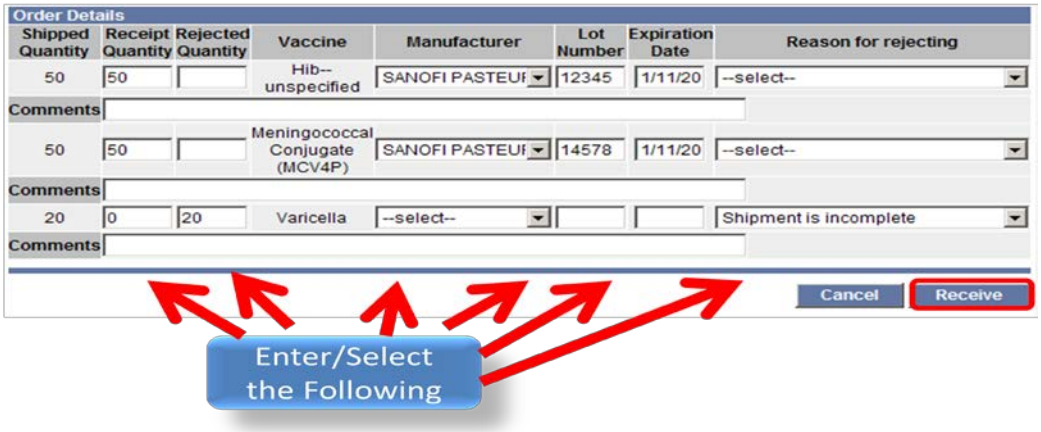
D The whole order is damaged or nonviable.....Page 7

A.) <u>If the Order is Complete and Viable:</u>

1. Enter the following on the *Receive Order Screen* for each vaccine product if the order is complete and viable:
   a. Enter the Receipt Quantity for the total doses ordered (listed under Shipped Quantity - must be a positive, whole number).
   a. Select the manufacturer from the dropdown
   b. Enter the Lot Number
   c. Enter the Expiration Date
2. Click the **Receive** button
3. The Receipt Quantity for each product is added to the lot inventory.

B.) <u>If the order is a partial order with missing vaccine products</u> <u>(for example, frozen Varicella doses in separate shipment)</u>

1. **For each vaccine product that is complete and viable**:
   a. Enter the Receipt Quantity,
   b. Select the Manufacturer,
   c. Enter the Lot Number and Expiration Date (as shown in Section A, above)
2. **For each vaccine product that is missing from the shipment**:
   a. Enter the Receipt Quantity as 0 (zero).
   b. Enter the Rejected Quantity for the total number of doses that are missing from the shipment. This should be the same number as the doses ordered (listed under Shipped Quantity - must be a positive, whole number)
   c. Select the Reason for Rejecting from the dropdown. (For example, select: "Shipment in Incomplete", if the original order included Varicella, but is shipped separately).It is also suggested that you write the original order number in the Comments field for the vaccine product being rejected. This will help you locate the partial order later.
3. Click the **Receive** button
4. The Receipt Quantity entered for each product is added to the appropriate lot inventory.



C) If the order is not complete or shorted (for example, doses are shorted for a particular vaccine product)

1. **For each vaccine product that is complete and viable**: Enter the Receipt Quantity, select the Manufacturer, enter the Lot Number and Expiration Date (as shown in Section A, above)
2. **For each vaccine product that is completely missing from the shipment**: Enter the Rejected Quantity, Reason for Rejecting, and write comment (as shown in Section B, above).
3. **For each vaccine product that is shorted**: Enter the following:
    a. Enter the Receipt Quantity (must be a positive, whole number) for the number of actual, viable doses received.
    b. Enter the Rejected Quantity (must be a positive, whole number) for the number of doses that are missing from the shipment.
    c. Enter the Lot Number for the number of actual, viable doses received.
    d. Enter the Expiration Date for the number of actual, viable doses received.
    e. Select the Reason for Rejecting from the dropdown.

Tip: Write the original order number in the Comments field for the vaccine product being rejected. This will help you locate the partial order later.

4. Click the **Receive** button
5. The Receipt Quantity entered for each product is added to the appropriate lot inventory.
6. The Rejected Quantity entered for each product is saved as a separate order with a new Order Number. The original order date will remain the same.
7. Click on the words *Create/View Orders* under the page **Orders/Transfers Menu Heading** on the Navigation Menu. You should see the order listed with a new Order Number, the original order Submission Date and the Approval Date will be blank.

Tip: Look for the largest Order Number. This will be the order created that includes those vaccine rejected when the original order was partially received

D) If the whole order is damaged or nonviable (for example, temperature monitors are triggered).

1. Do not receive the vaccine order into your inventory.
2. Damaged or non-viable vaccine replacements are tracked outside of the Immunization Information System.
3. When the replacement order is received, follow the directions for scenario A – C (as applicable) to receive the order into inventory.

If you have a disability and need this document in another format, please call 1-800-322-2588 (711—TTY relay).