



VIMS

User Guide

v5.16.5



Support Services

See the sections in this document for information about specific troubleshooting tips.

For general support on this product, contact your system administrator or help desk. The contact information for some states/organizations is available on the **Answers > Answer Line** pop-up window.

User Documentation, Videos, and Training Materials

Depending on your state or organization, you can access user documentation, videos, and other training materials by clicking **Answers** on the application's menu on the left-hand-side, and then on the related link.

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This documentation describes the following Scientific Technologies Corporation software:
VIMS 5.16.5

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Table of Contents

Introduction	1
Supported Platforms	1
IWeb Registry Application Features	2
IMS Administration Module Features	2
Mass Immunization Module Features	3
School Nurse Module Features.....	3
Provider Recruitment and Tracking Module Features.....	4
Application Access Authorization.....	4
Access Levels / Permissions	5
Login / Logout	6
Prerequisites	6
Home Page.....	6
Sign Up for Provider Enrollment/Vaccination Campaigns	6
Log in to VIMS	7
Forgot Password	7
Accept (or Decline) the Confidentiality Agreement.....	8
Select an Application	8
Select an Organization (IRMS)	8
Select a VFC PIN	9
Messages	9
View Messages (Orders Placed on Your Behalf)	9
Set Message Menu Permissions.....	10
Create a Message	10

Change/Reset Password	10
Change Password	10
Reset Password (New Users)	11
Add Links to Favorites Menu	12
Add a New Link to the Favorites Menu	12
Edit a Favorites Link	12
Remove a Favorites Link.....	12
Tennessee Provider Registration	13
Pandemic Provider Registration	16
Log Out of the Application	16
VIMS Module and Activity Flows	17
VIMS Module and Activity Flow.....	17
VIMS Components.....	17
State Administrator Activity Flow	18
Provider Activity Flow	19
Placing Orders.....	19
Receiving Orders	20
Transferring Inventory	20
Advertising Transfers	21
Vaccinations.....	23
View/Add/Edit Vaccinations.....	23
Vaccination/Medicine Detail Page	27
Smallpox.....	30
Notes about Vaccine Contraindications, Global Exemptions, and Precautions	31
Mass Immunizations Module - Antivirals.....	32

School Nurse Vaccinations - Important Notes	32
Invalid and Warning Vaccination Reasons.....	32
Deferrals.....	34
Vaccination Forecasts	35
Vaccination Summary	38
Add Anonymous Vaccinations.....	39
Organizations (IRMS)	40
Select an Organization (IRMS)	40
Search/Add/Edit Organizations (IRMS)	40
Search for an Organization (IRMS).....	40
View/Print the Organization (IRMS) Report.....	41
Add a New Organization (IRMS).....	42
Edit an Organization (IRMS).....	51
Create/Modify Order Set from Organization (IRMS) Maintenance [Detail] Page	51
View or Add Notes	51
Redisplay Organization (IRMS) Search Results.....	52
Redisplay Organization (IRMS) Details.....	52
Organization (IRMS) Group Management.....	52
Create an Organization (IRMS) Group.....	53
Remove an Organization (IRMS) Group.....	53
Provider IWeb Enrollment.....	53
View/Update a Provider Enrollment Application	54
Print an Enrollment Application	62
Create an Organization (IRMS) from the Enrollment Application	62
View an Enrollment Form from the Organization (IRMS) Details Page	63

Facilities	64
Select a Facility.....	64
Search/Add/Edit Facilities	64
Search for a Facility	64
Add a New Facility	65
Edit a Facility	74
Create/Modify Order Set from Facility Maintenance [Detail] Page.....	74
View or Add Notes	74
Redisplay Facility Search Results	75
Redisplay Facility Details	75
Physicians/Vaccinators.....	76
Search for a Physician/Vaccinator	76
Add a New Physician/Vaccinator	77
Edit a Physician/Vaccinator	79
Add/Edit a New Physician/Vaccinator.....	79
Add a New Physician/Vaccinator	79
Edit a Physician/Vaccinator	81
Edit an Electronic Signature	81
Redisplay Physician/Vaccinator Search Results	82
Redisplay Physician/Vaccinator Details	82
Associate a Physician or Vaccinator with a Facility	82
Lot Numbers	84
Search/Add/Edit/Inactivate Lot Numbers	84
Search for a Lot Number	85
Add a New Lot Number.....	86

Edit a Lot Number and Add/Subtract Doses	87
Inactivate a Lot Number	90
Add to Scan Sheet	90
Redisplay Lot Number Search Results.....	90
Redisplay Lot Number Details.....	90
Inventory Reconciliation	91
Reconcile the Inventory	91
Reconciliation Reasons	93
Submit Monthly Inventory	95
Aggregate Vaccine Counts	95
View Inventory Lot & Offsite Logs	96
Lot Number Inventory Log	96
Lot Number Inventory Log - Offsite	97
Generate a Barcode	98
View/Print Inventory Lot Number Scan Sheet	98
Decrement Lots	99
Lot Decrementing Overview	99
Vaccination Updates.....	100
Correct Lot Decrementing	100
View Patient Vaccination Records from Search Results	103
Reconstitute a Smallpox Lot.....	103
Orders / Transfers.....	104
Inventory Alerts	104
Inventory That Has Expired or is About to Expire	104
Inventory Running Low	105

Order Notifications.....	105
Orders.....	105
View a List of Orders.....	105
Create an Order.....	106
Create an Order with Provider / Local Allocations.....	110
Approve or Deny an Order.....	111
Approve Provider / Local Allocation Orders.....	115
Receive an Order.....	115
Send an Order to VTrckS.....	117
Recreate VTrckS Files.....	118
View Approved Orders.....	118
Business Logic for Orders.....	119
Business Logic for Approval Queues.....	119
Business Logic for Manual Review.....	120
Transfers.....	122
Create a Transfer.....	122
Print a Transfer.....	123
Delete a Transfer.....	123
Approve or Deny a Transfer.....	124
Search History.....	124
Search for Orders, Transfers, Returns, or Wastage.....	124
View Order/Transfer/Return/Wastage Details.....	127
Export the Search Results.....	130
Receive an Order from the Search History.....	130
Send Automated Messages.....	130

Send a Message	130
Import VTrckS/McKesson Shipped Data	131
State/Local Vaccine Allocations	132
Add State/Local Vaccine Allocations.....	132
Add a New Row	134
Add or Edit Vaccine Allocations	134
Import Vaccine Allocations	136
Export Vaccine Allocations	137
Accountability Record Submission.....	137
Accountability on Create Order Page	137
View Accountability Records.....	137
Update/Receive Accountability Records.....	138
Return Vaccines	138
Reprint a Packing Slip	140
Remove or Delete a Return	140
Modify Order Set.....	140
Cold Storage Units	143
Add a Cold Storage Unit	143
Cold Storage (Physical) Location	144
Edit/Update a Cold Storage Unit	145
Enter Temperatures for Cold Storage Units.....	145
Change a Cold Storage Unit's Status to Active or Inactive.....	146
View Previously Saved Temperature's User, Date, and Time	147
Cold Storage Units on Provider Agreements.....	147
Export Cold Storage Unit Information	147

Enable the Freezer Options	147
Enable the Upload Temperature Data Option	148
Upload/Import Temperature Data	148
Send Temperature Data to the State	148
Provider Agreements	148
Search for and Approve Provider Agreements	148
View/Edit/Approve a Provider Agreement	149
View the Full PDF Agreement or Signature Page	154
View/Edit/Approve a Frozen Vaccine Certification	154
View the PDF of the Frozen Vaccine Certificate	155
Create an Organization (IRMS)	155
Delete a Provider Agreement Submitted in Error	155
Archive/Unarchive a Provider Agreement	155
Add a New Provider Agreement	155
Export a Provider Agreement	155
Export a Provider	155
Export a Provider or Practice Profile	155
Reports	157
Generate a Report	157
Reset Report Criteria	157
Export a Report	157
Print a Report	158
Send a Report to the System Administrator via Email	158
Create Mailing Labels	158
Return to the List of Reports	158

Facility Undefined Error	158
Schedule a Report	158
Reset Schedule Criteria	159
Return without Saving.....	159
Report Module	160
Report Module.....	160
Lot Number Summary Report.....	161
Lot Usage and Recall Report.....	163
Vaccine Lots to Expire Report	164
Daily Inventory Report	164
VFC Vaccinations Breakdown Report.....	165
Vaccine Administered Report.....	166
VFC Accountability Log Report	167
Inventory Transaction Report	169
Inventory Submission Report	170
Monthly Inventory Reconciliation Audit Report	170
Cost Report by Lot Number	171
Cold Chain Tolerance Exception Report.....	172
Order History Comparison Report.....	173
VOMS Vaccine Shipment Summary Report	173
VIMS Vaccine Shipment Summary Report	174
Vaccine Return Adjustment Notification Report	175
Aggregate Wastage Report	175
Vaccine Dispensed Report.....	176
Inventory Adjustment Report	176

Usage Tracking	177
Province Reports	178
Vaccine Shipping Invoice	178
Vaccine Location Report	178
Alberta Aggregate Wastage Report.....	178
Import / Export	180
Import Files (Upload).....	180
Batch Vaccinations.....	180
DTT/HL7	181
HL7 Realtime	183
VTrckS Upload	183
Upload Temperature Data.....	183
Export Files (Download)	184
Agg Reporting Exports	185
Reset Report Criteria.....	186
Create Export	186
Schedule Report.....	186
Create Report	186
Settings.....	187
Personal Settings	187
Personal Settings.....	187
Lot Default Settings	188
VIS Publication Date Default Settings	189
Vaccine Default Volume Settings.....	190
User Preferences Default Settings	190

Forecast Settings	192
HL7 Uploads Settings.....	193
HL7 Settings.....	193
General Settings	193
Update Settings	195
Observation Settings (ORU Only)	199
Query Settings (VXQ Only)	200
Record Export Options for Queries and Updates	201
Facility Settings	202
Glossary	205

Introduction

The IWeb Core application suite is a combination of applications that run on an Internet browser. These applications provide immunization resource management and administration tools to track patients, students, personnel ready to respond to a bio-event, entry of demographic and vaccination information, recruitment progress of potential providers to the registry, and the ability to generate reports.

The IWeb Core-Plus application suite consists of the following additional application modules:

- [IWeb Registry Application](#)
- [IMS Administration Module](#)
- [Mass Immunization Module](#)
- [School Nurse Module](#)
- [Provider and Tracking Module](#)
- [VIMS Module](#)

This guide is specifically for the VIMS module.

Supported Platforms

The supported platforms for VIMS are as follows:

What	Supported	Notes
Number of instances	Single only	
Java server platform	1.7	As of January 2016, Java 1.6 is no longer supported.
Operating systems	Linux Microsoft Windows	
Minimum RAM	8+ Gb for application server 16+ Gb for database	RAM requirements can vary based on the size of the state, the amount of traffic into the application, and the number of reports run simultaneously.
Minimum disc size	1 TB	
Application server	Tomcat 7	
Database	Oracle 11	Oracle 12c may be supported after August 2016.
Web browser	Internet Explorer 11	As of January 2016, Internet Explorer 8, 9, and 10 are no longer supported.

IWeb Registry Application Features

The **IWeb Registry** application provides patient immunization resource management and administration tools that work together to help perform patient immunization management tasks.

Depending on the user's access (authorization) level, the following can be performed:

- Search for patients in the central registry (also referred to as the state registry database, or the central database)
- Create and edit patient demographics (first name, last name, address, city, state, etc.)
- Create and edit vaccination records (current and historical)
- Create and edit names of physicians and vaccinators
- Create and edit vaccine inventory information (lot numbers, manufacturers, etc.)
- Run and print reports
- Submit queries and reports for Reminder Recall appointments
- Send imports to the central registry (upload external data to the central registry; i.e., billing systems, vital records, Medicaid, etc.)

IMS Administration Module Features

The **IMS Administration Module** is used to create and set up the following categories within the IWeb Core-Plus suite of applications:

- Settings
- User Management
- Value Definitions
- Patient Management
- Vaccine Management
- *Deduplication*
- School Nurse
- Arizona - Vital Records Export
- Child Care Settings
- Immunization Schedule Settings
- *SIF*

- Countermeasure and Response
- Accountability Requirements
- Site Administration

Mass Immunization Module Features

The **Mass Immunization (MI) Module** is used in the field to conduct quick entry of patient demographic and vaccination information, including inventory for dispensed medication gathered in mass immunization situations. The Mass Immunization application also has a stand-alone version referred to as **MISA** (Mass Immunization Stand Alone). For more information about MISA, see the documentation for that product.

Depending on the user's access (authorization) level, the following tasks can be performed with this module:

- Search for patients
- Create and edit patient demographics (first name, last name, address, city, state, etc.)
- Add vaccinations or medication distributions
- Set up the vaccine inventory
- Set up personal defaults per patient, vaccine lot inventory, and automatic population of city, state, and zip code
- Run and print reports

School Nurse Module Features

The **School Nurse Module** provides school nurses with a special level of access to view patient information and vaccinations, and to create annual reports for the Office of Public Health (OPH). Currently there are four different levels of access, depending on task involvement:

- School Nurse
- School Nurse / Facility Nurse
- School District Client
- School Nurse Coordinator
- Depending on the user access (authorization) level, the following tasks can be performed with this module:
- Search for patients
- Create and edit patient demographics (first name, last name, address, city, state, etc.)

- Add vaccinations and exemptions
- Set up personal defaults per patient, vaccine lot inventory, and automatic population of city, state, and zip code
- Search for and edit schools
- Add and edit student absences
- Run and print reports
- Export data via the CASA export

Provider Recruitment and Tracking Module Features

The **Provider Recruitment and Tracking Module** is an interface used to manage and track the recruitment progress of potential registry providers. The module can:

- Store the potential provider's information
- Track the provider through the various recruitment steps (forms completed, export written, trainings, etc.)
- Display a to-do list of the next activities or steps for each provider
- Generate the forms and labels used in the process
- Track the progress made by individual recruiters
- Provide reports detailing the status and throughput by each recruiter
- Provide additional uses through an integrated help desk tool, such as tracking provider issues, automatically providing user feedback, and reporting relationships between help desk calls and recruitment activities.

The final component of the module is a set of reports (some existing) and charts that detail the growth of the registry.

Application Access Authorization

The registry's system administrator is responsible for setting up user access to the application. Various access levels are available and different, depending on user tasks.

Depending on user access level, you will have either Client or View privileges. The major differences are:

- **Client** - Users with the Client access (authorization) level can read (view) and write (add new and modify existing) information.

- **View** - Users with the View access level can only read (view) information that is displayed on the screen. They cannot modify any information.

The next topic provides more details about the individual access levels and permissions.

Access Levels / Permissions

Although this list continually expands, some of the most common access levels and permissions are:

- County View
- Facility Client
- Facility View
- Health Promotions Client
- *IRMS* Client
- IRMS View
- Paper Data Entry
- Provider Recruiter
- Registry Client
- Registry View
- School District Client
- School Nurse
- School Nurse coordinator
- School Nurse - Facility Nurse
- Vender View

The following examples are permissions that can be granted to the access level to enable or disable certain privileges:

- IWeb Core
- Block Adverse Reaction
- Block Contraindication
- Block IWeb Core Access
- CDC Communication Access

If you have any questions about your access level or permissions, contact your state's system administrator.

Login / Logout

The home page that displays after you log in differs depending on your state, organization, and access level, but the general login steps are the same for all.

Prerequisites

The following steps should be taken before logging in to the application for the first time on any browser. A reminder also appears on the Login page. Refer to the browser's instructions for information on how to configure these settings.

- **Enable** your browser to **Accept Cookies**
- **Enable** your browser to allow **Scripting**
- **Disable** your browser's **Pop-Up Blocker**

Home Page

The Home page contains information specific to your state or organization, links to relevant websites, and other details such as the application's name and version number. You can return to the Home page at any time by clicking **Main > Home** from the menu on the left.

Sign Up for Provider Enrollment/Vaccination Campaigns

When campaigns are scheduled, this option appears on the Home page. If available, users do not need to be logged in to access the option.

TIP: The campaign name and title are populated from the **Administration > Properties > Vaccine Management > Provider Enrollment Campaign** Name property. See Administration Settings for more information.

Provider enrollment is a simple process for providers to easily enroll for various vaccination campaigns as needed. Users can either begin completing the form (which takes approximately 15-20 minutes), or print the instruction page.

The following information is needed to complete the form:

- Facility details - physical address, vaccine delivery access, and mailing address (if different from physical address)
- Contact details - names, email addresses, telephone and fax numbers

- Shipping details - days and times available to receive vaccine shipments
- Physician/vaccinator details - name, designation, medical license number, and national provider ID for each physician or vaccinator in your practice.
- Certified thermometer details
- Estimated number of patients to be vaccinated.

To sign up for the program, follow these steps:

1. From the Home page, click the **Sign up** link.
The Introduction/Instructions page appears.
2. Click one of the available buttons:
 - **Back** - Return to the previous page
 - **Print** - Print the instructions
 - **Continue** - Access the Provider Pre-Registration page

Log in to VIMS

To log in to the application, click **Main > Login** from the menu list on the left-hand side. On the Login screen that appears, enter your user name and password and click **Login**.

Click **Clear** to clear the fields and re-enter your user name and password.

Forgot Password

The Forgot Password link appears on the login page only if it has been enabled (**Administration > Settings > Password Rules > Show Forgot Password link at login**).

If you have forgotten your password, click the **Forgot Password** link. On the Forgot Password screen that appears, enter your user name and email address and click **Send**. Instructions on how to reset your password will be emailed to you, provided that your user name and email address match what was originally entered into the application when your account was first set up.

If the user name you entered does not match any user names on file for the application, an error message is displayed in red at the top of the screen:

Error: Submitted User Name does not match with User Name on file.

If the user name is valid but the email address is incorrect, this message displays in red at the top of the screen:

Error: Submitted Email does not match with Email on file.

If you are unable to reset your password, contact your system administrator or help desk.

Accept (or Decline) the Confidentiality Agreement

If your state has elected to require users to accept or decline the confidentiality (or security) agreement, the Confidentiality Agreement (or Security Agreement) page opens during your login process.

Read the title and the agreement, then click **Accept** or **Decline**:

- **Accept** - Clicking this button inserts your username and the date into a database table in order to log your acceptance, and then displays the next page in the login process. If the confidentiality agreement is later updated, you may need to read the updated version and accept it.
- **Decline** - Clicking this button logs you off the application and displays the STC Web - Invalid Session page. You will not be able to use the application if you decline the confidentiality agreement.

Select an Application

If your Organization (*IRMS*) or Facility uses more than one application, or other modules along with IWeb, you can easily switch between them using the **Main > Select Application** link on the menu.

NOTE: The default application is set using the Settings > Personal > User Preferences > Default Application setting. See the [User Preferences Default Settings](#) topic for more information.

To select a different application, click **Main > Select Application**, select the application from the drop-down list on the Select Application page, and click **Submit**.

Select an Organization (IRMS)

Use this link when you want to switch from one Organization (*IRMS*) to another and don't want to log out and back on again to do so.

To select an Organization (IRMS), simply click **Main > Select Organization (IRMS)**.

Once the Select Organization (IRMS) page opens, select the new Organization from the drop-down list and click **Submit**.

Select a VFC PIN

Use this link when you want to switch from one *VFC* PIN to another without logging out of the application and back in again.

To select or switch to another VFC PIN, simply click **Main > Select a VFC PIN** in the menu.

Once the VFC PIN page opens, select the new VFC PIN from the drop-down list and click **Submit**.

Messages

The **Messages** menu link only appears if the **Administration > Properties > Vaccine Management > Enable Automatic Messaging** option is selected (enabled). It allows the receiving Organization (*IRMS*) or Facility to view the automatic message containing the order number of an order prepared by a local or state approving Organization (*IRMS*), if they placed an order on the receiver's behalf.

View Messages (Orders Placed on Your Behalf)

In order to view messages, the user must first select the *VFC* PIN for which the order was placed (**Main > Select VFC PIN** on the menu). If applicable, a message stating *New messages to read* appears in red at the top of the page. Click **Main > View Messages** and the View Messages page opens.

The following columns appear on the View Messages page:

Column	Description
Read/Unread	Displays NEW or READ to indicate whether or not the message has been read or not.
Date	Displays the date in which the message first appeared in the message list.
Subject	Click the subject link to open the message on the Automatic Message page.
Delete	Select the checkbox to delete the message, and then click the Delete button.

To delete a message, select the checkbox for that message in the *Delete* column and then click the **Delete** button.

To view the message, click the message subject. The Automatic Message page opens and the message details are displayed. From here, you can click either:

- **Return to Messages** - Return to the View Messages list without deleting the current message.
- **Delete** - Delete the current message.

Set Message Menu Permissions

Administrative users can grant (or remove) the Create/Send Message permission for users by going to **Administration > User Management > Search / Add User**, searching for the username and clicking the user's name in the search results list, then clicking the **Update** button. On the Web User Maintenance [Update] page, select the **Create/Send Messages** permission in the Available Permissions box, and use the right arrow (chevron) button to move the permission into the Current Permissions box. To remove the permission, select it in the Current Permissions box and use the left arrow (chevron) button to move it into the Available Permissions box. Click **Update** when finished.

Create a Message

Authorized users can create new messages by clicking **Message > Create Message** from the menu. The Messaging page opens. Enter the information and click **Send** when finished. The following fields and options are available on this page:

Field	Description
Organization (IRMS)	Select the recipient Organizations (IRMS) from the list in the Unselected box and click the right arrow (chevron) button to move them to the Selected box. Do the opposite (and use the left arrow button) to remove them.
Facilities	Select the recipient Facilities from the Unselected box and click the right arrow (chevron) button to move them to the Selected box. Do the opposite (and use the left arrow button) to remove them.
Subject Line	Enter the subject line for the message or email.
Email / Message	Select either Email or Message. If Email is selected, only users from the selected Organizations and Facilities that have valid email addresses listed in the application are sent the email.
(message body)	Enter the body of the message or email.

If the Message option is selected, the message is sent to each user that meets the entered criteria, becoming available from the **Main > View Message** menu link the next time they log in. Otherwise, if the Email option is selected, the message is emailed to the users that meet the criteria and have valid email addresses listed in their account information.

Change/Reset Password

Users can change their password themselves using the **Change Password** link on the menu. Under circumstances, new users can be prompted via email to reset their password. See the information for each below.

Change Password

Your state or organization may have specific rules on how often you should change your password, but it should be changed at least every 90 days. To change your password, click **Change Password** on the menu on the left.

NOTE: Before you change your password, make sure your email address is up-to-date. Click the "here" link to go to the Personal Settings page. Click **Update** for the Update Contact Information section, add or edit your email address as needed, and click **Save**. Return to the Change Password page by clicking **Change Password** in the menu.

On the Change Password page, read any instructions that may be listed, and then enter your current password and a new password, then enter it again to confirm it. Click **Submit** after the passwords have been entered.

If any errors occur while changing your password, such as the current password is incorrect or the new password is too short, an error message will display in red at the top of the page.

If you decide not to change your password, click **Cancel** to abort the process and return to the Home page.

Reset Password (New Users)

New users can be sent an email request to reset their password if the following criteria are met:

- The **Administration > Settings > Password Rules > Only Allow User Created Passwords** option is selected (enabled).
- The **Administration > Settings > Properties > Email Settings > Updated password email text** textbox contains content that will be included in the email sent to users.
- An accurate email address exists for each user who will be sent the password reset request.

When the new user receives the email invitation to reset their password, they must click on the URL link included in the email. The Set New Password page opens. They will enter the information in the fields (all of the fields are required) and click **Submit**. (They can click the **Reset** button to clear the fields and start over.)

Field	Description
User Name	If not pre-populated, enter the new user's username. This field is required.
Email	If not pre-populated, enter the new user's email address. This field is required and must be a valid email address.
New Password	Enter the new password. If password administrative properties have been configured, an error message may appear indicating any of the following: Password must contain at least one uppercase letter Password must contain at least one lowercase letter Password must contain at least one number

Field	Description
New Password (again)	Enter the new password again.

Add Links to Favorites Menu

You can add links to the application pages you use the most often to the Favorites menu to provide easier access. The items included in the Favorites menu may vary depending on the state and which applications are used.

Add a New Link to the Favorites Menu

To add a frequently used page link to the Favorites menu, click **Favorites > Add/Edit Favorites** in the menu. The page that opens is organized by menu name and lists the available options per menu. The list of options differs depending on the applications and access level being used.

To add a new link to the Favorites menu, first locate the menu for the desired option and then click the checkbox to enable the option for the specific page. You can type in a new name for the label, too.

For example, to add the link to the Select Organization (*IRMS*) page to the Favorites menu as "Select Org", select the checkbox for "Select Organization (IRMS)" in the Main Menu: Main section, then erase "Select IRMS" in the Label textbox (which appears after selecting the checkbox) and type "Select Org" instead. When you are finished, scroll down to the bottom of the page and click **Save**. The new link appears in the Favorites menu with the new label ("Select Org"). The original link still appears under the menu name where it is always located.

Edit a Favorites Link

To edit the label for a link in the Favorites menu, click **Favorites > Add/Edit Favorites** in the menu. Scroll down to the page name (which is organized under the name of the menu where it always appears in the menu list) and change the text in the Label textbox. Leave the checkbox selected. Click **Save** when you are finished. The name of the link in the Favorites menu for that page updates to the new label you entered.

Remove a Favorites Link

To remove a link from the Favorites menu, click **Favorites > Add/Edit Favorites** in the menu. Scroll down to the page name (which is organized under the name of the menu where it always appears in the menu list) and deselect the checkbox. Click **Save** when you are finished. The link disappears from the Favorites menu.

Tennessee Provider Registration

Tennessee providers can register online for access to the Tennessee IWeb application by clicking the **Online Provider Registration Request** link on the home page. Clicking this link opens the TennIIS Provider Enrollment Application page, which the new provider can fill out and submit to request access.

Enter the information in the fields (see table below) and click **Save and Continue to Page 2**.

Field	Description
Full Access Read Only Access	Select whether the provider is requesting full access (default) or read-only (view-only) access to the application.
Practice Name	Enter the name of the practice. This field is required.
Address	
Street Address	Enter the first line of the street address. This field is required.
Street Address 2	Enter the second line of the street address, if necessary.
City	Enter the city name. This field is required.
State	TN is the default state, otherwise select the state from the drop-down list. This field is required.
County	Select the county from the drop-down list. This field is required.
Zip Code	Enter the zip code. This field is required.
Phone	Enter the phone number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111). This field is required.
Phone Extension	Enter the extension number associated with the phone number.
Fax	Enter the fax number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111).
Office Manager	Enter the name of the office manager or contact person.
Email Address	Enter the email address for the provider, office manager, or other contact person. This field is required.
Mailing Address (if different from above)	
Street Address	Enter or modify the first line of the mailing street address.
Street Address 2	Enter the second line of the mailing street address, if necessary.
City	Enter the city name. (Enter the zip code first to pre-populate the city field.)
State	TN is the default state, otherwise select the state from the drop-down list.
County	Select the county from the drop-down list. (Enter the zip code first to pre-populate the county field.)
Zip Code	Enter the mailing zip code.

Field	Description
Facility Type	Select the Facility type from the drop-down list. If Other is selected, enter a description in the Facility Type Comments field.
Facility Type Comments (if Other)	Enter a description of the Facility Type, if Other was selected from the Facility Type drop-down list.
Facility Type	
Does this practice see adults, children, or both?	Select Adult , Pediatric , or Both from the drop-down list. This field is required.
Does this practice provide obstetric care?	Select Yes or No from the drop-down list. This field is required.
Does this practice primarily provide inpatient care, outpatient care, or pharmacy services?	Select Pharmacy , Primarily Inpatient , or Primarily Outpatient from the drop-down list. This field is required.
Is this a multi-specialty group practice?	This question appears if the answer to the previous question is Primary Outpatient. Select Yes or No from the drop-down list. This field is required if it appears on the page.
Select the specialty that best describes this Primarily Outpatient practice.	This displays only if Outpatient is selected. Select a specialty from the drop-down list. This field is required if it appears on the page.
Select the sub-specialty that best describes this _____ practice.	This displays for certain specialties and is a required field if it appears on the page. Select a sub-specialty from the drop-down list.
Has this practice registered for TennIIS access in the past?	Select one of these options (this field is required): Yes this practice has registered for TennIIS access every year Yes this practice has registered in the past but has not accessed TennIIS in over 1 year No this is the first time the practice has registered for TennIIS access Don't know
Current Computer Hardware Setup	
Internet Access Type	Select the provider office's Internet access type from the drop-down list. Examples: Cable modem DSL T-1

After clicking **Save and Continue to Page 2**, the User Agreement page opens. (If there is an error on the first page, it will appear in red at the top of the page. Correct the error and click the button again to continue.)

The second page is the TennIIS User Agreement Form page. Enter the relevant information and click **Submit** when finished.

