

NEW MEXICO
DEPARTMENT OF
HEALTH

NEW MEXICO IMMUNIZATION INFORMATION SYSTEM



**INVENTORY TRAINING
PARTICIPANT GUIDE**

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Welcome

This course will cover part 1 of the inventory module to include on-hand inventory management, orders and returns.



New Mexico State Immunization Information System - NMSIIS

Once all required trainings and quizzes have been completed, you can request your login credentials that include your user name, a temporary password and a link to the information registry.

Because the security of patient information must be maintained, users must not share login credentials.



Learning Objectives

By the end of this course, you should be able to:

- How to use the inventory module.
- Understand On-Hand inventory.
- Define what Reconciliations are.
- How to add inventory.
- How to make an inventory adjustment.
- How to transfer inventory.
- How to place an order.
- Receive a vaccine order.
- Returning a vaccine order.

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Inventory Module

The Inventory module is accessed by expanding "Inventory" on the left-hand menu.

The screenshot displays the NMSIIS Training Site interface. On the left is a blue sidebar menu with the following items: Home, Patients, Immunizations, Education, IZ Quick Add, **Inventory** (highlighted with a red box), Vaccines, Vaccine Shipments, Locations, Clinic Tools, Program Tools, Reports, VTrckS Interface, Administration, and HL7 Management. Below the menu is version information: Version 18.1.20180504, Copyright © 2001-2018, Envision Technology Partners Inc., and a link for Third Party Notices.

The main content area includes:

- Default Provider/Clinic:** A dropdown menu showing "Provider/Clinic : ABQ BESTCARE PHARMACY, ABQ BESTCARE PHARMACY" and a search prompt: "SELECT A CLINIC BY TYPING PROVIDER, CLINIC, VFC PIN, OR CLINIC CODE".
- Login History:** A list of login events:
 - 7/9/2018 11:13:02 AM - SUCCESSFUL LOGIN
 - 7/9/2018 11:12:55 AM - INVALID PASSWORD
 - 7/3/2018 9:55:46 AM - SUCCESSFUL LOGIN
 - 7/3/2018 8:22:26 AM - SUCCESSFUL LOGIN
 - 7/2/2018 2:12:14 PM - SUCCESSFUL LOGIN
 - 7/2/2018 1:00:02 PM - SUCCESSFUL LOGIN
- Notifications:** A message with a warning icon: "There are currently no pending notifications."
- News:** A news item dated [05/03/2016] titled "Welcome To Our New NMSIIS Training". The content features a large word cloud with "TRAINING" as the central, largest word. Other words include: KNOWLEDGE, GOAL, SKILLS, EDUCATION, IMPROVEMENT, COMPETENCIES, RESULT, JOB, TEACHING, PROFESSIONAL, CAPACITY, QUALIFICATION, SPECIFIC, ACQUISITION, DEVELOPMENT, PERFORMANCE, SOFTWARE, PRACTICAL, SCHOOL, FEEDBACK, CONTENT, PERSONAL, CAPABILITY, VOCATIONAL, and PROFESSIONAL.

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By expanding "Vaccines" you will be able to access different functions of the inventory module.

The screenshot displays the New Mexico Immunization Program software interface. At the top left is the logo for the New Mexico Immunization Program, featuring a stylized sun with colorful rays. Below the logo is a vertical navigation menu with the following items: Home, Patients (+), Immunizations, Education, IZ Quick Add (+), Inventory (-), Vaccines (-), Vaccine Shipments, Locations, Clinic Tools (+), Program Tools (+), Reports, VTckS Interface (+), Administration (+), and HL7 Management (+). The 'Vaccines' item is highlighted with a red box, and a red arrow points from it to a larger, expanded view of the 'Vaccines' menu. This expanded menu, also outlined in red, lists the following options: Inventory (-), Vaccines (-), On-Hand, Electronic Decrementing, Reconciliation, Vaccine Orders, Vaccine Returns, Flu Prebook, Vaccine Shipments, and Locations. At the bottom of the main interface, the version number 'Version 18.1.20180504', copyright information 'Copyright © 2001-2018', and the company name 'Envision Technology Partners Inc.' are displayed, along with a link to 'Third Party Notices'.

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On-Hand Inventory

The Inventory On-Hand Screen is a quick way to view all the inventory items on hand at every Inventory Location within your organization.

