

# NMSIIS TRAINING

Presented By: DOH Trainers



# Agenda

- Logging on to your New NMSIIS
- Patients Module
- Immunization Module
  - Patient Level Reports
- School Module
  - School Nurse Reports
- Inventory Module
  - Reports
- Reports Module

# Logging In To NMSIIS



## New Mexico State Immunization Information System - NMSIIS

### Login

Username

Password

[Forgot Password?](#)

Login

[Trouble Logging in?](#)

By logging into NMSIIS domain, you agree to abide by the terms of the New Mexico Department of Health (NMDOH) that were outlined in your Organization and User Agreement. Users are responsible for ensuring they act in accordance with these terms and any other applicable policies. Only authorized users of this site should be accessing this system. Monitoring may be conducted for the protection against improper or unauthorized use or access. Any unauthorized and improper use of this system may result in disciplinary action or criminal and civil penalties.

For technical assistance, please contact the NMDOH Help Desk at (800) 280-1618 or (505) 476-8526.

- Enter your Username and Temporary password as supplied by the NMSIIS team.
- Since this is your first time logging into NMSIIS, you will be prompted to change your password and set your security questions.
- If you forget your password you can reset your password after answering your security questions.
- **Please remember your password and security questions**
- **If you cannot log in or have technical issues.**  
**There is contact information for:**  
**NMDOH-Help Desk**  
**800-280-1618 or 505-476-8526**

# Creating Password

## Change Password

Please enter your username and password and a new password (and confirmation) to change your password. Click the 'Update' button to continue...

### New Password

Username

Existing Password

New Password

Confirm New Password

On your first log in, you will be immediately taken to the following screen. Please enter the password that is given to you by NMSIIS team member under “Existing Password” box.

1. Please create a new password for your account. It must contain: A minimum of eight (8) characters
  1. A combination of upper and lower case letters
  2. At least one (1) number. (0-9)
  3. At least one special character. (Ex. #, %, \*, !, \$, etc.)
  4. \* Passwords must be changed a minimum of 6 times before re-use.
2. Enter your new password into the “New Password” box and again in the “Confirm New Password” box.

# Security Questions

This gives you the ability to reset your own password if you forgot it.

You must answer at least 5 questions.

Question	Answer
What is your mother's maiden name?	<input type="text"/>
What was the name of your first pet?	<input type="text"/>
What city or town does your nearest sibling live?	<input type="text"/>
What is your father's middle name?	<input type="text"/>
What was the name of you elementary school?	<input type="text"/>
What was the last name of your 1st grade teacher?	<input type="text"/>
Who was the person you had your first kiss with?	<input type="text"/>
What did you want to be when you grew up?	<input type="text"/>
Who was your childhood hero?	<input type="text"/>

- You will need to answer at least five (5) of the security questions. You may answer more if you prefer, but you must at least answer five (5) of the questions.
- When you have created a new password and answered at least five (5) security questions, you will need to click the “Update” button in order to save the changes.

# Home Screen

The screenshot shows a web application interface with a dark blue header. The header contains a location indicator (3), a search bar with the text 'DEFAULT ORGANIZATION, DEFAULT ORGANIZATION, NM10' and a magnifying glass icon, a 'PATIENT SEARCH' button, a 'Support' icon, and a user profile dropdown (4) for 'FELICIA' (5). The main content area is white and contains several sections: 'Default Provider/Clinic' with a dropdown menu (1) showing 'Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION' and a search input (2) with the placeholder 'SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE'; 'Login History' with a list of login events; 'Notifications' with a message 'There are currently no pending notifications.'; and 'News' at the bottom. A user menu is open on the right side of the header, listing options: Log Out, Change Password, Password Questions, User Defaults, Clinic Vaccine Defaults, and User Vaccine Defaults.

1. Select **Provider**
2. Select **Clinic**
3. Currently selected **Provider/Clinic**
4. Current **User**
5. **Log Out** link

# Home Screen (cont.)



1

- Home
- Patients +
- Immunizations
- Education
- IZ Quick Add +
- Inventory +
- Reports

2

## Default Provider/Clinic

Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE

## Login History

9/20/2016 5:56:44 AM - INVALID PASSWORD  
9/20/2016 5:56:34 AM - INVALID PASSWORD  
9/19/2016 4:12:18 PM - SUCCESSFUL LOGIN  
9/16/2016 5:43:19 AM - SUCCESSFUL LOGIN  
9/14/2016 11:36:59 AM - SUCCESSFUL LOGIN

3

## Notifications

⚠ There are currently no pending notifications.

4

## News

1. NMSIIS Modules
2. User Login History

- The last five (most recent) login attempts will be displayed so the user can review it for accuracy. If they are not familiar with the date/time then they may want to reset their password.

3. Notifications
4. News

# Home Screen (cont.)

DEFAULT ORGANIZATION, DEFAULT ORGANIZATION, NM10  PATIENT SEARCH

 Support  FELICIA ▾



## Default Provider/Clinic

Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION

Log Out

Change Password

Password Questions

User Defaults

Clinic Vaccine Defaults

User Vaccine Defaults

1. User Defaults
2. Change Password
3. Password Questions
4. User Defaults
5. Clinic Vaccine Defaults
6. User Vaccine Defaults



# Helpful Tips

- Use the Modules menu to navigate between modules/screens.
- Click a Module with a + sign to expand the menu and view the screens within the module.
- Once expanded, click a Module with a – sign to collapse the menu.
- **AVOID** using the browser back and forward buttons.
- Mandatory Items/Required Fields

Required Field Headers will appear in **BOLD**

For example below “**STREET#**” is required but “Prefix” is not:

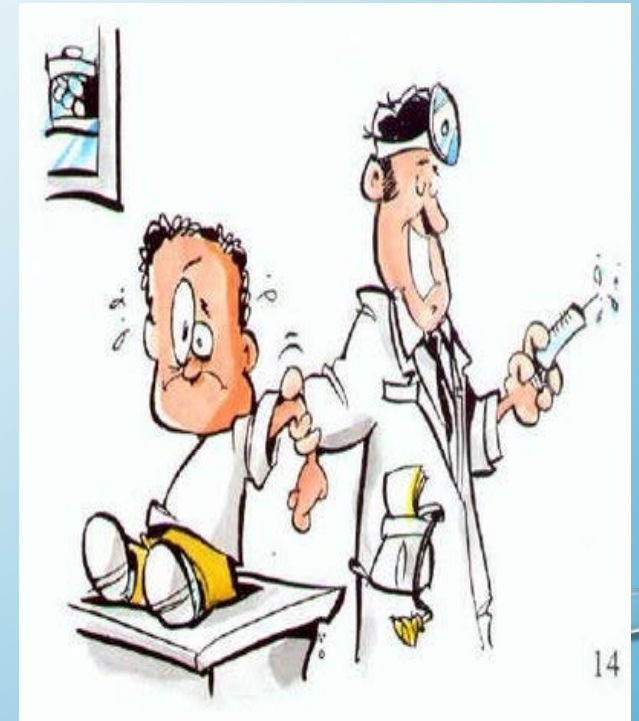
→ **Primary Address**

<b>Street #</b>	Prefix	<b>Street Name</b>	Type	Suffix	Unit #	P.O. Box
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>City</b>		Out of State City	<b>County</b>		Out of State County	
<input type="text"/>		<input type="text"/>	<input type="text"/>		<input type="text"/>	
<b>State</b>		Country			<b>Zip Code</b>	
<input type="text"/>		<input type="text"/>			<input type="text" value="99999-9999"/>	<input type="button" value="Q"/> <input type="button" value="X"/>


Copy Primary Address To Secondary Address	Clear Primary Address
Copy Secondary Address To Primary Address	Clear Secondary Address

# Patients Module

- Central Repository shared by all users of the system to create and update patient records
- Tracks demographic information, local identifiers, events, notes, precautions/contraindications, etc.



# Patient Search



Home  
Patients  
Search

Patient Search Links

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>
<b>Birth Info</b>				
Mother Last Name	Mother First Name	Mother Middle Name	Mother Maiden Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Father Last Name	Father First Name	Father Middle Name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

- On the left side of the page, click on the “+” sign next to the patients module for your search option to appear.
- The Previous Criteria button allows you to pull up the most recent search you performed without re-entering the criteria.
- Enter your search criteria and select the search button to find any matching patients.
  - Note: Unique numbers (e.g., Patient ID) require an exact match

# Patient Search (cont.)












- Minimum search criteria:
  - Patient ID
  - ID type and value
  - Patient date of birth (*user security function required*)
  - Two or more letters of patient first and last names
  - Two or more letters of two of the following:
    - Mother Last, First, Middle or Maiden names

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>
<b>Birth Info</b>				
Mother Last Name	Mother First Name	Mother Middle Name	Mother Maiden Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Father Last Name	Father First Name	Father Middle Name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

# Patient Search Results

Search Results - 5 record(s)

ID	Name	Insurance	VFC	Gender	DOB	Action
2336081	SIMPSON, BART M 1011 WINWARD MANHATTAN, KS 66502			M	01/01/1999	   <b>Demographics</b>
2	SIMPSON, BART 123 SIMPSON LATE SANTA FE, NM 87501	CAID: 95912314517	1	M	03/06/2009	 
2325776	SIMPSON, BART 999 ELM ST ALBUQUERQUE, NM 87108	TRI: 999999	5	M	06/01/2011	 
2345220	SIMPSON, BART 921 W MACKENZIE HOBBS, NM 88240	CAID: UNKNOWN	1	F	06/11/2011	 
2329788	SIMPSON, BART 132 SIMPSON LN SANTA FE, NM 87505		2	M	11/11/2011	 

You may add a new patient by clicking the 'New Patient' button.

**1**

**2**

**Patient Preview**

**SIMPSON, BART M**

ID: 2336081 DOB: 01/01/1999 Gender: M  
Phone: 864-130-9701  
Mailing Address: 1011 WINWARD MANHATTAN, KS 66502  
Default Clinic: PATIENT RECORD

1. You can hover over **the Patient Demographic** Button to see a Patient Preview. You can also Double-click a record to view **Patient Demographics**, or select a record and click a button to navigate to the respective screen.
2. If the record is not found, click to create a **New Patient** in the registry.

# Adding New Patient

1. Complete required fields: **Last Name, First Name, Date of Birth (DOB),** and **Gender.**
2. Click **Create.**

**Add**

1

Last Name *	First Name *	Middle Name	Generation
<input type="text" value="SIMPSON"/>	<input type="text" value="BART"/>	<input type="text" value="M"/>	<input type="text" value="▼"/>
DOB *	Gender *	SSN	
<input type="text" value="03/15/2013"/>	<input type="text" value="MALE"/>	<input type="text" value="999-99-9999"/>	
Mother Maiden	Mother First		
<input type="text"/>	<input type="text"/>		

2

Create

**Add**

Last Name *	First Name *	Middle Name	Generation
<input type="text" value="SIMPSON"/>	<input type="text" value="BART"/>	<input type="text" value="M"/>	<input type="text" value="▼"/>
DOB *	Gender *	SSN	
<input type="text" value="03/15/2013"/>	<input type="text" value="MALE"/>	<input type="text" value="999-99-9999"/>	
Mother Maiden	Mother First		
<input type="text"/>	<input type="text"/>		

4 Proceed With Create

## Possible Duplicates 3

The following patients have been found with similar criteria. If any of the following record(s) are the patient you are trying to create, select the patient below.

ID	Name	Insurance	VFC	Gender	DOB	Action
2346235	SIMPSON, BART M			M	03/15/2013	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

3. Possible duplicate patients are identified.
4. If the patient is not in the possible duplicates list, click **Proceed with Create.**

# Adding New Patient (cont.)

Patient Demographics ? i Cancel ↑ Links ⚙ Update

Alias

Last Name First Name Middle Name Generation

Sources of Health Insurance

Health Insurance Source (identify up to three)	Insurance ID or Number	Date Last Verified	Primary?
		MM/DD/YYYY	<input type="checkbox"/>
		MM/DD/YYYY	<input type="checkbox"/>
		MM/DD/YYYY	<input type="checkbox"/>

Contact Information

Home Phone Cell Phone Message Phone Work Phone

999-999-9999 999-999-9999 999-999-9999 999-999-9999 ext.

E-mail

Address is Unavailable or Temporary  Do Not Include Patient in Reminder/Recall

Mailing Address

Street # \* Prefix Street Name \* Type Suffix Unit # P.O. Box

City \* Out of State City County \* Out of State County

State \* Country Zip Code \*

1. Complete required fields on **Demographics** screen.
  - Record up to 3 sources of health insurance
  - **Mailing Address** and **Physical Address** are required
2. Click **Update**.

REMEMBER: The more information you give us the better it is for your client. This ensures they have a complete and accurate Immunization record.

# Adding New Patient (cont.)

## Mailing Address

Street # *	Prefix	Street Name *	Type	Suffix	Unit #	P.O. Box
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City *	Out of State City		County *	Out of State County		
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>		
State *	Country		Zip Code *			
<input type="text"/>	<input type="text"/>		<input type="text" value="99999-9999"/> <input type="button" value="Q"/> <input type="button" value="X"/>			

1

Copy Mailing Address To Physical Address

Clear Mailing Address

Copy Physical Address To Mailing Address

Clear Physical Address

## Physical Address

Street # *	Prefix	Street Name *	Type	Suffix	Unit #	P.O. Box
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City *	Out of State City		County *	Out of State County		
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>		
State *	Country		Zip Code *			
<input type="text"/>	<input type="text"/>		<input type="text" value="99999-9999"/> <input type="button" value="Q"/> <input type="button" value="X"/>			

3

2

When entering your client's address it will ask you for mailing as well as physical address.

Extra features:

1. Ability to copy address from mailing to physical with a click of a button.
2. Magnifying glass icon. Allows you to search for the client's correct postal location and can auto fill some sections for you. (ie. City, County, State and Zip Code)
3. "Out of City" and "Out of State County" options are used when a client does NOT have NM Immunization documentation.



# Patient Duplicates

If your patient has a duplicate record you will now be able to flag the records in question for a member of NMSIIS to review and then merge.

To flag a record you will need to:

1. Click Demographics drop down option
2. Click Duplicates

You will then be directed to another screen to complete this process

**Search Criteria**

Patient ID	Identifier Type	Identifier Value		
<input type="text"/>	<input type="text" value="v"/>	<input type="text"/>		
Last Name	First Name	Middle Name	DOB	Gender
<input type="text" value="SIMP"/> x	<input type="text" value="BAR"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="v"/>
<b>Birth Info</b>				
Mother Last Name	Mother First Name	Mother Middle Name	Mother Maiden Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Father Last Name	Father First Name	Father Middle Name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

## Search Results - 2 record(s)

ID	Name	Insurance	VFC	Gender	DOB	Action
2	SIMPSON, BART			M	03/06/2009	Demographics <input type="button" value="v"/> <span>1</span>
4	SIMPSON, BART 1234 STREET SANTA FE, NM 87501	BCBS: 555555	1	M	03/06/2009	Demographics Immunizations Duplicates <span>2</span>





# Patient Duplicates (cont.)

📁 SIMPSON, BART M ID: 2346236 DOB: 03/15/2013 AGE: 3Y 6M 0D GENDER: M



## Patient Duplicates ⓘ

View

Duplicates Already Identified

Patient ID	Last	First	Middle	Gender	DOB	Identified By	
2336081	SIMPSON	BART	M	M	01/01/1999	FELICIA MARTINEZ	   

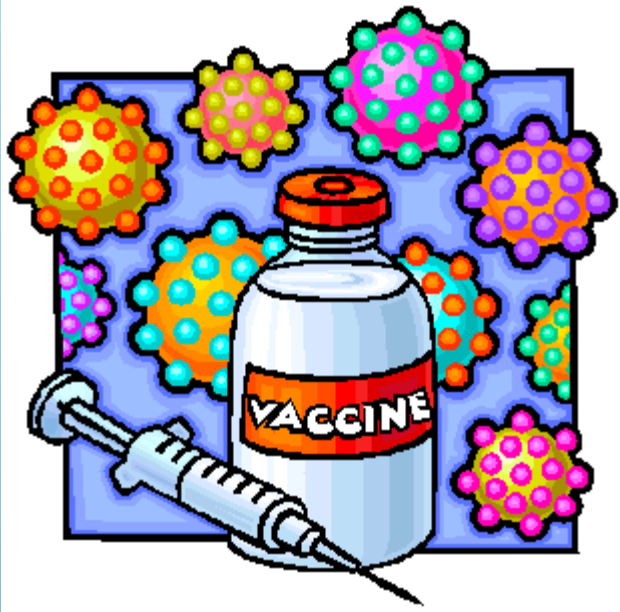
Search for Additional Duplicates

Comments \*

1. Search for duplicate patient.
2. Enter **Comments**.
3. Click **Add to Duplicates**.
4. Compare patients.
  - You will be able to view the files that are needing to be merged but you will not be able to merge them yourself.