Field	Description
Primary Method of Report	Select the primary reporting method from the drop-down list: Direct Data Entry DTT Import Batch HL7 Realtime HL7 Paper
PMS Name	Enter the provider's PMS name.
Name of Vendor/Company	Enter the vendor or company name.
Staff: Last Name First Name Phone Email Privileges	For each staff member from the provider's office that needs access to the IWeb application, enter their last name, first name, phone number, and email address, and select whether they are to have View Privileges or Edit Privileges. Each field is required for each staff member to have access to the application.
Add More Staff Members	Select this option if you need more rows for additional staff members.
Provider: Last Name First Name Specialty Email Phone Medical License Number	For each authorized immunization provider, enter their last name, first name, specialty, email address, phone number, and medical license number. Each field is required for each authorized immunization provider to have access to the application.
Primary Contact	
Type	Select the primary contact type from the drop-down list. Examples: Primary Vaccine Coordinator Facility Primary Vaccine Coordinator Backup Vaccine Coordinator
First Name, Middle Initial, Last Name	Enter the first name, middle initial, and last name of the primary contact person.
Phone Number	Enter the primary contact person's phone number.
Phone Number Extension	If applicable, enter the primary contact person's phone number extension.
Fax Number	Enter the primary contact person's fax number.
Email Address	Enter the primary contact person's email address.

Toward the bottom of the page, in the Pandemic Influenza Vaccine Provider Network section, read the information and select one of the three options:

- **Yes**, include this practice in the Pandemic Influenza Vaccine Provider Network. This does not obligate the practice to provide vaccine, but will ensure we receive vaccine information directly if a pandemic is declared.

- **No**, this practice is not likely to administer vaccine during a pandemic influenza national emergency and does not need to receive vaccine information directly during a pandemic.
- **Don't know**, please ask again the next time I log in to TennIIS.

After clicking **Submit** at the bottom of the second page, the submission thank you page opens. On the submission thank you page, click **Print** to print the provider enrollment application for your records, or click **Done** to close the page.

For information about viewing and updating provider enrollment applications, see the [Provider IWeb Enrollment Applications](#) topic.

Pandemic Provider Registration

Pandemic Influenza Vaccine Provider Network registration is only available for some states.

Providers can register for the Pandemic Influenza Vaccine Provider Network only after they have created an IWeb account. Therefore, non-enrolled providers need to request access to the application prior to registering to become a pandemic provider. In some cases, providers can register for the Pandemic Influenza Vaccine Provider Network on the Provider Enrollment Application form.

To complete the Pandemic Provider registration process, click **Orders/Transfers > Provider Agreement** from the menu. On the Provider Agreement / Pandemic Agreement page, click **Pandemic Provider Agreement Add** toward the bottom of the page. The Pandemic Influenza Vaccine Provider Network page opens.

Read the information on the page about the Pandemic Influenza Vaccine Provider Network, select one of the three available options, and click **Submit**. The options are:

- **Yes**, include this practice in the Pandemic Influenza Vaccine Provider Network. This does not obligate the practice to provide vaccine, but will ensure we receive vaccine information directly if a pandemic is declared.
- **No**, this practice is not likely to administer vaccine during a pandemic influenza national emergency and does not need to receive vaccine information directly during a pandemic.
- **Don't know**, please ask again the next time I log in.

Log Out of the Application

The application will automatically log you out after a time period specified by your state or organization.

To manually log out, click **Main > Logout** in the menu on the left. A pop-up message may appear to prompt you to close the browser window for security purposes. If you do not close the browser at this time, you are returned to the Home page after a few seconds.

VIMS Module and Activity Flows

VIMS Module and Activity Flow

The Vaccine Inventory Management System (VIMS) module complements the CDC's Vaccine Tracking System (*VTrckS*). VIMS provides a convenient way to handle the orders directly from within the registry.

Most of the VIMS module's features are available from the **Orders and Transfers** menu, located along the left side of the application. From this menu, users with the correct access levels and permissions can monitor the Organization's vaccine inventory, and place or approve vaccine orders and vaccine transfers.

The goal of the VIMS module is to manage inventory for all of the providers in the registry. This allows state and local health jurisdiction administrators an electronic visibility to all providers in the state.

VIMS Components

The following are VIMS-related functions, but they are not always performed by the same person:

- Administration - located throughout this document
- Reconciliation - see [Inventory Reconciliation](#)
- Alerts - see [Inventory Alerts](#)
- Provider ordering - see [Orders](#)
- Order approval - see [Approve or Deny an Order](#)
- Order receiving - see [Receive an Order](#)
- Order transfers - see [Transfers](#)
- Vaccine returns - see [Return Vaccines](#)

The user access levels and permissions determine what each user can view and do within the application. A user with permission to place orders, for example, may not have permission to approve orders.

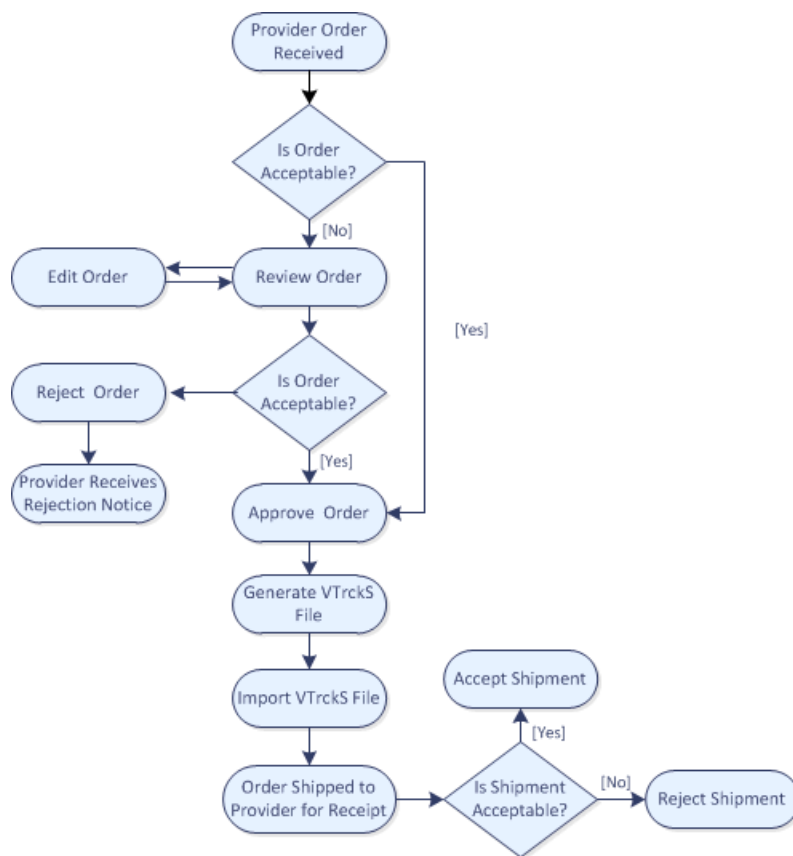
Specifically, the **Lot Numbers** and **Orders/Transfers** categories in the menu are from the VIMS module.

State Administrator Activity Flow

One of the primary roles of the state administrator is to fill provider orders. State bulk activity is defined as inventory belonging to a state-level Organization (*IRMS*). When the provider submits an order, it is either manually or automatically approved, rejected, or back-ordered.

If the order is approved, it is combined with other orders and sent to the state distribution center using *VTrckS*. The distributor fills the order and ships it directly to the receiving provider. The order shipment information is then updated to both the registry and the state administrator using *VTrckS*.

The following diagram shows the activity flow for filling orders at the state level:



The advantage to managing and filling inventory in the registry is that it allows the state to quickly flag all appropriate lots as *recalled* when a manufacturer issues a recall.

Provider Activity Flow

From the provider's perspective, the *VOMS* module simplifies the ordering process. VOMS improves data accuracy in the registry and alleviates the risk of vaccine shortages by electronically:

- Projecting order quantities
- Receiving orders without manually hand-keying the lot numbers
- Sending inventory status alerts

The provider has these main activity flows:

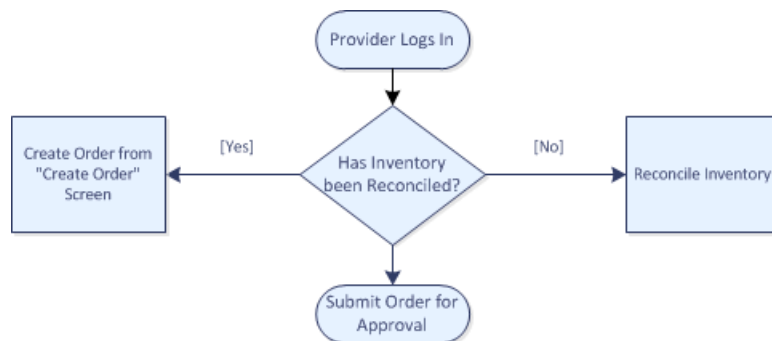
- [Placing orders](#)
- [Receiving orders](#)
- [Transferring inventory](#)
- [Advertising transfers](#)

Placing Orders

When the provider places the order, the vaccines that are low in inventory are automatically added to the order and the order quantities are recommended based on the "administrative" setting performed at the registry level. The projected usage equation takes both historical usage and seasonal variations into account.

The provider also reconciles their inventory prior to placing an order to ensure that the electronic quantities on hand match the physical inventory.

The following diagram shows the activity flow for placing an order:

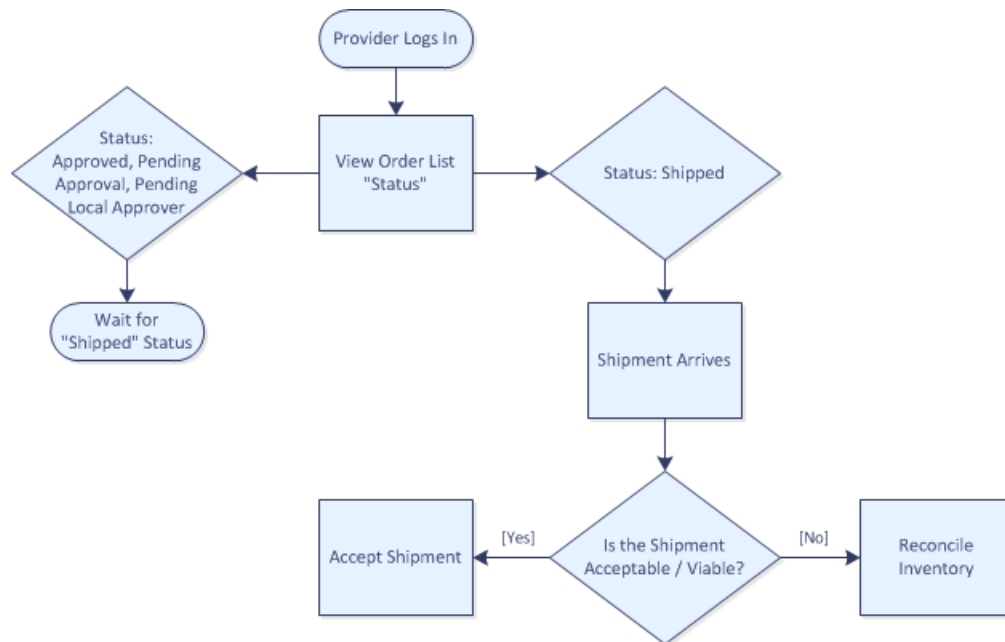


Receiving Orders

After the provider successfully submits an order, the state or local health jurisdiction either approves, rejects, or back-orders the order. The provider then receives an alert on the status of the order, and another alert to notify them that an order has shipped.

Once the order physically arrives at the provider's location, the provider receives the order into inventory.

The following diagram shows the activity flow for receiving an order:

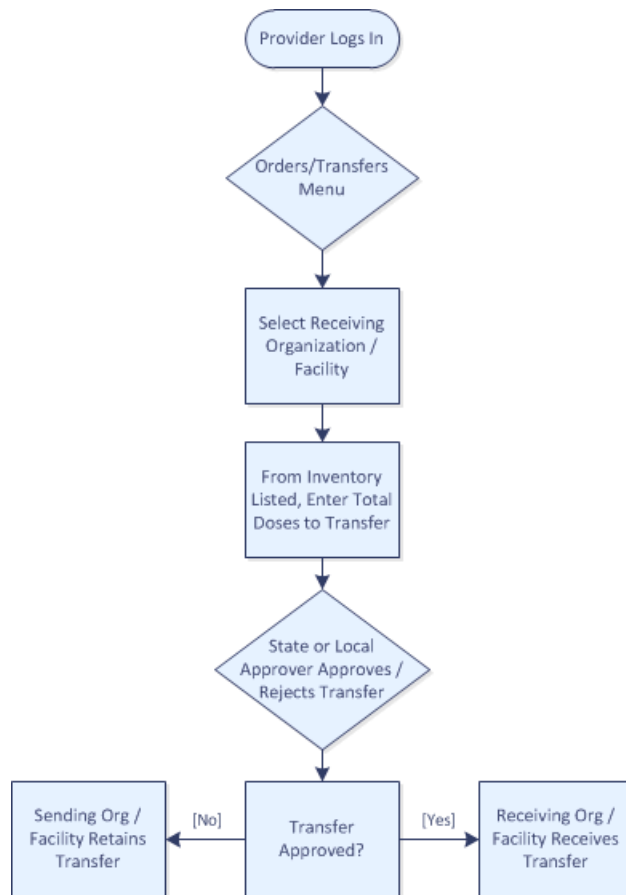


Transferring Inventory

Providers can also transfer inventory. In cases where provider inventory has expired or been wasted, the provider can transfer inventory back to the state so that the state can receive a refund on the excise tax for that inventory. For more information, see the state's guidelines on expired transfers.

The provider can also use the transfer functionality to move inventory between their sub-sites. Inventory can also be transferred to other providers by the state's request if a provider has inventory that cannot be used before it expires.

The following diagram shows the activity flow for transferring vaccine orders:



Advertising Transfers

Providers can advertise vaccines they wish to transfer out of their inventory. Advertising transfers will:

- Allow the provider to advertise to other providers that they have vaccines to transfer
- Remove the state from the process of identifying providers who may need the vaccine
- Decrease overall wastage of vaccines

To enable this function, a registry client must:

1. Select the Organization (*IRMS*).
2. Click **Administration > Properties > Settings**.
3. Click on **Vaccine Management**, select **Enable Vaccine Advertisement**, and then click **Save**.
Properties Saved Successfully will appear in red along the top of the page.

4. Click **Facilities > Search/Add** and search for your facility to ensure that vaccine transfers are allowed in the **Vaccine Management** section. If the function is disabled, click **Edit**, select the option to allow vaccine transfers, and then click **Save**.

The following steps continue the provider workflow for advertising transfers:

- Click **Orders/Transfers > Vaccine Advertisement**.

The View All Vaccine Advertisements section displays on the Vaccine Advertisement window, listing all of the vaccines that are currently being advertised by either your facility or by other facilities. Select **Advertise Vaccine for Transfer**, enter the information in the fields, and click **Advertise** to create your own vaccine(s) for transfer.

Update and **Delete** buttons are also available for vaccines that have already been advertised.

Vaccinations

From the Vaccinations menu section, authorized users can view, add, forecast, and summarize vaccination information.

View/Add/Edit Vaccinations

Before you can view or add vaccinations for a patient, you must first search for that patient, then click the **Vaccinations > View/Add** menu link. A page opens with information about the patient, along with the patient's vaccination forecast and a Vaccination View/Add section for seeing past vaccinations and adding new ones. In fact, authorized users can perform these actions on this page:

- View additional details about vaccinations, including comments
- Edit and/or delete vaccination information
- Add new vaccinations (shot administration)
- Add historical vaccination information
- Add smallpox history prior to 1990
- Add chickenpox disease (this is a state-configurable option)
- Add contraindications
- Add exemptions
- View vaccination forecast (if the option is enabled)

If the system administrator has configured vaccines to appear in alphabetical order, they appear in alphabetical order on this page. Administered vaccinations appear first, followed by unadministered vaccinations.

Note that patient vaccinations are re-forecasted before the Vaccination View/Add page opens. This eliminates problems encountered after an upgrade or before the registry forecast is complete. It also eliminates the need for users to force a forecast by editing a vaccination.

NOTE: Regarding the rabies vaccine, an exception for the vaccine level deduplication for rabies post-exposure vaccine series has been created to apply special logic that differs from the registry-wide setting established through **Administration > Settings > Properties > Deduplication > Dedup Vaccination Threshold**. The rabies series that needs to be accommodated regardless of the threshold setting is 0, 3, 7, 14, and 21-18 days. The exception is for the 0 and 3-day doses.

The first section on the page contains the patient demographic information in the following fields:

Field	Description
Name	The name of the patient whose vaccinations appear on this page.
Date of Birth	The patient's birthdate.
Guardian	The name of the patient's guardian.
SIIS Patient ID	The SIIS patient ID number.
Age	The patient's age in weeks, months, and years.
Status	The patient's status: Inactive, Moved Out of State, etc.
Print Page	Click this link to open the patient information in a separate browser tab/window. Use the browser's print function to print the page.

The next section is the Vaccination Forecast section. See the [Vaccination Forecasts](#) topic for more information.

The third section is the Vaccination View/Add section, containing the following fields, columns, options, and buttons:

Field	Description
Special Considerations on Record for Patient, Please Review Notes Below	This red Special Considerations message appears when one or more fields contain information related to contraindications, exemptions, precautions, allergies, or comments. If chickenpox history was added for the patient, the message <i>The patient was reported to have had the chickenpox disease</i> appears.
Vaccination Notification Symbols	<p>Special symbols representing specific information may appear next to vaccination dates. The symbols and their meanings are:</p> <ul style="list-style-type: none"> X - Indicates a vaccination outside of the ACIP schedule where revaccination is required. * - Historicals # - Adverse Reaction !1 - Warning (setting configured in Administration > Properties > Vaccination Settings > Warning Group 1 Indicator and Warning Group 1 Indicator Description) !2 - Warning (setting configured in Administration > Properties > Vaccination Settings > Warning Group 2 Indicator and Warning Group 2 Indicator Description) !3 - Warning (setting configured in Administration > Properties > Vaccination Settings > Warning Group 3 Indicator and Warning Group 3 Indicator Description) + - Unverified Historicals (information about the vaccination was provided, but not verified) ^ - Compromised Vaccination C - Confidential Services (vaccine was given as part of confidential services for a teen patient and should not be disclosed to parent)

Field	Description
	without patient consent) Blue text indicates the vaccination was administered or recorded in the user's facility.
Documented By	Select the name of the facility where the shot was administered.
Barcode Scanner	Displays depending on configuration settings. If a barcode scanner is installed and the Administration > Settings > Properties > Registry Settings > Enable Barcode Tools option is enabled (selected), this field will display <i>Ready</i> in green if the barcode is ready to be used.
(enter default date for vaccination)	Double-click in any date field next to a vaccine name to enter the default date. The date can be changed.
Vaccine Name	<p>The name of the vaccine. The vaccines listed on this page are known as <i>vaccine shortcuts</i>. If the vaccine you need is not listed on the page, select it from the drop-down list at the bottom of the list of vaccines.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTES: If the patient has a history of varicella reported, the word <i>History</i> appears in the first cell in the Varicella row of the vaccination shot grid. In addition, a <i>History of Chickenpox</i> message replaces the contraindication message at the top of the page.</p> <p>If you attempt to give a patient an administered shot of an unspecified vaccine type, a warning message appears at the top of the page and you need to do one of the following:</p> <ul style="list-style-type: none"> Cancel the vaccine type and select a specific administered type Mark the vaccination as historical versus administered Select the checkbox to Ignore warning and add the unspecified vaccination <p>If you attempt to add an administered vaccination with an active deferral, a warning message appears and the vaccination is rejected.</p> <p>A state-configurable option is available that displays a footnote and an exclamation symbol (!) when the 4th DTaP is between the 4th and 6th month (but not after the 6th month). The footnote message displays, <i>The minimum recommended interval between DTaP-3 and DTaP-4 is 6 months; however, DTaP-4 need not be repeated if administered at least four months after DTaP-3.</i></p> </div>
Date/Dose Administered	Dates and dose number of the shot given (e.g., 1-6). Note that depending on state configuration, you may not be able to enter more than one vaccination from the same vaccine family. Click on a date previously entered to view the details about that vaccination. Click on the field for the vaccine and dose (column number) to enter the default date; change it if necessary. Click Add Administered to open the Vaccination/Medical Detail page. See the Vaccination/Medication Detail section for more information about

Field	Description
	<p>this page.</p> <p>History to the right of the Varicella vaccine indicates the patient has a history of varicella.</p> <p>School Nurse users with the Vaccine Administrator permission are able to administer vaccines and record historical vaccinations from their School Nurse login. They also have full edit/delete permissions on vaccines entered by their Organization (IRMS) and vaccinations they enter do not appear as <i>unverified</i>.</p>
Do not take ownership when adding vaccinations	By default, the facility takes ownership of the patient record when they administer a vaccination. Select this option to prevent the Organization (IRMS) from taking ownership if the record. Instead, ownership remains with the previous owning IRMS. Note that this option does not appear on the patient if the user does not have permission to make changes to records, if the IRMS is blocked from ownership, or if the logged-in user already owns the patient record.
Add Administered	After entering the date for a vaccine, click this button to open the Vaccination Detail Add page. See the Vaccination Detail Add Page section for more information about the fields on this page.
Clear	Click this button to clear the selections made and dates entered you entered, to start over.
Contraindications	Click this button to add vaccination contraindications. The button turns red if the patient has any previously entered contraindications. See the Contraindications section below for more information about the fields on this page. To remove a contraindication from this section, click the Delete button for the specific contraindication in the list.
Add Chickenpox History	Click this button to mark the patient as having had chickenpox. The message, <i>The patient was reported to have had the Chickenpox disease</i> , appears on the page to indicate the patient's history of chickenpox. If you need to remove the chickenpox history for the patient (for example, if it was entered in error), click the Remove Chickenpox History button. Note that whether or not this button appears is state-configurable, as is the option of having the information be public or private.

The last section on the page is the Vaccine Contraindications / Exemptions / Precautions section, containing the following information:

Section	Description
Contraindications	If the patient has any contraindications, they are listed in this section and the Contraindications button turns red. To view the specifics of or add a new contraindication, click the Contraindications button. In the Add Contraindication section on the page that opens, select at least a vaccine and the contraindication from the drop-down lists. Optionally, select the facility where the contraindication was documented, select the Permanent option if the contraindication is a permanent one, enter the date the contraindication was noted, and/or add the patient's

Section	Description
	age when the contraindication first occurred. Click Add Contraindications to save the information and return to the Vaccination View/Add page. The new contraindication appears in the list. To remove a contraindication from the list, click the Delete button for that contraindication, either on the Vaccination View/Add page or on the page where contraindications are entered.
Exemptions	If the patient has any exemptions, they are listed in this section.
Precautions	If the patient has any precautions, they are listed in this section.
Allergies	If the patient has any allergies, they are listed in this section.
Comments	If there is any other relevant information about the patient or vaccinations, they are listed in this section. For example, if a campaign is incorrectly configured in MISA and the MISA data is imported via HL7 into IWeb, the campaign and tier information is appended to the Vaccination Comments in IWeb if they were not previously defined in IWeb.

To add new vaccination information, you can select from the Documented By list and/or change the default date as needed. Double-click in the empty field next to a vaccine, in the correct column related to the dose number, to automatically add the date.

Vaccination/Medicine Detail Page

The Vaccination/Medicine Detail page opens after you click on a previously entered vaccination date to view the details of that vaccination, or when you enter a date into a blank field and click **Add Administered**. Only authorized users can edit and delete vaccination information, so some users may not see all of the buttons on this page.

Only authorized users can edit vaccination records, and only the patient records owned by the user's Organization (IRMS) can be edited or deleted unless the IRMS Registry Client user has the Delete Administered and Historical Vaccinations permission assigned.

The fields on this page are as follows (and can be edited after clicking **Edit Record**):

Field	Description
Vaccine	The administered vaccine. Smallpox is included only for historical use. Forecasting does not display the smallpox vaccine until a historical vaccination has been given to the patient. The smallpox vaccination appears on the Patient Detail report.
Date Administered	The date the vaccination was administered at the facility.
Invalid Vaccination	If an entered vaccination is invalid, the invalid reason message appears here.
Historical	Indicates the shot was recorded by a facility or vaccinator but was administered elsewhere, by someone else. When editing the record, select Yes or No.

Field	Description
Confidential	This is a state-configurable option. Displays Yes or No depending on whether the vaccination is confidential or not. This setting impacts the Certificate of Immunizations report by either displaying all vaccinations (confidential setting = No) or not displaying the confidential vaccinations (confidential settings = Yes).
Manufacturer Lot Number Lot Facility Funding Source	<p>These fields work together. To edit the Manufacturer, click the Click to select link, then click the arrow button in the <i>Select</i> column in the Manufacturer pop-up window next to the name of the manufacturer. Otherwise, enter the information in the fields manually.</p> <p>Manufacturer - Name of the vaccine manufacturer Lot Number - Number of the vaccine lot Lot Facility - Location of the vaccine Funding Source - Indicates whether the vaccine was publicly supplied (public) or not (private). This is retrieved from the lot number information unless imported with a vaccination sent via batch with the data translation tool.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: There is a state-configurable option that prevents publicly supplied vaccines from being administered to VFC-ineligible patients. If the option is enabled and a user attempts this, a warning message appears, stating to either modify the VFC status or administer a privately supplied vaccine. Also, when the VFC eligibility date update is enabled for a state and a vaccination is added or edited, the updated VFC eligibility and lot publicly supplied (funding source) status is stored in the Vaccination tables. This allows a detailed history of VFC status changes to be kept for each patient.</p> </div>
Vaccinator	<p>Name of the person giving the vaccination. Select the name from the drop-down list.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTES:</p> <p>For Facility Client users, the Vaccinator list displays only vaccinators associated with the user's facility and doesn't include additional vaccinators from the Organization (IRMS) that do not have a facility defined. For Organization (IRMS) Client users, the list displays all vaccinators (assigned and not assigned).</p> <p>If configured, this may be a required field.</p> <p>If using barcode tools, the appropriate settings must be configured in order to see the scanning fields. When enabled, an extra field displays in order to scan the barcode. Click the field, point the scanner to the vaccinator barcode, and scan. After scanning, <scan barcode here> reappears in the field.</p> </div>
Organization (IRMS)	The Organization (IRMS) that owns the patient record. Automatically populated on the main Vaccination/Medicine page and not editable.
Facility	The Facility that owns the patient record. Automatically populated on the main Vaccination/Medicine page and not editable.

Field	Description
Anatomical Site	The location of the injection. Select from the drop-down list. When adding vaccinations for DTaP, MMR, IPV, and Varicella, this field may be automatically populated. It is also a setting in Personal Settings to allow for an optional minimum and maximum age, so the field may be prepopulated. Barcode scanning can be used if the appropriate settings are configured.
Anatomical Route	The placement of the injection. Select from the drop-down list. Examples: Intramuscular, nasal. This is configured in Personal Settings .
Dose Size	When enabled, indicates the dose size provided. Examples: <ul style="list-style-type: none"> • Full - default setting; equal to 1 dose • Double - equal to 2 doses • Half - equal to 0.5 dose
Volume (CC)	Vaccine amount administered. May be prepopulated if configured in Personal Settings, but can be modified.
Revaccination Reason	This is a state-configurable option. When a patient is revaccinated because the prior vaccination was compromised, this field allows the user to document the reason the vaccination was compromised. Select from the drop-down list. This field also appears on the patient's immunization history and on any reports that show the patient's complete vaccination record. In addition, the original vaccination that the revaccination replaced is not counted in the patient's vaccination forecast.
VFC Status	The patient's VFC status.
Adverse Reason	Indicates a reason for the adverse reaction to the vaccine. Select an option from the drop-down list, if displayed. To add or edit an adverse reaction, click the Add/Edit Adverse Reactions button toward the bottom of the main Vaccination/Medicine Detail page. Select the appropriate option on the page that opens, enter any comments, and click Save and Continue to return to the previous page. The newly edited or added adverse reaction appears in the field. Note that in some states, adverse reaction recording is not available because it is considered a violation of privacy.
District/Region	The district or region where the vaccination was administered.
Dates of VIS Publications	The publication dates of the vaccine information sheet (VIS). This field may be required.
Date VIS Form Given	The date the VIS form was given to the patient. It is assumed that this form is given at the time of the vaccination if another date is not explicitly specified. This may be a required field.
Ordering Provider	The ordering provider associated with the administered vaccine. Select from the drop-down list.
Comments	Notes regarding the vaccination.
Entered By	State-configurable field used when entering historical vaccinations; indicates the person who entered the information.
Entry Date	State-configurable field that shows the date and timestamp for

Field	Description
	when the historical information was entered.
Last Updated By	State-configurable field that indicates the username of the person who last updated the vaccination record.
Last Update	State-configurable field that shows the date and timestamp the vaccination record was last updated.
Validate Vaccination	Indicates whether or not the vaccination was verified. Displays when a vaccination is entered as <i>Unverified</i> , such as through the School Nurse module (School Nurse or School Nurse Coordinator). Authorized users can validate the vaccination by selecting this option. Also displays when validating a vaccination.
Validating Facility	Displays when the vaccination was entered as <i>Unverified</i> , such as through the School Nurse module (School Nurse or School Nurse Coordinator). Authorized users can validate the vaccination by selecting the option and selecting a facility from the drop-down list.
Decline ownership when saving this vaccination	When editing the vaccination record, select this option to maintain the patient record ownership with the previous Organization (IRMS) and Facility.