Vaccine Inventory On-Hand [Learn More](#) Links Add New Inventory

On-Hand Inventory

There are 3 Pending Inventory Transfers.

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

PCV13 (Prevnar 13) PFR 00005-1971-02 654-536284-368521 12/31/2018 PRIVATE PURCHASE 14 ?

INV: ABQ BESTCARE PHARMACY

Action

Reconciliation

Vaccine Inventory Reconciliation [Learn More](#) Add Reconciliation

Search Criteria

There are 3 Pending Inventory Transfers.

Inventory Location: (ALL) 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

The inventory reconciliation feature in NMSIIS provides a spreadsheet-based view to assist in the process of reconciling the inventory transactions in the system with the actual inventory that is on hand in your refrigerator.

As inventory is added, adjusted, administered, and transferred, the system automatically summarizes this data.

Vaccine Orders

Providers and clinics participating in the Vaccines for Children program or other state funded program will have access to the Vaccine Inventory Order and the Vaccine Returns Screens. The Vaccine Inventory Order Screen is a quick way to view all the vaccine orders for every clinic within your organization.

Vaccine Orders [Learn More](#)

[Add New Vaccine Order](#)

Search

Clinic (ALL) ▼	Order Status (ALL) ▼	Order Type (ALL) ▼
Order Date Range From: 04/09/2018 📅 Through: 07/09/2018 📅		Date Submitted to VTrckS Date Range From: MM/DD/YYYY 📅 Through: MM/DD/YYYY 📅
Previous Criteria		Clear Search

Returns

The Vaccine Returns Screen is a quick way to view all vaccine returns for one or more clinics.

Vaccine Returns [Learn More](#)

[Add New Vaccine Return](#)

Search

Clinic (ALL) ▼	Return Status (ALL) ▼	
Return Reason ▼	Return Type ▼	
Return Date Range From: 04/09/2018 📅 Through: 07/09/2018 📅		Date Submitted to VTrckS Date Range From: MM/DD/YYYY 📅 Through: MM/DD/YYYY 📅
Previous Criteria		Clear Search



Vaccine Shipments

The Vaccine Shipments features in NMSIIS provide the ability to receive vaccine orders.

Vaccine Inventory Shipment [i Learn More](#)

Add Inventory Shipment

Search Criteria

Inventory Location *	Inventory Location Status *	Shipment ID
(ALL INVENTORY LOCATIONS) <input type="button" value="v"/>	(ALL) <input type="button" value="v"/>	<input type="text"/>
		<input type="button" value="Search"/>

Locations

The inventory location screen allows the user to maintain inventory locations. An inventory location is a physical storage location that contains the actual inventory for one or more clinics. All inventory transactions are associated with an inventory location - therefore, inventory locations must be defined to make use of the inventory module.

There is no limit to the number of inventory locations a user can create, but a clinic must have at least one inventory location associated with it to give vaccinations or administer treatments.

Inventory Locations [i](#)

Add Inventory Location

View

Code	Name	Status
IABP5794	INV: ABQ BESTCARE PHARMACY	ACTIVE <input type="button" value="?"/> <input type="button" value="View"/>

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Add Inventory

Once you have an inventory location created you can go ahead and add vaccine inventory through the on-hand option

Click the add new inventory button

Vaccine Inventory On-Hand [Learn More](#)

Links [Add New Inventory](#)

On-Hand Inventory

 There are 3 Pending Inventory Transfers.

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	
INV: ABQ BESTCARE PHARMACY								
PCV13 (Prevnar 13)	PFR	00005-1971-02	654-536284-368521	12/31/2018	PRIVATE PURCHASE	14		Action

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On this screen you will need to enter all the required fields.

Vaccine Inventory [Learn More](#)

Cancel Create

View

Date/Time *	<input type="text" value="07/10/2018"/> <input type="text" value="HH:MM AM/PM"/> (HH:MM A/P)
Inventory Location *	<input type="text" value=""/>
Vaccine Mfg NDC Brand *	<input type="text" value=""/>
Lot Number *	<input type="text" value=""/>
Expiration Date *	<input type="text" value="MM/DD/YYYY"/>
Funding Source *	<input type="text" value=""/>
Doses Adjusted *	<input type="text" value=""/>
Container Id	<input type="text" value=""/>
Comments	<input type="text" value=""/>

Enter the effective date of this inventory adjustment. By default, the system will populate this field with the current system date.