# Immunization Module



## Manages all immunizations

- Entered via the System and imported through interface(s)
- Recommender that identifies needed vaccines based on age, vaccine history, and current immunization schedules
- Print Official Immunization Record

# Immunization History

<b>1</b> Vaccine	<b>2</b> Dose	<b>3</b> Date	<b>4</b> Age	<b>5</b> Clinic				
<b>DTaP / TD / Tdap</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR				<input type="button" value="Update"/>
<b>Polio</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR				<input type="button" value="Update"/>
<b>Hib</b>								
Hib (PRP-OMP; pedvax		09/01/2011	12Y 8M 0D	PR				<input type="button" value="Update"/>
<b>Pneumococcal</b>								
PCV13	1	06/01/2011	12Y 5M 0D	PR				<input type="button" value="Update"/>
<b>Hep A</b>								
Hep A, UF	1		01/01/1999	0Y 0M 0D	PR			<input type="button" value="Update"/>
<b>Hep B</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR				<input type="button" value="Update"/>
<b>Influenza</b>								
Influenza Nasal UF	1	10/10/2015	16Y 9M 9D	PR				<input type="button" value="Update"/>
<input type="button" value="Recommend"/>	<b>6</b>	<input checked="" type="checkbox"/> Auto-Populate Add Vaccines Screen						

1. Vaccine name.
2. Dose number in series.
3. Date vaccine given.
4. Patient age at vaccination.
5. Clinic administering immunization.
6. Click to recommend immunizations.

# Add Immunization History

- Enter immunizations from a patient's paper record into NMSIIS
- **DO NOT** use the *Add History* screen to record immunizations administered at the clinic!
  - Historical immunizations **DO NOT** decrement from inventory
  - Historical immunizations **ARE NOT** counted on certain reports

# Adding Immunization History (cont.)



- On the left side of the page click immunization.

A screenshot of the "Immunizations Home" page. The page title is "Immunizations Home" with an information icon. To the right of the title are two dropdown menus: "Links" and "Select Action". The "Select Action" dropdown is open, showing a list of options, with "Add History" highlighted and circled in red. Below the navigation is a "View" section containing a form. The form has a warning message: "Precautions / Contraindications ARE specified" and "Please enter required information on Patient Demographics screen prior to entering immunizations." The form fields include: "DOB" (01/01/1999), "Age" (17Y 8M 14D), "History of Varicella?" (NO), and "Date of Varicella" (MM/DD/YYYY). To the right of these fields is a note: "The patient has previously refused one or more vaccines." Below the form is a section titled "Recommended Immunizations for today, 9/15/2016 (17Y 8M 14D)" with a disclaimer: "Please do not rely solely on the Recommender to forecast immunizations. Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <http://www.cdc.gov/vaccines/pubs/pinkbook/index.html#chapters>".

- This action will open your patient's "Immunization Home" page.
- To the right of "Immunization Home" you will select your action. In this case, it will be "Add History"

# Adding Immunization History (cont.)

Immunization History ⓘ

Cancel Create

View

Show: CHILD VACCINES ▾ ①

History of Varicella? \* NO HISTORY ▾ ② Date of Varicella MM/DD/YYYY

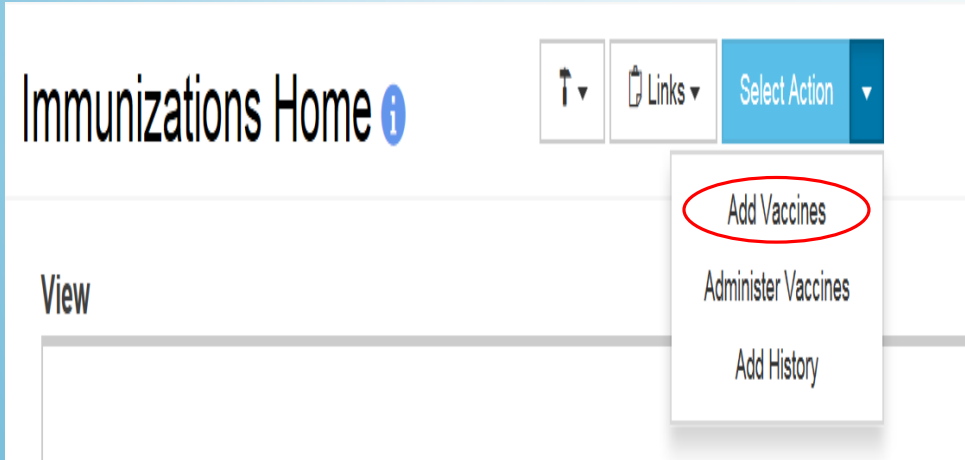
Past Vaccination Clinic \* PATIENT RECORD ▾ ③  Take ownership of patient ④

Vaccine	Dates of Past Immunizations (order not important)								Vaccine
DT, ped	MM/DD/YYYY ⑤	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DT, ped
DTaP	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP
DTaP (Daptacel)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP (Daptacel)
DTaP, UF	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP, UF
DTaP-HepB-IPV (Pedia 11/01/2011)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-HepB-IPV (Pedia 11/01/2011)
DTaP-Hib (TriHIBit)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-Hib (TriHIBit)
DTaP-Hib-IPV (Pentac	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-Hib-IPV (Pentac
DTaP-IPV (Kinrix)	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-IPV (Kinrix)
DTaP-IPV-HIB-HepB	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP-IPV-HIB-HepB
DTaP/DTP-Hib-Hep B	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	MM/DD/YYYY	DTaP/DTP-Hib-Hep B

1. Display CHILD or ALL vaccines.
2. Record **History of Varicella** and **Date**.
3. Clinic where immunization was given.
4. Select to add patient to clinic roster.
5. Enter **Date(s) of Past Immunizations**.

When you hit “ADD” your information will then be added to the patients immunization history

# Add Administered Immunization



In the Immunization Home screen you will click “Add Vaccines”

**Add**

**Precautions / Contraindications**  
Severe allergic reaction to gelatin, History of Chicken Pox

**Clinic \*** POISON IVY CLINIC **Vacc Date \*** MM/DD/YYYY **Prescribed By \*** UNKNOWN

Do not set this clinic as the 'default clinic' for this patient

Patient is VFC eligible Display All Vaccines Clear Vaccines

Vaccine	VIS/Publication	If Vaccine Refused, Reason
TD (ADULT), ADSORBED	Select VIS ▲	
HEP A, PED/ADOL, 2D	Select VIS ✓	
HEP B, PED/ADOL	Select VIS ✓	
POLIO-IPV	Select VIS ✓	
INFLUENZA, SEASONAL	Select VIS ▲	
MCV4P (MENACTRA)	Select VIS ▲	
HPV4 (GARDASIL)	Select VIS ✓	



## Add Administered Immunization (Cont.)

Immunizations i Cancel Links Create And Administer **6**

**Add**

Precautions / Contraindications  
Severe allergic reaction to gelatin, History of Chicken Pox

Clinic \*  Do not set this clinic as the 'default clinic' for this patient  
POISON IVY CLINIC  Patient is VFC eligible

Vacc Date **2** MM/DD/YYYY  Prescribed By **5** MARTINEZ, FELICIA (-)

**3**

Vaccine	VIS/Publication	If Vaccine Refused, Reason
TD (ADULT), ADSORBED	Select VIS <input checked="" type="checkbox"/>	
	Select VIS <input checked="" type="checkbox"/>	
	Select VIS <input checked="" type="checkbox"/>	
	Select VIS <input checked="" type="checkbox"/>	
INFLUENZA, SEASONAL	Select VIS <b>4</b> <input checked="" type="checkbox"/>	
	Select VIS <input type="checkbox"/>	
	Select VIS <input checked="" type="checkbox"/>	

1. **Select to NOT take ownership of patient. If you are not the Primary Provider for this patient.**
2. Enter your Vaccination Date
3. Click to display ALL vaccine types.
4. Click to select an alternate VIS.
5. Click to select Prescribed By
6. Click to proceed to the administer screen

You will then be taken to administered Immunization page.

**Note:** VIS can be changed manually from English to Spanish if necessary. Simply click on the "Select VIS" button and select the appropriate VIS option.

# Administer Immunization

SIMPSON, BART M ID: 2336081 DOB: 01/01/1999 AGE: 17Y 8M 14D GENDER: M Precautions / Contraindications ARE specified

Immunizations i Cancel Update

**Administer**

Patient is VFC eligible 1

Vaccine Administered By \* Refusal Reason \*

Td (adult), adsorbed 2

Did not Admin  Mfg | Lot | Exp Date (MM/DD/YY) | Funding Src | Inv Loc | NDC | Brand \*

Delete  (I) AKR | TDADULT | 03/22/17 | PRIVATE PURCHASE | NM00023 | 17478-0131-01 | 10 SINGLE DOSE VIALS

VFC:Uninsured <19 yrs

Hep A, ped/adol, 2D 3

Did not Admin  Mfg | Lot | Exp Date (MM/DD/YY) | Funding Src | Inv Loc | NDC | Brand \*

Delete  NO INVENTORY AVAILABLE

4 Body Site \* Route \* Dosage Refusal Reason

1. Indicate who administered the vaccine.
2. Select the lot number administered.
3. A message displays when no inventory is on-hand for the selected vaccine.
4. Indicate the **Body Site** where vaccine was administered. (**Route** and **Dosage** default, but can be changed.)

After clicking “Update” your administered immunizations are then populated in your patient’s immunization record.

# VAERS Documentation Process

SIMPSON, BART M ID: 2336081 DOB: 01/01/1999 AGE: 17Y 8M 14D GENDER: M Precautions / Contraindications ARE specified

Immunizations ? i

Cancel Links Update And Return

Vaccine Adverse Event Reporting System (VAERS)

**Edit**

**Precautions / Contraindications**  
Severe allergic reaction to gelatin, History of Chicken Pox

**Clinic \*** PATIENT RECORD Administered By MARTINEZ, FELICIA (-)

Prescribed By CISNEROS, ELIZABETH (-)

**Vaccine \*** DTAP-HEPB-IPV (PEDIA Manufacturer

Lot/Serial Funding Src Expiration Date NDC #

Vaccination Date \* 11/01/2011 12Y 10M 0D Patient Eligibility

Dosage Body Site Route

Health Insurance Insurance ID Date Last Verified

Group	Dose Number
DTaP / TD / Tdap	1
Polio	1
Hep B	1

- When in the administered immunization edit screen you will be able to create a VAERS Document.
- This document auto populates in a separate screen with all the information necessary filled in.
- At that point it is your responsibility to make sure that this document gets to the appropriate people at the VAERS Office.

# Patient Level Reporting



- Patient Reports
- Informational Documents

# Reports Overview

- Nearly all reports are rendered as a PDF
  - Most PDF versions provide totals and subtotals
  - You can choose to extract the report using a delimiter such as “,” or “|”
- Reports are grouped into categories
- Most reports appear in a new window
- Make sure your internet browser is **NOT** blocking pop-ups!
- Users are assigned a reporting level security
  - Unrestricted: ALL Providers & Clinics in Registry
  - Provider Level: Only Providers associated to the user and Clinics within those Providers
  - Clinic Level: Only Clinics associated to the user

## Common Search Criteria

- Provider/Clinic
  - Defaults to the Provider/Clinic selected on *Home* screen
  - Can be changed depending on user security
- Date Ranges
  - Vaccination Date Range
  - Patient DOB Date Range

# Printing Immunization Record

**Official Immunization Record**

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page.


**Report Selection Criteria**

SIMPSON, BART (2336081)

In the reports module:

1. Use the lookup tool to search for a patient.
2. Clear the currently selected patient.
3. Generate the patient's Immunization Record.
4. Return to the **Reports** home screen.

# Immunization Record



**New Mexico Immunization Record**  
Official Document

**Registro de Inmunización**  
Documento Oficial

**Name/Nombre:** BART M SIMPSON

**Date of Birth/Fecha de Nacimiento:** 01/01/1999

**Gender/Genero:** M

**New Mexico WebID#:** 2336081

**Date of Next Vaccination/Fecha de Proxima Vacuna:** 09/15/2016

Present this record at each medical visit.  
Presente este documento durante sus visitas medicas.

**Immunization Provider:**  
POISON IVY CLINIC  
123 HARLEY QUINN DR  
P.O. BOX 456  
DIXON, NM 87527  
505-476-3672

**Allergies/Precautions/Contraindications**  
**Alergias/Precauciones/Contraindicaciones:**  
History of Chicken Pox., Severe allergic reaction to gelatin

**Vaccine Reactions / Reacciones contra Vacunas:**  
11/01/2011:DTaP-HepB-IPV (Pedia)

**Comments**

Date	Note

**Vaccines Refused**

Date	Note
10/10/2009	REFUSED 'DTaP, UF' FOR REASON: 'Parental refusal'. REFUSAL CREATED VIA HL7 INTERFACE.

Vaccine/Vacuna	Date Given Dada en la Fecha MMDD/YYYY	Age at Imm. Edad Cuando Imm.	Doctor or Clinic Doctor o Clinica
<b>Influenza</b>			
1	Influenza Nasal UF	10/10/2015	18Y 9M 9D PR
2			
3			

**Invalid Dose. Minimum age/Interval not met.**  
Dose determined invalid by provider

Vaccine/Vacuna	Date Given Dada en la Fecha MMDD/YYYY	Age at Imm. Edad Cuando Imm.	Doctor or Clinic Doctor o Clinica
<b>DTaP / TD / Tdap</b>			
1	DTaP-HepB-IPV (Pedia)	11/01/2011	12Y 10M 0D PR
2			
3			
4			
5			
<b>Polio</b>			
1	DTaP-HepB-IPV (Pedia)	11/01/2011	12Y 10M 0D PR
2			
3			
4			
<b>Hib</b>			
1	<input checked="" type="checkbox"/> Hib (PRP-OMP; pedvax)	09/01/2011	12Y 8M 0D PR
2			
3			
4			
<b>Pneumococcal</b>			
1	PCV13	06/01/2011	12Y 5M 0D PR
2			
3			
4			
<b>Rotavirus</b>			
1			
2			
3			
<b>Hep A</b>			
1	Hep A, UF	01/01/1999	0Y 0M 0D PR
2			
<b>Hep B</b>			
1	DTaP-HepB-IPV (Pedia)	11/01/2011	12Y 10M 0D PR
2			
3			
<b>MMR</b>			
1			
2			
<b>Varicella (CPOX)</b>			
1			
2			
<b>Meningococcal</b>			
1			
2			
<b>HPV</b>			
1			
2			
3			
<b>Other</b>			
1			

**Print Date 9/15/2016 2:35:37PM**

**Page 1 of 1**

Generates an immunization record for a patient

- Output includes:
  - Clinic Name and Address
  - Patient ID, Name, Gender, Date of Birth.
  - List of the patient's vaccinations, including date and vaccine type.