Click one of these buttons on the main Vaccination/Medicine Detail page to continue:

- **Cancel** - To return to the previous page without continuing.
- **Edit Record** - To edit the vaccination record.
- **Delete Record** - To delete the vaccination record.
- **Add/Edit Adverse Reactions** - To add or edit any adverse reactions the patient had to the vaccination.

On the Vaccination Detail Edit page, click:

- **Cancel** - To return to the previous page without saving any changes.
- **Reset Values** - To clear all of the fields and start over.
- **Submit Changes** - To submit the changes and add the vaccination information to the patient's vaccination record.

Smallpox

Smallpox has been added to the vaccination list and can be used for administration or to enter historical smallpox vaccinations. Forecasting does not display the smallpox vaccine until a historical vaccination has been given to the patient. The **Administration > Settings > Properties > Vaccination Settings > Display "Add Smallpox History" button** option must be enabled for the button to appear on the Vaccination View/Add page for authorized users. When added, the smallpox vaccination appears on the Patient Detail report.

To add a smallpox vaccination history, on the Vaccination View/Add page, click the **Add Smallpox History** button. The Smallpox Vaccination History page opens, with the following fields and options. Enter the information and click **Add History Now**.

Field	Description
Name	The name of the patient.
Date of Birth	The patient's birthdate.
Facility where history documented	Select the facility that documented the patient's smallpox history from the drop-down list.
Smallpox Vaccination History	<p>This information is required. Select one of the options to indicate the smallpox history:</p> <ul style="list-style-type: none"> • Patient received vaccination in childhood • Patient received vaccination in adulthood • Patient received vaccination and remembers data (enter the undocumented date in MM/DD/YYYY format) • Patient received vaccination and has a documented date (enter the documented date in MM/DD/YYYY format)

Smallpox Take Responses

There are three possible Smallpox Take Responses:

- **Smallpox Major Take** - indicates the smallpox vaccination took
- **Smallpox Equivocal Take** - indicates it cannot be determined if the vaccination took
- **Smallpox No Take** - indicates the smallpox vaccination did not take

Adding Smallpox Take Responses is similar to adding vaccinations. On the Vaccination View/Add page, select the appropriate take response for the responder by selecting the checkbox to the left of the take response description.

Notes about Vaccine Contraindications, Global Exemptions, and Precautions

In some states, contraindication recording is not available because it is considered a violation of privacy. To prevent patients who opt out of a specific vaccine from being forecasted and appearing on the reminder/recall list on the Contraindications page, the message *Parent or Patient Refusal: Personal or Laboratory Evidence of Immunity* appears instead of the actual contraindication text (or Vaccination Refusal).

A patient's forecast updates immediately when adding or deleting contraindications. However, if global exemptions are enabled, the patients do not forecast.

When adding contraindications, the selected vaccine determines which valid reasons are listed.

In order for the **Contraindications** button to display on the pages, the **Administration > Settings > Properties > Vaccination Settings > Display Contraindications on Vacc View/Add Screen** and **Display Contraindications on Vacc Summary Screen** options must be enabled (selected).

CASA only assesses coverage levels. Permanent contraindications and refusals are assessed as *incomplete coverage* for the specific antigen.

Mass Immunizations Module - Antivirals

The Vaccination/Medication table in the Mass Immunizations module is populated with antivirals that are available for selection as an administered countermeasure in Mass Immunizations and the Mass Immunizations stand-alone modules. An administrative setting (Administration > Settings > Properties > Mass Immunizations > Mass Immunizations Vaccine Display Label) is used to enable antivirals - select Vaccines and Medicines from the drop-down list. Antivirals/medications are not included on the list of available vaccines to administer in the core IWeb application, but they appear on the Vaccination View/Add page if they have been administered in Mass Immunizations. Both the Patient Detail Report and the Daily Patient Immunization List in Mass Immunizations include antivirals in their output.

School Nurse Vaccinations - Important Notes

When the Administration > Settings > Properties > School Nurse > Enable Vaccine Administration Permission option is enabled (selected), users with the School Nurse Vaccine Administrator permission can record administered vaccines and historical vaccinations from the School Nurse login. They also have full edit/delete permissions on vaccines entered by their Organization (IRMS). In addition, vaccinations administered by School Nurses with this permission do not appear as *unverified*.

Invalid and Warning Vaccination Reasons

The table below lists the Invalid or Warning reason descriptions. There are three groups of warnings:

- **Group #1:** Existing Warnings
- **Group #2:** All warnings not in Group 1 or 3
- **Group #3:** *Dose not required* type warnings

All three warnings are state-configurable in the **Administration > Properties > Vaccination Settings > Warning Group [#] Indicator** and **Warning Group [#] Indicator Description** settings.

NOTE: If the vaccination is both invalid and incorrectly administered, only the invalid reason displays.

#	Reason Description	Invalid or Warning
1	Minimal interval from previous dose not met	Invalid
2	Minimum age for this does not met	Invalid
3	Minimal interval from dose 1 not met	Invalid
4	Live vaccines not administered on same date must be separated by 28 days	Invalid
5	Antigen not found for this schedule	Invalid
6	Vaccine marked as compromised	Invalid
7	Patient age outside of recommended schedule	Invalid
8	Antigen not recommended for primary series	Invalid
9	Antigen recommended for booster dose only	Invalid
14	Vaccine not licensed in U.S.	Invalid
26	HPV Bivalent vaccine is not appropriate for male vaccination	Invalid
11	Minimum interval from previous dose not met but CDC does not recommend repeating this dose (Group 1)	Warning 1
12	Antigen administered off-label but CDC does not recommend repeating dose (Group 1)	Warning 1
22	The minimum recommended interval between DTaP-3 and DTaP-4 is 6 months. However, DTaP-4 need not be repeated if administered at least 4 months after DTaP-3 (Group 1)	Warning 1
23	The minimum recommended interval between TD and TDAP is 5 years. However, shorter intervals may be counted as valid (Group 1)	Warning 1
24	This patient is on the twinrix accelerated schedule (Group 1)	Warning 1
25	Seasonal influenza nasal and novel influ-H1N1-09 nasal should not be administered at same visit but CDC does not recommend repeating the doses	Warning 1
32	Rotavirus dose 1 administered at age greater than recommended age. CDC recommends completing series	Warning 1
33	PCV13 is recommended for children ages 14-59 mos. Previously complete for PCV7	Warning 1
15	TD administered at < 7 years of age (Group 2)	Warning 2
16	PPV23 Administered at < 24 months of age (Group 2)	Warning 2
17	DTaP administered at >= 7 years of age (Group 2)	Warning 2
18	TDAP administered at < 10 years of age (Group 2)	Warning 2
19	TDAP administered at > 64 years of age (Group 2)	Warning 2
20	Influenza, 36+ months administered at < 36 months of age (Group 2)	Warning 2
21	Influenza, 6-35 months administered at < 6 months of age or > 35 months of	Warning 2

#	Reason Description	Invalid or Warning
	age (Group 2)	
30	Influenza, 48+ months administered at < 48 months of age	Warning 2
31	Influenza, 18+ years administered at < 18 years of age (Group 2)	Warning 2
34	TIV (flu) high-dose administered at < 65 years of age	Warning 2
10	This additional dose not required (group 3)	Warning 3
13	Antigen not recommended for primary HIB series and CDC recommends disregarding in forecast	Warning 3
27	Multiple doses administered for single dose series. One does of TDAP is recommended (Group 3)	Warning 3
28	Multiple doses administered for single dose series. Revaccination for meningococcal recommended for high risk only (Group 3)	Warning 3
29	Multiple doses administered for single dose series (Group 3)	Warning 3

Deferrals

A patient can be deferred for a vaccination on the Vaccination View/Add page. Adding a vaccine deferral affects the reminder/recall. If a patient is not forecasted to receive the vaccine, they do not receive a reminder/recall for it. A report is available to retrieve all deferrals.

If a patient receives an administered vaccination in the family of the shot that was deferred, the deferral is automatically removed. If an administered vaccination matches a historical vaccination, the deferral is left in place.

Click the **Deferrals** button on the Vaccination View/Add page. The Vaccine Deferrals page opens. Enter the vaccine deferral information and click **Save**. Once a deferral is added, it can be deleted by clicking the **Delete** button for it.

The available fields on this page are:

Field	Description
Vaccine	Select the vaccine from the drop-down list. This field is required.
Dose Number	Enter the dose number. This field is required.
Documented By	Select the facility that is documenting the deferral from the drop-down list.
Reason	Select a reason for the deferral from the drop-down list. Examples: <ul style="list-style-type: none"> • Vaccine Shortage • Temporary Acute Illness
Start Date	Enter the deferral start date. The start date appears in the Date column on the Vaccine Deferral - Detail report.

Field	Description
End Date	Enter the deferral end date.

Vaccination Forecasts

The Vaccination Forecast feature allows users to view the shots that will be due for a specific patient (including invalid doses), their recommended dates, and their status.

Of note, smallpox has been added to the vaccination list for administration or historical recording of smallpox vaccinations. However, forecasting does not display the smallpox vaccine until a historical vaccination has been recorded for the patient. The smallpox vaccination appears on the Patient Detail report.

When Measles and Rubella are administered on the same day, a message appears indicating, *A vaccination from the same family as Rubella (and/or Measles) was entered for the same day.*

If the Personal Forecast setting has been configured to prevent certain vaccines from appearing due to the age setting (maximum age for immunizations), the forecast is hidden if the patient is over the maximum age.

A state may choose to adjust the ACIP schedule by using the Administration settings. Changes to the ACIP schedule appear in the patient's vaccination forecast.

A state-configurable option can also be set to not forecast a specific vaccine unless the first dose has been given.

Forecasting reflects the situations that are illustrated in the following table, as well as:

- If a patient received single antigens of Measles, Mumps and Rubella, the forecast does not show them in need of another MMR.
- If they do not receive all three components of the vaccine, or if they are due for a second MMR, they should still be recalled for an MMR.
- If a patient receives the single antigen vaccines, they should appear on the Universal Certificate and the Vaccination Summary, Vaccination View/Add print page, Patient Record Summary, and Patient Record pages.

Note that in the following table, the green middle section is the forecast section:

Vaccination Name	MMR1	MMR2	Measles2	Mumps2	Rubella2	Notes
No Vaccination	X					Single antigens are not forecasted until the patient receives the first dose of a single antigen.
MMR1	X					Single antigens are not

Vaccination Name	MMR1	MMR2	Measles2	Mumps2	Rubella2	Notes
						forecasted until the patient receives the first dose of a single antigen.
Measles1	X		X			Mumps and Rubella are not displayed since the patient has not received any of those antigens.
Measles2	X					The Measles vaccine is complete, so it no longer appears in the forecasting. However, MMR #1 is still not satisfied, so it remains in the forecasting. Mumps and Rubella are not displayed since the patient has not yet received any of those antigens.
Measles1, Mumps1, Rubella1		X	X	X	X	
Measles1, Mumps1, Rubella1, MMR1						All of the intervals for two doses can be met, then the MMR series is complete and all of the vaccines are removed from forecasting.

An alternate minimum interval to accept Tdap if it is administered at least two years from a previous dose (for a child ten years of age or older) has been added. The dose is not marked as invalid since it should not be repeated. However, the invalid dose reason screen displays a message that it was given too early but CDC does not recommend repeating the dose.

The vaccinations selected on the Forecast Settings page (**Settings > Forecast**) determine the vaccines that display in the patient's forecast. This is a global setting and the same vaccinations display for every patient.

There are two types of schedules, regular and accelerated. Based on the patient's existing vaccinations, the application automatically switches between the schedules to get the child up to date as recommended by the CDC.

NOTE: Unless otherwise stated by state-specific school entry requirements, the ACIP schedule indicates that in order for a child to get into school, the child must receive four doses of IPV unless the third dose is given on or after the fourth birthday.

[View a Patient's Vaccination Forecast](#)

Before you can view a patient's vaccination forecast, you must first search for the patient, then click the **Vaccinations > View/Add** or **Vaccinations > Forecast** menu link. Either

page opens with the Vaccination Forecast section for the patient toward the top of the page, under the patient information section. The Vaccination Forecast is also available toward the bottom of the Vaccination Summary page (**Vaccinations > Summary**).

Note that if a contraindication is marked as permanent, that vaccine is not included in the patient's forecast.

The columns in the Vaccination Forecast section are as follows:

Column	Description
Vaccine Family	The name of the vaccine family for the shots due for the patient.
Dose	<p>The dose number for the vaccine shot.</p> <p>If the Assume Childhood DTAP History after Age is Set for a Specific Age administrative option is enabled (selected), once the patient reaches the specified age, the forecast for DTAP/TDAP/TD reflects the booster dose by placing the letter <i>B</i> in the dose field instead of a dose number, regardless of whether or not the patient has completed the DTAP/TDAP/TD series.</p> <p>Example 1: A patient, age 21 years with an example DOB of 05/01/1974, has received these DTAP vaccinations:</p> <ul style="list-style-type: none"> • Dose 1 = 07/01/1974 • Dose 2 = 11/01/1974 • Dose 3 = 11/29/1974 • Dose 4 = 05/29/1975 • Dose 5 = 05/01/1978 <p>The patient's TDAP vaccine displays in the forecast as dose <i>1</i> because the recommended date for the child would be age 11.</p> <p>Example 2: A patient, age 21 years with an example DOB of 05/01/1974, has received these DTAP vaccinations:</p> <ul style="list-style-type: none"> • Dose 1 = 07/01/1974 • Dose 2 = 11/01/1974 • Dose 3 = 11/29/1974 • Dose 4 = 05/29/1975 • Dose 5 = 05/01/1996 <p>The patient's TDAP vaccine displays in the forecast as <i>B</i> because the recommended maximum date has passed.</p>
Recommended Date	<p>The recommended date for the shot. If the recommended date is more than one year before the current date, the actual date is hidden and the words <i>Past Due</i> display instead.</p> <p>There is a state-configurable option to forecast for HepA.</p>

Column	Description
Minimum Valid Date	The earliest date of validity for the shot. Forecasting always goes to the next flu season when two shots have been met when using the influenza split vaccine.
Overdue Date	The date the shot becomes or became overdue.
Status	<p>The status of the shot. Examples:</p> <ul style="list-style-type: none"> • Due Now - As of today's date, the patient's age falls between the recommended minimum age and the recommended maximum age for this dose and the absolute minimum interval has been met since the last dose. • Past Due - As of today's date, the recommended maximum age or the recommended maximum date for this dose has passed. • Up to Date - As of today's date, the patient is not due or past due. • Optional - This vaccine can be administered today. Although the usual recommended date has not been met, the minimum valid date for this dose has been met. This appears when the current date is between the minimum valid date and the recommended date.

Vaccination Summary

The Vaccination Summary page groups vaccinations by vaccine family and is used to view the vaccination series or single antigens of Measles, Mumps and Rubella completion. An example of a series is DTaP/DTP/DT/Td. All vaccines display on the Vaccination Summary page, including all childhood and travel vaccines.

If a patient receives the single antigen vaccines, they appear in various places in the application, such as the Universal Certificate and the Vaccination Summary, Vaccination View/Add, Patient Record Summary, and Patient Record pages.

The Vaccination Summary can also be used as a printable report for a patient's vaccinations. (Use the browser's print function to print the page.)

The patient's age at the time of immunization is included in the Dose Date column within the same vaccine family.

Before you can view a patient's vaccination forecast, you must first search for the patient, then click the **Vaccinations > Summary** menu link. The summary page opens with patient and vaccination information in the following sections:

- Patient information
- Vaccination Summary - click the date link to view details about a vaccination
- Invalid Vaccinations (state-configurable option)

- Vaccine Deferrals (state-configurable option)
- Contraindications (state-configurable option)
- Exemptions
- Precautions
- Vaccination Forecast (state-configurable option)

Add Anonymous Vaccinations

Anonymous vaccinations can be recorded. Each vaccination must be added individually. Anonymous vaccinations cannot be viewed on the Vaccination View/Add page.

When anonymous vaccinations are added, inventory is decremented just as if a regularly administered vaccination was given. Anonymous vaccinations can only be administered, not added as historical vaccinations.

Anonymous vaccinations are not included in CASA, reminder/recall, or any detail-level reports, but are included in aggregate reports.

To add an anonymous vaccination, click the **Vaccinations > Add Anonymous** link on the menu. The Anonymous Vaccination Add page opens. Enter the patient's birthdate, select the vaccine from the drop-down list, enter the administered date, and click **Save**. The Vaccination Detail Add page opens.

Enter the information (see the [Vaccination/Medicine Detail Page](#) section for more information about the fields on this page) and click **Save**.

Organizations (IRMS)

The options listed in the Organization (*IRMS*) menu allow you to search for, add, and edit Organizations (IRMS), manage groups, and work with provider enrollment.

Registry Client users can set up defaults for their Organization (IRMS) and change between Organizations as often as needed. When an Organization (IRMS) is selected, every page containing the Organization (IRMS) field will automatically populate with that Organization's information.

The topics in this section are:

- [Select an Organization \(IRMS\)](#)
- [Search/Add/Edit Organizations \(IRMS\)](#)
- [Redisplay Organization Search Results](#)
- [Redisplay Organization Details](#)
- [Organization Group Management](#)
- [Provider IWeb Enrollment Applications](#)

NOTE: Throughout this documentation, "Organization" refers to "Organization (IRMS)" and "Organization/Facility" refers to "Organization (IRMS)/Facility".

Select an Organization (IRMS)

Use this link when you want to switch from one Organization (*IRMS*) to another and don't want to log out and back on again to do so.

To select an Organization (IRMS), simply click **Main > Select Organization (IRMS)**.

Once the Select Organization (IRMS) page opens, select the new Organization from the drop-down list and click **Submit**.

Search/Add/Edit Organizations (IRMS)

Before viewing, adding, or editing an Organization (*IRMS*), you must search for it first.

Search for an Organization (IRMS)

To search for an Organization (IRMS), click **Organization (IRMS) > Search/Add** on the menu. The Organization (IRMS) Maintenance page appears. Enter the search criteria

(optional) and click **Search**. The search results appear in the Search Results section of the screen.

Enter fewer criteria to broaden the search and try to increase the number of search results. Enter more criteria to narrow the search results.

To view details about an Organization (IRMS), click the arrow button in the *Select* column for that Organization (IRMS) in the list. The Organization (IRMS) Maintenance [Details] page opens where, depending on your access level and permissions, you can view the information, create an order set, edit the details, and create new notes.

When searching for an Organization (IRMS), these are the criteria you can use to conduct your search:

Field	Description
Inactive Status	Select the status of the Organization (IRMS) - All Organization (IRMS), Active Only, or Inactive Only .
Organization (IRMS) ID / Name	Select an Organization (IRMS) ID and name from the drop-down list, after which the radio button will automatically be selected (if it isn't already). If the user selected an Organization (IRMS) previously, it is already selected.
Organization (IRMS) ID	Enter the Organization (IRMS) ID number, after which the radio button will automatically be selected.
Organization (IRMS) Name	Enter part or all of the Organization (IRMS) name, after which the radio button will automatically be selected.
City	Enter the Organization's city, after which the checkbox will be selected.
Zip Code	Enter the Organization's zip code, after which the checkbox will be selected.
Phone	Enter the Organization's phone number, after which the checkbox will be selected.
District / Region	Enter the Organization's district or region, after which the checkbox will be selected.
VFC PIN	Select a VFC PIN from the drop-down list, after which the checkbox will automatically be selected.

View/Print the Organization (IRMS) Report

You can view and/or print a report of either one specific Organization (IRMS) or all of them. For the full report, conduct the search with no Organization (IRMS) selected and click **View Report**, located under the search result list. To run the report for one specific Organization (IRMS), search for that Organization, then click the **Back** button on the Organization (IRMS) Maintenance [Details] page that opens. This returns you to the main Organization (IRMS) Maintenance page, where you can click the **View Report** button for that specific Organization (IRMS).

The report opens in a new window or tab. The report contains the search criteria, as well as Organization (IRMS) ID, VFC PIN, site name, contact person, status, phone, extension, city, and state. Use the browser's Print function to print the report.

Add a New Organization (IRMS)

Before adding a new Organization (IRMS), you must first conduct a search to make sure it does not already exist. Under the list of Organization (IRMS) in the Search Results, click **Add**.

If you attempt to add an Organization (IRMS) that is already entered in the application, a message appears indicating that the Organization (IRMS) already exists.

After clicking Add, the Organization (IRMS) Maintenance [Add] page appears. Enter as much information about the Organization (IRMS) as possible (the required fields are in **bold red** text) and click **Save**.

The fields available on this page are as follows:

Field	Description
Possible Organization (IRMS) ID	This is a computer-generated number for the new Organization (IRMS). It can be changed if necessary. This field is required and must be unique.
Organization (IRMS) Name	If not automatically populated, enter the full, complete name of the Organization (IRMS). This field is required.
Organization (IRMS) NPI ID	Enter the Organization's NPI ID.
Organization (IRMS) Provider Assigned Name	Enter the Organization (IRMS) provider's assigned name.
Organization (IRMS) Authorized Global Submitter	Select the Organization (IRMS) authorized global submitter from the drop-down list.
Suppress Organization (IRMS) Name	Select this option to prevent the "owning" Organization (IRMS) name from displaying on the patient demographics, vaccination view/add, and vaccination details screens. The primary reason for using this option is confidentiality. Previous providers are not considered to be confidential, but there are some providers that might be, such as jails, HIV/STD clinics, Planned Parenthood, etc.
Inactive	Select this option if the Organization (IRMS) is inactive. Since records cannot be deleted, setting the Organization (IRMS) as inactive flags it so that it cannot be used.
Street Address	Enter the first line of the street address or PO Box. This field is required.
Street Address 2	Enter the second line of the street address.
City	Enter the city name of the Organization (IRMS) location. This field is required.

Field	Description
State	Select the state from the drop-down list. This field is required.
Zip Code	Enter the zip code for the Organization (IRMS). If more than one zip code exists, the Select Zip Code dialog box will appear. This field is required.
County	Enter the City and State information first, then select the county, parish, borough or census area from the drop-down list. If the City and State are not entered first, this list will be blank. This field is required.
Phone	Enter the Organization's phone number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111).
Phone Extension	Enter the extension number associated with the Organization's phone number.
Fax	Enter the Organization's fax number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111).
District	Enter the district or region. This is a whole number and must be known by the user.
Contact Person	Enter the first name of the Organization's contact person.
Email	Enter the Organization's email address.
Reporting Method	Select the method the Organization (IRMS) uses for reporting (e.g., Direct Data Entry, DTT Import, Batch HL7). If the method is DTT Import, the DTT Profile Name field must have a valid entry.
DTT Profile Name	If the reporting method is DTT Import, enter the name of the profile being used.
Computerized	Select this option if the Organization (IRMS) is computerized.
Internet Access Type	Select the type of Internet access the Organization (IRMS) uses from the drop-down list. Examples: <ul style="list-style-type: none"> • Cable Modem • DSL • Dial-up • T-1 • Satellite • None • Other
VFC Representative	Enter the name of the VFC representative for the Organization (IRMS).
VFC PIN	Enter a VFC PIN. The number must be unique or an error will appear stating <i>Error: Duplicate VFC PIN.</i>
Next VFC Visit Date	Enter the date of the next scheduled VFC visit, in MMDDYYYY format.
Disable VFC/Publicly Supplied Functionality	Select this option to disable the VFC/Publicly Supplied (or Funding Source) functionality throughout the application. This will remove the VFC Status and Publicly Supplied/Funding Source fields from the Vaccination add/edit pages, the Lot Number add/edit pages, and the Select Lot Number pop-up. This will also cause vaccination barcoding

Field	Description
	to NOT require matching inventory.
Site Type	Select a site type from the drop-down list. Examples: <ul style="list-style-type: none"> • Community Health Center • Health Maintenance Organization (Public or Private) • Hospital • School • WIC • Dentist
Provider Agreement Facility Type	Select the Facility type for the provider agreement. If Other is selected, a description must be entered in the next field.
Provider Agreement Facility Type Other	Enter a description for Other in the previous field. This field is required if Other is selected in the previous field.
Automatic Ownership Blocked	If this option is selected, the Organization (IRMS) cannot own patient and vaccination records. An Organization (IRMS) with blocked ownership does not display in the drop-down list on the patient demographics screen. When adding an administered vaccination, the Organization (IRMS) on the patient demographics screen is not populated with the Organization (IRMS) from the administered shot.
Comments	Enter any other information to keep on file for the Organization (IRMS). Maximum of 254 characters.
Local Approval Organization (IRMS)	Select the appropriate jurisdictional Organization (IRMS) for approving vaccine orders. This option is only visible if the user has state or local order approver permission.
Is Local Approver	Select this option if the Organization (IRMS) is a local approver. This option is only visible if the user has state or local order approver permission.
Is State Approver (Distributor)	Select this option if the Organization (IRMS) is a state approver (distributor). This option is only visible if the user has state or local order approver permission.
Is Depot	Select this option if the Organization (IRMS) is a vaccine depot. Only one Organization (IRMS) can have this option enabled. If this option is selected (enabled), the Is State Approver and Is Local Approver options must be disabled.
Is Vaccine Return Depot	Select this option if the Organization (IRMS) is a vaccine return depot. Multiple Organizations can be designated as vaccine return depots. If the Registry has multiple Organizations with this option enabled, a required field appears on the vaccine return page to allow the user to select the correct vaccine return Organization (IRMS). This option is only visible if the user has state or local order approver permission. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: The Organization (IRMS) that is designated as the return depot should not be used for other vaccine order functions. All return depot Organizations should be dedicated to that purpose.</p> </div>

Field	Description
Provider Agreement (displays when enabled in Administration properties)	
Allow Provider Agreements	<p>Select this option if the Organization (IRMS) is able to allow provider agreements. This option only appears if the Administration > Properties > Vaccine Management option Enable Provider Agreement Features is selected.</p> <p>If Allow Provider Agreements is selected/enabled, the Organization (IRMS) can use the Orders/Transfers > Search Agreement feature to view/approve provider agreements. The provider agreement fields are linked at the Organization (IRMS)/Facility level associated with the VFC PIN. The Organization (IRMS) or Facility Maintenance page updates when the agreement is approved.</p>
Shipping Address Street	Enter the first line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address Street 2	Enter the second line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address City	Enter the city name where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address State	Select the state where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address County	Select the county, parish, borough or census area for the vaccine order shipments. The user must have state or local order approver permission in order to see this option.
Shipping Address Zip	Enter the zip code for the vaccine order shipments. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered for the city, the Select Zip Code dialog box will appear. Otherwise, the zip code may be automatically populated.
Shipping Instructions	Enter any special shipping instructions, including a contact person's name, phone, fax, and/or email address. The user must have state or local order approver permission in order to see this option.
Mailing Address Street	Enter the first line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Street 2	Enter the second line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address City	Enter the city for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address State	Select the state for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or

Field	Description
	local order approver permission in order to see this option.
Mailing Address County	Select the county, parish, borough, or census area for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Zip	Enter the zip code for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered, the Select Zip Code dialog box appears. Otherwise, the zip code may be automatically populated.
Contact Details	
Type 1 (and 2-5)	Select a contact type. Examples: Vaccine Delivery, Mailing, Facility.
Contact First Name 1, Middle Initial 1 and Last Name 1 (and 2-5)	Enter the name of the contact person.
Phone Number 1 (and 2-5)	Enter the phone number for this contact.
Phone Number Extension 1 (and 2-5)	If applicable, enter the phone extension for this contact.
Fax Number 1 (and 2-5)	Enter the fax number for this contact.
Email Address 1 (and 2-5)	Enter the email address for this contact.
Vaccine Management	
Certifying Provider	Enter the name of the certifying provider. This is used to support the depot using VOMS. This field is populated from the provider agreement with the same VFC PIN.
Certifying Provider Phone	Enter the phone number for the certifying provider. This is used to support the depot using VOMS. This field is populated from the provider agreement with the same VFC PIN.
Certifying Provider Fax	Enter the fax number for the certifying provider. This is used to support the depot using VOMS.
Certifying Provider Email	Enter the email address for the certifying provider. This is used to support the depot using VOMS.
Agreement Signatory Name	Enter the name of the agreement signatory.
Agreement Signatory Title	Enter the title of the agreement signatory.
Original VFC Cert Date	Enter the original VFC certification date.
Current Certification Date	Enter the date of the current certification.
Freezer average temperature of 5° F or colder	Select this option to indicate that the average temperature of the freezer is 5° F or colder, if applicable.
Separate, insulated freezer door	Select this option to indicate that there is a separate insulated freezer door on the freezer, if applicable.
Freezer Measuring Device	Select the device used to measure the freezer temperature. The choices are:

Field	Description
	<ul style="list-style-type: none"> • Standard Fluid Filled • Continuous Recording • Min Max • Dial • Digital • Digital Data Logger • Other - enter the description in the next field (mandatory if Other is selected)
Other Device	If the Freezer Measuring Device is Other, enter a description here (required).
Allow Online Orders	Select this option is the Organization (IRMS) can send vaccine orders online. The user must have state or local order approver permission in order to see this option. Once this option is enabled, the VFC PIN field is required.
Allow Vaccine Transfers	Select this option if the Organization (IRMS) is able to allow vaccine order transfers. The user must have state or local order approver permission in order to see this option.
Allow Vaccine Returns	Select this option if the Organization (IRMS) is able to allow vaccine returns. The user must have state or local order approver permission in order to see this option.
Default physical inventory on order	Select this option to display the Current Inventory for that Vaccine on the Create Order > Order Details page for the <i>Physical Inventory</i> column. If selected (enabled), the current inventory displays on the Create Order screen as read-only. This field is used for reconciliation and controls the defaults in the <i>Physical Inventory</i> column on the Create Order page. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.
Default doses used last month on order	Select this option to display the Default Doses Used Last Month in the <i>Doses Used Last Month</i> column on the Create Order > Order Details screen. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.
Order Threshold Percent	Enter a numeric value to represent the percentage of orders to reach before placing an order for the Organization/Facility. There is also a registry-wide setting in the Administration properties that is used if a setting is not entered here (see Settings). However, this setting overrides the registry-wide setting.
Ordering Frequency	<p>Select the provider's ordering frequency from the drop-down list. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • Annual (calendar year)

Field	Description
	<ul style="list-style-type: none"> • Every six months (month will vary as assigned) • Every three months (month will vary as assigned) • Every two months (month will vary as assigned) • Monthly (1st day of the month to the last day of the month) • Twice monthly (1st to the 15th and 16th to the last day of the month) <p>If the Organization (IRMS) does not have an ordering frequency set, the ordering frequency is derived from the registry setting. If there is an IRMS/Facility setting, it will override the registry setting.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the provider orders more frequently than their ordering frequency, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order frequency. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i></p> </div>
Order Timing	<p>Select the timing to provide the ability to record ordering timing on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide setting. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • 1st to the 15th • 16th to End of Month <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the provider orders outside their order timing window, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order timing. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i> The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order timing.</i></p> </div>
Order Frequency Start Month	<p>Select a month for the start of the order frequency timing. Appears on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide property setting. Choices are January, February, March, April, May, or June. This field uses the Ordering Frequency field to determine a valid schedule. No order schedule displays for twice monthly, monthly, or annual frequencies.</p> <ul style="list-style-type: none"> • Every Two Months - Start Month = January, Schedule = Jan., Mar., May, July, Sep., Nov. / Start Month = February, Schedule = Feb., Apr., June, Aug., Oct., Dec. • Every Three Months - Start Month = January, Schedule = Jan., Apr., July, Oct. / Start Month = February, Schedule = Feb., May, Aug., Nov. / Start Month = March, Schedule = Mar., June, Sept., Dec. • Every Six Months - Start Month = Jan., Schedule = Jan., July. / Start Month = February, Schedule = Feb., Aug. / Start Month = March, Schedule = Mar., Sept. / Start Month = April, Schedule = April, Oct., June, Dec.