From the list of values provided, select the Inventory Location for which an adjustment is to be made.

Choose the vaccine, manufacturer, NDC, and Brand that is to be added from the list of values and add the remaining information about the vaccine.

Once all the information has been entered you will click the create button.

Vaccine Inventory [Learn More](#)

Cancel Create

View

Date/Time *	<input type="text" value="07/10/2018"/> <input type="text" value="HH:MM AM/PM"/> (HH:MM A/P)
Inventory Location *	<input type="text" value="ABQ BESTCARE PHARMACY > INV: ABQ BESTCARE PHARMACY"/>
Vaccine Mfg NDC Brand *	<input type="text" value="DTAP-HEPB-IPV (PEDIA SKB 58160-0811-52 PEDIARIX (0.5 ML X 10 SYR)"/>
Lot Number *	<input type="text" value="G5464-3824"/>
Expiration Date *	<input type="text" value="07/31/2019"/>
Funding Source *	<input type="text" value="PRIVATE PURCHASE"/>
Doses Adjusted *	<input type="text" value="15"/>
Container Id	<input type="text" value=""/>
Comments	<input type="text" value=""/>



Adjustment

Back on the on-hand inventory screen you will now see the inventory associated to your site or sites. you can use the filter options to choose different views.

Vaccine Inventory On-Hand [Learn More](#) Links ▾ Add New Inventory

On-Hand Inventory

⚠ There are 3 Pending Inventory Transfers.

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
INV: ABQ BESTCARE PHARMACY							
DTaP-HepB-IPV (Pedia (Pediarix (0.5 mL x 10 syr)	SKB	58160-0811-52	G5464-3824	07/31/2019	PRIVATE PURCHASE	15 ?	Action ▾
PCV13 (Prevnar 13)	PFR	00005-1971-02	654-536284-368521	12/31/2018	PRIVATE PURCHASE	14 ?	Action ▾

If you need to edit or make an adjustment to your vaccine you can click on the action button. from the drop down, you can select from the available options, edit will allow you to make changes.

Selecting adjustment, can be used to increment or decrement inventory for any unique combination of criteria, this feature is vital to maintaining system inventory level, so it reflects physical inventory. An adjustment is not to be used in place of administering a vaccine.

Vaccine Inventory Adjustment [i](#) Cancel Create

Add

Date/Time: 07/10/2018 11:00 AM (HH-MM A/P)

Inventory Location: INV: ABQ BESTCARE PHARMACY

Vaccine | Mfg | NDC: DTAP-HEPB-IPV (PEDIA | SKB | 58160-0811-52

Lot Number: G5464-3824

Expiration Date: 07/31/2019

Funding Source: PRIVATE PURCHASE

Doses On-Hand: 15

Reason: VTRCKS - OTHER

Modification: SUBTRACT

Doses Adjusted: 5

Container Id:

Comments: 5 DOSES ON BACK ORDER

Clear

To do an adjustment you will need to select the date the adjustment occurred, the adjustment reason and the doses adjusted.

Transfer

In certain circumstances you may need to transfer inventory.

Transferring inventory entails moving vaccine doses from one inventory location to another. Transfers must be initiated in the system by the inventory location that will be sending vaccine. You are required to notify your regional immunization program staff of all transfers of publicly funded vaccine.

Vaccine Inventory Transfer [Learn More](#)