# Informational Documents

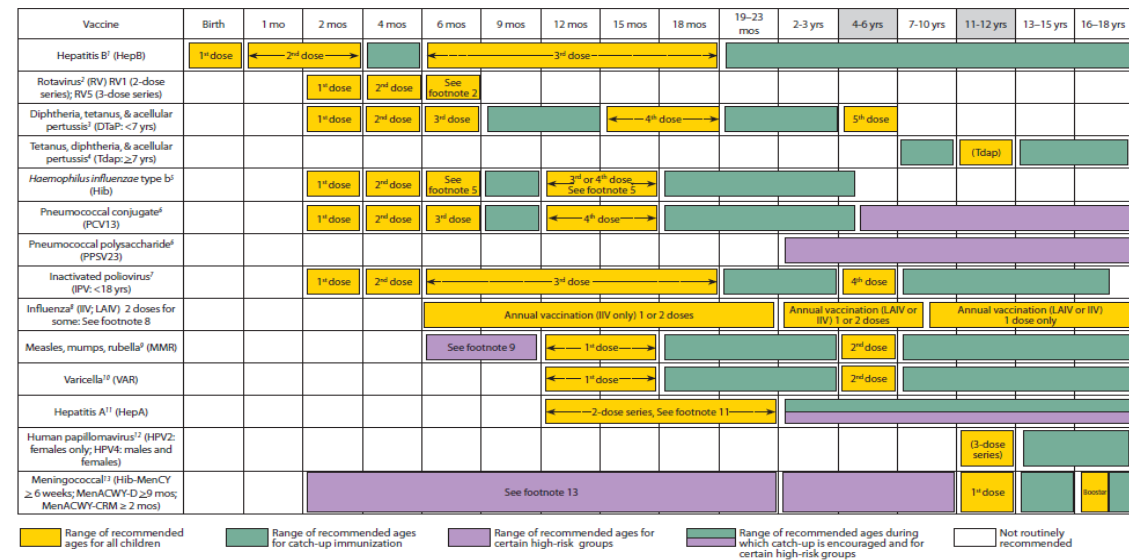
## ACIP Immunization Schedules

- ACIP Child and Adolescent Immunization Schedule
- ACIP Child and Adolescent Catch-up Immunization Schedule
- ACIP Adult Immunization Schedule

Figure 1. Recommended immunization schedule for persons aged 0 through 18 years – United States, 2015.

(FOR THOSE WHO FALL BEHIND OR START LATE, SEE THE CATCH-UP SCHEDULE (FIGURE 2)).

These recommendations must be read with the footnotes that follow. For those who fall behind or start late, provide catch-up vaccination at the earliest opportunity as indicated by the green bars in Figure 1. To determine minimum intervals between doses, see the catch-up schedule (Figure 2). School entry and adolescent vaccine age groups are shaded.



This schedule includes recommendations in effect as of January 1, 2015. Any dose not administered at the recommended age should be administered at a subsequent visit, when indicated and feasible. The use of a combination vaccine generally is preferred over separate injections of its equivalent component vaccines. Vaccination providers should consult the relevant Advisory Committee on Immunization Practices (ACIP) statement for detailed recommendations, available online at <http://www.cdc.gov/vaccines/hcp/acip-recs/index.html>. Clinically significant adverse events that follow vaccination should be reported to the Vaccine Adverse Event Reporting System (VAERS) online (<http://www.vaers.hhs.gov>) or by telephone (800-822-7967). Suspected cases of vaccine-preventable diseases should be reported to the state or local health department. Additional information, including precautions and contraindications for vaccination, is available from CDC online (<http://www.cdc.gov/vaccines/recs/vac-admin/contraindications.htm>) or by telephone (800-CDC-INFO [800-232-4636]).

This schedule is approved by the Advisory Committee on Immunization Practices (<http://www.cdc.gov/vaccines/acip/>), the American Academy of Pediatrics (<http://www.aap.org>), the American Academy of Family Physicians (<http://www.aafp.org>), and the American College of Obstetricians and Gynecologists (<http://www.acog.org>).

**NOTE: The above recommendations must be read along with the footnotes of this schedule.**




# Informational Documents

## Vaccine Information Statements (VIS)


- View (and print) PDF versions of VIS
- Option to display ALL vaccines or CHILD vaccines only







### Vaccine Information Statement (VIS)

Click on a vaccine information sheet icon to view the corresponding file or click "Cancel" to return to the previous page. 

**View**

Cancel

Show: CHILD VACCINES 

VIS Name	Effective Date	End Date	Language	
<b>DT, ped</b>				
<i>DTaP,DT</i>	05/17/2007		ENGLISH	
<i>DTaP,DT</i>	05/17/2007		SPANISH	
<b>DTaP</b>				
<i>DTaP,DT</i>	05/17/2007		ENGLISH	
<i>DTaP,DT</i>	05/17/2007		SPANISH	
<b>DTaP (Daptacel)</b>				
<i>DTaP,DT</i>	05/17/2007		ENGLISH	
<i>DTaP,DT</i>	05/17/2007		SPANISH	


# Education (School) Module




- Education Module Overview
- School Nurse Reports
- Exemptions

# Education Screen


1. Click to add a new school enrollment for the patient.
2. Click to view and/or update an existing school enrollment.

 **SIMPSON, BART** ID: 2 DOB: 03/06/2009 AGE: 6Y 11M 5D GENDER: M



### Education

Click "View" to see the details of an existing record or "Add School Enrollment" to a new record. 1  


### View

 **No patient school enrollments are found**

- [Create a new school enrollment...](#)


 

### Education

Click "View" to see the details of an existing record or "Add School Enrollment" to create a new record.  

### View

**SMITH, JOHN (499901)** DOB: 02/15/2013 AGE: 2Y 0M 12D

School District	School	Enrollment Date	Unenrollment Date	FERPA Date	
ABILENE USD 435	ABILENE HIGH SCHOOL	02/17/2015		02/17/2015	 <input data-bbox="1133 1199 1210 1228" type="button" value="View"/>

2

# Add School Enrollment

**Add**

**School District \***

1

**School \***

2

**Author \***

3 FELICIA MARTINEZ

**Student ID**

4 **Enrollment Date \*** MM/DD/YYYY

**Unenrolled Date** MM/DD/YYYY

**Grade Level**

**Comments**

**FERPA Consent**

**Date** MM/DD/YYYY

**Method**

**Relationship**

1. Select a **School District**.
2. Select a **School** within the **School District**.
3. Select an **Author** (user).
4. Enter the **Enrollment Date**.

Click the “Create” Button and the student’s school information is saved.

A user can only edit enrollments at a school to which a user is associated.

# School Nurse Reports

**Report Selection Criteria**

**School District \***  
(ALL SCHOOL DISTRICTS) ▼

**School \***  
(ALL SCHOOLS) ▼

**Report Type**

Appropriate Statistics Summary  
 Patients not Properly Immunized Detail

**Doses By Vaccine Series**

Vaccine Series Dose Presets  
▼

<b>DTaP/Tdap *</b> 0	<b>Hepatitis A *</b> 0	<b>Hepatitis B *</b> 0	<b>HIB *</b> 0
<b>HPV *</b> 0	<b>Influenza *</b> 0	<b>Meningococcal *</b> 0	<b>MMR *</b> 0
<b>Pneumococcal *</b> 0	<b>Polio *</b> 0	<b>Rotavirus *</b> 0	<b>Varicella *</b> 0

**Tdap (Or Pertussis Containing) \***  
0

**Age Range**      **As Of Date Range \***

From: [ ] Through: [ ] UOM: MONTHS ▼      From: MM/DD/YYYY [ ] Through: MM/DD/YYYY [ ]

**Grade Range**

From [ ] Through [ ]

**Compliance By**

Age [ ] MONTHS ▼      Or Date MM/DD/YYYY [ ]

Exclude Patients with Less than 2 non- Influenza/H1N1-09 Vaccinations?  
 Count both valid and invalid doses (i.e., Do not run Recommender to validate immunization history)?

## Immunization Rates

Calculates percent of student patients up-to-date on recommended immunizations

View coverage rates by antigen(s) or by vaccine series

Results are based on the Recommender, thus, invalid doses are not counted

- Identify student patients not up-to-date
- Please be sure when generating this report you enter all fields necessary to conduct a proper search.

# School Nurse Report (cont.)

## Patient Reminder/Recall (School Version)

Choose filters for existing Reminder/Recall Runs. Click "View" to see the details of the Reminder/Recall run or select a specific Reminder/Recall Run and click the applicable button to view extracts, reports, etc.

Add Reminder/Recall Run



### View

School District

(ALL SCHOOL DISTRICTS)




School

(ALL SCHOOLS)



Cancel

 No records found

## Patient Reminder / Recall

Generate a list of student patients due and/or overdue for vaccinations

Choose from a variety of search criteria to target students included in the reminder/recall

Reminder/recall runs are processed nightly.

# Exemptions

The screenshot shows a patient record interface. At the top, there is a table with columns: ID, Name, Insurance, VFC, Gender, and DOB. The first row contains the following data: ID: 2336081, Name: SIMPSON, BART M, Insurance: 1011 WINWARD, VFC: 2, Gender: M, DOB: 01/01/1999. Below the table, there is a message: "You may add a new patient by clicking the 'New Patient' button." and a "New Patient" button. To the right of the table, there is an "Action" column with a dropdown menu. The dropdown menu is open, showing options: Demographics, Immunizations, Duplicates, Education, Events, and Exemptions. The "Exemptions" option is circled in red. A red arrow points to the "Demographics" dropdown tab, and another red arrow points to the "Exemptions" option in the dropdown menu.

ID	Name	Insurance	VFC	Gender	DOB	Action
2336081	SIMPSON, BART M 1011 WINWARD MANHATTAN, KS 66502		2	M	01/01/1999	Demographics

You may add a new patient by clicking the 'New Patient' button.




- Demographics
- Immunizations
- Duplicates
- Education
- Events
- Exemptions

Patients that have an exemption will have a gray flag icon next to their NMSIIS file information .

- Click the demographic drop down tab
- Click Exemptions


It will take you to your patient's exemption information.

# Exemptions (cont.)

SIMPSON, BART M ID: 2336081 DOB: 01/01/1999 AGE: 17Y 8M 14D GENDER: M    Precautions / Contraindications ARE specified

## Exemptions

View

Vaccine Group	Precautions / Contraindications	Medical Exemption	Begin Date	End Date	Status	
MMR	Religious Exemption with Affidavit		02/01/2016	11/01/2016	ACTIVE	 <a href="#">View</a>

You will be able to review your patient's:

- Vaccine Group
- Exemption Reason
- Precautions/contraindications
  - If the exemption is for medical reasons, the associated precaution and/or contraindication is automatically added to the patient record.
- Begin Date
- End Date
- Status

Exemptions do not affect recommended vaccines and are only used for reporting purposes.



# Exemption Report

## Students with Active Exemptions

Enter the selection criteria and click the 'Run Report' button.



### Report Selection Criteria

#### School District \*

(NO SCHOOL DISTRICTS AVAILABLE)

#### School \*

(NO SCHOOLS AVAILABLE)

#### Exemption Reason

(ALL)

#### Report Type

Statistical Summary

Student View

#### Grade Range

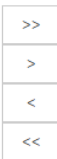
From  Through

\*Students without a grade level assigned are not included in the report.

#### Vaccine Groups

##### Available

DTAP / TD / TDAP  
H1N1-09  
HEP A  
HEP B  
HIB  
HPV  
INFLUENZA  
MENINGOCOCCAL  
MMR  
OTHER  
PNEUMOCOCCAL  
POLIO



##### Selected (If none are selected default is ALL)

#### Begin Date Range

From Date  To Date

Include Inactive?

Output Type  PDF  EXTRACT - Delimiter:

Run Report

Cancel

## Reports Module:

- Section: School Nurse
  - Report: Students with Active exemptions.

Be sure to enter your search criteria before clicking “Run report”.

A pop up window will appear with your results.

# Inventory Module



- Inventory Location Setup
- Inventory On-Hand
- Inventory Transfers
- Reconciliations
- Vaccine Orders and Returns

# YOU NO LONGER NEED TO ADD A “-STATE” OR “-VFC” AT THE END OF THE LOT #'S

- FOR THOSE OF YOU THAT HANDLE INVENTORY YOU ARE RESPONSIBLE FOR INPUTTING YOUR OWN ON-HAND VACCINE INVENTORY INTO THE NEW NMSIIS.
- WHAT YOU WILL NEED TO DO:
- **NOTE: YOU WILL HAVE TO ENTER THE LOT NUMBER TWICE, HOWEVER YOU WILL BE CLICKING AN OPTION OF STATE OR VFC FROM A DROP DOWN OPTION. THIS WILL REPLACE HAVING TO ENTER THE HYPHEN AND ITS CORRESPONDING ENDING.**
- IT IS VERY IMPORTANT TO FOLLOW THIS NEW PROCESS FOR ENTERING YOUR VACCINE LOT INFORMATION.



# Inventory Module (cont.)

- Tracks manufacturer, lot number, expiration date, funding source, and doses on-hand
- Administering an immunization automatically decrements inventory
- Requires a routine (e.g., monthly or weekly) inventory reconciliation process
- Allows clinics to submit vaccine orders and returns to the VFC program

Vaccine Inventory ⓘ Cancel Create

View

Date \* 09/15/2016 ⓘ

Inventory Location \* DEFAULT ORGANIZATION > INV: DEFAULT ORGANIZATION ▼

Vaccine | Mfg | NDC | Brand \* ANTHRAX | MIP | 64678-0131-01 | 10 SINGLE DOSE VIALS ▼

Lot Number \*

Expiration Date \* MM/DD/YYYY ⓘ

Funding Source \*

Doses Adjusted \*

Container Id

Comments

# Inventory On-Hand

**On-Hand Inventory**

⚠ There are 4 Pending Inventory Transfers. 2

Inventory Location: (ALL) Status: ON-HAND

Vaccine: (ALL) Funding Source: (ALL)

Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	Expiring Soon	
<b>DEFAULT FRIDGE ON THIRD FLOOR</b>								
MMR (MMR II (0.5 mL x 10 vials))	MSD	00006-4681-00	468100	01/01/2019	STATE	10	?	Action
DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials))	PMC	49281-0286-10	TE234	04/26/2018	VFC			Edit Adjustment Transfer Inquiry Transactions
DTaP-HepB-IPV (Pedia (Pediarix (0.5 mL x 10 syr))	SKB	58160-0811-52	223344556	04/26/2018	VFC	1		
DTaP-IPV (Kinrix) (Kinrix	SKB	58160-0812-52	88995544	04/26/2018	VFC	1		

Inventory Module → Vaccines link → On-Hand Inventory

1. Use filters to find specific line items.
2. View pending transfers and VTrckS shipments.
3. Select a line item and navigate to other inventory screens by clicking Edit, Adjustment, Transfer and Inquiry

# Adding Inventory (cont.)

Vaccine Inventory i Cancel Create


**View**

<b>Date *</b>	<input type="text" value="04/21/2016"/>
<b>Inventory Location *</b>	<input type="text"/>
<b>Vaccine   Mfg   NDC   Brand *</b>	<input type="text"/>
<b>Lot Number *</b>	<input type="text"/>
<b>Expiration Date *</b>	<input type="text" value="MM/DD/YYYY"/>
<b>Funding Source *</b>	<input type="text"/>
<b>Doses Adjusted *</b>	<input type="text"/>
<b>Container Id</b>	<input type="text"/>
<b>Comments</b>	<input type="text"/>

- Complete required fields and click Create to add doses to inventory on-hand.
- NMSIIS checks for duplicate inventory line items automatically.
- Do NOT add an ending of “-State” or “-VFC” to your lot number
- “Funding Source” drop down option is where you will choose State or VFC.

# Edit Inventory

**View**

 **Update**

**Inventory Location**  
TRAINING INV LOC - IMM CLINIC

**Vaccine**  
INFLUENZA, P-FREE

**Vacc | Mfg | NDC | Brand**  
INFLUENZA, P-FREE | CSL | 33332-0014-01 | AFLURIA 2014-2015, PRESERVATIVE-FREE


**Doses (initial)** 30 **Doses (current)** 30

**Lot Number** 45SW6701 **Expiration Date** 12/30/2015

**Funding Source** VFC  **Container Id**  **Orig. Exp. Date** 12/30/2015

**Note that modifying this inventory item will also change the following items (if applicable):**

- ALL inventory transactions (e.g. adjustments and vaccinations) for the selected item
- ALL vaccination records where a dose of the selected inventory item has been administered

  **Update**

Update inventory line item **Manufacturer, Lot Number, Expiration Date, and/or Funding Source.**

# Inventory Adjustments

Vaccine Inventory Adjustment i Cancel Create

**Add**

Date	<input type="text" value="MM/DD/YYYY"/>
Inventory Location	<input type="text" value="INV: DEFAULT ORGANIZATION"/>
Vaccine   Mfg   NDC	<input type="text" value="DTAP (DAPTACEL)   PMC   49281-0286-10"/>
Lot Number	<input type="text" value="1235"/>
Expiration Date	<input type="text" value="04/28/2019"/>
Funding Source	<input type="text" value="STATE"/>
Doses On-Hand	<input type="text" value="10"/>
Reason	<input type="text"/>
Modification	<input type="text"/>
Doses Adjusted	<input type="text"/>
Container Id	<input type="text"/>
Comments	<input type="text"/>

Clear

- Add or remove doses from on-hand inventory for various reasons.
- Code table values determine in which column adjustments appear on reconciliations.
- Adjustments are included in VTrckS wastage extracts depending on the reason code selected.