Field	Description
	<p>= Apr., Oct. / Start Month = May, Schedule = May, Nov. / Start Month = June, Schedule = June, Dec.</p> <p>If the Organization (IRMS)/Facility does not have an order start date set, the order schedule is not validated.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the provider orders outside their order schedule, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order schedule. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i> The exception comment is required for submitted orders only. The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order schedule.</i></p> </div>
<p>Recommended Quantity Calculation</p>	<p>Select the recommended calculation to use for the recommended quantity (Based on Administered Doses, Based on Order History). This determines how the default quantity is calculated. (The Recommended Quantity default can also be turned off under Administration > Properties > Vaccine Management, which is recommended when there is no data yet.)</p> <p>If Based on Administered Doses is selected, the Recommended Quantity is rounded off to a whole number divisible by the vaccine Package Size for publicly supplied vaccines.</p> <p>If Based on Order History is selected and an order is created with an Order Quantity that is more or less than the Order Threshold Percent and Recommended Quantity, an alert displays and the order is queued for Manual Review. Additionally, when using order history, the safety stock is already factored in and does not need to be added separately.</p>
<p>Enable Auto-Receive</p>	<p>Select this option to allow an uploaded McKesson file to populate lot numbers on open orders. If part of an order is missing from the McKesson file, the new order is created upon receipt.</p>
<p>Order Set/Order Type</p>	<p>Select the order set and order type that define the vaccines that the Organization (IRMS) can order from the drop-down list. The user must have state or local order approver permission in order to see this option.</p>
<p>Allow only one brand selection per vaccine</p>	<p>Select this option to require users to select only one vaccine brand.</p>
<p>Require Manual Deduplication for Intra-Organization (IRMS) Merges</p>	<p>Select this option to have the system queue records for Manual Review if a new patient is an exact match to an existing patient within the same Organization (IRMS). If this option is disabled, the current deduplication behavior is applied.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If both the Organization (IRMS) system ID and the medical record number (or Organization patient ID) are the same for the patient, the record is considered to be an update and continues to be processed automatically.</p> </div>
<p>Bypass Dose-Level</p>	<p>Select this option to activate the business logic that allows providers</p>

Field	Description
Accountability	<p>that do not track their inventory to the patient dose level, to enter the appropriate reconciliation data to record their current physical inventory.</p> <p>If this option is selected/enabled, the Reconciliation page automatically populates the reason with <i>Matches Physical Inventory</i>. When the physical inventory value is entered and the user tabs out of the field, the reason automatically defaults to the correct add/subtract <i>Matches Physical Inventory</i> reason and all other reasons are removed from the drop-down list.</p> <p>For example, if a site does not manage inventory in the Registry and does not decrement from inventory by either the electronic import decrementing logic or by selecting the lot during direct data entry, the system does not know the doses used value for the site. In this case, the provider needs to do their own refrigerator count and enter that number, rather than record each inventory adjustment individually. This is needed to simplify data entry and increase participation among sites that are not significant Registry users.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: In the Inventory Transaction report, <i>Matches Physical Inventory Plus</i> displays under the <i>Other In</i> transaction type and <i>Matches Physical Inventory Minus</i> displays under the <i>Other Out</i> transaction type. This reason does not display on the Lot Number Maintenance screen or on the regular Reconciliation page.</p> </div>
Upload Temperature Data	Select this option to allow the Organization (IRMS) to upload the cold storage temperature data.
Cold Storage Physical Location	Select this option if there is a cold storage physical location. Note that if this is not selected, authorized users have the ability to fulfill an order with one or more lots.
Facility Required for this Organization (IRMS)	Select this option to require users to select a Facility upon login, rather than requiring it at the Registry level. The default setting should be set to Required or Yes for existing Facilities. When enabled, the menus are disabled until a Facility is chosen. Facility Group users are required to select a Facility prior to proceeding.
Click here to select receiving transfer Organization (IRMS) and facilities	<p>This option only appears if the Administration > Properties > Vaccine Management > Limit Organization (IRMS) and Facilities to Receive Transfer option is enabled (selected). If this option is enabled and the Allow Vaccine Transfers option (previous field) is selected, this becomes a required field.</p> <p>Click this link to open the Select Receiving Transfer Facilities window. Select one or more Organizations/Facilities that can receive vaccine transfers and click the double-chevron (>>) button to transfer them to the Selected box. Click Done when all of the Facilities have been selected.</p> <p>Once Done is clicked, a validation is performed. If the Allow Vaccine Transfers is selected but no Organizations/Facilities were selected, an error message appears at the top of the screen stating <i>Please select the receiving transfer facilities</i>. If a new Facility is being added, the selected Receiving Transfer Facilities are saved to the database only</p>

Field	Description
	when the Facility has been created and saved. Once saved, only the selected Organizations/Facilities are populated on the Create Transfer screen in the Receiving Organization (IRMS) and Receiving Facility drop-down lists.
Add Facility	Select this option, located immediately above the Cancel , Reset and Save buttons, if you want to add a new Facility as your next step. Otherwise, you will be returned to the Organization (IRMS) Maintenance page. You must have state or local order approver permission to see this option.

Edit an Organization (IRMS)

To edit an Organization's information, search for the Organization (IRMS) and click on the arrow button in the *Select* column for that Organization (IRMS) in the Search Results list. On the Organization (IRMS) Maintenance [Detail] page that opens, click **Edit**. Make any necessary changes on the Organization (IRMS) Maintenance Update page and click **Save**.

The fields available on the Organization (IRMS) Maintenance Update page are the same as detailed in the [Add an Organization \(IRMS\)](#) section, with these additional fields:

Field	Description
Organization (IRMS) Last Updated Date	Displays the last date/time the Organization (IRMS) was updated.
Organization (IRMS) Last Updated By	Displays the user name of the user who last updated the Organization (IRMS). However, if the last update was based on the approval of a provider agreement, the user who approved the agreement will appear here.
Organization (IRMS) Created Date	Displays the date and time the Organization (IRMS) was originally created.
Organization (IRMS) Created By	Displays the user name of the person who originally created the Organization (IRMS).

Create/Modify Order Set from Organization (IRMS) Maintenance [Detail] Page

Registry Client users can immediately create a new order set for a specific Organization (IRMS) by clicking the **Create Order Set** button on the Organization (IRMS) Maintenance [Detail] page for that Organization (IRMS). If an order set has already been created for that Organization (IRMS), the button will display as **Modify Order Set**.

View or Add Notes

To view recent notes about an Organization (IRMS) or to create new notes, follow the steps to search for an Organization and view the data on the Organization (IRMS) Maintenance

[Details] page for that Organization. Scroll down to the bottom of the page. If any notes were created previously, the most recent ones appear at the bottom of the page. There is also an option to view prior notes. To add a new note, click **Create New Notes**, add the new note in the pop-up window, and click **Save**.

Redisplay Organization (IRMS) Search Results

Once you have conducted an Organization (*IRMS*) search, the **Organization (IRMS) > Search Results** link becomes available on the menu. If no Organization (IRMS) search has yet been performed, the link is disabled.

To view the results for a previous Organization (IRMS) search, click **Organization (IRMS) > Search Results**. The Organization (IRMS) Maintenance page appears with the search results.

Redisplay Organization (IRMS) Details

Once you have conducted an Organization (*IRMS*) search and viewed the Organization (IRMS) Maintenance [Details] page for an Organization, the **Organization (IRMS) > Detail** link becomes available on the menu. If no Organization (IRMS) search has yet been performed, or if a search was performed but the Organization (IRMS) Maintenance [Details] page was not viewed for an Organization (IRMS), the link is disabled. The **Organization (IRMS) > Detail** link takes you to the information for the most recently viewed Organization (IRMS).

To view the Organization (IRMS) Maintenance [Details] page for the most recently viewed Organization (IRMS), click **Organization (IRMS) > Detail**. The Organization (IRMS) Maintenance [Details] page appears for that Organization (IRMS).

To edit the details for the Organization (IRMS), click **Edit**. See [Edit an Organization \(IRMS\)](#) more information.

Organization (IRMS) Group Management

The Organization (*IRMS*) Group Management feature is used to create a hierarchy of organizations. One Organization (IRMS) will "own" a group of others and have a parent/child relationship.

The following information relates to group management:

- As a prerequisite, an Organization (IRMS) must be created first, before it is added to a group.
- An Organization (IRMS) cannot be added as a group member if it is the group owner.

- An Organization (IRMS) group owner cannot be a member of any other group.
- An Organization (IRMS) group member can be a member of multiple groups as long as it is not the group owner of any groups.

Create an Organization (IRMS) Group

1. Click **Organization (IRMS) > Group Management**.
The Create New Organization (IRMS) Group page appears.
2. Select an **Owning Organization (IRMS)** from the drop-down list and click **Create Group**.
A success or error message will appear at the top of the page.
3. Select the Owning Organization (IRMS) from the **Organization (IRMS) Group to Modify** drop-down list in the Modify Organization (IRMS) Group Membership section of the page.
The available Organizations (IRMS) to add to the group will appear in the **Available Organization (IRMS)s** and **Member Organization (IRMS)s** boxes.
4. To add an Organization (IRMS) to the group, select it from the first box (Available Organizations) and click the >> button to add it to the second box (Member Organizations). To remove a member Organization (IRMS), select it in the second box and click the << button. A confirmation message will appear at the top of the screen after each Organization (IRMS) is moved from one box to the other.

If an Organization (IRMS) is not listed in either box, it may be because it is an owner of another group.

Remove an Organization (IRMS) Group

To remove a group that was created previously, select the group owner from the **Organization (IRMS) Group to Modify** drop-down list in the Modify Organization (IRMS) Group Membership section of the page, then remove each of the member organizations.

Provider IWeb Enrollment

This feature is used by the system administrator to view and update the status of a provider enrollment application, as well as to create a new Organization (*IRMS*) from the provider's enrollment form.

This topic includes the following sections:

- [View/Update a Provider Enrollment Application](#)
- [Print an Enrollment Application](#)
- [Create an Organization \(IRMS\) from the Enrollment Application](#)

- [View an Enrollment Form from the Organization \(IRMS\) Details Page](#)

View/Update a Provider Enrollment Application

1. Log in to the IWeb ASIIS application as a Registry Client user.
2. Click Organization (IRMS) > Enrollment.
The IWeb Enrollment Search page appears.
3. Enter the search criteria and click **Search**.
The search results appear in the lower portion of the screen.

The search criteria fields are as follows:

Field	Description
Practice Name	Enter the name of the practice.
Request ID	Enter the identification number of the request.
Phone Number	Enter the phone number for the provider's practice.
Primary Contact	Enter the name of the primary contact at the provider's practice.
Status	Select a status: <ul style="list-style-type: none"> • Valid (default) • Evaluated (default) • Pending Review (default) • IRMS Created (default) • Invalid

To view an enrollment application, click the arrow button in the *Select* column for the practice. The ASIIS Enrollment Application page appears. To edit the application, modify the fields as needed and click **Save and Continue to Page 2**. Continue to edit as needed on the second page and click **Save** when finished.

The fields on the ASIIS Enrollment Application page are as follows:

Field	Description
Practice Name	Pre-populated with the name of the practice. This field is required.
Address	
Street Address	Enter or modify the first line of the street address. This field is required.
Street Address 2	Enter the second line of the street address, if necessary.
City	Enter the city name. This field is required.
State	Select the state from the drop-down list. This field is required.
Zip Code	Enter the zip code. This field is required.

Field	Description
Phone	Enter the phone number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111). This field is required.
Phone Extension	Enter the extension number associated with the phone number.
Fax	Enter the fax number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111).
Office Manager	Enter the name of the office manager or contact person.
Email Address	Enter the email address. This field is required.
Mailing Address (if different from above)	
Street Address	Enter or modify the first line of the mailing street address.
Street Address 2	Enter the second line of the mailing street address, if necessary.
City	Enter the city name.
State	Select the state from the drop-down list.
Zip Code	Enter the mailing zip code.
Facility Type	Select the Facility type from the drop-down list.
Phone Extension	Enter the extension number associated with the phone number.
Site Type	Select a site type from the drop-down list. Examples: <ul style="list-style-type: none"> • Community Health Center • Health Maintenance Organization (Public or Private) • Hospital • School • WIC • Dentist
Provider Agreement Facility Type	Select the Facility type for the provider agreement. If Other is selected, a description must be entered in the next field.
Provider Agreement Facility Type Other	Enter a description for Other in the previous field. This field is required if Other is selected in the previous field.
Automatic Ownership Blocked	If this option is selected, the Organization (IRMS) cannot own patient and vaccination records. An Organization (IRMS) with blocked ownership does not display in the drop-down list on the patient demographics screen. When adding an administered vaccination, the Organization (IRMS) on the patient demographics screen is not populated with the Organization (IRMS) from the administered shot.
Comments	Enter any other information to keep on file for the Organization (IRMS). Maximum of 254 characters.
Local Approval Organization (IRMS)	Select the appropriate jurisdictional Organization (IRMS) for approving vaccine orders. This option is only visible if the user has state or local order approver permission.
Is Local Approver	Select this option if the Organization (IRMS) is a local approver. This option is only visible if the user has state or local order approver

Field	Description
	permission.
Is State Approver (Distributor)	Select this option if the Organization (IRMS) is a state approver (distributor). This option is only visible if the user has state or local order approver permission.
Is Depot	Select this option if the Organization (IRMS) is a vaccine depot. Only one Organization (IRMS) can have this option enabled. If this option is selected (enabled), the Is State Approver and Is Local Approver options must be disabled.
Is Vaccine Return Depot	Select this option if the Organization (IRMS) is a vaccine return depot. Multiple Organizations can be designated as vaccine return depots. If the Registry has multiple Organizations with this option enabled, a required field appears on the vaccine return page to allow the user to select the correct vaccine return Organization (IRMS). This option is only visible if the user has state or local order approver permission. NOTE: The Organization (IRMS) that is designated as the return depot should not be used for other vaccine order functions. All return depot Organizations should be dedicated to that purpose.
Is Vactrack User	Select this option if the Organization (IRMS) submits data to the system but is not a <i>VFC</i> provider or <i>VOMS</i> user. The reason for this is so that there is a way to pull this information for providers that are not captured in the VFC information distribution on the provider contact report.
Provider Agreement (displays when enabled in Administration properties)	
Allow Provider Agreements	Select this option if the Organization (IRMS) is able to allow provider agreements. This option only appears if the Administration > Properties > Vaccine Management option Enable Provider Agreement Features is selected. If Allow Provider Agreements is selected/enabled, the Organization (IRMS) can use the Orders/Transfers > Search Agreement feature to view/approve provider agreements. The provider agreement fields are linked at the Organization (IRMS)/Facility level associated with the VFC PIN. The Organization (IRMS) or Facility Maintenance page updates when the agreement is approved.
Shipping Address Street	Enter the first line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address Street 2	Enter the second line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address City	Enter the city name where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address State	Select the state where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address County	Select the county, parish, borough or census area for the vaccine order

Field	Description
	shipments. The user must have state or local order approver permission in order to see this option.
Shipping Address Zip	Enter the zip code for the vaccine order shipments. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered for the city, the Select Zip Code dialog box will appear. Otherwise, the zip code may be automatically populated.
Shipping Instructions	Enter any special shipping instructions, including a contact person's name, phone, fax, and/or email address. The user must have state or local order approver permission in order to see this option.
Mailing Address Street	Enter the first line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Street 2	Enter the second line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address City	Enter the city for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address State	Select the state for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address County	Select the county, parish, borough, or census area for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Zip	Enter the zip code for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered, the Select Zip Code dialog box appears. Otherwise, the zip code may be automatically populated.
Contact Details	
Type 1 (and 2-5)	Select a contact type. Examples: Vaccine Delivery, Mailing, Facility.
Contact First Name 1, Middle Initial 1 and Last Name 1 (and 2-5)	Enter the name of the contact person.
Phone Number 1 (and 2-5)	Enter the phone number for this contact.
Phone Number Extension 1 (and 2-5)	If applicable, enter the phone extension for this contact.
Fax Number 1 (and 2-5)	Enter the fax number for this contact.
Email Address 1 (and 2-5)	Enter the email address for this contact.
Vaccine Management	
Certifying Provider	Enter the name of the certifying provider. This is used to support the depot using VOMS. This field is populated from the provider agreement

Field	Description
	with the same VFC PIN.
Certifying Provider Phone	Enter the phone number for the certifying provider. This is used to support the depot using VOMS. This field is populated from the provider agreement with the same VFC PIN.
Certifying Provider Fax	Enter the fax number for the certifying provider. This is used to support the depot using VOMS.
Certifying Provider Email	Enter the email address for the certifying provider. This is used to support the depot using VOMS.
Agreement Signatory Name	Enter the name of the agreement signatory.
Agreement Signatory Title	Enter the title of the agreement signatory.
Original VFC Cert Date	Enter the original VFC certification date.
Current Certification Date	Enter the date of the current certification.
Freezer average temperature of 5° F or colder	Select this option to indicate that the average temperature of the freezer is 5° F or colder, if applicable.
Separate, insulated freezer door	Select this option to indicate that there is a separate insulated freezer door on the freezer, if applicable.
Freezer Measuring Device	Select the device used to measure the freezer temperature. The choices are: <ul style="list-style-type: none"> • Standard Fluid Filled • Continuous Recording • Min Max • Dial • Digital • Digital Data Logger • Other - enter the description in the next field (mandatory if Other is selected)
Other Device	If the Freezer Measuring Device is Other, enter a description here (required).
Allow Online Orders	Select this option if the Organization (IRMS) can send vaccine orders online. The user must have state or local order approver permission in order to see this option. Once this option is enabled, the VFC PIN field is required.
Allow Vaccine Transfers	Select this option if the Organization (IRMS) is able to allow vaccine order transfers. The user must have state or local order approver permission in order to see this option.
Allow Vaccine Returns	Select this option if the Organization (IRMS) is able to allow vaccine returns. The user must have state or local order approver permission in order to see this option.
Default physical inventory on order	Select this option to display the Current Inventory for that Vaccine on the Create Order > Order Details screen for the <i>Physical Inventory</i>

Field	Description
	<p>column. If selected (enabled), the current inventory displays on the Create Order screen as read-only. This field is used for reconciliation and controls the defaults in the <i>Physical Inventory</i> column on the Create Order page. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.</p>
<p>Default doses used last month on order</p>	<p>Select this option to display the Default Doses Used Last Month in the <i>Doses Used Last Month</i> column on the Create Order > Order Details screen. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.</p>
<p>Order Threshold Percent</p>	<p>Enter a numeric value to represent the percentage of orders to reach before placing an order for the Organization/Facility. There is also a registry-wide setting in the Administration properties that is used if a setting is not entered here. However, this setting overrides the registry-wide setting.</p>
<p>Ordering Frequency</p>	<p>Select the provider's ordering frequency from the drop-down list. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • Annual (calendar year) • Every six months (month will vary as assigned) • Every three months (month will vary as assigned) • Every two months (month will vary as assigned) • Monthly (1st day of the month to the last day of the month) • Twice monthly (1st to the 15th and 16th to the last day of the month) <p>If the Organization (IRMS) does not have an ordering frequency set, the ordering frequency is derived from the registry setting. If there is an IRMS/Facility setting, it will override the registry setting.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the provider orders more frequently than their ordering frequency, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order frequency. Your LHM will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i></p> </div>
<p>Order Timing</p>	<p>Select the timing to provide the ability to record ordering timing on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide setting. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • 1st to the 15th • 16th to End of Month <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the provider orders outside their order timing window, a dialog box appears when the user clicks Submit, stating <i>Your order</i></p> </div>

Field	Description
	<p><i>is outside the assigned order timing. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order. The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order timing.</i></i></p>
<p>Order Frequency Start Month</p>	<p>Select a month for the start of the order frequency timing. Appears on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide property setting. Choices are January, February, March, April, May, or June. This field uses the Ordering Frequency field to determine a valid schedule. No order schedule displays for twice monthly, monthly, or annual frequencies.</p> <ul style="list-style-type: none"> • Every Two Months - Start Month = January, Schedule = Jan., Mar., May, July, Sep., Nov. / Start Month = February, Schedule = Feb., Apr., June, Aug., Oct., Dec. • Every Three Months - Start Month = January, Schedule = Jan., Apr., July, Oct. / Start Month = February, Schedule = Feb., May, Aug., Nov. / Start Month = March, Schedule = Mar., June, Sept., Dec. • Every Six Months - Start Month = Jan., Schedule = Jan., July. / Start Month = February, Schedule = Feb., Aug. / Start Month = March, Schedule = Mar., Sept. / Start Month = April, Schedule = Apr., Oct. / Start Month = May, Schedule = May, Nov. / Start Month = June, Schedule = June, Dec. <p>If the Organization (IRMS)/Facility does not have an order start date set, the order schedule is not validated.</p> <p>NOTE: If the provider orders outside their order schedule, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order schedule. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i> The exception comment is required for submitted orders only. The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order schedule.</i></p>
<p>Recommended Quantity Calculation</p>	<p>Select the recommended calculation to use for the recommended quantity (Based on Administered Doses, Based on Order History). This determines how the default quantity is calculated. (The Recommended Quantity default can also be turned off under Administration > Properties > Vaccine Management, which is recommended when there is no data yet.)</p> <p>If Based on Administered Doses is selected, the Recommended Quantity is rounded off to a whole number divisible by the vaccine Package Size for publicly supplied vaccines.</p> <p>If Based on Order History is selected and an order is created with an</p>

Field	Description
	Order Quantity that is more or less than the Order Threshold Percent and Recommended Quantity, an alert displays and the order is queued for Manual Review. Additionally, when using order history, the safety stock is already factored in and does not need to be added separately.
Enable Auto-Receive	Select this option to allow an uploaded McKesson file to populate lot numbers on open orders. If part of an order is missing from the McKesson file, the new order is created upon receipt.
Order Set/Order Type	Select the order set and order type that define the vaccines that the Organization (IRMS) can order from the drop-down list. The user must have state or local order approver permission in order to see this option.
Allow only one brand selection per vaccine	Select this option to require users to select only one vaccine brand.
Require Manual Deduplication for Intra-Organization (IRMS) Merges	<p>Select this option to have the system queue records for Manual Review if a new patient is an exact match to an existing patient within the same Organization (IRMS). If this option is disabled, the current deduplication behavior is applied.</p> <div data-bbox="613 814 1469 940" style="border: 1px solid black; padding: 5px;"> <p>NOTE: If both the Organization (IRMS) system ID and the medical record number (or Organization patient ID) are the same for the patient, the record is considered to be an update and continues to be processed automatically.</p> </div>
Bypass Dose-Level Accountability	<p>Select this option to activate the business logic that allows providers that do not track their inventory to the patient dose level, to enter the appropriate reconciliation data to record their current physical inventory.</p> <p>If this option is selected/enabled, the Reconciliation page automatically populates the reason with <i>Matches Physical Inventory</i>. When the physical inventory value is entered and the user tabs out of the field, the reason automatically defaults to the correct add/subtract <i>Matches Physical Inventory</i> reason and all other reasons are removed from the drop-down list.</p> <p>For example, if a site does not manage inventory in the Registry and does not decrement from inventory by either the electronic import decrementing logic or by selecting the lot during direct data entry, the system does not know the doses used value for the site. In this case, the provider needs to do their own refrigerator count and enter that number, rather than record each inventory adjustment individually. This is needed to simplify data entry and increase participation among sites that are not significant Registry users.</p> <div data-bbox="613 1566 1469 1717" style="border: 1px solid black; padding: 5px;"> <p>NOTE: In the Inventory Transaction report, <i>Matches Physical Inventory Plus</i> displays under the <i>Other In</i> transaction type and <i>Matches Physical Inventory Minus</i> displays under the <i>Other Out</i> transaction type. This reason does not display on the Lot Number Maintenance screen or on the regular Reconciliation page.</p> </div>
Upload Temperature Data	Select this option to allow the Organization (IRMS) to upload the cold storage temperature data.
Facility Required for this	Select this option to require users to select a Facility upon login, rather

Field	Description
Organization (IRMS)	than requiring it at the Registry level. The default setting should be set to Required or Yes for existing Facilities. When enabled, the menus are disabled until a Facility is chosen. Facility Group users are required to select a Facility prior to proceeding.
Click here to select receiving transfer Organization (IRMS) and facilities	<p>This option only appears if the Administration > Properties > Vaccine Management > Limit Organization (IRMS) and Facilities to Receive Transfer option is enabled (selected). If this option is enabled and the Allow Vaccine Transfers option (previous field) is selected, this becomes a required field.</p> <p>Click this link to open the Select Receiving Transfer Facilities window. Select one or more Organizations/Facilities that can receive vaccine transfers and click the double-chevron (>>) button to transfer them to the Selected box. Click Done when all of the Facilities have been selected.</p> <p>Once Done is clicked, a validation is performed. If the Allow Vaccine Transfers is selected but no Organizations/Facilities were selected, an error message appears at the top of the screen stating <i>Please select the receiving transfer facilities</i>. If a new Facility is being added, the selected Receiving Transfer Facilities are saved to the database only when the Facility has been created and saved.</p> <p>Once saved, only the selected Organizations/Facilities are populated on the Create Transfer screen in the Receiving Organization (IRMS) and Receiving Facility drop-down lists.</p>
Add Facility	Select this option, located immediately above the Cancel, Reset and Save buttons, if you want to add a new Facility as your next step. Otherwise, you will be returned to the Organization (IRMS) Maintenance page. You must have state or local order approver permission to see this option.