Cancel Create

Add

Date/Time	<input type="text" value="07/10/2018"/>	<input type="text" value="11:40 AM"/> (HH:MM A/P)
Source Inventory Location		
Inventory Location	<input type="text" value="INV: ABQ BESTCARE PHARMACY"/>	
Vaccine Mfg NDC	<input type="text" value="DTAP-HEPB-IPV (PEDIA SKB 58160-0811-52)"/>	
Lot Number	<input type="text" value="G5464-3824"/>	
Expiration Date	<input type="text" value="07/31/2019"/>	
Funding Source	<input type="text" value="PRIVATE PURCHASE"/>	
Doses On-Hand	<input type="text" value="10"/>	
Container Id	<input type="text"/>	
Destination Inventory Location		
Inventory Location	<input type="text" value="ACME HOSPITAL > ACME- ABQ INV"/>	
Doses Transferred	<input type="text" value="2"/>	(The quantity will be immediately decremented from the Source Inventory Location and added to the Destination Inventory Location when marked as 'Received'.)
Equivalent Cases	<input type="text"/>	
Authorized By	<input <img="" alt="dropdown arrow" type="text" value="RODRIGUEZ, TIMOTHY (--)"/>	
Inventory Picked By	<input <img="" alt="dropdown arrow" type="text" value="RODRIGUEZ, TIMOTHY (--)"/>	
Inventory Picked Date	<input type="text" value="07/10/2018"/>	
QA Approved By	<input <img="" alt="dropdown arrow" type="text" value="RODRIGUEZ, TIMOTHY (--)"/>	
QA Approved Date	<input type="text" value="07/10/2018"/>	
Shipped Date	<input type="text" value="07/10/2018"/>	
Comments	<input type="text"/>	
		<input type="button" value="Clear"/>

Inventory Training - Participant Guide

The location receiving the transfer will need to accept the vaccine
 To do this a use can click on the hyper link notification.

Vaccine Inventory Transfer [Learn More](#)

Pending Incoming Inventory Transfers

Vaccine	Doses	NDC	Transfer Date	Lot	Funding Source	Mfg	Source Location	
Receiving Location: INV: ABQ BESTCARE PHARMACY								
Hep A, adult (Havrix (10 pack - 1 dose T-L syringes, No Needle))	15	58160-0826-52	07/26/2017	87UYJ	317 ADULT	SKB	INV: ALMA FAMILY MEDICINE	Received
Hep A, adult (Havrix (10 pack - 1 dose T-L syringes, No Needle))	967	58160-0826-52	08/25/2017	87UYJ	317 ADULT	SKB	INV: EDGEWOOD PEDIATRIC CLINIC	Received
Hep A, adult (Havrix (1 mL x 10 vials))	20	58160-0826-11	04/11/2016	242625	317 ADULT	SKB	INV: IR PHYSICIANS	Received

On this screen users will be able to view all incoming transfers as well as the status of outgoing transfers. To accept a transfer, you will need to select "received"

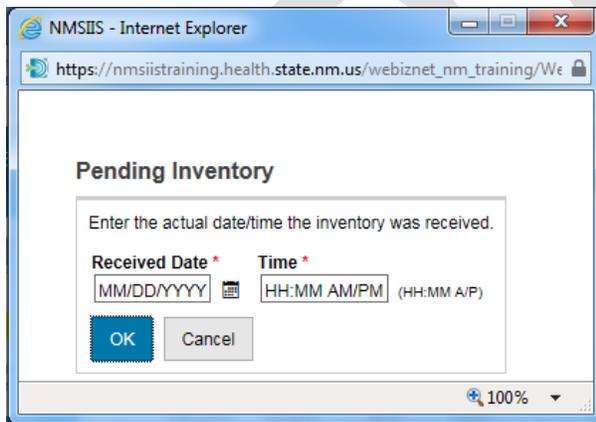
Pending Outgoing Inventory Transfers

There are no Pending Outgoing Transfer(s) available.

Reports

[Pending Incoming Inventory Transfers](#)

On the following popup you will need to enter the actual date the inventory was received.

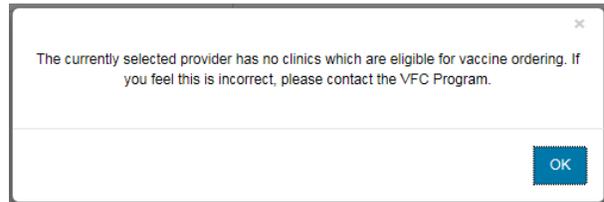


After you have received a transfer both inventory locations will have their on-hand inventory updated to reflect the transfer.

Ordering Vaccine

Now let's go over placing an order in NMSIIS. To place an order we will begin at the vaccine orders screen and select add new vaccine order.

if your default provider is not a VFC or State program provider you will get an error message and won't be able to place an order.