# Transfer Inventory

Date

Source Inventory Location

Inventory Location	<input type="text" value="TRAINING INV LOC - IMM CLINIC"/>
Vaccine   Mfg   NDC	<input type="text" value="DTAP (DAPTACEL)   PMC   49281-0286-10"/>
Lot Number	<input type="text" value="1898194"/>
Expiration Date	<input type="text" value="02/28/2015"/>
Funding Source	<input type="text" value="VFC"/>
Doses On-Hand	<input type="text" value="60"/>
Container Id	<input type="text"/>

**REMINDER: You must notify the VFC Program of all transfers of publicly-funded vaccine *before* the transfer occurs.**

Destination Inventory Location

Inventory Location

Doses Transferred  (The quantity will be immediately decremented from the Source Inventory Location and added to the Destination Inventory Location when marked as 'Received'.)

Equivalent Cases

Authorized By

Inventory Picked By

Inventory Picked Date

QA Approved By

QA Approved Date

Shipped Date

Comments

Move doses from one inventory location to another inventory location within the provider or the registry

You will still need to notify the VFC Program of all transfers of publicly funded vaccine before the transfer occurs.

## Transfers (cont.)

Pending Incoming Inventory Transfers							
Vaccine	Doses	NDC	Lot	Funding Source	Mfg	Source Location	
Receiving Location: PRIVATE INVENTORY							1
Influenza, Seasonal (Afluria 2014-2015)	17	33332-0114-10	564DG674001	VFC	CSL	TRAINING INV LOC - IMM CLINIC	? Received

Pending Outgoing Inventory Transfers							
Vaccine	Doses	NDC	Lot	Funding Source	Mfg	Receiving Location	
Source Location: TRAINING INV LOC - IMM CLINIC							2 3
Influenza, Seasonal	17	33332-0114-10	564DG674001	VFC	CSL	PRIVATE INVENTORY	? Delete Update

1. Mark incoming inventory transfer as **Received**.
2. **Delete** outgoing inventory transfer.
3. **Update** outgoing inventory transfer.

# Reports Module



# Reports Module

## Provider Level Reporting

- To run any report you will need to be in your Reports Module.

For example:

- Patient Management Reports
- Coverage Statistics Reports
- Data Quality Reports
- New Mexico Forms and Documents

### Patient Management

- Birth Vaccinations
- Patient Detail with Services
- Patient List By Insurance Source

### Coverage Statistics

- Clinic Immunization Count
- Dosage Report
- Doses Administered
- Immunization Rates

### New Mexico Forms and Documents

- Organization Agreement
- User Agreement

# Patient Management Reports

## Patient Detail With Services

- Generates a list of patient immunization history by provider/clinic, including:
  - Patient Details
    - Full Name, Patient ID, DOB, VFC Eligibility
    - Patient Default Clinic
  - Vaccination Details
    - Date Given, Administering Clinic, Vaccine, Lot Number, Funding Source
    - Indicates if vaccine is historical and/or invalid
    - User who created and last updated the record

## Patient List by Insurance Source

- Generate a list of patients grouped by insurance source
- All patient insurance sources are included (rather than only the primary insurance source)
- Patient insurance sources are recorded on the *Demographics* screen

# Patient Management Reports (Cont.)

## Patient Reminder/Recall

- Generate a list of patients due and/or overdue for vaccinations
- Choose from a variety of search criteria to target patients included in the reminder/recall
- Reminder/recall runs are processed nightly

Two versions:

Provider/Clinic  
County/ZIP Code

**Note:** Reminder Recall Report is processed over night.  
Please allow 24 hours for processing.

### Add

Run Name

Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION

Run Schedule Date \* Run Completed Date

Reminder/Recall Date Range \*  
From:  Through:

Age Range \*  
From:  Through:  UOM: MONTHS ▾

# Coverage Statistics Reports

## Clinic Immunization Count

- Lists the number of vaccinations by vaccine type and provider/clinic during a specified date range
- Totals by clinic include:
  - Number of vaccinations administered
  - Number of patients receiving one or more doses
- Historical vaccinations are not included in results

## Dosage Report

- Counts of vaccines administered by dose number, vaccine, patient VFC eligibility and patient age at vaccination
- Optional filters:
  - Vaccine
  - Funding source
- Historical vaccinations are not included in results

# Coverage Statistics Reports (Cont.)

## Doses Administered

- Shows the usage of vaccines administered by funding source to help determine if vaccine ordering is appropriate
- Provides patient or vaccination counts per funding source and/or vaccine group
- Counts doses administered by the selected provider/clinic and not doses administered by the patient's default provider/clinic

### Doses Administered

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. i

---

#### Report Selection Criteria

Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION

Vaccination Date Range \*  
From:  Through:

Vaccines

Available Vaccines		Selected Vaccines (Default is ALL)
ANTHRAX	>>	
DT, PED	>	
DTAP	<	
DTAP (DAPTACEL)	<<	
DTAP-HEPB-IPV (PEDIA)		
DTAP-HIB-IPV (PENTAC)		
DTAP-IPV (KINRIX)		
HBIG		
HEP A, ADULT		
HEP A, PED/ADOL, 2D		
HEP B, ADULT		
HEP B, DIALYSIS		

Practice Type

Apply criteria to:  Provider  Clinic

(ALL)  
CERTIFIED HOME HEALTH AGENCY  
CHILDREN AND FAMILY SERVICES  
COLLEGE  
CORRECTIONS FACILITY  
FQHC  
HMO  
HOSPITAL  
HOSPITAL: BIRTHING UNIT  
INDIAN HEALTH

Note: Hold the Ctrl key to select multiple items.

Report Type

Patient Count (Aggregated Statistics)  
 Patient Count (Detailed Breakdown by Vaccine)  
 Vaccination Count (Aggregated Statistics)  
 Vaccination Count (Detailed Breakdown by Vaccine)

Output Type  PDF  EXTRACT - Delimiter:

Run Report Cancel



# Coverage Statistics Reports (Cont.)

## VFC Category Patient Count Report

- Generates a list of patients who have received a vaccination by VFC Eligibility and age group
- Available as PDF or extract

Age Group	<1	1-6	7-18	Total	%	19-20	21+	Age Unknown
* Centennial Care (Medicaid) <19 yrs	4	1	1	6	66.67	0	0	0
317 Adult	0	0	0	0	0.00	0	0	0
Adult (Other)	0	0	0	0	0.00	0	0	0
* Uninsured <19 yrs	0	0	1	1	11.11	0	0	0
* American Indian or Alaska Native <19 yrs	0	0	0	0	0.00	0	0	0
* Underinsured <19 yrs	0	0	0	0	0.00	0	0	0
Not VFC Eligible	0	1	1	2	22.22	0	1	0
<b>Total Clients</b>	<b>4</b>	<b>2</b>	<b>3</b>	<b>9</b>		<b>0</b>	<b>1</b>	<b>0</b>
<b>Totals of clients ages 18 and younger:</b>								
Total of VFC Eligible Clients:	7		Percentage of VFC Eligible Clients:		7 / 9		77.78%	
Total of NON-VFC Eligible Clients:	2		Percentage of NON-VFC Eligible Clients:		2 / 9		22.22%	
* = VFC Eligible								
<b>VFC Patient Count - Flu Eligibility</b>								
Age Group	<1	1-6	7-18	19-20	21+	Age Unknown	Total	
Eligible for flu vaccination	0	0	0	0	0	0	0	
Not Eligible for flu vaccination	0	0	1	0	1	0	2	
<b>Total Clients</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>2</b>	
Total of all Flu-Vaccination Eligible Clients:			0 / 2		0.00%			
Total of NON Flu-Vaccination Eligible Clients:			2 / 2		100.00%			



## New Mexico State Immunization Information System (NMSIIS)

### VFC Category Patient Count Report

September 15, 2016


Provider = DEFAULT ORGANIZATION, Clinic = DEFAULT ORGANIZATION, Vaccination Date From = 02/01/2016, Vaccination Date Through = 09/15/2016

# Data Quality Reports

## Data Quality - Statistics

- Provides real-time statistics found on the scheduled report
  - Patient Counts
  - Patient Completeness
  - Vaccination Completeness
  - Accuracy
  - Timeliness
- Must be restricted to a specific provider and clinic
- Date range filters may not exceed 30 days

## Data Quality - Statistics

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. 

[Data Quality - Patient Exceptions](#)

## Report Selection Criteria


Provider/Clinic : DEFAULT ORGANIZATION, DEFAULT ORGANIZATION

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE 

### Date Range Type \*

- Date Of Birth  
 Vaccination

### Date Range \*

From:   Through:  

Output Type  PDF  EXTRACT - Delimiter:

Previous

Run Report

Cancel

# Inventory Reports

Under Reports Module, Section Inventory Management-Vaccine you can run reports like:

- Daily Vaccinations Reports
  - Generates a list of doses administered from a specific provider's inventory location(s)
- Inventory Adjustment Inquiry
  - Generates a list of inventory adjustment transactions meeting the search criteria
- Inventory On-Hand
  - Generates a list of doses on-hand meeting the search criteria
- Monthly Immunization Report (VFC and State)
  - Generates a MIR for publicly-funded vaccines belonging to a closed inventory reconciliation



## New Mexico State Immunization Information System (NMSIIS) Daily Vaccinations Report

September 15, 2016

Provider = DEFAULT ORGANIZATION, Inv Location = (ALL), Vaccination Date From = 01/01/2016, Vaccination Date Through = 09/15/2016


<u>Inventory Location</u>	<u>Vaccination</u>	<u>Funding Source</u>	<u>Vacc Date</u>	<u>Doses</u>
INV: DEFAULT ORGANIZATION	Hep B, ped/adol	VFC	04/11/2016	1
INV: DEFAULT ORGANIZATION	Hep B, ped/adol	VFC	04/26/2016	1
INV: DEFAULT ORGANIZATION	HPV4 (Gardasil)	VFC	04/26/2016	1
INV: DEFAULT ORGANIZATION	MCV4P (Menactra)	VFC	04/26/2016	1
INV: DEFAULT ORGANIZATION	MMR	317 ADULT	03/16/2016	1
INV: DEFAULT ORGANIZATION	PCV13	PRIVATE PURCHASE	03/31/2016	1
INV: DEFAULT ORGANIZATION	Polio-IPV	VFC	04/26/2016	1
INV: DEFAULT ORGANIZATION	Tdap, Adsorbed	VFC	04/26/2016	1

# Vaccine Order Management Reports

Under Reports Module, Section Vaccine Order Management Reports you can run reports like:

- Vaccine Shipment
  - Generates a list of VTrckS shipments imported into NMSIIS
  - Output includes status per line item:
    - Pending
    - Received
    - Dismissed
- Vaccine Order Status
  - View the status of VTrckS orders meeting search criteria
- Vaccine Return Status
  - View the status of VTrckS returns meeting search criteria

## Vaccine Order Status

Enter the selection criteria and click the 'Run Report' button. 

## Report Selection Criteria

Provider/Clinic : ALL PROVIDERS, ALL CLINICS

SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE 



Order Status \*

(ALL STATUSES) ▼

Order Type \*

(ALL) ▼

Vaccine Order Date Range

From:   Through:  

Submitted To VTrckS Date Range

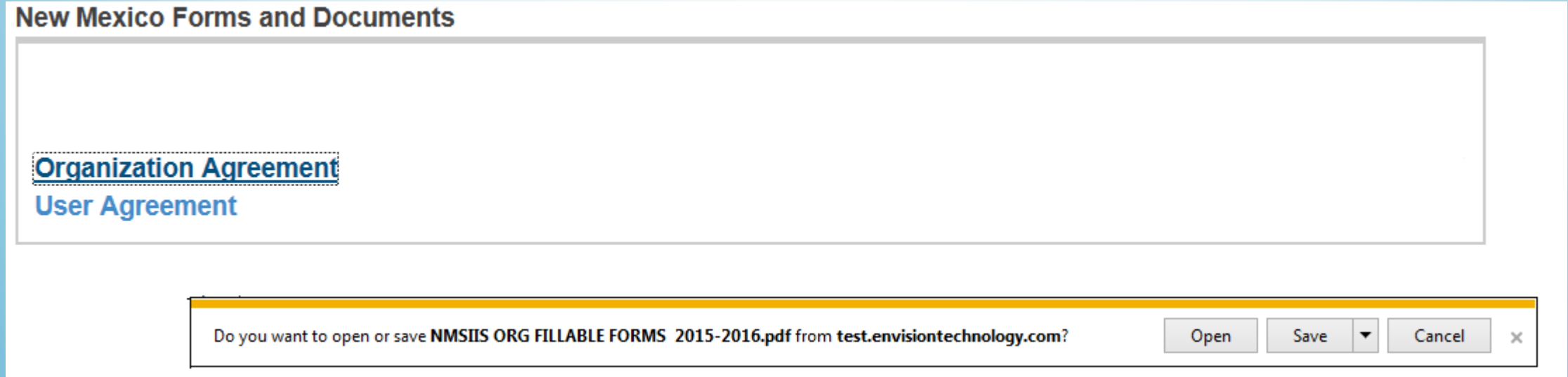
From:   Through:  

Output Type  PDF  EXTRACT - Delimiter:

Run Report

Cancel

# New Mexico Forms and Documents



Under the Reports Module, Section New Mexico Forms and Documents.

- NMSIIS will post important documents as well as helpful tips for the user.
- When you click on the desired hyper link a pop (shown above) will appear requesting that you either Open, Save or Cancel what you requested.
- It is only when you click open that it will open your document in another pop up window.

# Vaccine Management



# Vaccine Returns

Add - Select Clinic

Clinic

1

2

Next Cancel

Next Cancel

Select Inventory Module

Select Vaccine Returns

Click Add new Vaccine Return

1. Select the **Clinic** returning vaccine.
2. Click **Next** to continue.

**Note:** Each Vaccine Return should have a single return reason specified. Returning two vaccines with two different return reasons (e.g. “Expired vaccines” and “Refrigerator too warm”), will not allow you to return the vaccine within the same transaction . You will need to create 2 returns one for each reason category.

# Vaccine Returns

**Update** **Cancel**

Clinic  
TRAINING - PED CLINIC

Return Number: R0131201565432200  
Return Status: IN WORK  
Return Type: RETURN ONLY  
Return Reason: EXPIRED VACCINE  
Date Submitted to VTrckS: MM/DD/YYYY

Return Created Date: 01/31/2015  
Number of Shipping Labels: 1  
Label Shipping Method: MAIL TO PROVIDER SHIPPING ADDRESS  
Description:

Clinic Comments:  
VFC Program Comments:

Vaccine	Mfg	NDC	Brand/Packaging	Funding Source	Lot Number	Expiration Date	Doses Remaining	Doses Returning
MMR	MSD	00006-4681-00	MMR II (0.5 ML X 10 VIALS)	VFC	DF00542123	12/31/2015	25	
MMR	MSD	00006-4681-00	MMR II (0.5 mL x 10 vials)	VFC	DF00542123	12/31/2015	25	
MMRV	MSD	00006-4999-00	Proquad (0.5 mL x 10 vials)	VFC	54DS54001	01/01/2016	20	

**Update** **Cancel**

You will need to confirm your location's information to proceed in returning your vaccines.

1. Begin typing a vaccine, manufacturer, NDC, etc.
2. Select a vaccine from inventory on-hand.
3. Enter the number of doses returned.
4. Click to add line item to return.