Print an Enrollment Application

Only enrollment applications with a status of *Valid* display the Printable Version link in the *Print* column in the Search Results section of the Search page. Click the link to open the application in a new window or tab, then click the **Print** button at the bottom of the page.

Create an Organization (IRMS) from the Enrollment Application

If an Organization (IRMS) does not yet exist in the application for the practice named in the application, a **Create Organization (IRMS)** link appears in the column of the same name. The Organization (IRMS) Maintenance [Add] page opens, with fields pre-populated with the information from the application. See [Add a New Organization \(IRMS\)](#) for more information on how to create a new one.

View an Enrollment Form from the Organization (IRMS) Details Page

After the Organization (IRMS) is created using the **Create Organization (IRMS)** link, it can be viewed from the Organization (IRMS) Maintenance [Details] page. Search for and select the Organization (see the [Search/Add/Edit Organizations](#) topic). On the Organization (IRMS) Maintenance [Details] page, click **Show Enrollment Forms**.

Facilities

The options listed in the Facilities menu allow you to search for, add, and edit information for Facilities (clinics) for consistent data entry and to avoid data entry redundancy.

In the First Responder application, both referring organizations (employers) and vaccination locations are defined as Facilities and appear as "Facilities/Employers" on the menu and options.

Facilities are usually configured by a user at the Registry level, so most users do not have access to the Facility setup screen.

Depending on your access level and permissions, you may be able to add a new user immediately after adding a Facility. An option to invoke the Web User Maintenance - Add portion of the IWeb application appears on the Facility Add page if you have the appropriate permissions. See [Add a Facility](#) for more information.

The topics in this section include:

- [Search/Add/Edit Facilities](#)
- [Redisplay Search Results](#)
- [Redisplay Facility Details](#)

Select a Facility

The Select Facility page may appear immediately after logging on to the application, but you can also quickly switch Facilities (if you have permission to access more than one Facility) any time you want to by using the menu on the left - simply click **Main > Select Facility**.

Once the Select Facility page opens, select the new Facility from the drop-down list and click **Continue**.

Search/Add/Edit Facilities

Although Facilities are typically set up by a user at the Registry, the information is included here because the feature is part of the IWeb application.

Search for a Facility

To search for a Facility, click **Facilities > Search/Add** on the menu. The Facility Maintenance page appears. Enter the search criteria (optional) and click **Search**. The search results appear in the Search Results section of the screen.

If an Organization (*IRMS*) was selected, only the Facilities for that Organization (IRMS) will appear in the list. If no Organization (IRMS) was selected before the search (including if none was selected after logging in), all of the Facilities will appear in the search results.

Enter fewer criteria to broaden the search and try to increase the number of search results. Enter more criteria to narrow the search results.

To view details about a Facility, click the arrow button in the *Select* column for that Facility in the list. The Facility Maintenance [Detail] page opens where, depending on your access level and permissions, you can view the information, create an order set, edit the details, and create new notes.

When searching for a Facility, these are the criteria you can use to conduct your search:

Field	Description
Organization (IRMS) ID / Name	Select an Organization (IRMS) ID and name from the drop-down list, after which the radio button will automatically be selected (if it isn't already). States have the ability to configure this so that it is an automatically populated, read-only field instead of a drop-down list.
Organization (IRMS) ID	Enter the Organization (IRMS) ID number, after which the radio button will automatically be selected.
Organization (IRMS) Name	Enter part or the entire Organization (IRMS) name, after which the radio button will automatically be selected.
Inactive Status	Select the status of the Facility (Active Only or Inactive Only) or leave it as "--select--" to search for all Facilities, regardless of status. The checkbox will automatically be selected after you select from the list.
Facility Name	Enter part or the entire Facility name, after which the checkbox will automatically be selected.
VFC PIN	Select a VFC PIN from the drop-down list, after which the checkbox will automatically be selected.
Facility City	Enter the Facility's city, after which the checkbox will be selected.
Phone	Enter the Facility's phone number, after which the checkbox will be selected.
District / Region	Enter the Facility's district or region, after which the checkbox will be selected.
Recruiting Status	Appears for the Provider module. Indicates the status of the recruitment.

Add a New Facility

Before adding a new Facility, you must first conduct a [search](#) to make sure it does not already exist. Under the list of Facilities in the Search Results, click **Add**. (If the **Add** button does not appear under the Search Results list, narrow the search criteria and conduct another search that will have fewer search results.)

If you attempt to add a Facility that is already entered in the application, a message appears indicating that the Facility already exists.

After clicking Add, the Facility Maintenance Update page appears with the Organization (IRMS) name already filled in if it was selected previously, such as after you logged in.

Enter as much information about the Facility as possible (the required fields are in **bold red** text) and click **Save**.

The fields available on this page are as follows:

Field	Description
Facility Name	If not automatically populated, enter the full, complete name of the Facility. This field is required.
Facility Display Name	Enter a short name or abbreviation for the new Facility. Maximum of 30 characters. If used, this display name appears in drop-down lists for all screens using the Facility's name.
Organization (IRMS)	Organization (IRMS) client users are required to select an Organization (IRMS) from the drop-down list. However, there is a state-configurable option to have this field automatically populate instead.
Street Address	Enter the first line of the street address or PO Box. This field is required for the First Responder application.
Street Address 2	Enter the second line of the street address.
City	Enter the city name of the Facility location. This field is required for the First Responder application.
State	Select the state from the drop-down list. This field is required for the First Responder application.
Zip Code	Enter the zip code for the Facility. If more than one zip code exists, the Select Zip Code dialog box will appear. This field is required for the First Responder application.
County/Parish	Enter the City and State information first, then select the county/parish from the drop-down list. If the City and State are not entered first, this list will be blank.
Phone Number	Enter the Facility's phone number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111). This field is required for the First Responder application.
Phone Number Extension	Enter the extension number associated with the Facility's phone number.
Fax Number	Enter the Facility's fax number. An error message will appear if a phone number with repeating digits is entered (e.g., 111-1111).
Email	Enter the Facility's email address.
Primary Contact First Name	Enter the first name of the contact person at the Facility. This field is required for the First Responder application.
Primary Contact Last Name	Enter the last name of the contact person at the Facility. This field is required for the First Responder application.

Field	Description
Inactive	Select this option if the Facility is inactive. Since records cannot be deleted, setting the Facility as inactive flags it so that it cannot be used.
District/Region	Enter the whole number that corresponds with the Facility's district or region. There is a state-configurable option to have this field automatically populated.
Automatic Ownership Blocked	If this option is selected, the Facility cannot own patient and vaccination records. A Facility with blocked ownership does not display in the drop-down list on the patient demographics screen. When adding an administered vaccination, the Facility on the patient demographics screen is not populated with the Facility from the administered shot.
Comments	Enter any other information to keep on file for the Facility. Maximum of 254 characters.
Enable Waiting Room	Select this option to have the Waiting Room option appear under the Patient menu in order to allow the use of the waiting room in servicing patients in IWeb and Mass Immunizations.
VFC PIN	Enter a VFC PIN. The number must be unique or an error will appear stating <i>Error: Duplicate VFC PIN</i> .
Disable VFC/Publicly Supplied Functionality	Select this option to disable the VFC/Publicly Supplied (Funding Source) functionality throughout the application. This will remove the VFC Status and Publicly Supplied/Funding Source fields from the Vaccination add/edit pages, the Lot Number add/edit pages, and the Select Lot Number pop-up. This will also cause vaccination barcoding to NOT require matching inventory.
Administration of public vaccine to VFC ineligible patients	Select an option to indicate whether the administration of public vaccine to VFC ineligible patients should be: <ul style="list-style-type: none"> • Allowed - Permits administration of the vaccine • Warning - Issues a warning but allows the user to override the warning. The override is entered into the vaccination table. • Error - Prevents administration of the shot and displays an error in red.
Facility Type	Select the Facility type. If Other is selected, a description is required in the next field.
Facility Type Description (if Other)	Enter the description for the "Other" Facility type. If the Facility type Other is selected, this field is required.
Provider Agreement Facility Type	Select the Facility type for the provider agreement. If Other is selected, a description must be entered in the next field.
Provider Agreement Facility Type Other	Enter a description for Other in the previous field. This field is required if Other is selected in the previous field.
Referring Organization Category (FRITS)	Select the First Responder application's referring organization.
Reporting Method	Select the method the Facility uses for reporting (e.g., Direct Data Entry, DTT Import, Batch HL7). If the method is DTT Import, the DTT

Field	Description
	Profile Name field must have a valid entry.
DTT Profile Name	If the reporting method is DTT Import, enter the name of the profile being used.
Allow Imports to Decrement Organization (IRMS) Inventory	<p>Select this option to allow imported data to decrement the inventory. Organization-associated lots must be able to be decremented by immunizations given at facilities for RPMS sites using the HL7 Realtime data upload.</p> <p>If inventory is imported in HL7 or DTT with this decrement option selected, the logic first looks at the Facility for available inventory. If no inventory exists, the inventory is decremented at the Organization (IRMS) level instead, if the available inventory does not exceed the negative doses allowed amount.</p> <p>If no inventory exists for either the Facility or the Organization, the import line errors with the existing message that the inventory cannot be decremented.</p> <p>If the Facility does not have the Allow Decrement Inventory at Organization (IRMS) option selected/enabled, the existing functionality is applied. (The Facility must have inventory, or the line will error).</p>
Facility Group	Select the group of the Facility.
Local Approval Organization (IRMS)	Select the appropriate jurisdictional Organization (IRMS) for approving vaccine orders. This option is only visible if the user has state or local order approver permission.
Provider Agreement	
Allow Provider Agreements	<p>Select this option if the Organization (IRMS) is able to allow provider agreements. This option only appears if the Administration > Properties > Vaccine Management option Enable Provider Agreement Features is selected.</p> <p>If Allow Provider Agreements is selected/enabled, the Facility can use the Orders/Transfers > Search Agreement feature to view/approve provider agreements.</p>
Shipping Address Street	Enter the first line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address Street 2	Enter the second line of the address where the vaccine order shipments will be sent/shipped. The user must have state or local order approver permission in order to see this option.
Shipping Address City	Enter the city name where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address State	Select the state where the vaccine order shipments are to be sent. The user must have state or local order approver permission in order to see this option.
Shipping Address County	Select the county for the vaccine order shipments. The user must have

Field	Description
	state or local order approver permission in order to see this option.
Shipping Address Zip	Enter the zip code for the vaccine order shipments. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered for the city, the Select Zip Code dialog box will appear. Otherwise, the zip code may be automatically populated.
Shipping Instructions	Enter any special shipping instructions, including a contact person's name, phone, fax, and/or email address. The user must have state or local order approver permission in order to see this option.
Mailing Address Street	Enter the first line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Street 2	Enter the second line of the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address City	Enter the city for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address State	Select the state for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address County	Select the county for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option.
Mailing Address Zip	Enter the zip code for the mailing address where correspondence for vaccine order shipments are to be mailed. The user must have state or local order approver permission in order to see this option. If multiple zip codes have been entered, the Select Zip Code dialog box appears. Otherwise, the zip code may be automatically populated.
Contact Details	
Type 1 (and 2-5)	Select a contact type. Examples: Vaccine Delivery, Mailing, Facility.
Contact First Name 1, Middle Initial 1 and Last Name 1 (and 2-5)	Enter the name of the contact person.
Phone Number 1 (and 2-5)	Enter the phone number for this contact.
Phone Number Extension 1 (and 2-5)	If applicable, enter the phone extension for this contact.
Fax Number 1 (and 2-5)	Enter the fax number for this contact.
Email Address 1 (and 2-5)	Enter the email address for this contact.
Vaccine Management	
Certifying Provider	Enter the name of the certifying provider. This is used to support the depot using VOMS.
Certifying Provider Phone	Enter the phone number for the certifying provider. This is used to support the depot using VOMS.

Field	Description
Certifying Provider Fax	Enter the fax number for the certifying provider. This is used to support the depot using VOMS.
Certifying Provider Email	Enter the email address for the certifying provider. This is used to support the depot using VOMS.
Agreement Signatory Name	Enter the name of the agreement signatory.
Agreement Signatory Title	Enter the title of the agreement signatory.
Original VFC Cert Date	Enter the original VFC certification date.
Current Certification Date	Enter the date of the current certification.
Freezer average temperature of 5° F or colder	Select this option to indicate that the average temperature of the freezer is 5° F or colder, if applicable.
Separate, insulated freezer door	Select this option to indicate that there is a separate insulated freezer door on the freezer, if applicable.
Freezer Measuring Device	Select the device used to measure the freezer temperature. The choices are: <ul style="list-style-type: none"> • Standard Fluid Filled • Continuous Recording • Min Max • Dial • Digital • Digital Data Logger • Other - enter the description in the next field (mandatory if Other is selected)
Other Device	If the Freezer Measuring Device is Other, enter a description here (required).
Allow Online Orders	Select this option is the Facility can send vaccine orders online. The user must have state or local order approver permission in order to see this option.
Default physical inventory on order	Select this option to display the Current Inventory for that Vaccine on the Create Order > Order Details screen for the <i>Physical Inventory</i> column. If selected (enabled), the current inventory displays on the Create Order screen as read-only. This field is used for reconciliation and controls the defaults in the <i>Physical Inventory</i> column on the Create Order page. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.
Default doses used last month on order	Select this option to display the Default Doses Used Last Month in the <i>Doses Used Last Month</i> column on the Create Order > Order Details screen. If not selected (disabled), a blank field displays on the Create Order screen for the user to enter their own quantity. The user must have state or local order approver permission in order to see this option.

Field	Description
Allow Vaccine Transfers	Select this option if the Facility is able to allow vaccine order transfers. The user must have state or local order approver permission in order to see this option.
Click here to select receiving transfer Organization (IRMS) and facilities	<p>This option only appears if the Administration > Properties > Vaccine Management > Limit Organization (IRMS) and Facilities to Receive Transfer option is enabled (selected). If this option is enabled and the Allow Vaccine Transfers option (previous field) is selected, this becomes a required field.</p> <p>Click this link to open the Select Receiving Transfer Facilities window. Select one or more Organizations/Facilities that can receive vaccine transfers and click the double-chevron (>>) button to transfer them to the Selected box. Click Done when all of the Facilities have been selected.</p> <p>Once Done is clicked, a validation is performed. If the Allow Vaccine Transfers is selected but no Organizations/Facilities were selected, an error message appears at the top of the screen stating <i>Please select the receiving transfer facilities</i>. If a new Facility is being added, the selected Receiving Transfer Facilities are saved to the database only when the Facility has been created and saved.</p> <p>Once saved, only the selected Organizations/Facilities are populated on the Create Transfer screen in the Receiving Organization (IRMS) and Receiving Facility drop-down lists.</p>
Allow Vaccine Orders	Select this option if the Facility is able to allow vaccine orders. The user must have state or local order approver permission in order to see this option.
Order Frequency	<p>Select the provider's ordering frequency from the drop-down list. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • Annual (calendar year) • Every six months (month will vary as assigned) • Every three months (month will vary as assigned) • Every two months (month will vary as assigned) • Monthly (1st day of the month to the last day of the month) • Twice monthly (1st to the 15th and 16th to the last day of the month) <p>If the Organization/Facility does not have an ordering frequency set, the ordering frequency is derived from the registry setting. If there is an IRMS/Facility setting, it will override the registry setting.</p> <div style="border: 1px solid black; padding: 5px; background-color: #f0f0f0;"> <p>NOTE: If the provider orders more frequently than their ordering frequency, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order frequency. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i></p> </div>

Field	Description
Order Timing	<p>Select the timing to provide the ability to record ordering timing on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide setting. Choices are:</p> <ul style="list-style-type: none"> • --Select-- (will not validate) • 1st to the 15th • 16th to End of Month <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: If the provider orders outside their order timing window, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order timing. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i> The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order timing.</i></p> </div>
Order Frequency Start Month	<p>Select a month for the start of the order frequency timing. Appears on both the Organization (IRMS) and Facility add/update screens. This is not a registry-wide property setting. Choices are January, February, March, April, May, or June. This field uses the Ordering Frequency field to determine a valid schedule. No order schedule displays for twice monthly, monthly, or annual frequencies.</p> <ul style="list-style-type: none"> • Every Two Months - Start Month = January, Schedule = Jan., Mar., May, July, Sep., Nov. / Start Month = February, Schedule = Feb., Apr., June, Aug., Oct., Dec. • Every Three Months - Start Month = January, Schedule = Jan., Apr., July, Oct. / Start Month = February, Schedule = Feb., May, Aug., Nov. / Start Month = March, Schedule = Mar., June, Sept., Dec. • Every Six Months - Start Month = Jan., Schedule = Jan., July. / Start Month = February, Schedule = Feb., Aug. / Start Month = March, Schedule = Mar., Sept. / Start Month = April, Schedule = Apr., Oct. / Start Month = May, Schedule = May, Nov. / Start Month = June, Schedule = June, Dec. <p>If the Organization (IRMS)/Facility does not have an order start date set, the order schedule is not validated.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: If the provider orders outside their order schedule, a dialog box appears when the user clicks Submit, stating <i>Your order is outside the assigned order schedule. Your LHJ will have to approve this exception. Select an exception comment from the drop-down menu and click "Submit" to place this order.</i> The exception comment is required for submitted orders only. The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the exception reason of <i>Outside assigned order schedule.</i></p> </div>
Order Threshold Percent	<p>Enter a numeric value to represent the percentage of orders to reach before placing an order for the Organization/Facility. There is also a</p>

Field	Description
	registry-wide setting in the Administration properties that is used if a setting is not entered here (see Administration Settings). However, this setting overrides the registry-wide setting.
Recommended Quantity Calculation	<p>Select the recommended calculation to use for the recommended quantity (Based on Administered Doses, Based on Order History). This determines how the default quantity is calculated. (The Recommended Quantity default can also be turned off under Administration > Properties > Vaccine Management, which is recommended when there is no data yet.)</p> <p>If Based on Administered Doses is selected, the Recommended Quantity is rounded off to a whole number divisible by the vaccine Package Size for publicly supplied vaccines.</p> <p>If Based on Order History is selected and an order is created with an Order Quantity that is more or less than the Order Threshold Percent and Recommended Quantity, an alert displays and the order is queued for Manual Review. Additionally, when using order history, the safety stock is already factored in and does not need to be added separately.</p>
Enable Auto-Receive	Select this option to allow an uploaded McKesson file to populate lot numbers on open orders. If part of an order is missing from the McKesson file, the new order is created upon receipt.
Order Set/Order Type	Select the order set and order type that define the vaccines that the Facility can order from the drop-down list. The user must have state or local order approver permission in order to see this option.
Bypass Dose-Level Accountability	<p>Select this option to activate the business logic that allows providers that do not track their inventory to the patient dose level, to enter the appropriate reconciliation data to record their current physical inventory.</p> <p>If this option is selected/enabled, the Reconciliation page automatically populates the reason with <i>Matches Physical Inventory</i>. When the physical inventory value is entered and the user tabs out of the field, the reason automatically defaults to the correct add/subtract <i>Matches Physical Inventory</i> reason and all other reasons are removed from the drop-down list.</p> <p>For example, if a site does not manage inventory in the Registry and does not decrement from inventory by either the electronic import decrementing logic or by selecting the lot during direct data entry, the system does not know the doses used value for the site. In this case, the provider needs to do their own refrigerator count and enter that number, rather than record each inventory adjustment individually. This is needed to simplify data entry and increase participation among sites that are not significant Registry users.</p> <div data-bbox="613 1661 1471 1812" style="border: 1px solid black; padding: 5px;"> <p>NOTE: In the Inventory Transaction report, <i>Matches Physical Inventory Plus</i> displays under the <i>Other In</i> transaction type and <i>Matches Physical Inventory Minus</i> displays under the <i>Other Out</i> transaction type. This reason does not display on the Lot Number Maintenance screen or on the regular Reconciliation page.</p> </div>

Field	Description
Upload Temperature Data	Select this option to allow the Facility to upload the cold storage temperature data.
Allow only one brand selection per vaccine	Select this option to require users to select only one vaccine brand.
Add user following facility creation	Select this option, located immediately above the Cancel , Reset and Save buttons, if you want to add a new user for this Facility as your next step. Otherwise, you will be returned to the Facility Maintenance page.

Edit a Facility

To edit a Facility's information, search for the facility and click on the arrow button in the *Select* column for that Facility in the Search Results list. On the Facility Maintenance [Detail] page that opens, click **Edit**. Make any necessary changes on the Facility Maintenance Update page and click **Save**.

When facilities are merged, the information from the provider agreement populates in the new facility created from the merge.

The fields available on the Facility Maintenance Update page are the same as detailed in the [Add a Facility](#) section, with these additional fields:

Field	Description
Facility Last Updated Date	Displays the last date/time the Facility was updated.
Facility Last Updated By	Displays the user name of the user who last updated the Facility. However, if the last update was based on the approval of a provider agreement, the user who approved the agreement will appear here.
Facility Created Date	Displays the date and time the Facility was originally created.
Facility Created By	Displays the user name of the person who originally created the Facility.

Create/Modify Order Set from Facility Maintenance [Detail] Page

You can immediately create a new order set for a specific Facility by clicking the **Create Order Set** button on the Facility Maintenance [Detail] page for that Facility. If an order set has already been created for that Facility, the button will display as **Modify Order Set**.

View or Add Notes

To view recent notes about a Facility or to create new notes, follow the steps to search for an Facility and view the data on the Facility Maintenance [Detail] page for that Facility. Scroll down to the bottom of the page. If any notes were created previously, the most

recent ones appear at the bottom of the page. There is also an option to view prior notes. To add a new note, click **Create New Notes**, add the new note in the pop-up window, and click **Save**.

Redisplay Facility Search Results

Once you have conducted a Facility search, the **Facilities > Search Results** link becomes available on the menu. If no Facility search has yet been performed, the link is disabled.

To view the results for a previous Facility search, click **Facilities > Search Results**. The Facility Maintenance page appears with the search results.

Redisplay Facility Details

Once you have conducted a Facility search and viewed the Facility Maintenance [Detail] page for a Facility, the **Facilities > Detail** link becomes available on the menu. If no Facility search has yet been performed, or if a search was performed but the Facility Maintenance [Detail] page was not viewed for a Facility, the link is disabled. The **Facilities > Detail** link takes you to the information for the most recently viewed Facility.

To view the Facility Maintenance [Detail] page for the most recently viewed Facility, click **Facilities > Detail**. The Facility Maintenance [Detail] page appears for that Facility.

To edit the details for the Facility, click **Edit**. See [Edit a Facility](#) for more information.

Physicians/Vaccinators

The **Physicians & Vaccinators** menu is used to search for, add, and edit names of physicians and vaccinators for consistency purposes and to avoid data entry redundancy. Adding this information allows the related application fields to automatically populate with the data.

For the purposes of VIMS, a *physician* is the primary care physician for the patient. The physician's name can be selected on the patient record. A *vaccinator* is a person who administers shots, and can also be selected on the vaccination record.

Search for a Physician/Vaccinator

A search is always performed prior to adding or updating physician and vaccinator information.

To search for a physician or vaccinator, click **Physicians & Vaccinators > Search/Add**. The Physician/Vaccinator Maintenance page opens. Enter the search criteria and click **Search**. The search results display in the lower portion of the page.

To view details about a physician or vaccinator, click the arrow button in the *Select* column for that physician/vaccinator in the list. The Physician/Vaccinator Maintenance [Detail] page opens where, depending on your access level and permissions, you can view the information, edit the details, view associated facilities, and add additional associated facilities.

To add a physician or vaccinator to a scan sheet, click the **Add to Scan Sheet** button located underneath the search results list.

When searching for a physician or vaccinator, these are the criteria you can use to conduct your search:

Field	Description
Type	Select the type of person you are searching for from the drop-down list: <ul style="list-style-type: none"> • Physician • Vaccinator • Physician and Vaccinator
Physician/Vaccinator Last Name	Enter the physician or vaccinator's last name (or just the first few letters of the last name). The option is automatically selected after you start typing.
Organization (IRMS) Organization (IRMS) Group	Select the Organization (IRMS) or Group from the drop-down list (after which the option is automatically selected), or select Do Not Limit.

Field	Description
Do Not Limit	
Facility Facility Group Do Not Limit	Select the Facility or Facility Group from the drop-down list (after which the option is automatically selected) or select Do Not Limit.
VFC PIN	Select a VFC PIN from the drop-down list, after which the checkbox will automatically be selected.

Add a New Physician/Vaccinator

Before adding a new physician or vaccinator, you must first conduct a search to make sure they have not already been entered. Under the list of physicians/vaccinator in the search results, click **Add**.

If you attempt to add a physician or vaccinator who has already been entered into the application, a message appears indicating that the physician/vaccinator already exists.

After clicking **Add**, the Physician/Vaccinator Maintenance [Add] page appears with some information already filled in if it was selected as search criteria, such as the type.

Enter as much information about the physician or vaccinator as possible (the required fields are in **bold red** text) and click **Save**.

The fields available on this page are as follows:

Field	Description
First Name	Enter the physician or vaccinator's first name. This field is required.
Middle Name	Enter the physician or vaccinator's middle name.
Last Name	Enter the physician or vaccinator's last name. This field is required.
Title	Select the physician or vaccinator's title from the drop-down list.
Specialty	Select a specialty from the drop-down list. If Other is selected, enter the specialty in the textbox that appears.
SSN	Enter the physician or vaccinator's social security number (U.S.).
BOMEX	Enter the physician or vaccinator's BOMEX number (Arizona).
DO	Enter the physician or vaccinator's Doctor of Osteopathy state-assigned license number.
Medicaid PIN	Enter the physician or vaccinator's Medicaid PIN.
Medicaid Group	Enter the physician or vaccinator's group number.
Medicare PIN	Enter the physician or vaccinator's Medicare PIN.
Medicare Group	Enter the physician or vaccinator's Medicare group number
NPI	Enter the physician or vaccinator's National Provider ID. NOTE: The NPI is a 10-digit unique identification number for

Field	Description
	covered healthcare providers. Healthcare providers that bill for Medicare services require an NPI. This field displays on the HCFA 1500 report (33A).
Medical License Number	Enter the physician or vaccinator's medical license number.
Terminal Distributor's License	Enter the physician or vaccinator's terminal distributor's license number.
Group NPI	Enter the physician or vaccinator's group NPI number.
Other Provider ID	Enter any additional provider IDs, up to 30 characters in length. NOTE: This field displays on the HCFA 1500 report (33B).
Organization (IRMS)	Select the physician or vaccinator's associated Organization (IRMS) from the drop-down list.
Facility	Select the physician or vaccinator's Facility from the drop-down list. Facility names in the list may be abbreviated names instead of full names. NOTE: Physicians/vaccinators added without a Facility are considered <i>floaters</i> and do not display in all drop-down menus for the Organization (IRMS).
Phone Number	Enter the physician or vaccinator's phone number.
Phone Number Extension	Enter the physician or vaccinator's phone number extension.
Fax Number	Enter the physician or vaccinator's fax number.
Email	Enter the physician or vaccinator's email address.
District/Region	Enter the physician or vaccinator's district or region. This is a whole number and may be automatically populated, depending on the application's configuration settings.
Inactive	Select this option if the physician or vaccinator is inactive. Since records cannot be deleted, selecting this option flags the record so that it cannot be used.
Automatic Ownership Blocked	Select this option to disable the physician's ability to "own" a patient. If this option is selected, the physician's name does not display in the drop-down list on the patient demographics page.
Comments	Enter any other optional information for the physician/vaccinator. This field holds 254 characters.
Provider Tax ID	Enter the physician or vaccinator's provider tax identification number.
Provider Tax ID Type	Enter the physician or vaccinator's tax ID type.
Provider Taxonomy (Allopathic / Osteopathic / Internal Medicine)	Select the provider taxonomy from the drop-down list.
Type	Select Physician, Vaccinator, or Physician and Vaccinator from the drop-down list. This field is required.

Edit a Physician/Vaccinator

Authorized users can edit physician/vaccinator details and add an electronic signature if the Electronic Signature Pad and corresponding software has been installed.

To edit a physician or vaccinator's information, search for the physician/vaccinator and click on the arrow button in the *Select* column for that physician/vaccinator in the Search Results list. On the Physician/Vaccinator Maintenance [Detail] page that opens, click **Edit**. Make any necessary changes on the Physician/Vaccinator Maintenance [Update] page and click **Save**.

The fields available on the Physician/Vaccinator Maintenance [Update] page are the same as detailed in the [Add a Physician/Vaccinator](#) section.