Vaccine Order [?](#) [Learn More](#)

Cancel [Links](#) [Update](#)

Edit

[View Vaccine Inventory Reconciliation](#)

Clinic: ACME- ALBUQUERQUE Last Approved Order Date: 04/19/2018

Order Number: 20180502753701 Order Date: 05/02/2018 Order Status: IN WORK Priority Reason: Date Submitted to VTrckS: MM/DD/YYYY

Clinic Comments:

VFC Program Comments:

Vaccine | Mfg | NDC | Brand/Packaging

BEGIN TYPING A VACCINE, MANUFACTURER CODE, NDC, OR BRAND/PACKAGING HERE

Intent	Quantity of Packages	Doses Per Package	Total Doses	Cost Per Package	Total Cost (\$)
<input type="text"/>					

Add To Order

Vaccine	Mfg	NDC	Brand/Packaging	Intent	Quantity of Packages	Doses Per Package	Total Doses	Cost	Fund Type
Hep A, ped/adol, 2D	SKB	58160-0825-11	Havrix (0.5 mL x 10 vials)	PED	10	10	100	1615.00	SPLIT
VFC	7	317	0	State	3	CHIP	0	Total	10/10
							Total Doses	Total Cost	
							100	\$1615.00	

Verify the contact information and delivery hours are correct, you can also add special instructions if you have any. If everything is correct you can check the acknowledgement and proceed to the next step. If information is incorrect or needs to be updated, you can contact the NMSIIS helpdesk or you can use the clinic tools module to update certain information. The clinic tools module will be covered in another video.

After your order has been submitted you will need to verify the status, your order status should read "submitted for approval"

Your order will go to program staff for review and processing.



Returning Vaccine

Next we'll talk about returning vaccine. Similar to ordering, the returns feature is only usable for VFC and state programs.

A vaccine return will need to be completed for each vaccine and reason, for example, you would do one return for dtap that was expired and another return for dtap that was wasted. Start by selecting the clinic. Verify the information and click the acknowledgement.

Vaccine Returns [?](#) [Learn More](#) Cancel Links Update

Edit

Clinic: ACME- ALBUQUERQUE | Last Approved Return Date: MM/DD/YYYY

Return Number: R05022018753700 | Return Status: IN WORK | Return Type: RETURN ONLY | Return Reason: OTHER | Date Submitted to VTrckS: MM/DD/YYYY

Return Created Date: 05/02/2018 | Number of Shipping Labels: 1 | Label Shipping Method: EMAILED TO PROVIDER EMAIL STORED IN VTRCKS | Description:

Clinic Comments: TEST

VFC Program Comments:

Vaccine | Mfg | NDC | Brand/Packaging | Funding Source | Lot Number | Expiration Date | Doses Remaining | Doses Returning | Add Return

BEGIN TYPING A VACCINE, MFG CODE, NDC, BRAND/PACKAGING, FUNDING SOURCE, LOT #, OR DATE HERE

Vaccines To Return

Vaccination	Mfg	NDC	Brand/Packaging	Funding Src	Lot Number	Expiration Date	Doses Remaining	Doses Returned
DTaP (Daptacel)	PMC	49281-0286-10	Daptacel (0.5 mL x 10 vials)	VFC	1050	03/01/2019	8	1

on the next screen, begin by typing a vaccine, manufacturer or NDC. Then select from the inventory on hand. Enter the number of doses being returned and click add return. Once completed, doses will automatically be removed from the on hand. Program will review and approve you return. Under certain circumstances program may reject a return at which point the doses will be added back to the on hand until the issue has been resolved.

This concludes this portion of the inventory module.

Additional Resources

NMSIIS Online Help Guide

https://nmsiis.health.state.nm.us/webiznet_nm/WebCode/Reports/ReportSteam.aspx?REPORT_GUID=6d066f74-6c23-e611-8136-001dd80017be

NMSIIS Immunization Program Overview

https://nmsiis.health.state.nm.us/webiznet_nm/WebCode/Reports/ReportSteam.aspx?REPORT_GUID=30c7a3c9-6c23-e611-8136-001dd80017be

NMSIIS Quick Reference Guide - Standard User

https://nmsiis.health.state.nm.us/webiznet_nm/WebCode/Reports/ReportSteam.aspx?REPORT_GUID=44b08324-8a47-e611-8136-001dd8001407

NMSIIS Policies and Procedures

<https://nmhealth.org/publication/view/help/929/>

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