Submit your return by clicking "Update"



# Immunization Inventory Reconciliation



- 1. Vaccines Added but not Administered**
- 2. Documentation in NMSIIS**
- 3. Verify Reconciliation Reports**
- 4. Start/Run Reconciliation Report**
- 5. Review Reconciliation Worksheet**
- 6. Managing Inventory Adjustments**
- 7. Closing Reconciliation**



# IMPORTANT CONCEPTS

■ **VERY IMPORTANT!** Your reconciliation should be completed at the end of the workday after all immunizations have been given and entered into NMSIIS or at the beginning of the workday.

## FOR EXAMPLE:

### Reconcile at the END of the workday

At the end of your workday perform the following:

- Ensure all vaccines administered are entered into NMSIIS with all necessary adjustments for wasted doses, broken vials, expired vaccine, etc.
- Run reconciliation report and perform an on-hand physical inventory count. The end date of the reconciliation report will be the same date you run the report.

**Example:** If you run the report on 06/15/16, your reconciliation end date will be 06/15/16.

**NOTE:** Please ensure any pending vaccine transfers or shipments have been received and have been added to the system prior to creating your reconciliation.

### Reconcile at the BEGINNING of the workday

At the beginning of your workday perform the following:

- Run reconciliation report and perform an on-hand physical inventory count. The end date for the reconciliation will be the day before.

**Example:** If you run the report on 06/15/16, your reconciliation end date will be 06/14/16.

**NOTE:** Please ensure any pending vaccine transfers or shipments have been received and have been added to the system prior to creating your reconciliation.

# STEP ONE

## **“Vaccines Added but not Administered” Report**



# STEP ONE

## VACCINES ADDED BUT NOT ADMINISTERED

1. Click on “Reports”
2. Find the Report  
Section: Data Quality – User
3. Vaccines Added but not Administered”

### Quick Tip:

For easier Reconciliation, it may be helpful to run the “**Vaccines Added but not Administered Report**” weekly to assist with inventory counts.

The screenshot displays the New Mexico Immunization Program web application. At the top is the logo with the text 'New Mexico Immunization Program'. Below the logo is a vertical navigation menu with the following items: Home, Patients, Immunizations, Education, IZ Quick Add, Inventory, Reports, VTckS Interface, Administration, and HL7 Management. A red '1.' with a blue arrow points to the 'Reports' menu item. To the right of the menu is a white box titled 'Data Quality - User' with a red '2.' and a blue arrow pointing to the title. Inside this box is a list of report options: Data Quality - Statistics - Scheduled, Data Quality - Statistics, Data Quality - Patient Exceptions, Patients with Possible Duplicate Vaccinations, Possible Patient Duplicates, Shots Before Birth, User Vaccination Details, and Vaccines Added but not Administered. A red '3.' with a blue arrow points to the 'Vaccines Added but not Administered' report option.

## STEP ONE (CONTINUED)

### VACCINES ADDED BUT NOT ADMINISTERED (VABNA)

Only the fields in **bold** are required – This VABNA report will need to correspond to the dates that you want to run your reconciliation for.

**Example:** Run a reconciliation for 7/1/16 -7/15/16. Use the same dates in the VABNA report criteria section. You may choose a PDF output Type or a Extract-Delimiter type, OR enter a comma (,) in the box, and it will produce an Excel spreadsheet.



**NOTE:** Ensure your Provider/Clinic matches your physical location or the location for which you are running the reconciliation and the VABNA report.

#### Report Selection Criteria

**Provider/Clinic :** ALBUQUERQUE FAMILY HEALTH CENTER, ALBUQUERQUE FAMILY HEALTH CENTER  
[ALBUQUERQUE FAMILY HEALTH CENTER] ALBUQUERQUE FAMILY HEALTH CENTER - AFHC964 (964) ✕

**Clinic County**  
▼

**Vaccination Date Range \***

**From:** 07/01/2016  **Through:** 07/15/2016 

**Output Type**  PDF  **EXTRACT - Delimiter:** |

# STEP ONE (CONTINUED)

## VACCINES ADDED BUT NOT ADMINISTERED(VABNA)

### REPORT OUTPUT

#### PDF EXAMPLE:



### New Mexico State Immunization Information System (NMSIIS) Vaccines Added but not Administered

September 15, 2016

Provider = POISON IVY PEDS, Clinic = POISON IVY CLINIC, Vaccination Date From = 09/15/2016, Vaccination Date Through = 09/15/2016

<u>Patient</u>	<u>DOB</u>	<u>Vaccination</u>	<u>Dose</u>	<u>Clinic</u>	<u>Date</u>	<u>Age</u>	<u>Created By</u>
SIMPSON, BART M (2336081)	01/01/1999	Hep A, ped/adol, 2D	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ
		Hep B, ped/adol	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ
		HPV4 (Gardasil)	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ
		MCV4P (Menactra)	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ
		Polio-IPV	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ
		Td (adult), adsorbed	1	NM0521	09/15/2016	17Y 8M 14D	FELICIA MARTINEZ

## STEP ONE (CONTINUED)

### VACCINES ADDED BUT NOT ADMINISTERED(VABNA) *REPORT OUTPUT*

This is using the Extract-Delimiter with a comma ,

EXTRACT - Delimiter:

Excel EXAMPLE:

Patient ID	First Name	Middle Name	Last Name	DOB	Age	Vaccination	Vaccination Date	Dose Num	Clinic ID	Clinic Code	Clinic	Provider ID	Provider	Created By
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	Hep A ped/adol 2	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	Hep B ped/adol	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	HPV4 (Gardasil)	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	MCV4P (Menactra)	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	Polio-IPV	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ
2336081	BART	M	SIMPSON	1/1/1999	17Y 8M 14D	Td (adult) adsorbe	9/15/2016	1	3508	NM0521	POISON IVY CLINIC	1313	POISON IVY PEDS	FELICIA MARTINEZ



# STEP ONE (CONTINUED)

## VACCINES ADDED BUT NOT ADMINISTERED (VABNA)

For any vaccines that appear on the report:  
Were these vaccines actually administered to the patient? Go in the patient's record and view the immunization record.

**NOTE: Only the nurse who added this vaccination can either delete it or complete it.**

1. If the Vaccine(s) were not administered, click **DELETE** next to vaccine.  
**Remember, you will only have this option if you added the vaccine to the system or have administrative rights.**
2. If the vaccine was administered, click **ADMINISTER VACCINES** and complete the process. Ensure the administered date is correct – It must be in the same reconciliation date range to reflect and display in the specified reconciliation period.

SIMPSON, BART M ID: 2336081 DOB: 01/01/1999 AGE: 17Y 8M 14D GENDER: M Precautions / Contraindications ARE specified

Immunizations Home

Links Select Action

Precautions / Contraindications ARE specified

DOB: 01/01/1999 Age: 17Y 8M 14D History of Varicella?: NO Date of Varicella: MM/DD/YYYY

the patient has previously refused one or more vaccines.

Recommended Immunizations for today, 9/15/2016 (17Y 8M 14D)

Vaccine: Influenza, Seasonal

Please do not rely solely on the Recommender to forecast immunizations. Utilize clinical judgment and consult both the ACIP recommended immunization schedules and the CDC Pink Book @ <http://www.cdc.gov/vaccines/pubs/pinkbook/index.html#chapters>

Vaccine	Dose	Date	Age	Clinic				
<b>DTaP / TD / Tdap</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR		H	-	? Update
Td (adult), adsorbed	2	09/15/2016	17Y 8M 14D	NM0521				? Delete
<b>Polio</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR		H	-	? Update
Polio-IPV	2	09/15/2016	17Y 8M 14D	NM0521		★		? Delete
<b>Hib</b>								
Hib (PRP-OMP; pedvax		09/01/2011	12Y 8M 0D	PR		H		? Update
<b>Pneumococcal</b>								
PCV13	1	06/01/2011	12Y 5M 0D	PR		H		? Update
<b>Hep A</b>								
Hep A, UF	1	01/01/1999 0Y 0M 0D	PR			H		? Update
Hep A, ped/adol, 2D	2	09/15/2016	17Y 8M 14D	NM0521		★		? Delete
<b>Hep B</b>								
DTaP-HepB-IPV (Pedia	1	11/01/2011	12Y 10M 0D	PR		H	-	? Update
Hep B, ped/adol	2	09/15/2016	17Y 8M 14D	NM0521		★		? Delete
<b>Meningococcal</b>								
MCV4P (Menactra)	1	09/15/2016	17Y 8M 14D	NM0521		★		? Delete
<b>HPV</b>								
HPV4 (Gardasil)	1	09/15/2016	17Y 8M 14D	NM0521		★		? Delete

# **STEP TWO**

## **Documentation in NMSIIS**



# STEP TWO:

## CONFIRM DOCUMENTATION IN NMSIIS

Confirm that ALL vaccine activities are documented in NMSIIS for the following:

- Added AND Administered
- Adjustments made -- i.e., adjust wasted doses, adjust broken vials, adjust expired vaccine, etc.
- All transfers and shipments completed – Your pending transfers/shipments will appear on your inventory ON- HAND screen.

Vaccine Inventory Reconciliation

⚠ There are 10 Pending Inventory Transfers.

⚠ There are 8 Pending VTrckS Shipments.

Inventory Location \*

Description \*

Authorized By

Status: \*

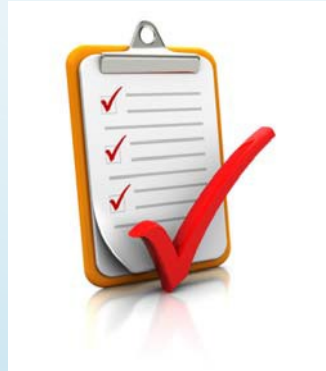
OPEN

Begin Date \* MM/DD/YYYY

End Date \* MM/DD/YYYY

# STEP THREE

## Verify Reconciliation Reports



# STEP THREE:

## Verify Reconciliation Report

Run Reconciliation Report by performing the following:

- Select the **Reconciliation** option under the Inventory and Vaccines section on the left side of the module.
- Ensure that your physical location matches the location named at the top of your Home Screen.



# STEP THREE (CONTINUED)

## Verify Reconciliation Report

- Click **Search** to verify there are no open reconciliations.

**\*NOTE: All past reconciliations must be closed before opening a new one.**

- If any reconciliations are **OPEN**, ensure that reconciliation is complete and accurate before closing it.

Be aware of the dates of the open reconciliation.

Reconciliations must be closed in chronological order.

### Search Criteria

Inventory Location	Inventory Location Status	Reconciliation Status
INV: ALBUQUERQUE FAMILY HEALTH CENTER	(ALL)	(ALL)

Begin Date Range      End Date Range


From: MM/DD/YYYY Through: MM/DD/YYYY      From: MM/DD/YYYY Through: MM/DD/YYYY

Sort by

Audit Date (descending)    Inventory Location, Begin Date (descending)

Previous Criteria      Clear      Search

### Search Results - 0 record(s)

 There are no results found that match your search criteria.

## ***STEP FOUR***

# **Start/Run Reconciliation Report**



# STEP FOUR: Run Reconciliation Report

Click on **ADD RECONCILIATION** to start your new report.

The screenshot shows the 'Vaccine Inventory Reconciliation' interface. At the top, there is a header with the location 'ALBUQUERQUE FAMILY HEALTH CENTER, ALBUQUERQUE FAMILY H...' and a 'PATIENT SEARCH' button. Below the header, the page title is 'Vaccine Inventory Reconciliation' with an information icon. A blue button labeled 'Add Reconciliation' is highlighted with a yellow arrow pointing to it from the right. On the left side, there is a navigation menu with the following items: Home, Patients, Immunizations, Education, IZ Quick Add, Inventory, Vaccines, On-Hand, and Reconciliation. The main content area is titled 'Search Criteria' and contains the following fields:

- Inventory Location:** A dropdown menu with 'INVENTORY LOCATION 1' selected.
- Inventory Location Status:** A dropdown menu with '(ALL)' selected.
- Reconciliation Status:** A dropdown menu with '(ALL)' selected.
- Begin Date Range:** Two date input fields labeled 'From' and 'Through', both with a calendar icon.
- End Date Range:** Two date input fields labeled 'From' and 'Through', both with a calendar icon.
- Sort by:** Radio buttons for 'Audit Date (descending)' (selected) and 'Inventory Location, Begin Date (descending)'.
- Buttons:** 'Previous Criteria', 'Clear', and 'Search'.



# STEP FOUR (CONTINUED)

## Run Reconciliation Report

Complete the following information specific to your location and report date:

- a. **Inventory Location:** Choose from the dropdown list.
- b. **Description:** Name the report (e.g., JULY RECON)
- c. **Begin Date:** The beginning date will be the day after your most recent reconciliation was closed. The begin date will default to the first day after your last reconciliation was closed. For your initial reconciliation, however, you will need to enter the date you entered your initial inventory.

**NOTE: If this is your first reconciliation, use the date you entered your Inventory into NMSIIS.**

- d. **End Date:** Put in current date OR the last day you created and administered any inventory, made any adjustments, and counted your on hand inventory.
- e. **Authorized By:** Choose your name from the dropdown
- f. Click "Create"

The screenshot shows a web form titled "Vaccine Inventory Reconciliation" with a "Cancel" and "Create" button in the top right. The form contains several fields with red annotations and yellow arrows:

- a.** Points to the "Inventory Location" dropdown menu, which currently shows "INV: ALBUQUERQUE FAMILY HEALTH CENTER".
- b.** Points to the "Description" text input field.
- c.** Points to the "Authorized By" dropdown menu.
- d.** Points to the "Begin Date" field, which has a calendar icon and the placeholder "MM/DD/YYYY".
- e.** Points to the "End Date" field, which has a calendar icon and the placeholder "MM/DD/YYYY".
- f.** Points to the "Create" button.

# STEP FOUR (CONTINUED)

## Run Reconciliation Report

### Scenario One:

- End of Business (EOB): all vaccines have been administered and entered into NMSIIS with all necessary adjustments for wasted doses, broken vials, expired vaccine, etc. and; physical on-hand inventory count is performed. **Example: Run the report at the EOB on 7/15/16 and your reconciliation end date will be 7/15/16.**

**NOTE:** Please ensure that any pending vaccine transfers, shipments have been received and have been added into the system prior creating your reconciliation.

### Scenario Two:

- Beginning of Business (BOB): physical on-hand inventory count is performed. **Example: Run the report at the BOB 7/15/16 and your reconciliation end date will be 7/14/16.**
- This option will allow the clinic to begin administering vaccines later that business day without affecting your reconciliation report because it captures all vaccines administered and entered into NMSIIS from the prior business day.

# STEP FIVE

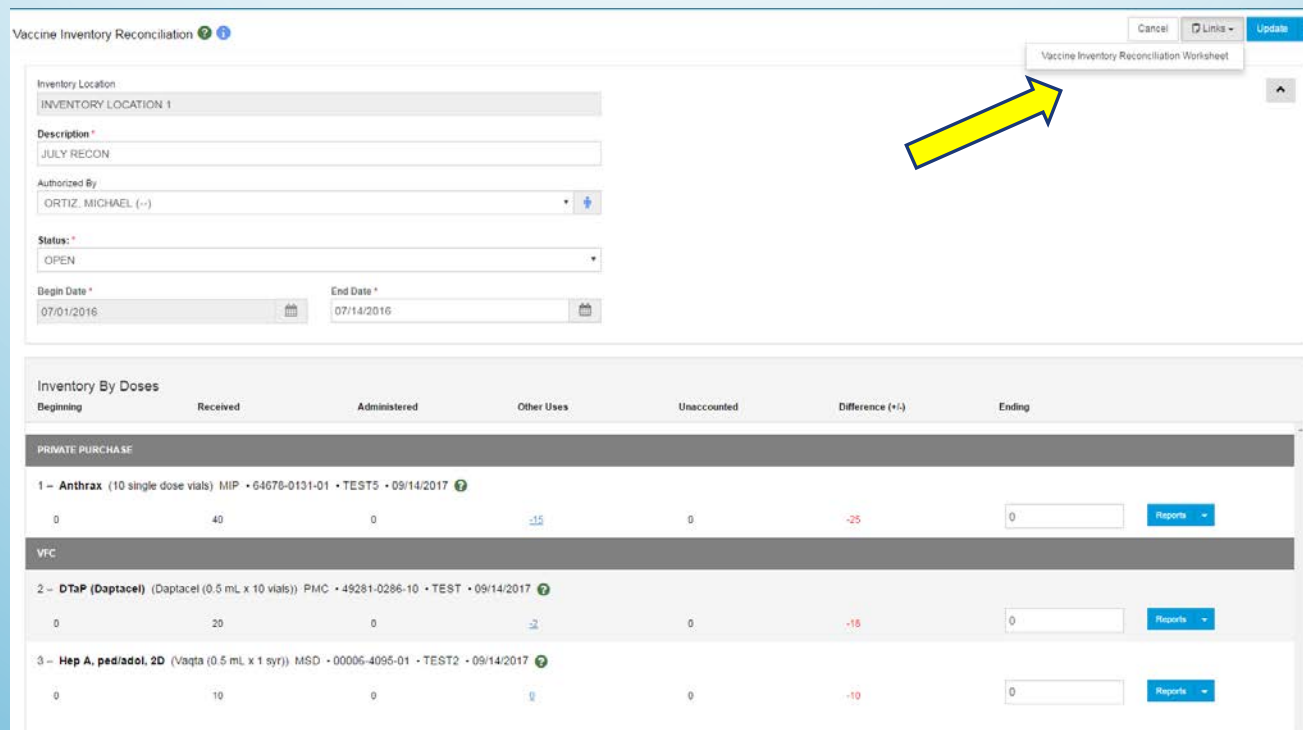
## *Reconciliation Worksheet*



# STEP FIVE: Reconciliation Worksheet

It is recommended that you **“Print”** out this worksheet and use it to assist you in performing your on-hand physical inventory count.