To edit an electronic signature using the signature pad, have the authorized person sign and click one of the available buttons:

- **Edit** - To edit the form data (date given, resigature)
- **Clear** - To erase the signature
- **Done** - To save and store the signature
- **Cancel** - To abort the signature task

Add/Edit a New Physician/Vaccinator

Use these steps to enter the information for the primary care physicians and other employees who administer vaccines (*vaccinators*).

Add a New Physician/Vaccinator

Before adding a new physician or vaccinator, you must first conduct a [search](#) to make sure they have already been added to the application. Under the list of physicians/vaccinators in the Search Results, click **Add**.

If you attempt to add a physician or vaccinator who is already entered in the application, a message appears indicating that they already exist.

After clicking Add, the Physician/Vaccinator Maintenance [Add] page opens.

Enter as much information about the physician/vaccinator as possible (the required fields are in **bold red** text) and click **Save**.

The fields available on this page are as follows:

Field	Description
First Name	Enter the physician/vaccinator's first name. This field is required.

Field	Description
Middle Name	Enter the physician/vaccinator's middle name.
Last Name	Enter the physician/vaccinator's last name. This field is required.
Title	Select the physician/vaccinator's title from the drop-down list.
Specialty	Select physician/vaccinator's specialty from the drop-down list. If Other is selected, enter the specialty in the textbox that appears.
SSN	Enter the physician/vaccinator's social security number (U.S.).
BOMEX	Enter the physician/vaccinator's BOMEX number (Arizona).
DO	Enter the physician/vaccinator's Doctor of Osteopathy state-assigned license number.
Medicaid PIN	Enter the physician/vaccinator's Medicaid PIN.
Medicaid Group	Enter the physician/vaccinator's Medicaid group number.
Medicare PIN	Enter the physician/vaccinator's Medicare PIN.
Medicare Group	Enter the physician/vaccinator's Medicare group number.
NPI	Enter the physician/vaccinator's NPI number, which is a unique 10-digit ID number for covered healthcare providers. NOTE: This field displays on the HCFA 1500 report (33A).
Medical License Number	Enter the physician/vaccinator's medical license number, up to 30 characters/digits.
Terminal Distributor's License	Enter the physician/vaccinator's terminal distributor's number.
Group NPI	Enter the physician/vaccinator's group NPI number.
Other Provider ID	Enter any additional provider IDs, up to 30 characters/digits in length. NOTE: This field displays on the HCFA report (33B).
Organization (IRMS)	Select the physician/vaccinator's associated Organization (IRMS) from the drop-down list. This field is required.
Facility	Select the physician/vaccinator's Facility from the drop-down list. The Facility name may be the abbreviated version instead of the full name. NOTE: Physicians/vaccinators without an assigned facility are considered <i>floaters</i> and display in all drop-down lists for the Organization (IRMS).
Phone Number	Enter the physician/vaccinator's phone number.
Phone Number Extension	Enter the phone number extension.
Fax Number	Enter the physician/vaccinator's fax number.
Email	Enter the physician/vaccinator's email address.
District/Region	Enter the physician/vaccinator's district or region. This is a whole number and may be automatically populated.

Field	Description
Inactive	Select this option if the physician/vaccinator is inactive. Since records cannot be deleted, selecting this option flags it so that it cannot be used.
Automatic Ownership Blocked	Select this option if the physician/vaccinator cannot "own" a patient. If this option is enabled, the physician/vaccinator does not appear in the drop-down list on the patient demographics page.
Comments	Enter any additional comments, up to 254 characters.
Provider Tax ID	Enter the physician's provider tax ID number.
Provider Tax ID Type	Enter the physician's provider tax ID type.
Provider Taxonomy	Select the physician's taxonomy from the drop-down list.
Type	Select Physician, Vaccinator, or Physician and Vaccinator from the drop-down list. This field is required.

Edit a Physician/Vaccinator

Authorized users can edit existing physicians and vaccinators. Electronic signatures can be edited if the electronic signature pad is connected and the software is installed.

To edit a physician/vaccinator's information, [search](#) for the physician/vaccinator and click on the arrow button in the *Select* column for that physician/vaccinator in the Search Results list. On the Physician/Vaccinator Maintenance [Detail] page that opens, click **Edit**. Make any necessary changes on the Physician/Vaccinator Maintenance [Update] page and click **Save**.

The fields available on the Physician/Vaccinator Maintenance [Update] page are the same as detailed in the [Add a New Physician/Vaccinator](#) section.

Edit an Electronic Signature

To edit the electronic signature using the signature pad, have the authorized person sign and click one of these buttons:

- **Edit** - Edit the form data (date given, re-sign)
- **Clear** - Erase the signature
- **Done** - Save and store the signature
- **Cancel** - Abort the signature process

Redisplay Physician/Vaccinator Search Results

Once you have conducted a physician/vaccinator search, the **Physician & Vaccinators > Search Results** link becomes available on the menu. If no physician/vaccinator search has yet been performed, the link is disabled.

To view the results for a previous physician/vaccinator search, click **Physicians & Vaccinators > Search Results**. The Physician/Vaccinator Maintenance page appears with the search results.

Redisplay Physician/Vaccinator Details

Once you have conducted a physician/vaccinator search and viewed the Physician/Vaccinator Maintenance [Detail] page for a physician/vaccinator, the **Physicians & Vaccinators > Detail** link becomes available on the menu. If no physician/vaccinator search has yet been performed, or if a search was performed but the Physician/Vaccinator Maintenance [Detail] page was not viewed for a physician/vaccinator, the link is disabled. The **Physicians & Vaccinators > Detail** link takes you to the information for the most recently viewed physician/vaccinator.

To view the Physician/Vaccinator Maintenance [Detail] page for the most recently viewed physician/vaccinator, click **Physicians & Vaccinators > Detail**. The Physician/Vaccinator Maintenance [Detail] page appears for that physician/vaccinator.

To edit the details for the physician/vaccinator, click **Edit**. See [Edit a Physician/Vaccinator](#) for more information.

Associate a Physician or Vaccinator with a Facility

Physicians and vaccinators can be associated with one or more facilities within the Organization (IRMS).

NOTE: Physicians and vaccinators not assigned to at least one facility are considered *floaters* and display in all drop-down lists in the application.

Before a facility can be associated with a physician/vaccinator, [search](#) for the physician/vaccinator and click on the arrow button in the *Select* column in the search results list. The Physician/Vaccinator Maintenance [Detail] page opens.

To associate the physician/vaccinator with only one facility, you can click **Edit** and update the Facility field, then click **Save**. However, to associate the physician/vaccinator with

multiple facilities, click the **Associate Facilities** button at the bottom of the Physician/Vaccinator Maintenance [Detail] page.

The physician's name appears at the top of the page that opens. The currently associated Organization (IRMS) and any previously associated facilities appear in the list under the Associate Facilities heading. To add additional facilities, click **Add New Row**, and select the Organization (IRMS) and Facility from the related drop-down lists. Click **Save** after all of the associated facilities have been added.

To remove any previously associated facilities, select the checkbox in the *Inactive?* column for that facility. Again, click **Save** when finished.

Lot Numbers

The Lot Numbers menu (referred to as the Toolbox menu in the Mass Immunizations module) allows authorized users to work with lots and inventory management. For example, depending on their access level and permissions, users can:

- Search, add, and edit names of lot numbers for consistent data entry and to avoid data entry redundancy - see [Search/Add/Edit Lot Numbers](#)
- View inventory lot number logs and offsite logs - see [View Inventory Lot & Offsite Logs](#)
- Configure and use 2D barcode scanning - see [Generate a Barcode](#)
- Reconcile the inventory - see [Inventory Reconciliation](#)
- Aggregate vaccine counts - see [Aggregate Vaccine Counts](#)
- Review and correct log decrementing - see [Decrement Lots](#)
- Reconstitute a smallpox lot - see [Reconstitute a Smallpox Lot](#)

After logging in, the Lot Numbers menu displays for authorized users after an Organization (*IRMS*) and/or Facility is selected.

A state-configurable option for a Facility Inventory Manager can be configured to allow facility-wide lot number defaults to be used. If a user does not have lot number defaults configured in their [Personal Settings](#), the Inventory Manager's defaults are used. However, if the user does have lot defaults configured, those settings override the Facility Inventory Manager's settings.

States can also turn on the 2D barcode functionality (**Administration > Settings > Properties > Registry Settings > Enable Barcode Tools** and others) to add the ability to scan a 2D barcode on the vaccine vial to add into inventory. These properties also allow for 2D barcode scans on the vaccination page. See the Administration Settings topic for more information.

Search/Add/Edit/Inactivate Lot Numbers

Prior to adding or updating lot numbers, a search must be conducted.

NOTE: If you do not see the Lot Numbers menu, you either have not logged in as an authorized user, or you have not yet selected an Organization (*IRMS*) and/or Facility. In addition, when the **Administration > Settings > Properties > Vaccine Management > Do Not Allow Facility Client to add new inventory using "Lot number - Search/Add"** option is enabled (selected), Facility Client users cannot add new lot numbers on the Lot Number Maintenance page either manually or via barcode scanning.

Use these links to jump to a specific section:

- [Search for a Lot Number](#)

- [Add a New Lot Number](#)
- [Edit a Lot Number and Add/Subtract Doses](#)
- [Inactivate a Lot Number](#)
- [Add to Scan Sheet](#)
- [View Inventory Lot & Offsite Logs](#)
- [Generate a Barcode](#)

Search for a Lot Number

To search for a lot number, click **Lot Numbers > Search/Add** on the menu. The Lot Number Maintenance page appears. Enter the search criteria (optional) and click **Search**. The search results appear in the Search Results section of the screen.

When searching for a Lot Number, these are the criteria you can use to conduct your search:

Field	Description
Vaccine	Select a vaccine from the drop-down list to search for that specific vaccine name.
Manufacturer	Select a manufacturer from the drop-down list to search for a specific manufacturer. Manufacturers are added by administrative users (Administration > Define Values > Limit Manufacturer by Vaccine) - see Administration Settings for more information.
Lot Number	Enter a lot number to search for.
Facility	Select a Facility from the drop-down list. If a Facility has an abbreviated name, it will appear in the list instead of the full name.
Inactive	Select an active/inactive status from the drop-down list. If Inactive is selected, an Inactive Reason can be selected.
Inactive Reason	Select an Inactive Reason to search for. Examples: <ul style="list-style-type: none"> • Cold Chain Failure • Recall • Other

In the Search Results section of the page, expired vaccines are highlighted in **red** and vaccines that are set to expire in 30 days or less are highlighted in **yellow**.

The columns can be sorted by clicking on the up/down arrows to the right of each column name. The columns displayed are:

- Facility
- Manufacturer

- Lot Number
- Vaccine
- Funding Source
- Exp. Date (Expiration Date)
- Inactive ("Y" appears in the column if the Lot Number is inactive)

Add a New Lot Number

Users must have the Lot Number Manager permission in order to add new lot numbers. In addition, the **Administration > Properties > Vaccine Management > Do Not Allow Facility Client to add new inventory using "Lot number - Search/Add"** option must be disabled (deselected).

To add a lot number, first conduct a search, then click the **Add** button that appears at the bottom of the list. The Lot Number Maintenance [Add] page appears. Enter the information (see the table below) and click **Add**.

If there is a warning and the state-configurable option is enabled, select the **Ignore Unspecified Warning and Add Lot Number** option to ignore the warning and continue to add. (If the state-configurable option is not enabled, this will not appear.)

If the Limit Manufacturer by Vaccine option (**Administration > Define Values > Limit Manufacturer by Vaccine**) is set to None for a specific vaccine, an error appears when attempting to add the lot number with that manufacturer. The message is *Unable to add, manufacturer doesn't make this vaccine*. You must select a correct vaccine/manufacturer to continue.

CAUTION: Once you click **Add**, the new lot number cannot be removed/deleted. Instead, you must change the status to Inactive. See that topic for instructions.

Field	Description
Manufacturer	Select a manufacturer from the drop-down list. This field is required.
Vaccine	If entered on the search screen, this field is pre-populated. Otherwise, select a vaccine from the drop-down list. This field is required. NOTE: If you attempt to create a new vaccine lot of an unspecified vaccine type (e.g., HIB - Unspecified), a warning message appears at the top of the page to alert you that this action is not recommended. The message states, <i>Vaccine is unspecified, are you sure you want to add?</i> The checkbox must be selected to verify that you want to continue to add the unspecified vaccine.
Lot Number	Enter a lot number. This field is required.
Facility	Select the associated Facility from the drop-down list.

Field	Description
Expiration Date	Enter an expiration date in MM/DD/YYYY format. This is the date after which the vaccine can no longer be used. If a lot number does not include an expiration date, use the last day of the month.
Funding Source	Select the funding source, public (PUB) or private (PRVT). This field is required. The field may be read-only, depending on the user's permissions and the configured administration properties.
Reason Categories	Select a reason category from the drop-down list. Examples: <ul style="list-style-type: none"> • Correction • Matches Physical Inventory • Order Received • Transfer
Reason for Change	Select a reason for change from the drop-down list. This field is required. Example reasons: <ul style="list-style-type: none"> • Borrowed from Public/Private Inventory • Correction of invalid entry / to wasted doses (disposed/returned) • Matches Physical Inventory • Order Received • Received from ...
Date of Transaction	Enter the date the lot number was added/subtracted from inventory, in MM/DD/YYYY format. The current date is the default. This field is required.
Number of Doses Added	Enter the total number of doses added to inventory.
Product	Select the product from the drop-down list.
NDC Number	Select the NDC name and number from the drop-down list. (The NDC number is treated as a character field and is not validated for format. However, the correct format is 5-4-2. For example, an NDC that previously read 49281-008-10 now reads 49281-0008-10.) NOTE: If either the Administration > Settings > Properties > Registry Settings > Require NDC Number on Lot Number Add for Private Lots or Require NDC Number on Lot Number Add for Public Lots option is selected, this field is required.
VFC PIN of other party (if applicable)	If applicable, enter the VFC PIN. If the added vaccine was supplied by VFC, this field should have an entry.

Edit a Lot Number and Add/Subtract Doses

If a user has both the Lot Number Manager Access and the Lot Number Manager Edit permissions, the lot number and manufacturer can be edited on the Lot Number Maintenance Update page even if the lot has already been used. All reports and screens that display a lot number show the new value when it is updated. These pages include:

- Vaccination Detail
- Vaccination Edit
- Lot Recall Report
- Lot Number Summary
- Inventory Transaction Report
- Patient Detail Report
- Vaccine Lots to Expire Report
- Cost Report by Lot Number Report
- Vaccine Dispensed Report

The Private/Public Lot Numbers on the Vaccinations View/Add - Select Lot Number page are shaded.

For all other users, if no vaccinations have been administered from an existing lot, the lot number, manufacturer and vaccine type can be edited to correct data entry mistakes. However, if a shot has been administered from a lot, even if deleted, a user cannot edit the lot number.

While you are editing lot number details, other users are blocked from saving vaccinations related to the lot number being edited. Therefore, try to edit as quickly as possible. Users are blocked from saving vaccinations for that lot number as soon as you click the **Edit** button.

To edit a lot number, you must first perform a [search](#) for it. Then, in the Search Results section, click on the row for the one you want to edit. The Lot Number Maintenance [Detail] page opens. Click the **Edit** button to open the Lot Number Maintenance [Update] page. Make the changes as needed and click **Save**. Click the **Add Doses (+)** and **Subtract Doses (-)** buttons as needed to adjust the inventory.

The fields that are available to update are as shown here:

Field	Description
Manufacturer	Select a manufacturer from the drop-down list. This field is required.
Vaccine	<p>If entered on the search screen, this field is pre-populated. Otherwise, select a vaccine from the drop-down list. This field is required.</p> <p>NOTE: If you attempt to create a new vaccine lot of an unspecified vaccine type (e.g., HIB - Unspecified), a warning message appears at the top of the page to alert you that this action is not recommended. The message states, <i>Vaccine is unspecified, are you sure you want to add?</i> The checkbox must be selected to verify that you want to continue to add the unspecified vaccine.</p>

Field	Description
Lot Number	Enter a lot number. This field is required.
Facility	Select the associated Facility from the drop-down list.
Expiration Date	Enter an expiration date in MM/DD/YYYY format. This is the date after which the vaccine can no longer be used. If a lot number does not include an expiration date, use the last day of the month.
Funding Source	Select the funding source, public (PUB) or private (PRVT). This field is required. The field may be read-only, depending on the user's permissions and the configured administration properties.
Reason Categories	Select a reason category from the drop-down list. Examples: <ul style="list-style-type: none"> • Correction • Matches Physical Inventory • Order Received • Transfer
Reason for Change	Select a reason for change from the drop-down list. This field is required. Example reasons: <ul style="list-style-type: none"> • Borrowed from Public/Private Inventory • Correction of invalid entry / to wasted doses (disposed/returned) • Matches Physical Inventory • Order Received • Received from ...
Date of Transaction	Enter the date the lot number was added/subtracted from inventory, in MM/DD/YYYY format. The current date is the default. This field is required.
Number of Doses Added	Enter the total number of doses added to inventory.
Product	Select the product from the drop-down list.
NDC Number	Select the NDC name and number from the drop-down list. (The NDC number is treated as a character field and is not validated for format. However, the correct format is 5-4-2. For example, an NDC that previously read 49281-008-10 now reads 49281-0008-10.) <p>NOTE: If either the Administration > Settings > Properties > Registry Settings > Require NDC Number on Lot Number Add for Private Lots or Require NDC Number on Lot Number Add for Public Lots option is selected, this field is required.</p>
VFC PIN of other party (if applicable)	If applicable, enter the VFC PIN. If the added vaccine was supplied by VFC, this field should have an entry.

Inactivate a Lot Number

Lot numbers cannot be deleted, but they can be inactivated so that they are not available for use. Prior to inactivating lot numbers, users must adjust the inventory quantity to zero using the reconciliation functions.

Some states only allow Registry Client users to inactivate lot numbers. If the **Administration > Settings > Properties > Vaccine Management > Allow Only Registry Clients to Inactivate Lots** option is selected (enabled), the Registry Client must also have the Inactivate Lot Numbers permission.

To inactivate a lot number, first [search](#) for it and then select it in the search results to open its Lot Number Maintenance [Detail] page. Click the **Edit** button, then the **OK** button on the warning message that appears to warn you that users are blocked from saving vaccinations related to this lot number until you have finished editing it. Select the **Inactive** option on the Lot Number Maintenance [Update] page (after verifying it is the correct lot number), and then select a reason from the **Inactive Reason** drop-down list. Click **Save** when finished.

To exit out of this page, select another link in the menu.

Add to Scan Sheet

On the Lot Number Maintenance [Detail] page, click **Add to Scan Sheet** to add the lot to the Scan Sheet. A confirmation message will appear stating that the lot number has been added to the Scan Sheet; click the **X** to close the message window.

See the [View/Print Lot Number Inventory Scan Sheet](#) for more information about the Scan Sheet.

Redisplay Lot Number Search Results

After you have conducted a lot number search, the **Lot Numbers > Search Results** link becomes available on the menu. If no lot number search has yet been performed, the link is disabled.

To view the results for a previous lot number search, click **Lot Numbers > Search Results**. The Lot Number Maintenance page appears with the search results.

Redisplay Lot Number Details

After you have conducted a lot number search and viewed the Lot Number Maintenance [Detail] page for a specific lot number, the **Lot Numbers > Detail** link becomes available on the menu. If no lot number search has yet been performed, or if a search was performed but the Lot Number Maintenance [Detail] page was not viewed for a lot number, the link is disabled. The **Lot Numbers > Detail** link takes you to the information for the most recently viewed lot number.

To view the Lot Number Maintenance [Detail] page for the most recently viewed lot number, click **Lot Numbers > Detail**. The Lot Number Maintenance [Detail] page appears for that lot number.

To edit the details for the lot number, click **Edit**. See [Edit a Lot Number and Add/Subtract Doses](#) for more information.

Inventory Reconciliation

The inventory reconciliation feature is configured by a system administrator.

Inventory reconciliation can be completed by two methods:

- Configured to be required before a provider site can place an order, or
- By clicking **Lot Numbers > Reconciliation** from the menu.

If a user attempts to create an order without reconciling, an error message displays stating that they must first reconcile. Otherwise, the Reconciliation page opens.

A site can only adjust inventory quantities by reconciling. On the Reconcile Inventory page, there is a drop-down list of reasons for any discrepancies. Action reasons match the values in VacMan. Also of note:

- Inventory reconciliation can be summarized.
- The state administrator can change the number of days between required reconciliations.
- If there are any outstanding vaccine receipts, a warning is displayed.

Correction adjustment reasons are only available to users with the Inventory Correction and Lot Number Maintenance permissions.

NOTE: If an Organization (*IRMS*) is selected without a Facility, only the lots assigned to the Organization (*IRMS*) with no Facility display. Registry and *IRMS* users must select a Facility in order to see lot numbers under Reconciliation. If there are lot numbers that are not assigned to a Facility, they appear at the *IRMS* level with no Facility - but only those appear, not all of the lot numbers across Facilities.

Reconcile the Inventory

To perform an inventory reconciliation, click on the **Lot Numbers > Reconciliation** link in the menu. The Reconcile Inventory page opens. The columns and fields on this page are as follows:

Field	Description
Vaccine	The trade name or abbreviation of the specific vaccine. Hover your

Field	Description
	mouse over it to see the full name. Click the <i>Vaccine</i> header to sort the list alphabetically (ascending or descending) by vaccine name.
Lot Number	The identifying number for the vaccine lot.
Exp Date	The vaccine lot number's expiration date, in MM/DD/YYYY format. Click the <i>Exp Date</i> header to sort the list alphabetically (ascending or descending) by expiration date.
Quantity on Hand	The quantity of vaccine currently in inventory, as estimated by the application.
Physical Inventory	Enter the quantity that physically exists in the inventory.
Adjustment (+/-)	The difference between the Quantity on Hand and the Physical Inventory.
Category	Select the reconciliation category adjustment from the drop-down list. The list varies depending on whether the adjustment is positive or negative.
Reason	Select a reason for the reconciliation adjustment from the drop-down list. When the adjustment is negative, a reduction in inventory occurs. Otherwise, an increase in inventory occurs. The reason list displayed depends on whether the adjustment is positive or negative. A reason must be selected for each vaccine entry row before clicking the Save button, or an error message appears. NOTE: Since recommendation reasons differ with each state, the reasons must be entered via a database release/patch script. This is to allow the application to correctly increment and decrement inventory.
Funding Source	Displays the funding source, such as PUB for Public. The background for public lots is darker than the background for private lots for easier differentiation. Click the <i>Funding Source</i> header to sort the list alphabetically (ascending or descending) by funding source.
Inactive	Select this checkbox to inactivate lot numbers that are expired or have no doses remaining.
Add Row	Click the button to add a blank row for the same vaccine. The information for the displayed row must be entered prior to clicking the button, or an error message appears (<i>Please provide a value for physical inventory and select a reason for the change</i>).
Inventory Last Submitted	The last date the inventory was submitted. This appears in red if it has been more than 30 days since the last submission. Click the Inventory Last Submitted link to view the most recent submission dates in a pop-up window.

After making changes, click one of the following buttons:

- **Save** - This saves the entries and advances to the Lot Number Maintenance - Search page. See [Search for a Lot Number](#) for more information.

- **Print** - This allows the user to print the current inventory to assist in counting. Lot number details are pre-populated based on lot numbers in the system and the *Physical Inventory* column is blank for your use.
- **Bypass** - This button only appears when the user has the Inventory Correction permission and is forced to reconcile before ordering. It allows the user to bypass the requirement to reconcile vaccines before ordering.
- **Add Row** - This button adds a row of the same vaccine directly below the original, with the quantity updated based on the previous row. A physical inventory and reason must be added to the original row first, before clicking the Add Row button. Use this button to add additional reasons for adding or deducting inventory for the same lot number.
- **Submit Monthly Inventory** - This button submits the monthly inventory report once final reconciliation is completed. After clicking this button, the Inventory Last Submitted date updates on both the Reconciliation page and the Create Order page, and is visible to the local health jurisdiction (*LHJ*).

NOTE: Only users with the Inventory Correction reason can update the correction reasons. Users without this permission cannot correct inventory using reasons such as Correction of Invalid Entry and must select a valid adjustment reason or call their state help desk for more information.

Reconciliation Reasons

The positive and negative reconciliation reasons are listed below, but may vary from state to state.

Subtract from Total Doses:

Reason for Change	Effect(s)
Administered	
Not linked to vaccine	Doses Total is decremented, not from total used.
Administered to client who chose to opt out of the IIS	Doses Used is incremented. If this reason is selected by error and an adjustment to the doses is necessary, use the Deduct From Doses Used reason. NOTE: If this administrator has the Enable Option to Deduct Inventory for Patient Not in the Registry vaccine property setting enabled, this reason does not appear in the list.
Correction	
Correction of invalid entry	Doses Total is incremented. Requires the Inventory Correction permission.
Expired	
Expired	Doses Wasted and Returned is incremented.
Expired opened multi-dose vial	Doses Wasted and Disposed is incremented.

Reason for Change	Effect(s)
Wasted	
Drawn up, not used	Doses Wasted and Disposed is incremented.
Lost or unaccounted for	Doses Wasted and Disposed is incremented.
Broken/dropped/spilled	Doses Wasted and Disposed is incremented.
Vaccine damaged in transit	Doses Wasted and Disposed is incremented.
Recall	
Vaccine recall	Doses Wasted and Returned is incremented.
Spoiled	
Power outage/natural disaster	Doses Wasted and Returned is incremented.
Not properly stored	Doses Wasted and Returned is incremented.
Failure to store upon receipt	Doses Wasted and Returned is incremented.
Refrigerator/freezer too cold	Doses Wasted and Returned is incremented.
Refrigerator/freezer too warm	Doses Wasted and Returned is incremented.
Refrigerator/freezer mechanical failure	Doses Wasted and Returned is incremented.
Vaccine spoiled in transit	Doses Wasted and Returned is incremented.
Transfer	
Returned to vendor, non-VFC supplied	Doses Total is decremented.
Returned to depot	Doses Total is decremented. Only available for states with a depot.
Returned to state/local VFC program	Doses Total is decremented.
Transferred to another provider	Doses Total is decremented.
Restock private inventory from public	Doses Total is decremented.
Restock inventory from private	Doses Total is decremented.
Matches Physical Inventory	
Matches physical inventory	Only displays when the Facility/IRMS property is enabled (Bypass Dose Level Accountability). It is the only option available for users.

Add to Total Doses:

Reason for Change	Effect(s)
Correction	
Correction of invalid entry	Doses Total is incremented. Requires the Inventory Correction permission.
Deduct from doses used	Doses Total is incremented. This option should be selected when the following reasons were used in error:

Reason for Change	Effect(s)
	<ul style="list-style-type: none"> Administered to client who chose not to be in registry Two doses given to be equivalent of normal dose for this age person Vaccine used in remote clinic
Correction to wasted doses (disposed)	Doses Total is incremented.
Correction to wasted doses (returned)	Doses Total is incremented.
Order Received	
Received directly from vendor, not VFC supplied	Doses Total is incremented.
Received from VFC program	Doses Total is incremented.
Dose count variance in multi-dose vial	Doses Total is incremented. Only allowed for vials, not syringes, as defined on the VACMAN vaccine settings page.
Transfer	
Transferred to another provider	Doses Total is incremented.
Borrowed from private inventory	Doses Total is incremented.
Borrowed from public inventory	Doses Total is incremented.
Matches physical inventory	
Matches physical inventory	Only displays when the Facility/IRMS property is enabled (Bypass Dose Level Accountability). It is the only option available for users.

NOTE: Doses that are wasted are not counted as administered in the lot number totals, but are listed separately since they need to be counted as part of the original total.

Submit Monthly Inventory

To submit the monthly inventory, follow the steps above for [reconciling an inventory](#), then click **Submit Monthly Inventory**. The inventory information is submitted, a success message appears at the top of the page, the Inventory Last Submitted date updates on both the Reconciliation page and the Create Order page, and the information is available to the local health jurisdiction.

Aggregate Vaccine Counts

This option allows authorized users to enter aggregate vaccination counts in LINKS to create an initial inventory count that links into the Vaccine Ordering Management System (VOMS). It displays a free text table allowing users to enter aggregate vaccine counts for each of the vaccines listed in the reconciliation table.

Users must have the Aggregate Vaccine Counts permission.

To enter aggregate vaccine counts, click **Lot Numbers > Aggregate Vaccine Counts** from the menu. The Aggregate Vaccine Counts page opens.

The following fields are available on this page:

Field	Description
Vaccine	Select the name of the vaccine from the drop-down list.
Manufacturer	Select the vaccine's manufacturer from the drop-down list.
Lot Number	Enter the lot number.
Exp Date	Enter the vaccine's expiration date.
Physical Inventory	Enter the total physical count for the vaccine inventory.
Reason	Select the reason the vaccine is being entered as inventory from the drop-down list.
NDC Number	Select the NDC number from the drop-down list. The NDC number is a unique number assigned to each vaccine manufacturer. If used here, the value must match a record in the database table.
Funding Source	Select whether the funding source is public (PUB) or private (PRVT).
Date of Transaction	The date the aggregate vaccine count was entered. Defaults to today's date.