**NOTE:** All expired vaccines should be removed from your storage unit upon expiration date, adjusted in NMSIIS, and then returned according to the VFC return guidelines.



Vaccine Inventory Reconciliation

Inventory Location: INVENTORY LOCATION 1

Description: JULY RECON

Authorized By: ORTIZ, MICHAEL (--)

Status: OPEN

Begin Date: 07/01/2016

End Date: 07/14/2016

Buttons: Cancel, Links, Update

Vaccine Inventory Reconciliation Worksheet

Inventory By Doses						
Beginning	Received	Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 single dose vials) MIP - 64678-0131-01 - TEST5 - 09/14/2017						
0	40	0	-15	0	-25	0
<b>VFC</b>						
2 - DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials)) P/MC - 49281-0286-10 - TEST - 09/14/2017						
0	20	0	-2	0	-18	0
3 - Hep A, ped/adol, 2D (Vaqta (0.5 mL x 1 syr)) MSD - 00006-4095-01 - TEST2 - 09/14/2017						
0	10	0	0	0	-10	0

# STEP FIVE (CONTINUED)

## Reconciliation Worksheet

- Do not count any **expired vaccines** in the “ending inventory” count. If you completed a return in NMSIS, these expired vaccines will show up in your “Inventory Expired” column once adjusted.
- Enter your actual vaccine inventory into the appropriate “ending inventory” columns.  
**REMEMBER: Your expired vaccines will be reflected in your “Inventory Expired” column once you made the appropriate adjustments.**
- Click on **Update**.

Other Uses:	
Transferred	0
Returned/Expired/Recalled	0
Wasted	-15

Inventory By Doses						
Beginning	Received	Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 vials) (MIP) MIP • 64678-0131-01 • TEST5 • 09/14/2017						
0	40	0	-15	0	-25	25
<b>VFC</b>						
2 - DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials)) PMC • 49281-0286-10 • TEST • 09/14/2017						
0	20	0	0	0	-18	18
3 - Hep A, pedi/adol, 2D (Vaqta (0.5 mL x 1 syr)) MSD • 00006-4095-01 • TEST2 • 09/14/2017						
0	10	0	0	0	-10	9

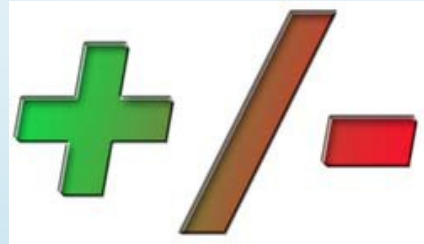
## **STEP FIVE (CONTINUED)**

### ***Reconciliation Worksheet***

- **If your Inventory Difference is not “0”, you will need to locate and account for the inventory difference and adjust your vaccine inventory in NMSIIS.**
- **Please continue on to Step Six if you have to adjust and Manage Inventory Differences due to broken or wasted inventory.**

## **STEP SIX:**

# **Managing Inventory Adjustments**



# STEP SIX:

## Managing Inventory Adjustments

### A.) Recount all vaccines with **Inventory Differences**

As a best practice perform a physical recount of all vaccines with a number  $\neq 0$  (not equal to the Inventory difference column)

Make any count adjustments on your worksheet and click **Update**. If there are no changes after the physical count and you still have differences, proceed to **Next Slide**.

Vaccine Inventory Reconciliation ? i Patent Search Cancel Links Update

Inventory Location  
INVENTORY LOCATION 1

Description \*  
JULY RECON

Authorized By  
ORTIZ, MICHAEL (--)

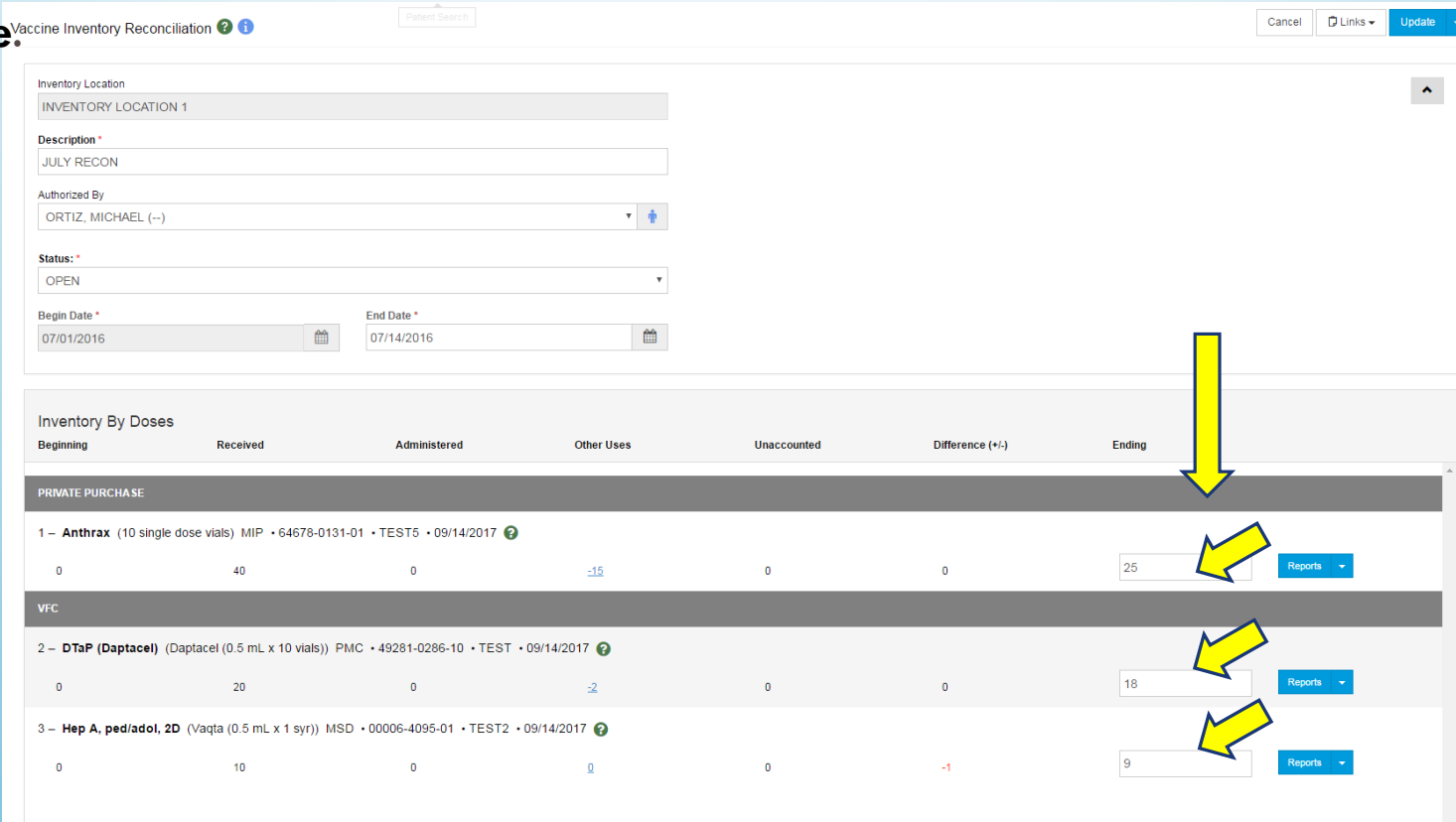
Status: \*  
OPEN

Begin Date \*  
07/01/2016

End Date \*  
07/14/2016

Inventory By Doses

Beginning	Received	Administered	Other Uses	Unaccounted	Difference (+/-)	Ending	
PRIVATE PURCHASE							
1 - Anthrax (10 single dose vials) MIP • 64678-0131-01 • TEST5 • 09/14/2017 <span>?</span>							
0	40	0	-15	0	0	25	Reports
VFC							
2 - DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials)) PMC • 49281-0286-10 • TEST • 09/14/2017 <span>?</span>							
0	20	0	-2	0	0	18	Reports
3 - Hep A, ped/adol, 2D (Vaqta (0.5 mL x 1 syr)) MSD • 00006-4095-01 • TEST2 • 09/14/2017 <span>?</span>							
0	10	0	0	0	-1	9	Reports





# STEP SIX (CONTINUED)

## Managing Inventory Adjustments

**B.** In the event that you have to make an Inventory Adjustment to the On-Hand inventory, this would be considered wasted.

### IMPORTANT:

Ensure that your adjustment date on that vaccine is with-in the dates you created the reconciliation report.  
Sample date range: 07/01/2016 - 07/15/2016.

1. Go to Inventory On-Hand module
2. Click Radio Button for vaccine that you need to adjust.
3. Click on adjustment.

**Example:** We dropped 1 vial of the Hep-A Lot#TEST2  
The On-hand is showing 10 and we only have 9.



On-Hand Inventory

Inventory Location: INVENTORY LOCATION 1 | Status: ON-HAND

Vaccine: (ALL) | Funding Source: (ALL)

Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	Expiring Soon	
INVENTORY LOCATION 1								
Hep A, ped/adol, 2D (Vaqta (0.5 mL x 1 syrl))	MSD	00006-4095-01	TEST2	09/14/2017	VFC	10	?	Action

Yellow arrow points to the 'Hep A' row. Another yellow arrow points to the 'Adjustment' option in the dropdown menu.

- Edit
- Adjustment
- Transfer
- Inquiry
- Transactions

# STEP SIX (CONTINUED)

## Managing Inventory Differences

4. Enter the Date of Adjustment – It HAS to be within the reconciliation date range. ( Example - 07/01/2016)

5. Click on the Reason for the adjustment

- Any inventory that needs to be added can only be labeled as “**Add Initial Inventory**” or “**Extra**”
- Any inventory that needs to be subtracted can be labeled as **wasted, expired, mishandled, etc.;**

**it DOES make a difference what you select**

c. “Unaccounted For” should only be selected for vaccines that you truly cannot account for; this category WILL subtract and affect your difference

**NOTE:** If you have extra doses in your ending inventory that you cannot account for, these should be adjusted as “Extra” so they will be added. The Unaccounted adjustment “reason code” will subtract from your on-hand doses in NMSIIS.

6. Enter comments regarding the adjustment:  
(ex: BROKE/DROPPED VIAL)

7). Click on **Create**.

The screenshot shows a web form titled "Vaccine Inventory Adjustment" with a "Cancel" button and a "Create" button. The form contains the following fields:

- Date:** 07/01/2016 (Callout 4 points to this field)
- Inventory Location:** INV: ALBUQUERQUE FAMILY HEALTH CENTER
- Vaccine | Mfg | NDC:** HEP A, PED/ADOL, 2D | MSD | 00006-4095-01
- Lot Number:** TEST2
- Expiration Date:** 09/26/2016
- Funding Source:** VFC
- Doses On-Hand:** 10
- Reason:** VTRCKS - BROKEN VIAL/SYRINGE (Callout 5 points to this dropdown)
- Modification:** SUBTRACT (Callout 5 points to this dropdown)
- Doses Adjusted:** 1
- Container Id:** (empty)
- Comments:** BROKE /DROPPED VIAL (Callout 6 points to this text area)

Callout 7 points to the "Create" button in the top right corner.

# STEP SIX (CONTINUED)

## Managing Inventory Adjustments

Once your inventory has been corrected in NMSIS, select the **Reconciliation option** under the **Inventory and Vaccines section** on the left side bar menu.

1) Click on **Search**.

**Search Criteria**

Inventory Location: INVENTORY LOCATION 1  
Inventory Location Status: (ALL)  
Reconciliation Status: (ALL)

Begin Date Range: From: MM/DD/YYYY Through: MM/DD/YYYY  
End Date Range: From: MM/DD/YYYY Through: MM/DD/YYYY

Sort by:  
 Audit Date (descending)  Inventory Location, Begin Date (descending)

Previous Criteria Clear Search

2) Click on **View** when record is displayed. This will provide an updated reconciliation worksheet.

**Search Results - 1 record(s)**

Status	Description	Begin Date	End Date	Authorized By
Open	JULY RECON	07/01/2016	07/14/2016	MICHAEL ORTIZ

View Report View

# STEP SIX (CONTINUED)

## Managing Inventory Differences

The Inventory Adjustment in the Other Uses column is now visible

Vaccine Inventory Reconciliation ? i Cancel Links Update

Inventory Location  
INVENTORY LOCATION 1

Description \*  
JULY RECON

Authorized By  
ORTIZ, MICHAEL (-)

Status: \*  
OPEN

Begin Date \*  
07/01/2016

End Date \*  
07/14/2016

Inventory By Doses

Beginning	Received	Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 – Anthrax (10 single dose vials) MIP • 64678-0131-01 • TEST5 • 09/14/2017						
0	40	0	-15	0	0	25
<b>VFC</b>						
2 – DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials)) PMC • 49281-0286-10 • TEST • 09/14/2017						
0	20	0	-2	0	0	18
3 – Hep A, ped/adol, 2D (Vaqta (0.5 mL x 1 syr)) MSD • 00006-4095-01 • TEST2 • 09/14/2017						
0	10	0	-1	0	0	9

**STEP SEVEN:**  
**Closing Reconciliation**



# STEP SEVEN (CONTINUED)

## Closing Reconciliation

- 1) Ensure all of your Inventory Differences = 0. When confirmed, close your reconciliation.
- 2) Click **UPDATE** if you made any Adjustments to your Ending Inventory.
- 3) Change **Status to CLOSED**; this will close your reconciliation.

**NOTE:** Once your reconciliation is closed and you click update, your inventory will be adjusted. Make sure your ending inventory is correct.

The screenshot shows the 'Vaccine Inventory Reconciliation' interface. A green success message at the top states 'Success Record saved on 9/14/2016 at 2:08:29 PM.' The form includes fields for 'Inventory Location' (INVENTORY LOCATION 1), 'Description' (JULY RECON), 'Authorized By' (MICHAEL ORTIZ), and 'Status' (CLOSED). Below these are 'Begin Date' (07/01/2016) and 'End Date' (07/14/2016). A table titled 'Inventory By Doses' shows the following data:

Beginning	Received	Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 single dose vials) MIP • 64678-0131-01 • TEST5 • 09/14/2017						
0	40	0	35	0	0	25
<b>VFC</b>						
2 - DTaP (Daptacel) (Daptacel (0.5 mL x 10 vials)) PMC • 49281-0286-10 • TEST • 09/14/2017						
0	20	0	2	0	0	18
3 - Hep A, ped/adol, 2D (Vaqta (0.5 mL x 1 syr)) MSD • 00006-4095-01 • TEST2 • 09/14/2017						
0	10	0	1	0	0	9

Annotations: A yellow arrow labeled '1.' points to the 'Difference (+/-)' column in the table. A yellow arrow labeled '2.' points to the 'Update' button in the top right corner. A yellow arrow labeled '3.' points to the 'Status' dropdown menu.