To add another row to enter the next aggregate vaccine count, click **Add Row**.

Click **Save** to save the aggregate vaccine count data and remain on the same page.

View Inventory Lot & Offsite Logs

The **View Lot Log** and **View Offsite Log** buttons are located on the Lot Number Maintenance [Detail] page. Click **Lot Numbers > Search/Add** in the menu, conduct a lot search, and select the lot to open the Lot Number Maintenance [Detail] page for that lot number, then select one of the buttons.

Lot Number Inventory Log

The Lot Number Inventory Log displays the lot number inventory information such as changes made to doses, a description of the reason for the change, and the date and timestamp of the change. It is used to view and verify changes that have been made to a lot.

NOTE: Vaccinations for patients who opt out or are exempt from the registry are included in the central registry for inventory and CASA purposes.

On the Lot Number Maintenance [Detail] page for a specific lot number, click **View Lot Log**. The Lot Number Inventory Log page opens for that lot number, displaying the following information:

- Vaccine name
- Manufacturer
- Lot Number
- Facility
- Publicly Supplied (Y/N) or Funding Source (Public/Private)

The details appear underneath the main lot information, with the following columns:

- Date
- Dose Change
- Other Party's *VFC* PIN
- Description
- Insert Stamp - the date and time the lot inventory was adjusted

After viewing the log information, click **Back** to return to the Lot Number Maintenance [Detail] page.

Lot Number Inventory Log - Offsite

If you are transporting and/or using vaccine inventory offsite, you can add log records about the addition (check in) or subtraction (check out) of doses, including comments. You can also print the log information.

NOTE: The application only accepts one value at a time in the Check In and Check Out fields.

On the Lot Number Maintenance [Detail] page for a specific lot number, click **View Offsite Log**. The Lot Number Inventory Log page opens for that lot number, displaying the following information:

- Manufacturer
- Lot Number
- Facility

The details appear underneath the main lot information, with the following columns:

- Date

- Dose Change
- Username
- Comments

Click **Print Log** to open the log in a new browser tab or window, from which you can use the browser's print feature to print the report.

To add (check in) or subtract (check out) doses, click **Add Log Record**. The Offsite Lot Number Maintenance [Add] page opens. On this page, you can add comments and the number of doses to add (Check In) or subtract (Check Out). Click **Save Changes** after entering the information.

Generate a Barcode

In order to generate and work with barcodes, the **Administration > Properties > Registry Settings > Enable Barcode Tools** option must be selected (enabled).

When the **Administration > Properties > Registry Settings > Enable Barcode Tools** property is enabled, the **Generate Bar Code** button appears at the bottom of the Lot Number Maintenance [Detail] page. (See [Search/Add/Edit Lot Numbers](#) for more information about the Lot Number Maintenance [Detail] page.)

To generate a barcode, click the Generate Bar Code button for a lot number, select one of these options in the pop-up window, load the label paper into the printer and click **Print**:

- **Single Label** (default)
- **Single Label on Sheet (Avery 5160)** - Select the number of rows and columns from the drop-down lists
- **Multiple Labels** (Avery 5160)

To cancel without printing, click the **X** in the upper left-hand corner of the pop-up window.

View/Print Inventory Lot Number Scan Sheet

When the **Administration > Properties > Registry Settings > Enable Barcode Tools** option has been selected (enabled), Registry Client users can view and print a lot number inventory scan sheet. The sheet is used when scanning vaccine barcodes during immunization administration.

Lot numbers can be added to the Scan Sheet from the Lot Number Maintenance [Detail] page.

To view and/or print the scan sheet, click **Lot Numbers > Scan Sheet**. The Scan Sheet page opens.

To create the scan sheet:

1. Add any necessary text in the textbox in the Add Free Text section. You can change the font size and font style (normal or bold) if needed. Click Add to add the text to the scan sheet.
2. Select vaccine lots from the list in the Currently Selected Lots section to add to the scan sheet. Click **Remove** to remove the lot from the list. To select all of the lots at once, click the checkbox located in the header row.
3. Click the **Layout as Avery 5160** button to display the selected lot(s) on the PDF Preview page.
4. Click the **Create PDF** button at the bottom of the page. The barcodes displayed on the page, which can then be printed.

Decrement Lots

This section includes an overview of lot decrementing, as well as information about the following topics:

- [Vaccination Updates](#)
- [Correct Decrementing](#)
- [View Patient Records from Search Results](#)

Lot Decrementing Overview

Administered vaccinations decrement imported inventory, taking the following data into account:

- Vaccine
- Lot Number
- Facility
- Funding Source

Each of these has configurations and settings that affect decrementing.

Since lot numbers do not overlap across manufacturers or vaccines, the manufacturer data is not required for decrementing. If a historical vaccination is submitted with lot details, the inventory is not decremented. Also, once a lot is marked as *inactive*, it no longer decrements.

This is how each of the imported fields affects decrementing:

Field	Affect
Vaccine	<p>When inventory is imported for a specific CVX or CPT code, the logic first looks for a matching lot for that vaccine.</p> <p>If a matching lot is <i>not</i> found, the logic looks across the entire family for a matching lot.</p> <p>If a matching lot <i>is</i> found, the vaccination is updated to reflect the correct vaccine and the inventory is decremented.</p> <p>For example, if the provider sends an administered vaccination for HIB-unspecified and a matching lot number is found for HIB-PRP-T, the lot for HIB-PRP-T is decremented and the vaccination is changed to HIB-PRP-T.</p>
Lot Number	<p>Lot Number is a required field and must be present for inventory to decrement. Lot numbers are not case-sensitive.</p>
IRMS/Facility	<p>The location of the inventory is required. The IRMS is determined based on the user account importing the data. If the data is imported by a facility client user, the facility is still determined from the user account. However, the facility is generally sent as part of the vaccination record. If the inventory is defined at the facility level and the vaccination is not associated with a facility, the inventory does not decrement. If inventory accountability is maintained at the IRMS level and vaccinations are administered at the facility level, the facility should be configured to decrement from the IRMS with the Allow imports to decrement IRMS inventory setting enabled on the facility (see Add a New Facility). This is not a typical case, however, and is most likely used with nurses that travel to remote locations.</p>
Funding Source	<p>It is possible for the same lot number to exist in both public and private supply. An option can be selected to map vaccination <i>VFC</i> eligibility from patient reserve and/or through Administration > Properties > DTT.</p>

Vaccination Updates

In order for a vaccination to be considered an update by the logic, the vaccination date and vaccine type must match. If an updated vaccination is sent with a new lot number, the old lot is un-decremented and the new lot is decremented.

Correct Lot Decrementing

An IRMS Client user with the Lot Number Manager Access permission can use this feature to review and correct administered lots that do not automatically match to the existing inventory, either due to missing or non-matching lot numbers for administered vaccinations that are not flagged as historical records.

Registry Client users can also use this feature after selecting an IRMS. An IRMS must be selected because lots are assigned at least to an IRMS. (When no IRMS is selected, the Lot Numbers section does not display in the menu.)

It is assumed that vaccine inventory already exists in the application or has been received from MISA, DTT, HL7, or another means and loaded into the application.

To start correcting lot decrementing, click on **Lot Numbers > Correct Decrementing** in the menu. The Review and Correct Lot Decrementing page opens.

You must first search for a vaccine lot before you can review and correct it. Select or enter one or more search criteria and click **Search**. Enter more search criteria to narrow a search; enter fewer criterions for more results. The search results are shown in that section of the page.

Field	Description
Vaccine	Select the name of the vaccine from the drop-down list.
Manufacturer	Select the name of the vaccine manufacturer.
Organization (IRMS) Organization (IRMS) Group Do Not Limit	Select an Organization (IRMS) or group, or select Do Not Limit. The option button is selected automatically when a selection is made from a drop-down list.
Facility Do Not Limit	Select a facility from the drop-down list or select Do Not Limit. The option button is selected automatically when a facility is selected from the list. If an abbreviated display name was entered for a facility when it was created, it will appear in the list instead of the full name.
VFC PIN	Select a VFC PIN from the drop-down list.
Funding Type	Select a funding type, PUB (public) or PRVT (private), from the drop-down list.
Date Imported	To search for vaccines that were imported within a given date range, enter the From and To dates for the range.
Disable enhanced Search Results table. (Useful for out-of-date internet browsers.)	<p>The Enhanced Search Results Table allows you to perform additional functions from the Search Results list without reloading the page. If you are using an older browser or if the response time is slow, select this option to disable the enhanced table.</p> <p>The additional functions with the Enhanced Search Results Table are:</p> <ul style="list-style-type: none"> • Sort the columns (by multiple columns at a time when holding the shift key while clicking) • Search for arbitrary text using the provided search field • Set the number of rows to display in the Search Results table/list • Navigate left and right to access additional pages

Field	Description
	<ul style="list-style-type: none"> Navigate to the next or previous set of records by clicking the arrow button

The enhanced search results default is to show ten entries at a time. Use the left and right arrow buttons to access additional search results.

The columns that appear for the search results are:

Column	Description
(checkbox)	Use this checkbox to remove items from the list without decrementing a lot.
Vaccine	The name of the vaccine to review or correct.
Facility	The name of the facility associated with the vaccine.
Lot Number	The lot numbers of the vaccinations that are to be decremented from the online inventory.
Manufacturer	The vaccine's manufacturer. If the message was imported via HL7, this field is blank.
Public	Indicates whether the funding source is public (Y) or not (N).
Count	Displays the number of vaccinations (not the number of doses) for that item in the list.
Patient ID	Displays the patient (or list of patient) ID number associated with the vaccine lot information. This information is not displayed for users with the Block Patient Data Access permission.
Date Imported	The date the lot was imported.
Available Lot Numbers	<p>The available lot numbers appear in a drop-down list, in this format: Lot Number Manufacturer Facility Public (Y/N) Doses Available. If no lots are available, <i>None</i> appears instead of <i>--Select--</i>. The following information applies:</p> <ul style="list-style-type: none"> Only active lot numbers appear. No inactive lots ever display as an option. Only unexpired lots appear. Expired lots display as available only if the import date is after or the same as the expiration date, even if the lot is expired at the current time. Limited by IRMS only. IRMS groups have no effect. The IRMS must match exactly. (Somewhat) limited by facility. If there is no facility, all lots for that IRMS display. If there is a facility, all IRMS level lots and lots for that facility display, but not lots specific to other facilities in that IRMS. Facility groups have no effect. A lot displays regardless of whether or not there are enough doses available, but does not save if you select a lot that does not have enough doses available.

To remove a vaccine to indicate it should not be decremented in the inventory, select the checkbox for that vaccine and then click **Save**. A confirmation dialog appears; click **OK** to remove the vaccines or **Cancel** to cancel the removal of the selected vaccines. The selected vaccine is removed from the list and the inventory is not decremented.

To update a vaccine, select a lot from the Available Lot Numbers drop-down list for that vaccine. A confirmation dialog box appears; click **OK** to continue. The appropriate lot number is assigned, the inventory is decremented, and the row is removed from the list.

View Patient Vaccination Records from Search Results

Authorized users can view patient vaccination records from the Search Results section of the Review and Correct Lot Decrementing page by clicking on the link provided in the *Patient ID* column, which is either a patient ID number or the word *List*. The word *List* indicates there are two or more counts of the incorrect lot number. When a link is clicked, a pop-up window appears, displaying the patient record associated with the lot number. If multiple accounts are associated with the lot number, the details for all of them are displayed. Close the pop-up window by clicking on the **X**.

Reconstitute a Smallpox Lot

Currently, only smallpox lots need to be diluted. The dilution strength is based on an administrative setting. The default strength is 1:1, which is full strength. If vaccines need to be diluted, an administrator changes the dilution strength and the new global value of dilution strength replaces the 1:1 on the screen.

To reconstitute a smallpox lot, [search](#) for the lot number and select it in the search results. On the Lot Number Maintenance [Detail] page for the smallpox lot, click the **Reconstitute** button. A warning dialog box opens to warn you that your edits will prevent others from using this lot while you are editing and that you should edit as quickly as possible. Click the **OK** button to close this warning after reading it.

Select the diluent manufacturer/lot from the drop-down list. Only diluents defined in the same Facility as the smallpox lot are included in the drop-down list.

Review the diluted date of the batch and modify it if necessary.

Click **Save** when finished.

NOTE: Diluting the lot removes 100 doses from the smallpox lot inventory, removes one vial from the diluent lot inventory, and creates a new diluted lot that has 100 doses.

Orders / Transfers

The submenu items that appear in the list under **Orders / Transfers** on the menu will differ depending on your user access level and permissions. Some of the menu commands include:

- Alerts - see [Alerts](#)
- Create/View Orders - see [Orders](#)
- Search History - see [Search History](#)
- Modify Order Set - see [Modify Order Set](#)
- Approve Orders - see [Approve or Deny an Order](#)
- Approve Transfer - see [Approve or Deny a Transfer](#)
- Approved Orders - see [View Approved Orders](#)
- Local Vaccine Allocations - see [State/Local Vaccine Allocations](#)
- Accountability Submission - see [Accountability](#)
- Cold Storage - see [Cold Storage](#)
- Provider Agreement - see [Provider Agreements](#)

Inventory Alerts

Users with the correct access levels and permissions, who have selected a specific Organization (*IRMS*), can access the alerts by clicking **Orders/Transfers > Alerts**. This link opens the Inventory Order Details page, where the following information is displayed.

Inventory That Has Expired or is About to Expire

The items that appear in this section are vaccines set to expire within the next 90 days, as determined by the Expiration Date entered for specific Lot from the Lot Number Inventory (Lot Number Maintenance).

Field	Description
Vaccine	The name of the vaccine in inventory that has expired or is about to expire.
Funding Source	The funding source that is associated with the vaccine. Example: <i>VFC</i> .
Lot Number	The lot number of the vaccine that has expired or is about to expire.
QOH (Quantity on Hand)	The amount of vaccine that has expired, is about to expire, or is running low.

Field	Description
Expiration Date	The date the vaccine expired or will expire.
Facility	The name or number of the facility that has expired lots or lots that are about to expire.

Inventory Running Low

The items listed in this section are determined by the user's [Personal Settings](#) (the Set Low Inventory Quantity for Orders option in the [User Preferences Default Settings](#)).

Field	Description
Vaccine	The name of the vaccine in inventory that is running low.
Funding Source	The funding source that is associated with the vaccine. Example: VFC.
QOH (Quantity on Hand)	The amount of vaccine that is about to expire or is running low.
Facility	The name or number of the facility that has lots that are about to expire.

Order Notifications

These items are determined by the submitted, approved, or shipped orders from the Orders/Transfers database table(s).

Field	Description
Order Number	The order number of the vaccine number. Click the link to open the Order page for that order.
Submit Date	The date the vaccine order was submitted.
Approval Date	The date the vaccine order was approved.
Order Status	The shipping status for the vaccine order.
Facility	The name or number of the facility for the vaccine order that has been submitted, approved, or shipped.

Orders

Users with the correct access level and permissions can click the **Orders/Transfers > Create/View Orders** menu item to display information about current orders and/or transfers. Orders can be created and transferred from this page. Accountability information is also available, but on the Create Orders page.

View a List of Orders

The Current Order/Transfer List page includes information about:

- Inbound orders
- Backorders
- Denied orders
- Inbound transfers
- Outbound transfers
- Rejected transfers

To view a specific order to receive it, or to create an Inventory Transaction Report or a Lot Number Summary, click the arrow button in the *Select* column for that order.

TIP: Check with your state for the specifics on returning and wasting vaccines.

Create an Order

When an administrator configures an Organization (*IRMS*) or Facility, they define the Order Set, which sets the order in which the vaccines appear. Users with the correct access level and permissions can create an order for the vaccine order sets that have been assigned to the Organization (IRMS) or Facility.

The fields and messages that appear on the Create Order page will depend on your user access level and permissions, as well as the configuration settings made by your organization/facility's administrator.

To create an order, click on the **Orders/Transfers > Create/View Orders** link in the menu. The Current Order/Transfers List page appears. Click on the **Create Order** button, enter the information in the fields as described below, and click **Save Order**. When you are ready to submit the order, click **Submit Order**.

NOTE: If specific administration properties are set, you will see a different page instead of the Create Order page and will need to perform additional tasks before creating an order. For example:

- If the **Inventory Reconciliation** page appears, you will need to reconcile the inventory first. See [Inventory Reconciliation](#) for more information.
- If the **Edit Cold Storage Temperature** page appears, and/or you see the *Please fill in all the values for Cold Storage in order to place the order* error message, you will need to edit the cold storage temperatures first. See [Cold Storage](#) for more information.
- If the *Warning: Order cannot be placed. There is no cold storage unit available for this Provider* error message appears, you will need to add a cold storage unit first. See [Cold Storage](#) for more information.

Field	Description
Organization (IRMS)	Name of the Organization (IRMS) creating the order. This may be automatically populated.
Facility Address City State Zip	Name of the Facility creating the order. This and the address demographic fields may be automatically populated with the information. TIP: If the city or state fields are edited and more than one zip code exists for the city, a Select Zip Code dialog box reappears. Otherwise, the zip code field automatically populates.
First Name Middle Name Last Name Phone Number Phone Extension Email	These fields are pre-populated based on contact information previously submitted to the state. NOTE: If the Name, Days/Times, and/or Instructions are changed and saved, an exception is automatically generated with the reason <i>Shipping Information Changed</i> . This exception reason is visible to local and state approvers and triggers when the order is in Manual Review. The first order created after the shipping details have changed has the exception. The exception reason appears in the order header section, the Order List page, and the export report option on the Search History page.
Monday - Friday	Select the days and the times that the Organization (IRMS) or Facility is open. NOTE: If the Name, Days/Times, and/or Instructions are changed and saved, an exception is automatically generated with the reason <i>Shipping Information Changed</i> . This exception reason is visible to local and state approvers and triggers when the order is in Manual Review. The first order created after the shipping details have changed has the exception. The exception reason appears in the order header section, the Order List page, and the export report option on the Search History page.
VFC PIN	This field automatically populates based on the Organization (IRMS) information.
Instructions	Enter any special instructions for the order, including instructions on what to do if the order is delivered outside of normal business hours. Once saved, the instructions will change; this is normal (example: ###M, W, F; MWF 9 to 5####). NOTE: If the Name, Days/Times, and/or Instructions are changed and saved, an exception is automatically generated with the reason <i>Shipping Information Changed</i> . This exception reason is visible to local and state approvers and triggers when the order is in Manual Review. The first order created after the shipping details have changed has the exception. The exception reason appears in the order header section, the Order List page, and the export report option on the Search History page.
Order Date	This field automatically populates based on the system's date when the order is first created.
Order Status	This field automatically populates with <i>In Progress</i> when the order is first created.
Submitter	This field automatically populates based on the user ID.

Field	Description
Comments	Enter a name for the order in this field.
Inventory Last Submitted	This field automatically populates with the date the inventory was last submitted to the state.
Vaccines Administered Report	This field is state-configurable and may not appear on your screen. The field automatically populates with the date the Vaccines Administered Report was last submitted to the state.
Order Frequency	This field automatically populates with the provider's ordering frequency and timing. It is determined by the registry-wide settings or the Organization (IRMS) or Facility settings.
Order Timing	This field is optional. If configured, it provides the ability to record ordering timing.
Order Schedule	This field is optional. If configured, the schedule is determined by the order frequency field and order frequency start month.
Order Set	This field only appears if there are more than one order types for the provider. (If there is only one order type/set, the vaccines for the order set are automatically populated.) Select the correct order set from the drop-down list. After a selection is made from the drop-down list, the page refreshes to show the vaccines for that order set. CAUTION: Once the order has been saved, the order type/set cannot be changed.
Accountability	This field is optional (state-configured in Administration > Settings > Properties > Vaccine Management > Display Accountability Report Links on Order). If configured, the name of the report received appears, along with the date range (last 3 full months) separated by month, per the order's Organization (IRMS)/Facility. In addition, buttons will appear to create and display the Doses Administered Report, Inventory Transaction Report, Lot Number Summary, and/or Edit Temperature.
Last Date Submitted	If available, the date the report was received automatically populates.
Last Order Submitted	If available, the date the last order was submitted automatically populates.

The following fields appear in the Order Details section on the page:

Field	Description
Vaccine	Type of the vaccine ordered.
Vaccine Name	Brand name of the vaccine ordered.
Funding Source	Funding source of the vaccine ordered. If multiple funding sources are available to order, each is listed as a separate line item.
Dose Used Last Month	The total number of doses used during the month. For publicly supplied vaccines, this total includes inactive and expired lots. The field automatically populates if the Organization's Default doses used last month on order option is enabled; otherwise, enter the

Field	Description
	quantity manually.
Physical Inventory	The total number of vaccines left in the physical inventory. The field automatically populates if the Organization's Default physical inventory on order option is enabled; otherwise, enter the quantity manually.
Local Allocation	<p>This column may or may not display, depending on user access level and permissions. If any vaccine on the order set is under allocation and the user meets the requirements below, this column displays; if no vaccines are restricted by allocation, or the user does not meet the requirements below, the column does not display.</p> <p>The user requirements for this column to display are as follows: The user creating the order has state or local approver permission and belongs to an Organization (IRMS) that is a local order approver. The remaining allocation displayed in the column is calculated based on the LHJ's total allocation for the vaccine minus all submitted quantities for that vaccine, with an order date that falls within the LHJ's order frequency. This is a real-time calculation based on Submitted Order (not Approved Order). Canceled Orders and Denied and/or Rejected Quantities are excluded. A negative value will appear if either the provider or local have exceeded the allocation.</p> <p>If there are vaccines that are not on allocation, but are on the same order set as vaccines that are on allocation, a blank value is displayed in this field. Also see the note in the Provider Allocation field description.</p>
Provider Allocation	<p>This column may or may not display, depending on user access level and permissions. If any vaccine on the order set is under allocation and the user meets the requirements below, this column displays; if no vaccines are restricted by allocation, or the user does not meet the requirements below, the column does not display.</p> <p>The user requirements for this column to display are as follows: The user creating the order has state or local approver permission and belongs to an Organization (IRMS) that is a local order approver.</p> <p>This field highlights in light green if there is a provider allocation. If there are vaccines that are not on allocation, but are on the same order set as vaccines that are on allocation, a blank value is displayed in this field.</p> <div data-bbox="597 1497 1416 1822" style="border: 1px solid black; padding: 5px;"> <p>NOTE: When the user submits the order, validation occurs against both the provider and local allocations. The calculation is as follows:</p> <p>LHJ - Total local allocation minus all approved quantities across all IRMS/Facilities in the local jurisdiction (non-canceled orders) for the vaccine and within the date range for the LHJ's order frequency.</p> <p>Provider - Total provider allocation minus all approved quantities (non-canceled orders) for the vaccine and within the date range</p> </div>

Field	Description
	<p>for the provider's order frequency.</p> <p>If the order exceeds the provider or local allocation, a warning message appears. However, the user can continue to create the order and it will be sent to Manual Review with an exception reason of <i>Exceeds provider allocation</i> or <i>Exceeds local allocation</i>, respectively.</p> <p>If the order quantity is within allocation, the order proceeds for local order approval and the remaining available allocation is reduced by the order quantity.</p>
Recommended Quantity	<p>This column is optional (configured in Administration > Settings > Properties > Vaccine Management > Hide recommended quantity). If disabled, the column displays the number preferred to be on hand. The recommended quantity based on administered doses only includes public doses and is an average of the previous year's usage.</p> <p>If the Organization (IRMS)/Facility has selected to have the recommended quantity calculated based on the doses administered, the number will round off to a whole number divisible by the package size.</p>
Order Quantity	<p>Enter the amount of vaccine to order. If the Administration > Settings > Properties > Vaccine Management > Require Order Quantity option is enabled, this is a required field.</p> <div data-bbox="597 1031 1414 1157" style="border: 1px solid black; padding: 5px;"> <p>NOTE: If the Order Quantity is more than the Order Threshold Percent, but less than the Recommended Quantity, an alert displays and the order is queued for Manual Review with an exception reason of <i>Outside recommended order quantity</i>.</p> </div>
Urgent	Select this checkbox if the vaccine is needed urgently.
Priority Reason	Select a priority reason from the drop-down list, if available and necessary. Priority reasons are configured in Administration > Define Values > Define Lookups > VOMS/VIMS Priority Reasons .
Comments	Enter any additional information about the vaccine order (per line item).

Create an Order with Provider / Local Allocations

When creating an order with provider/local allocations, validation occurs against both the provider and local allocations. The calculation is as follows:

- **LHJ** - Total local allocation minus all approved quantities across all IRMS/Facilities in the local jurisdiction (non-canceled orders) for the vaccine and within the date range for the LHJ's order frequency.

- **Provider** - Total provider allocation minus all approved quantities (non-canceled orders) for the vaccine and within the date range for the provider's order frequency.
- If the order exceeds the provider or local allocation, a warning message appears. However, the user can continue to create the order and it will be sent to Manual Review with an exception reason of *Exceeds provider allocation* or *Exceeds local allocation*, respectively.
- If the order quantity is within allocation, the order proceeds for local order approval and the remaining available allocation is reduced by the order quantity.

Approve or Deny an Order

Users that have the appropriate access level and permissions can approve orders for an Organization (IRMS) or Facility. This function is used by the state. Approved orders are not automatically sent to *VTrckS*. The local or state order approver reviews the orders and manually sends the orders to *VTrckS* using the **Send to VTrckS** button. (A **Send to VACMAN** or **Send to State** button may appear instead.) State approvers can also mark orders as *Urgent*.

Orders are added to the Conditionally Approved list if they meet the following criteria:

- The order is +/- X% from the threshold (defined by the state)
- The order does not meet the minimum time required between reconciliations
- The order does not contain any vaccines that are flagged as having a shortage
- The order does not meet the minimum time since the last order

Once the state approver reviews and approves an order in the Manual Review queue, it moves to the Conditionally Approved queue. Conditionally approved orders are automatically associated with lot numbers for the lots that will expire first.

NOTE: Varicella is not associated with a lot number.

See [Business Logic for Approval Queue](#) for more information on that topic.

1. To approve an order, follow these steps:
2. Click on the **Orders/Transfers > Approve Orders** link in the menu. The Approve Orders page displays.
3. Locate the order and click on the order number link to open the order on the Approve Order page.

On the Approve Order page for an order, the specific buttons that appear depend on your access level and permissions, as well as the overall configuration settings. Depending on the state, you may have the option to view the Doses Administered Report, Inventory

Transaction Report, the Lot Number Summary Report, or the Cold Chain Report submitted by the clinic.

For state approvers, when an order has a status of *In State Manual Review* and is in the *Reviewed for Approval* queue, the Order Details page has two buttons: **Cancel** and **Approve**. The **Cancel** button returns to the previous screen. The **Approve** button changes the Order Status to *Pending State Approval* and moves it to the Ready for State Approval queue.

While on the Approve Order page, you may be able to perform the following tasks (depending on your access level):

- Add vaccines to the order while approving
- Approve the quantity of the order
- Backorder the quantity of the order
- Deny a portion or all of the order
- Add comments to the order
- Mark the order as *Urgent*

The fields in the Approve Order section of the page are as follows:

Field	Description
Organization (IRMS)	The Organization (IRMS) ID number and name for this order. <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> NOTE: The order in which these appear depends on the format configured in the Administration > Properties > Registry Settings > Organization (IRMS) Dropdown List Order property. </div>
Facility	The Facility within the Organization (IRMS) that submitted the order.
Order Number	The order number for this order.
VFC PIN	The VFC PIN number.
Submit Date	The date the order was submitted.
Approver	The user name of the person who approved the order.
Comment	Enter any additional notes regarding the order. The text will appear on the Approve Orders page in the Ready for State Approval section as a bubble icon (also known as a tooltip or hover box).
Order Set / Order Type	This field combines the Order Set description and the Order Type display name (example: ABC Order Set / Adult Orders). Defines the vaccines that the IRMS can order. <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> NOTE: The user must have state/local order approver permission to see this option. </div>
Local Approver IRMS	The IRMS of the local order approver.