**Congratulations!**  
**You have successfully completed an  
inventory reconciliation**

**COMPLETED**

# **NMSIIS AGGREGATE RECONCILIATION**





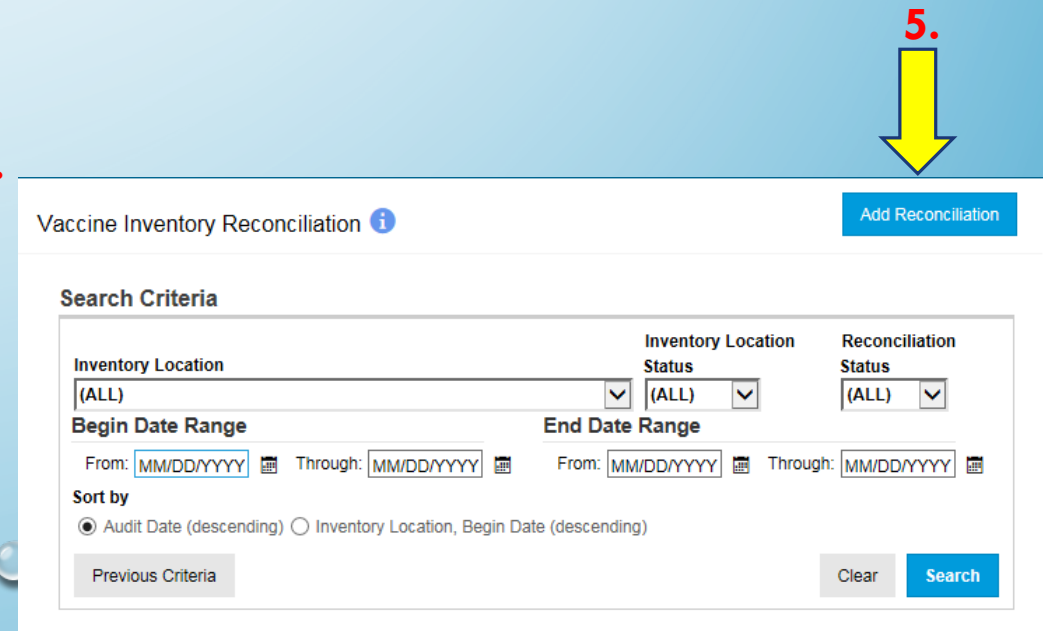
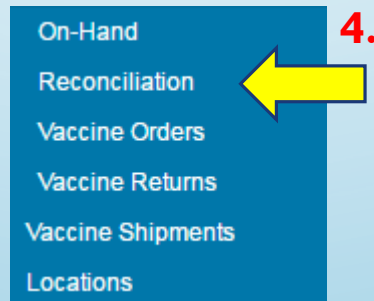
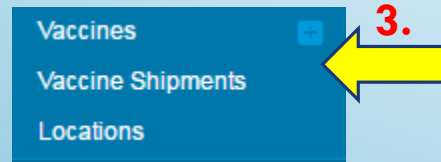
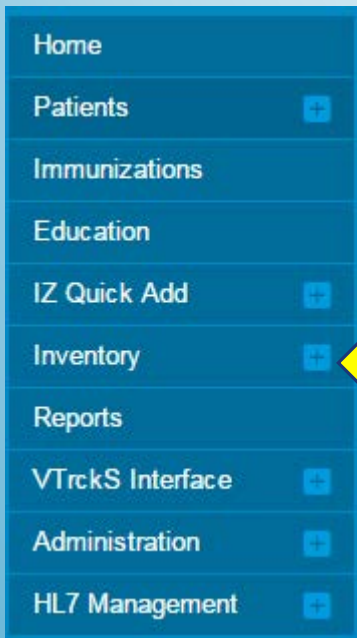
# **NMSIIS AGGREGATE RECONCILIATION**

## **What is a Aggregate Reconciliation?**

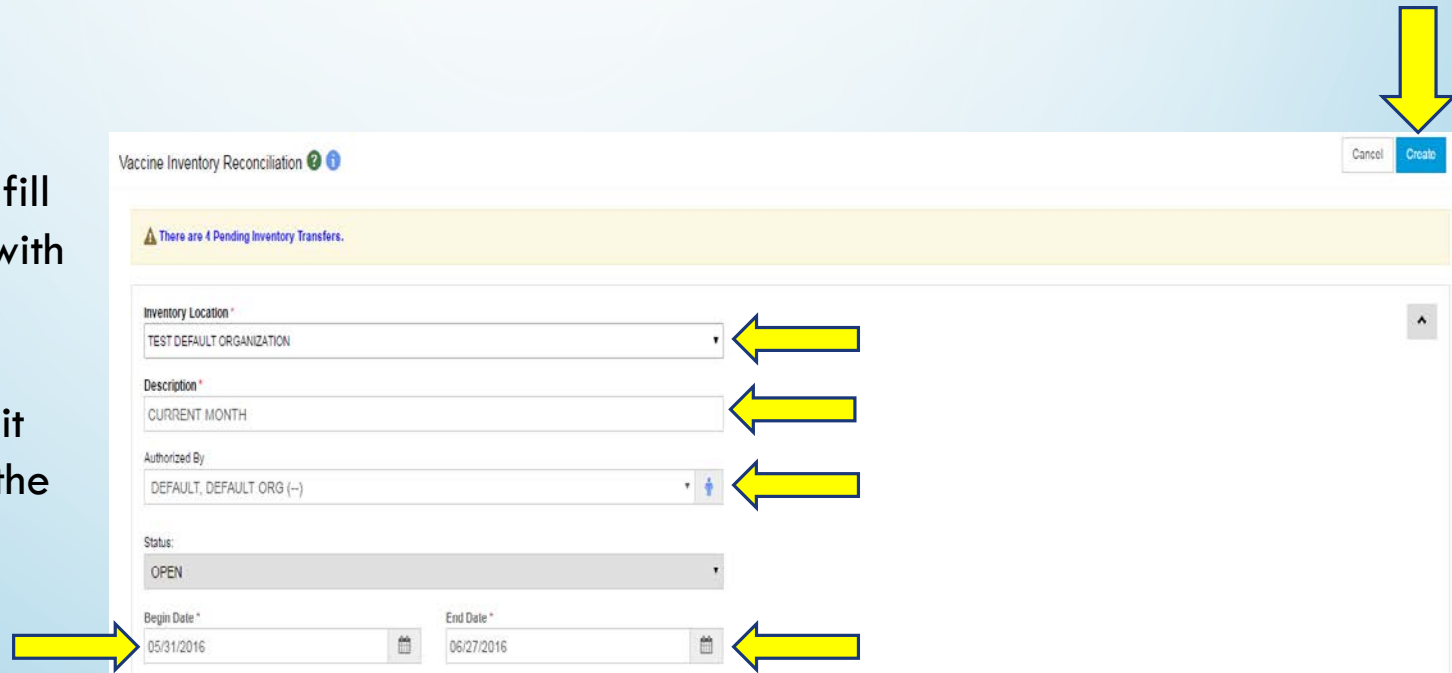
**Aggregate means that your location is participating in Data Exchange and you will have the Aggregate Administered column in each of your reconciliations.**



1. Log into NMSIIS
2. On the left hand side, navigate to the Inventory Module
3. Expand the module using the + sign and select Vaccines expand the Vaccines Module using the + sign.
4. Select Reconciliation
5. Select “Add Reconciliation”



On this screen you will fill out the fields labeled with an **RED\***. You will also have to fill out the Authorized by field or it will not let you create the reconciliation.



The screenshot shows the 'Vaccine Inventory Reconciliation' form. At the top right, there are 'Cancel' and 'Create' buttons. A yellow arrow points down to the 'Create' button. Below the title bar, a yellow warning banner states 'There are 4 Pending Inventory Transfers.' The form contains several fields, each with a red asterisk indicating it is required. Yellow arrows point to these fields: 'Inventory Location \*' (dropdown menu), 'Description \*' (text field), 'Authorized By' (dropdown menu with a user icon), 'Status' (dropdown menu), 'Begin Date \*' (calendar icon), and 'End Date \*' (calendar icon). The 'Begin Date' is set to 05/31/2016 and the 'End Date' is set to 06/27/2016. The 'Inventory Location' is 'TEST DEFAULT ORGANIZATION', 'Description' is 'CURRENT MONTH', and 'Authorized By' is 'DEFAULT, DEFAULT ORG (-)'. The 'Status' is 'OPEN'.

# Example of a Aggregate Reconciliation

The following columns will need to be populated as they **will not** be pre-populated for you.

- 1. Aggregate Administered
- 2. Ending Inventory

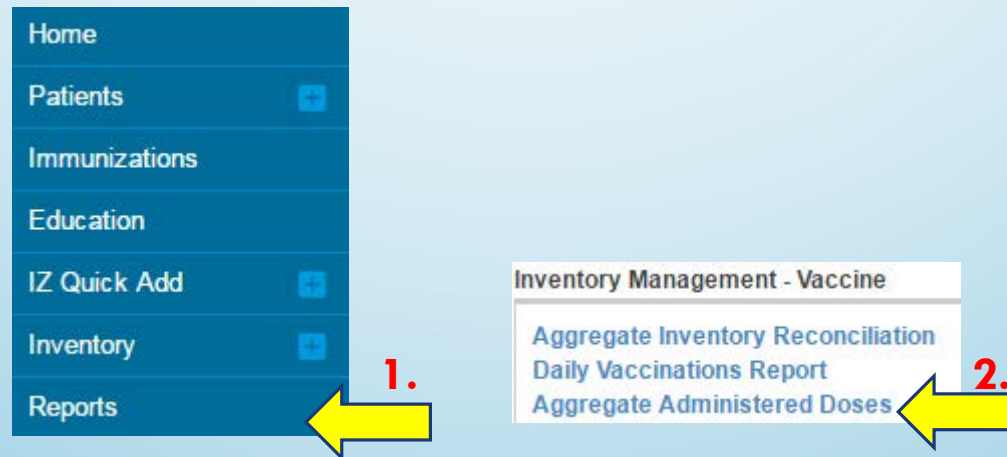
You will need to run a **Aggregate Doses Administered Report**.

**Note:** You may have the ability to run the doses administered report out of your **Electronic Medical Records (EMR)** you will need to inquire with your vendor if this report is available.

Beginning	Received	Aggregate Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 single dose vials) MIP • 84678-0131-01 • TEST1 • 09/18/2017						
0	2	<input type="text"/>	0	0	-2	<input type="text"/>
2 - Polio-IPV (IPOL (0.5 mL x 10 syrs)) FMC • 46281-0800-66 • TEST10 • 09/18/2017						
0	2	<input type="text"/>	0	0	-1	<input type="text"/>
<b>STATE</b>						
3 - DTaP-HepB-IPV (Pediarix (0.5 mL x 10 syrs) SKB • 58180-0811-52 • TEST2 • 09/18/2017						
0	10	<input type="text"/>	0	0	0	<input type="text"/>
4 - Hep A, ped/adol, 2D (Havrix (0.5 mL x 10 vials)) SKB • 58180-0825-11 • TEST3 • 09/18/2017						
0	3	<input type="text"/>	0	0	-1	<input type="text"/>
5 - Hep B, ped/adol (Recombivax (0.5 mL x 10 vials)) MSD • 00008-4861-00 • TEST4 • 09/18/2017						
0	3	<input type="text"/>	0	0	-3	<input type="text"/>
<b>VFC</b>						
6 - DTaP-IPV (Kinrix (0.5 mL x 10 vials)) SKB • 58180-0812-11 • TEST7 • 09/18/2017						
0	3	<input type="text"/>	0	0	-1	<input type="text"/>
7 - Influenza-LAIV Quad (Flumist 2014-2015 (10 pack - 1 dose sprayers)) MED • 86019-0301-10 • TEST9 • 09/18/2017						
0	2	<input type="text"/>	0	0	-1	<input type="text"/>
8 - PCV13 (Prevnar 13) PFR • 00005-1071-02 • TEST8 • 09/18/2017						
0	15	<input type="text"/>	1	0	0	<input type="text"/>

# To access the NMSIIS Aggregate Administered Doses Report

1. On the left hand side, navigate to the Reports Module located under Inventory and Management-Vaccine.
2. Select Aggregate Administered Doses.



Populate all fields that have a **RED \*** next to them.

➤ For the Vaccination Date Range  
You will use the same date range you used when you created your reconciliation.

Ex: From: 05/31/2016 Through:  
06/27/2016

➤ Click Run Report

➤ **Quick Tip:**

You can print the report in PDF format which it auto defaulted or you may print out in Excel format by:

➤ Clicking on the EXTRACT-Delimiter Radio Button and entering a , in the box

**Aggregate Administered Doses**

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. i

**Report Selection Criteria**

Provider \*  ▼

Clinic \*  ▼

**Vaccination Date Range \***


From:   Through:  x

Funding Source  ▼

Vaccine  ▼

Output Type  PDF  EXTRACT - Delimiter:

# This is an example of a PDF Aggregate Doses Administered Report

	<b>New Mexico State Immunization Information System (NMSIIS)</b> <b>Vaccine Inventory Reconciliation Worksheet</b>	September 16, 2016								
Description CURRENT MONTH Beg Date 05/31/2016 End Date 06/27/2016 Authorized By DEFAULT ORG DEFAULT Comments:	Practice/Facility: DEFAULT ORGANIZATION - TEST DEFAULT ORGANIZATION 1190 ST. FRANCIS DR SANTA FE, NM 87505 County: Santa Fe Phone: 505-476-3672 Fax: Contact: FELICIA R MARTINEZ Email: FELICIA.MARTINEZ2@STATE.NM.US									
Inventory Detail										
Line No.	Vaccine (Brand)   Mfg   NDC   Lot   Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Returned/Expired/Recalled	Inventory Wasted	Inventory Unaccounted	Inventory Difference (+/-)	Ending Inventory
PRIVATE PURCHASE										
1	Anthrax   MIP   64678-0131-01   TEST1   09/16/2017	0	2	0	0	0	0	0	(2)	
2	Polio-IPV   PMC   49281-0860-55   TEST10   09/16/2017	0	2	0	0	0	0	0	(2)	
STATE										
3	DTaP-HepB-IPV (Pedia   SKB   58160-0811-52   TEST2   09/16/2017	0	10	0	0	0	0	0	(10)	
4	Hep A, ped/adol, 2D   MSD   00006-4831-41   TEST3   09/16/2017	0	3	0	0	0	0	0	(3)	
5	Hep B, ped/adol   MSD   00006-4981-00   TEST4   09/16/2017	0	3	0	0	0	0	0	(3)	
VFC										
6	DTaP-IPV (Kinrix)   SKB   58160-0812-11   TEST7   09/16/2017	0	3	0	0	0	0	0	(3)	
7	Influenza-LAIV Quad   MED   66019-0301-10   TEST9   09/16/2017	0	2	0	0	0	0	0	(2)	
8	PCV13   PFR   00005-1971-02   TEST8   09/16/2017	0	15	0	0	0	0	0	(15)	

If you have not done so already you will need to:

- Perform a physical count of your current on-hand inventory in your fridge/freezer.
- Print out a reconciliation report and compare it to your physical on-hand inventory.

➤ **Quick Tip**

Writing on this sheet can be helpful and make the process easier if you have a large amount of Inventory that needs to be reconciled and entered.

The screenshot shows the 'Vaccine Inventory Reconciliation' interface. At the top right, there are buttons for 'Cancel', 'Links', and 'Update'. A yellow arrow points to a button labeled 'Vaccine Inventory Reconciliation Worksheet'. Below this is a form with fields for 'Inventory Location', 'Description', 'Authorized By', 'Status', 'Begin Date', and 'End Date'. The main part of the interface is a table titled 'Inventory By Doses' with columns for 'Beginning', 'Received', 'aggregate administered', 'other uses', 'unaccounted', 'difference(+)', and 'Ending'. The table lists several vaccine items with their respective counts and status indicators.

Inventory Location	Description	Authorized By	Status	Begin Date	End Date
TEST DEFAULT ORGANIZATION	CURRENT MONTH	DEFAULT, DEFAULT ORG (-)	OPEN	05/31/2018	09/27/2018

Inventory By Doses	Beginning	Received	aggregate administered	other uses	unaccounted	difference(+)	Ending
<b>RECENT PURCHASE</b>							
1 - Anthrax (10 single dose vials) MIP - 04079-0191-01 - TEST1 - 09/19/2017	0	2	0	0	0	-2	0
2 - Polio-IPV (POL) (0.5 mL x 10 vial) PNC - 46261-0865-05 - TEST10 - 09/19/2017	0	2	0	0	0	-2	0
<b>DATE</b>							
3 - DTaP-HepB-IPV (Pediar) (0.5 mL x 10 vial) D10 - 58105-0211-02 - TEST2 - 09/19/2017	0	10	0	0	0	-10	0
4 - Hep A, pediarid, 2D (large) (0.5 mL x 10 vial) MSD - 00006-4631-41 - TEST3 - 09/19/2017	0	3	0	0	0	-3	0
5 - Hep B, pediarid (Recombinant) (0.5 mL x 10 vial) MSD - 00005-4661-02 - TEST4 - 09/19/2017	0	3	0	0	0	-3	0
<b>WIC</b>							
6 - DTaP-IPV (Kivexa) (0.5 mL x 10 vial) D10 - 58105-0212-11 - TEST7 - 09/19/2017	0	3	0	0	0	-3	0
7 - Influenza-LAV Quad (Flumist 2014-2015 (10 pack - 1 dose spray) MSD - 85019-0001-10 - TEST9 - 09/19/2017	0	2	0	0	0	-2	0
8 - PCV13 (Prevnar 13) PPR - 00006-1071-02 - TEST8 - 09/19/2017	0	10	0	0	0	-10	0



This example demonstrates entry of inventory total into both:

1. Aggregate Administered column and
2. Ending Inventory columns.
3. After you have completed updating all your numbers in the columns stated. Click Update at the top of your screen.

Vaccine Inventory Reconciliation

Cancel Links Update

There are 4 Pending Inventory Transfers

Inventory Location: TEST DEFAULT ORGANIZATION

Description: CURRENT MONTH

Authorized By: DEFAULT, DEFAULT ORG (-)

Status: OPEN

Begin Date: 09/31/2018 End Date: 09/27/2018

1. 2.

Inventory By Doses						
Beginning	Received	Aggregate Administered	Other Uses	Unaccounted	Difference (-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - AstraZenca (10 single dose vials) MIP - 94078-0131-01 - TEST1 - 09/19/2017						
0	2	0	0	0	-2	0
2 - Polio-IPV (IPOL (0.5 mL x 10 vial)) PNC - 49281-0800-05 - TEST10 - 09/19/2017						
0	2	0	0	0	-2	0
<b>STATE</b>						
3 - DTaP-HepB-IPV (Pediar (0.5 mL x 10 vial)) SHB - 58100-0811-02 - TEST2 - 09/19/2017						
0	10	0	0	0	-10	0
4 - Hep A, pediatric, 2D (Apta (0.5 mL x 10 vials)) MSD - 00094-4031-41 - TEST3 - 09/19/2017						
0	3	0	0	0	-3	0
5 - Hep B, pediatric (Recombivax (0.5 mL x 10 vials)) MSD - 00008-4981-00 - TEST4 - 09/19/2017						
0	3	0	0	0	-3	0
<b>VFC</b>						
6 - DTaP-IPV (Kinrix) (Kinrix (0.5 mL x 10 vials)) SHB - 58100-0812-11 - TEST7 - 09/19/2017						
0	3	0	0	0	-3	0
7 - Influenza-LAIV Quad (Flumist 2014-2015 (10 pack - 1 dose sprayers)) MSD - 85019-0201-10 - TEST9 - 09/19/2017						
0	2	0	0	0	-2	0
8 - PCV13 (Prevnar 13) PFR - 00006-1971-02 - TEST8 - 09/19/2017						
0	10	0	0	0	-10	0



After you click the “update” the screen will refresh and save your changes.

Your Inventory Difference Column should reflect zero (0) if all inventory was accounted for and decremented accurately.

**STOP**

In the example we are still showing an Inventory Difference in RED (-1) on Line Item 8.

**Your Question:  
What do I do now?**



Inventory By Doses						
Beginning	Received	Aggregate Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 single dose vials) MIP • 04678-0131-01 • TEST1 • 09/18/2017 ?						
0	2	-2	0	0	0	0
2 - Polio-IPV (IPOL (0.5 mL x 10 syrt)) PMC • 40281-0800-55 • TEST10 • 09/18/2017 ?						
0	2	-1	0	0	0	1
<b>STATE</b>						
3 - DTaP-HepB-IPV (Pediarix (0.5 mL x 10 syrt)) SHB • 58160-0811-52 • TEST2 • 09/18/2017 ?						
0	10	0	0	0	0	10
4 - Hep A, ped/adol, 2D (Havrix (0.5 mL x 10 vials)) SHB • 58160-0825-11 • TEST3 • 09/18/2017 ?						
0	3	-1	0	0	0	2
5 - Hep B, ped/adol (Recombivax (0.5 mL x 10 vials)) MSD • 00005-4681-00 • TEST4 • 09/18/2017 ?						
0	3	-3	0	0	0	0
<b>VFC</b>						
6 - DTaP-IPV (Kinrix (0.5 mL x 10 vials)) SHB • 58160-0812-11 • TEST7 • 09/18/2017 ?						
0	3	-1	0	0	0	2
7 - Influenza-LAIV Quad (Flumist 2014-2015 (10 pack - 1 dose sprayers)) MED • 00019-0301-10 • TEST9 • 09/18/2017 ?						
0	2	-1	0	0	0	1
8 - PCV13 (Prevnar 13) PFR • 00005-1971-02 • TEST8 • 09/16/2017 ?						
0	15	0	0	0	-1	14

In this example we can see that:

1. Beginning Inventory reflect zero (0) and
2. Inventory Received Reflect fifteen (15).

After re-reviewing our on-hand and what we received, it was discovered that a total of 15 was entered in error instead a total of 14.

Inventory By Doses							
Beginning	Received	Aggregate Administered	Other Uses	Unaccounted	Difference (+/-)	Ending	
<b>PRIVATE PURCHASE</b>							
1 - Anthrax (10 single dose vials) MIP • 64878-0131-01 • TEST1 • 09/18/2017	2	-1		0	-1	0	<input type="text"/> Reports
2 - Polio-IPV (IPOL (0.5 mL x 10 syri) PMC • 49291-0980-55 • TEST10 • 09/18/2017	2	-1		0	-1	0	<input type="text"/> Reports
<b>STATE</b>							
3 - DTaP-HepB-IPV (Pedia (Pediarix (0.5 mL x 10 syri) SKB • 58180-0811-52 • TEST2 • 09/18/2017	10	0		0	0	10	<input type="text"/> Reports
4 - Hep A, ped/adol, 2D (Vaepta (0.5 mL x 10 vials) MSD • 00006-4831-41 • TEST3 • 09/18/2017	3	-1		0	0	2	<input type="text"/> Reports
5 - Hep B, ped/adol (Recombivax (0.5 mL x 10 vials) MSD • 00008-4981-00 • TEST4 • 09/18/2017	3	-3		0	0	0	<input type="text"/> Reports
<b>VFC</b>							
6 - DTaP-IPV (Kinrix) (Kinrix (0.5 mL x 10 vials) SKB • 58180-0812-11 • TEST7 • 09/18/2017	3	-1		0	0	2	<input type="text"/> Reports
7 - Influenza-LAIV Quad (Flumist 2014-2015 (10 pack - 1 dose sprayers) MED • 60019-0301-10 • TEST9 • 09/18/2017	2	-1		0	0	1	<input type="text"/> Reports
8 - PCV13 (Pevnar 13) PFR • 00005-1971-02 • TEST8 • 09/16/2017	15	-10		0	-1	4	<input type="text"/> Reports

1.  value is 0  
2.  value is 15

### Inventory On Hand

PCV13 (Pevnar 13)	PFR 00005-1971-02 TEST8	09/16/2017 VFC	15 ?	Action
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## Steps to Adjust Inventory:

1. Navigate back to your On-Hand Inventory Module.
2. Click on the Action Item drop down for the vaccine.
3. Click Adjustment.



### On-Hand Inventory

Inventory Location: TEST DEFAULT ORGANIZATION | Status: ON-HAND  
Vaccine: (ALL) | Funding Source: (ALL)

Vaccine (Brand)	Mfg NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	Expiring Soon	Action
TEST DEFAULT ORGANIZATION - NM10 (Aggregate Reporter)							
PCV13 (Prevnar 13)	PFR 00005-1971-02	TEST8	09/16/2017	VFC	15	?	Action

3. Adjustment



Vaccine Inventory Adjustment Cancel Create

Add

1. →	Date	06/27/2016
	Inventory Location	TEST DEFAULT ORGANIZATION
	Vaccine   Mfg   NDC	PCV13   PFR   00005-1971-02
	Lot Number	TEST8
	Expiration Date	09/16/2017
	Funding Source	VFC
	Doses On-Hand	15
2. →	Reason	VTRCKS - OTHER
3. →	Modification	SUBTRACT
4. →	Doses Adjusted	1
	Container Id	
5. →	Comments	MIS ENTRY OF VACCINES RECEIVED ONLY RECEIVED 14 NOT 15

Clear

The Inventory Adjustment Screen will come up and you will need to populate the following fields:

1. Date (this date should fall within your reconciliation dates)
2. Reason
3. Modification (add or subtract option)
4. Doses Adjusted
5. Comments
6. Click Create

Once you return to your reconciliation, you will now see the Adjustment you just made reflected in your Other Uses column. Your Inventory Difference column is now zero...

Inventory By Doses	Received	Aggregate Administered	Other Uses	Unaccounted	Difference (+/-)	Ending
<b>PRIVATE PURCHASE</b>						
1 - Anthrax (10 single dose vials) MIP • 64078-0131-01 • TEST1 • 09/16/2017	2	-2		0	0	0
2 - Polio-IPV (IPOL (0.5 mL x 10 syr)) PMC • 49281-0860-55 • TEST10 • 09/16/2017	2	-1		0	0	1
<b>STATE</b>						
3 - DTaP-HepB-IPV (Pedia (Pediarix (0.5 mL x 10 syr) SKB • 58160-0811-02 • TEST2 • 09/16/2017	10	0		0	0	10
4 - Hep A, ped/adol, 2D (Havrix (0.5 mL x 10 vials)) SKB • 58160-0825-11 • TEST3 • 09/16/2017	3	-1		0	0	2
5 - Hep B, ped/adol (Recombivax (0.5 mL x 10 vials)) MSD • 00005-4981-00 • TEST4 • 09/16/2017	3	-3		0	0	0
<b>VFC</b>						
6 - DTaP-IPV (Kinrix (0.5 mL x 10 vials)) SKB • 58160-0812-11 • TEST7 • 09/16/2017	3	-1		0	0	2
7 - Influenza-LAIV Quad (Flumist 2014-2015 (10 pack - 1 dose sprayers)) MED • 66019-0301-10 • TEST9 • 09/16/2017	2	-1		0	0	1
8 - PCV13 (Prevnar 13) PFR • 00005-1971-02 • TEST8 • 09/16/2017	15	0	-1	0	0	14

# Congratulations!

You have now completed your reconciliation and now you are able to close your reconciliation by clicking the drop down option in the status field and choosing

1. Closed

2. Update to save your request.

1.



Vaccine Inventory Reconciliation

Inventory Location: TEST DEFAULT ORGANIZATION

Description\*: CURRENT MONTH

Authorized By: ADMIN, ELIZABETH (-)

Status: \*

- CLOSED
- OPEN
- CLOSED

Buttons: Cancel, Links, Update

2.



**You will now see your Reconciliation as Closed**




Search Results - 1 record(s)

Status	Description	Begin Date	End Date	Authorized By
INV: DEFAULT ORGANIZATION - TEST (Aggregate Reporter)				
Closed	CURRENT MONTH	05/31/2016	06/27/2016	

Buttons: View Report, View

# Ordering Vaccines

Vaccine Order 

Cancel Next

Add - Select Clinic

Clinic

Select Inventory Module

Select Vaccines

Select Orders:

Click "Add New Vaccine Order".

1. Select the **Clinic** placing the order.
2. Click **Next** to continue.



# Ordering Vaccines (cont.)

Add Vaccine Order Creation Process i Cancel Next 2

**Add**

Clinic:DEFAULT ORGANIZATION

**Primary Shipping Contact**

**Name:**  
**Phone:**  
**Fax:**  
**Email:**

**Shipping Address**

1190 ST. FRANCIS DR  
SANTA FE, NM 87505

**Delivery Information**

	Delivery Time 1		Delivery Time 2	
	From	To	From	To
Monday	08:00	11:45	14:00	17:00
Tuesday				
Wednesday	08:00	11:45	14:00	17:00
Thursday	08:00	11:30	13:00	16:00
Friday				
Saturday				
Sunday				

**Special Instructions:**NO SPECIAL INSTRUCTIONS

I have reviewed the above shipping information and I certify the information is correct.  1

1. Select checkbox to confirm information is correct.
2. Click **Next** to continue.

Note: If you need to change your contact and shipping information please submit a VFC Change of Information Form before placing your order. The form is located under Reports Module VFC Program Forms.

# Ordering Vaccines (cont.)

Edit

Submit To VFC Program Update Cancel

[View Vaccine Inventory Reconciliation](#)

Clinic  
TRAINING IMM CLINIC

Order Number Order Date Order Status Priority Reason Date Submitted to VTrckS  
[ ] [01/31/2015] [IN WORK] [ ] [MM/DD/YYYY]

Clinic Comments  
[ ]

VFC Program Comments  
[ ]

Vaccine | Mfg | NDC | Brand/Packaging  
DTAP-IPV (KINRIX) | SKB | 58160-0812-11 | KINRIX (0.5 ML X 10 VIALS) [ ]

Intent Quantity of Packages Doses Per Package Total Doses Cost Per Package Total Cost (\$)  
PEDIATRIC [v] [2] [10] [20] [38.50] [770.00]

Add to Order [ ]

Vaccine	Mfg	NDC	Brand/Packaging	Intent	Quantity of Packages	Doses Per Package	Total Doses	Cost
Polio-IPV	PMC	49281-0860-10	IPOL (5.0 mL vial)	PED	2	10	20	249.20

Total Doses Total Cost  
[20] [\$249.20]

Delete Submit To VFC Program Update Cancel

1. Begin typing a vaccine, manufacturer, NDC, or brand. It will auto populate the field for you.
2. Select a vaccine from the list.
3. Indicate **Intent** and **Quantity of Packages**.
4. Click **Add to Order**.
5. Enter any **Comments**.
6. Click to **Submit to VFC Program**

# Receive Vaccine Orders

Pending VTrckS Shipments									
Order ID / Line Number	Date Shipped	Vaccine	NDC	Lot Number	Quantity Shipped	①	②	③	
2014102965432201 / 1	10/29/2014	Influenza Ped Quad P	49281-0514-25	05DG05879	40	Details	Receive	Dismiss	?
2014102965432201 / 2	10/29/2014	Influenza Quad Inj P	58160-0901-52	75FG45879	10	Details	Receive	Dismiss	?
2014102965432201 / 3	10/29/2014	Influenza- LAIV Quad	66019-0301-10	56JH54874	30	Details	Receive	Dismiss	?

Select Inventory Module

Select Vaccine Shipments

1. Click to view shipment **Details** for the line item.
2. Click to **Receive** the line item into inventory on-hand.
3. Click to **Dismiss** the shipment, e.g., line item was never shipped and received.

# Thank You for attending the training

We are here to help

Please call us at **Phone #: 505-476-8526** or **800-280-1618**

(Please press option 1 during regular business hours and option 4 for after hours and weekends.)



- Above is the phone number for the Help Desk system. Any problems you may encounter on NMSIIS and/or any questions that may pop up can be addressed by submitting a ticket.
- Make sure you give a detailed description of the issue so that we can resolve the problem promptly.
- Please remember to associate a valid email account and phone number to your ticket