Field	Description
Last Inventory Submitted	The date the inventory was last submitted. Click the link to view the last six dates of inventory submission.
Last Order Submitted	The date the order was last submitted.
Order Frequency	This field is extracted from the ordering organization (IRMS)/Facility information and is the provider's ordering frequency and timing. If the Organization (IRMS)/Facility does not have an ordering frequency set, the ordering frequency is derived from the registry setting. The Organization (IRMS)/Facility setting will override the registry setting.
Order Timing	This field is extracted from the ordering Organization (IRMS)/Facility information and provides the ability to record ordering timing on both the IRMS and Facility screens. This is not a registry-wide property setting, however. The output choices are: <ul style="list-style-type: none"> • -- select -- (no validation) • 1st to the 15th • 16th to end of month
Order Schedule	This field is extracted from the order frequency start month on the Organization (IRMS)/Facility settings to determine the order schedule. This is not a registry-wide property setting. The field uses the Ordering Frequency field to determine a valid schedule. If the Organization (IRMS)/Facility does not have an order start date set, the order schedule is not validated.
First Name Middle Name Last Name Phone Number Phone Extension Email	The first, middle and last name; phone number and extension (if applicable); and email of the contact person to whom the vaccine order shipments will be shipped to.
Address	The first line of the address of where the vaccine order shipments will be shipped.
Phone Number	The phone number of the submitting location's contact person.
Submitter	The full name and user name of the user who submitted the order.
Exception Comments	If the order or partial order had exception comments, they appear in this field.
Exception Reason	If the order or partial order had an exception, the reason appears in this field.
Local Approver	The name of the local approver.

The following fields appear in the Order Details section of the page:

Field	Description
Vaccine	The name of the vaccine being approved.
Dose Used Last Month	Enter the number of vaccine doses used last month. The values are based on the first day to the last day of the month prior to the current month.

Field	Description
Physical Inventory	Enter the number of doses that are physically located in inventory.
Recommended Quantity	Enter the recommended quantity of the vaccine. NOTE: The approver only sees the preference amount if the option is enabled in the Vaccine Management section of Properties. For depot approvers, the value is for informational purposes only and may or may not be necessary when choosing which vaccine to order.
Order Quantity	The quantity that is being ordered. Enter a new value for the quantity if it needs to be changed.
Lot Number / Fulfill with Multiple Lots	When the Organization (IRMS) has the Cold Storage Physical Location option disabled, authorized users have the ability to manually fulfill an order with one or more lots. To use only one lot, select it from the drop-down list. To use more than one lots, click the Fulfill with Multiple Lots button, select the lots individually from each drop-down list, enter the allocated quantity, and click Save . The allocated quantity cannot be greater than the order quantity. After multiple lots are entered, the lot drop-down list is replaced with "Multiple Lots" (text) and the button changes to View/Edit Multiple Lots .
Approved Quantity	Enter the quantity that is being approved. NOTE: If the approved quantity is set to zero - denied or backordered - the lot for that order item is set to inactive (lots are never deleted). This stops it from appearing on the Lot Number Maintenance report unless inactive lots are displayed. This does not apply to transfers.
Backorder Quantity	Enter the quantity that is backordered. If a partial order is backordered or denied, the original order number appears in the order header on the Order Detail page. NOTE: If the approved quantity is set to zero - denied or backordered - the lot for that order item is set to inactive (lots are never deleted). This stops it from appearing on the Lot Number Maintenance report unless inactive lots are displayed. This does not apply to transfers.
Denied Quantity	Enter the quantity that is being denied. A reason must be selected in the denial reason drop-down list. If a partial order is backordered or denied, the original order number appears in the order header on the Order Detail page. NOTE: If the approved quantity is set to zero - denied or backordered - the lot for that order item is set to inactive (lots are never deleted). This stops it from appearing on the Lot Number Maintenance report unless inactive lots are displayed. This does not apply to transfers.
Denial Reason	If the order quantity is being denied, select a reason from the drop-down list. This field is required if the order quantity is denied.
Urgent	Select this checkbox if the order is urgent. The value of this field is true/false and can be edited by a state approver. The value is exported with the order details when the Send to VTrckS option is selected. When the order is urgent (the value of "T" appears in the data string; otherwise, the value is "null") and sent to VTrckS, the export data string appears similar to this: "5", "169011", 20080110, "344", 20, , , 10, "TDAP", "SKB", 30.75, 200-2007-20307, "1", 20, " , , " , "MIKEB", "58160-0842-11" , , , , "T"

Field	Description
Priority Reason	Select a reason the order should be prioritized. Examples: <ul style="list-style-type: none"> • Fridge/Freezer Failure • Natural Disaster • Power Outage
Comments	Enter any additional comments. This is a free-form text field.

To deny an entire order, select the **Deny Entire Order** checkbox and select a valid reason for denying the entire order.

To approve the order and save the order entries, click **Approve** or **Save**. The approved quantity must have a value above zero.

Click **Cancel** to abort saving and approving the order and return to the Approve Orders page.

Approve Provider / Local Allocation Orders

When approving orders with provider or local allocations, the local order approver reviews each order with the option to adjust the quantity of an *excepted* order item. When the local approver clicks **Approve**, the system again validates against the allocation table:

- If the order quantity is within the allocation amount, the exception reason is removed, the allocation value is decremented by the order quantity, and the order proceeds to *Ready for State Approval* status.
- If the order quantity continues to exceed the allocation value for the specified timeframe, the exception reason remains and is displayed to the state approver in the Reviewed for Approval section.
 - Once approved, the allocation value is decremented by the order quantity.
 - The allocation balance remains at zero for the remainder of the specified timeframe.
- If the state approver reviews and approves the order but the order quantity still exceeds the allocation, the exception reason will still display in the Ready for State Approval section.

Receive an Order

To receive an order, the order must have an order status of *Approved*.

NOTE: If an order has been partially denied, a new order is created for that quantity so

that the entire order can have the same status. The Order Status of the original order is then set to *Denied*. Backorders work the same way. The denied order shows the original order number in the header so that the rest of the order quantity can be referenced. The new order is created only for the denied portion.

Follow these steps to receive an order:

1. Click on the **Orders/Transfers > Create/View Orders** link in the menu. The Current Order/Transfers List page appears, which includes Inbound Orders, Backordered Orders, Denied Orders, Inbound Transfers, Outbound Transfers, and Rejected Transfers.
2. Locate the Approved order you want to receive and click the arrow button in the *Select* column for that order. The Receive Order page displays.

The following order details are available:

Field	Description
Shipped Quantity	This field is populated with the quantity shipped.
Receipt Quantity	Enter the received quantity.
Rejected Quantity	Enter the quantity rejected. If this is greater than zero, a Reason for Rejecting must be selected.
Partial Quantity	Enter the partial quantity received. This number must be greater than zero and less than the shipped quantity, and the Receipt Quantity and Rejected Quantity fields must be blank or zero. The <i>Shipment is Incomplete</i> rejection reason is disabled.
Vaccine	The name of the vaccine on the originating order.
Manufacturer	Select the name of the manufacturer from the drop-down list.
Lot Number	Enter the lot number for the vaccine.
Expiration Date	Enter the vaccine's expiration date.
Reason for Rejecting	<p>If the order is completely or partially rejected, select a reason. Example reasons:</p> <ul style="list-style-type: none"> • Shipment is Incomplete - This option generates a new order to receive the remaining quantity. The original order appears on the new order so that the user knows what happened. • Shipment is Damaged - No additional action is taken. • Shipment was Not Ordered - No additional action is taken. • Damaged During State Shipment - No additional action is taken.
Comments	Enter any additional notes regarding the receipt or rejection of the order.

After reviewing the order and entering/selecting the necessary information, click **Receive** to save the information, change the order status to Received, and increment the inventory.

NOTE: State-provided VFC inventory classifications cannot be changed by other users. For example, received lots cannot have the publicly supplied field changed. Additionally, the order number is inserted into the h33_lot_number_log.

Send an Order to VTrckS

The local or state approver reviews orders and manually sends them to VACMAN using the **Send to VTrckS** or **Send to VACMAN** button.

Follow these steps to send an order to VTrckS:

1. Navigate to the Approve Orders page by clicking **Orders/Transfers > Approve Orders** on the menu.
2. In the Ready for State Approval section, select the checkbox next to the order number for the order that you want to send. Alternately, you can click **Select All** to select all of the orders in this section.
3. Click on one of these buttons, depending on your state:
 - **Send to VACMAN** - Two text files are generated and zipped: one for Varicella and the other for all other vaccines. If Varicella is not on the order, the text file for Varicella will be blank.
 - **Send to VTrckS** - Three files are generated and zipped: ProviderFile, ProvFile, and ProvOrders. Each file appends the date at the end of the filename. The files are in `.csv` format. A dialog box appears, asking if you want to Open, Save, or Save As.
4. In the dialog box that displays, open or save the file.

NOTE: When uploading VTrckS shipment files with multiple funding sources:

- The system can accommodate an order line fulfilled by a single lot number. For example:
 - a. Ordered and approved for 20 doses of DTaP with multiple funding sources (10 doses VFC; 10 doses 317).
 - b. VTrckS file is uploaded as 20 doses DTaP, lot #1234.
 - c. The IIS assigns: **10 doses DTaP, lot #1234, funding source VFC** and **10 doses DTaP, lot #1234, funding source 317**.
- The system can accommodate an order line item fulfilled by two or more lot numbers. For example:
 - a. Ordered and approved for 50 doses of HPV with multiple funding

- sources (40 doses VFC and 10 doses 317).
 - b. VTrckS shipment file is uploaded as 20 doses HPV, lot #ABC123 and 30 doses HPV, lot #XYZ321.
 - c. The IIS assigns: **20 doses HPV lot #ABC123, 20 doses HPV lot #XYZ321, funding source VFC** and **10 doses HPV lot #XYZ321, funding source 317**.
- The system can accommodate an incomplete order. For example:
 - a. Ordered and approved for 500 doses MMR with multiple funding sources (400 doses VFC and 300 doses 317).
 - b. VTrckS shipment file is uploaded as 300 doses MMR, lot #AB890.
 - c. The IIS assigns: **300 doses MMR, lot #AB890, funding source VFC**.

Recreate VTrckS Files

Registry Client users can recreate VTrckS files if indicated. The order must be approved for this function.

To recreate a VTrckS file:

1. Log in as a Registry Client user.
2. In the Search History criteria fields, enter the necessary information to search for the order you want to recreate the VTrckS file for.
3. Click **Search**. The order(s) that match the search criteria appear in the search results list.
4. Select the order. Note that it must have an approval date. The order opens with the option to recreate the VTrckS file.
5. Click **Re-create VTrckS File** to recreate the file.

View Approved Orders

The Approved Orders menu link is used to find and view all of the orders that have been approved. Data includes order number, Organization (IRMS) name, Facility, VFC PIN, order status, approval date, and approver.

The user must be a state or depot approver in order to access this page.

To view approved orders, click the **Orders/Transfers > Approved Orders** link in the menu to open the Approved Orders page. Click the order number link to display the order in another browser window or tab.

Alberta: To reprint the packing slip for an order with the Order Status of *Approved*, click **Reprint Packing Slip** on the specific order's detail page (e.g., click the order number link).

The fields that display on the Approved Orders page include:

Field	Description
Organization (IRMS)	To view a specific Organization (IRMS), select it from the drop-down list.
Facility	To view a specific Facility, select it from the list.
PIN	To view approved orders for a specific PIN, select it from the list. The default is the user's Organization's PIN.
Order Date / To	To view a specific date range, enter the from and to dates and click the Find button. The Is State Approver setting must be configured for the selected Organization (IRMS).
Order Number	The order number that has been approved. Click the link to see the details for a specific order.
Organization (IRMS)	The name and/or number of the Organization (IRMS).
Facility	The name of the Facility for the approved order.
VFC PIN	The VFC PIN number.
Order Status	The current status of the order.
Approval Date	The date the order was approved.
Approver	The name of the approver who approved the order.

Business Logic for Orders

The application uses different business logic methods (workflows) depending on certain criteria. This section details the business logic used for approval queues and manual reviews.

Business Logic for Approval Queues

If a provider is under the umbrella of a local approver and places either a depot order or a distributor order, the order displays on the local approver's Approval queue. The Order Type displays on the Approve Order screen.

NOTE: A vaccine will not appear on an order as available if the vaccine is not defined on the *VACMAN* vaccine settings, even if it is included in the Order Set.

If the Order Set is *Manufacturer Order*, the order never queues for approval.

Once the order is submitted, it displays as Approved. This logic is used when the state places an order with the manufacturer for adult vaccines. The order serves as a placeholder for incoming vaccines and when the vaccines arrive from the manufacturer, they can be received in full or in part.

Business Logic for Manual Review

There are two business logic methods or workflows used for manual review: Pre-4.10 logic and new logic for version 4.10 and later.

Pre-4.10 Logic

The pre-4.10 logic for manual review is as follows:

- The Recommended Quantity calculation is based on either Order History or Vaccines Administered.
- It is specified at the Facility or Organization (*IRMS*) level (the location of the *VFC* PIN).
- It assumes a three-month supply is required.
- It uses the average of the amount of vaccine used over the past three years.
- The current inventory is subtracted.
- The CDC recommends five weeks of safety stock. For example, if the order was placed on 07/19/2015:
 - $\text{Avg use (08/01/14 - 10/31/14)} + \text{Avg use (08/01/13 - 10/31/13)} + \text{Avg use (08/01/12 - 10/31/13)} / 3$
 - If no data exists for any year, the denomination is changed to match the number of years with data. In the above example, if the data only went back to 2013, the average would be calculated based on two years, not three.
- Order amount: Avg 3 month use - doses on hand
- Manual review exception reasons (all reasons that apply will be listed):
 - Have the minimum number of days passed since the last order?
 - Has the order met the accountability submission requirements?
 - For depots, does the depot have inventory available for that vaccine?
 - Does the order exceed the +/- range of the recommended quantity?
- Relevant settings:
 - Administration properties: Minimum days between orders, and Order Threshold Percent

- Accountability requirements for IRMS/Facility: Minimum days between orders, and the recommended quantity calculation is based on Administered Doses or Order History.

New 4.10+ Logic

The new logic for manually reviewing and approving orders is as follows:

- On hand quantity:
 - If the site does not manage inventory in the registry and manually enters on hand, the Recommended Quantity does not display until the On Hand Quantity is populated. The system calculates the Recommended Quantity by subtracting the current inventory, and populates the value dynamically.
 - If the site does manage inventory in the registry, the Recommended Quantity is calculated based on the existing inventory and is displayed.
- The equation for Recommended Quantity is modified from three months of stock to: Order frequency length + 1 month. The number of months of inventory required will vary based on how frequently the provider places orders.
- The Recommended Order Quantity field is visible to local and state approvers.
- The Order Threshold Percent field displays on the Facility Maintenance screen. If the field is blank, the registry's global setting is used.
- If the provider's orders are outside of the Order Threshold Percent (checked when the **Submit** button is clicked), a pop-up window displays with the message *One or more of your vaccine orders is outside the recommended order quantity. Your LHM will have to approve this exception. Click Submit to place this order.* Three buttons are available on the pop-up window:
 - **Cancel** - Closes the pop-up window and returns the user to the Create Order screen.
 - **Save** - Saves the order (without submitting it for approval).
 - **Submit** - Submits the order for approval.
- The exception reason is visible to both local and state approvers and is saved as part of the order history.
- The submitted order is queued for manual review.
- A new exception reason of *Outside Recommended Order Quantity* is added.
- Manual review exception reasons:
 - If the local approver has reviewed the exception, the exception displays on the order for the state approver.
 - All orders are queued to Manual Review at the state approver level, even if an order was reviewed by the local approver.

- The provider's exception reason is captured and becomes part of the order history. The order line has been modified to hold the exception reason and whether or not it has been resolved.

NOTE: For state approvers, when the order has a status of *In State Manual Review* and is in the Reviewed for Approval queue, the Order Details page has two buttons: **Cancel** and **Approve**. The **Cancel** button returns the user to the previous screen. The **Approve** button changes the Order Status to *Pending State Approval* and moves it to the Ready for State Approval queue.

Transfers

The application allows you to transfer vaccines between sites within your organization. An organization (*IRMS*) does not need a *VFC* PIN to enable a vaccine transfer as long as a facility has the **Facilities > Detail > Vaccine Management > Allow Vaccine Transfers** option enabled.

Create a Transfer

The Create Transfer page (**Orders/Transfers > Create/View Orders, Create Transfer** button) verifies that an Organization (*IRMS*) is allowed to receive a transfer at the Organization (*IRMS*) level (without a facility selected) before the transfer is created.

To create a transfer, follow these steps:

1. Navigate to **Orders/Transfers > Create/View Orders**.
2. Click the **Create Transfer** button.
The Create Transfer screen displays.
3. Select or enter the relevant information and click **Create Transfer**.

The available fields and descriptions for the Create Transfer section of the page are as follows:

Field	Description
Sending Organization (IRMS)	Name of the sending Organization (<i>IRMS</i>). This may be automatically populated. Otherwise, select a sending Organization from the drop-down list.
Sending Facility	Name of the sending Facility. This may be automatically populated. Otherwise, select a sending Facility from the drop-down list.
Submitter	This field automatically populates based on the user ID.
Receiving Organization (IRMS), Receiving Facility, or Open Transfer	Select the Organization (<i>IRMS</i>) or facility that will be receive the vaccine being transferred. This is a required field. An Open Transfers option can also be used, if the logged in user has ordering permissions and all of these administrative options are

Field	Description
	<p>enabled:</p> <ul style="list-style-type: none"> • Allow Local Order Approval • Allow Ordering Choice • Allow Open Transfers • Require Transfer Approval <p>NOTE: If no value is selected at the Organization (IRMS) or Facility level, the registry value will be provided. At the registry level, the non/use default value behavior will be used. If a value is selected at the IRMS or Facility level, it will override the registry value.</p>

The following fields are available in the Transfer Details section of the page:

Field	Description
Transfer Quantity	Enter the amount of vaccine to be transferred. This value cannot be greater than the available quantity.
Vaccine	The vaccine type. This field populates based on the inventory available to transfer.
Funding Source	The funding source for the vaccine.
Lot Number	The lot number associated with the specific vaccine.
Quantity Available	The quantity of doses available to transfer based on the current inventory of the sending Organization (IRMS) or Facility.
Expiration Date	The expiration date of the specific vaccine.
Transfer Reason	Enter a reason for the transfer. This field is required when the value of the transfer quantity is greater than zero.

Print a Transfer

To print a transfer, navigate to **Orders/Transfers > Create/View Orders** and click the arrow button for the transfer in the Outbound Transfers section. On the Transfer Details page for that transfer, click the **Print** button. The transfer will display in a new browser tab or window and the Print dialog will open.

Delete a Transfer

To delete a transfer, navigate to **Orders/Transfers > Create/View Orders** and click the arrow button for the transfer in the Outbound Transfers section. On the Transfer Details page for that transfer, click the **Delete** button.

CAUTION: The delete action cannot be undone.

Approve or Deny a Transfer

Users with the appropriate access level and permissions can approve transfers from one organization to another.

Transfer approvals appear under the state approver's Organization (IRMS) because there is not an easy method of determining whether a transfer should appear under Depot Approver or State Approver when both types of approvers are used by a state.

To approve a transfer, follow these steps:

1. Navigate to **Orders/Transfers > Approve Transfer**.
The Approve Transfers page displays.
2. Search for a transfer by enter the PIN and/or the date and clicking **Find**.
3. Locate the transfer in the Manual Review section of the page and click on the link for the sending organization.
The Approve Transfer page displays.
4. Enter the amount of the approved quantity in the first field and review the Transfer Reason.

If you have the appropriate access level and permissions, and automated messages have been configured, you can send the automated message by clicking **Send Message**. See the [Send Automated Messages](#) topic for more information.

To approve the transfer, click **Approve Transfer**.

To deny the entire transfer, select the **Deny Entire Transfer** checkbox, select an **Entire Transfer Denial Reason**, and click **Save**.

Search History

The **Orders/Transfers > Search History** feature is used to search for and/or view all orders and transfers that have been placed, regardless of status.

NOTE: If the Organization (*IRMS*) or Facility has selected the Recommended Quantity Calculation Based on Order History option and an order is created with an Order Quantity greater or less than the Order Threshold Percent and Recommended Quantity, an alert displays and the order is queued for Manual Review. Additionally, when using Order History, the safety stock is already factored in and does not need to be added separately.

Search for Orders, Transfers, Returns, or Wastage

To search the Order History, follow these steps:

1. Click **Orders/Transfers > Search History** in the menu.
The Search History page appears.
2. Select an option to filter the search:
 - Orders
 - Transfers
 - Returns
 - Wastage
3. Enter the search criteria. Enter more criteria to narrow the search; enter fewer criteria to retrieve more search results. See the tables below for fields and descriptions.
4. If necessary, limit the search by one or more of the following (depending on the type of search):
 - A specific **Vaccine**
 - A specific **Lot Number**
 - A specific **Order Status**
 - A specific **Order, Transfer, or Return Number**
5. Click one of the available buttons:
 - **Clear** - Erase all search criteria and start over.
 - **Export Report** - Export the search results to a CSV file. See [Export the Search Results](#).
 - **Search** - Begin the search process. The Order list displays in the lower portion of the screen.

Fields for an Orders search:

Field	Description
Facility	Select a Facility from the drop-down list. Only Facilities associated with the Organization are listed.
PIN	The <i>VFC</i> PIN number is automatically populated based on the organization/facility and cannot be changed.
Submit Date	Enter the From and Through dates to search for a submission date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Receipt Date	Enter the From and Through dates to search for a receipt date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Approval Date	Enter the From and Through dates to search for an approval date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.

Field	Description
Denial Date	Enter the From and Through dates to search for a denial date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Vaccine	Select one or more vaccines to search for, or do not select any of you want a complete list of all vaccines.
Lot Number	Enter a specific vaccine lot number to search for.
Order Status	Select a specific order status from the drop-down menu.
Order Number	Enter a specific Order number to search for.
Include deleted orders	Select this option to include deleted orders in the search results.

Fields for a Transfers search:

Field	Description
Facility	Select a Facility from the drop-down list. Only Facilities associated with the Organization are listed.
PIN	The VFC PIN number is automatically populated based on the organization/facility and cannot be changed.
Submit Date	Enter the From and Through dates to search for a submission date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Approval Date	Enter the From and Through dates to search for an approval date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Vaccine	Select one or more vaccines to search for, or do not select any of you want a complete list of all vaccines.
Transfer Number	Enter a specific Transfer number to search for.

Fields for a Returns search:

Field	Description
Facility	Select a Facility from the drop-down list. Only Facilities associated with the Organization are listed.
PIN	The VFC PIN number is automatically populated based on the organization/facility and cannot be changed.
Submit Date	Enter the From and Through dates to search for a submission date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Approval Date	Enter the From and Through dates to search for an approval date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Vaccine	Select one or more vaccines to search for, or do not select any of you want a complete list of all vaccines.

Field	Description
Return Number	Enter a specific Return number to search for.

Fields for a Wastage search:

Field	Description
Facility	Select a Facility from the drop-down list. Only Facilities associated with the Organization are listed.
PIN	The VFC PIN number is automatically populated based on the organization/facility and cannot be changed.
Submit Date	Enter the From and Through dates to search for a submission date range. Click in the field to use the pop-up calendar. Otherwise, enter the date in MM/DD/YYYY format.
Vaccine	Select one or more vaccines to search for, or do not select any of you want a complete list of all vaccines.
Lot Number	Enter a specific vaccine lot number to search for.

View Order/Transfer/Return/Wastage Details

After performing a search, the search results are listed in the Orders / Transfers / Returns/ Wastage section in the lower portion of the screen. To view the details of one Order, etc., click the arrow button in the *Select* column for that line item. The information displays in Order Header and Order Items sections.

These fields appear in the Order Header section. Note that the field names may differ depending on whether you are view the details for an order, transfer, return or wastage:

Field	Description
Organization (IRMS)	Name/number of the currently selected Organization (IRMS). This field is read-only.
Facility	Name of the Facility associated with the Organization (IRMS) and/or the order/transfer/return/wastage.
PIN	VFC PIN
Order Number	Order number for this order.
Submit Date	Date the order was submitted or placed.
Submitter	User name and ID of the person who submitted the order.
Receiver	If the order was received, the user name and ID of the person who received the order.
Comments	Any comments about the order entered when it was received.
Original Order #	Initial or original order number. This can be useful if there is a backorder.
Order Set / Order Type	Combination of the order set description and the order type display name. Example: ABC Order Set / Adult Orders. This is the name of

Field	Description
	the vaccine order set that defines the vaccines that can be ordered by the organization. Displays only if the user has state or local order approver permissions. If multiple order sets are available, select one from the drop-down list to view details for that order set.
Exception Reason	<p>The reason the order received an exception. Visible only to local and state approvers. Saved as part of the order history. Example exception reasons:</p> <p>Outside assigned order timing Outside assigned order schedule Outside recommended order quantity</p>
Order Frequency	Enter any additional information about the vaccine order (per line item).
Order Schedule	<p>Denotes the provider's ordering frequency and timing. If the organization/facility does not have an ordering frequency set, the ordering frequency is derived from the registry setting. If there is an organization or facility setting, it will override the registry setting. Examples:</p> <ul style="list-style-type: none"> • Blank - Do not validate this • Annual - Calendar year • Every six months - Month will vary as assigned • Every three months - Month will vary as assigned • Every two months - Month will vary as assigned • Monthly - 1st day of the month to the last day of the month • Twice monthly - 1st to the 15th and 16th to the last day of the month
First Name Middle Name Last Name Phone Number Phone Extension Email	First, middle and last names; phone number and extension; and email of the contact person in case there are questions about the order.
Address	Address of the contact person.
City	City name associated with the address of the contact person.
State	State name associated with the address of the contact person.
Zip	Zip code associated with the address of the contact person. If only one zip code exists for the city, it will automatically populate. If the city/state fields have been edited and more than one zip code exists for the city, the Select Zip Code dialog box will appear.
Instructions	Any special instructions about the order.
Order Status	Status of the order. When creating an order, <i>In Progress</i> is automatically used.
Approver	User name and ID of the person who approved the order.

Field	Description
Approval Date	Date the order was approved by the approver.
Exception Description	Description of the Exception Reason.
Exception Comment	Any additional comments regarding the exception displayed in the Exception Reason field.
Order Timing	<p>Select when orders can be placed by both the Organization (IRMS) and the Facility add/update screens. This is not a registry-wide property setting. Choices are:</p> <ul style="list-style-type: none"> • Blank (no validation) • 1st to the 15th • 16th to end of month <p>If the provider orders outside of their order timing window, a pop-up window appears upon order submission stating <i>Your order is outside the assigned order timing. Your LHJ will have to approve this exception. Select an exception comment and click "Submit" to place this order.</i> The exception comment and exception reason are visible to both local and state approvers and are saved as part of the order history. The submitted order is queued for Manual Review with the Exception Reason of <i>Outside Assigned Order Timing.</i></p>

These fields appear in the Order Items section. Note that the field names may differ depending on whether you are view the details for an order, transfer, return or wastage:

Field	Description
Vaccine	Type of the vaccine ordered.
Vaccine Name	Brand name of the vaccine ordered.
Funding Source	Funding source of the vaccine ordered. May be shown as PUB (public), PVT (private), or 317 (for specific VFC) or other state-designated funding source.
Dose Used Last Month	If required, the field populates based on the doses reported in the previous reporting month.
Physical Inventory	If applicable (by state), the field populates based on the doses available in inventory.
Ordered Quantity	The ordered quantity entered when the order was created.
Approved Quantity	The quantity approved by the local or state approver.
Received Quantity	The quantity of vaccine received by the provider.
Priority Reason	If a priority reason was entered, it will appear here.
Comments	Any comments regarding the order.
Priority Reason	If noted as a priority shipment, this field will populate based on the selected priority reason.
Tracking #	Tracking number associated with the line item from the shipment

Field	Description
	file.

If applicable, enter any special instructions and click **Save Changes**.

Export the Search Results

To export the search results to view or print them, click **Export Report**. The File Download dialog box appears, with options to **Open** (opens the file in the default spreadsheet application, such as Microsoft Excel), **Save** the CSV file to a selected location, or Cancel.

The saved CSV file contains these comma-delimited fields:

VFC Pin, Organization (IRMS) Id, Organization (IRMS) Name, Facility, Order Number, Order Status (current status of the order), Order Submit Date, Submitter Name, Local Approval Date, Local Approver Name, Order Approval Date, State Approver Name, Order Receipt Date, Receiver Name, Order Line Id, Vaccine, *NDC* Number, Lot Number, Manufacturer, Expiration Date, Order Quantity, Approved Quantity, Received Quantity, Cost/Dose (Cost associated with the vaccine at the time of State Approval; pulls from the Vaccine Settings for the selected report time period), Total Cost (calculated by multiplying the cost per dose by received quantity or cost per dose by approved quantity if no received quantity is available), Tracking Number, Ship Date, Exception Reason, Exception Description, Exception Comment

Receive an Order from the Search History

To receive an order from the Search History, it must have an order status of Approved.

After searching for orders using the Orders option on the Search History page, the search results display in the Orders section. Locate the Approved order to receive and click the **Receive Order** button. The Receive Order page opens, displaying the order details.

For additional information and instructions about receiving orders, see the [Orders](#) topic.

Send Automated Messages

(info on how to configure/set up, where they can be used, etc.) Administration - Property - Vaccine Management - Enable Automatic Messaging

Send a Message

If automated messaging has been enabled and an automatic message has been configured, you can send a message when the **Send Message** button is available on a screen.

Follow these steps to send an automated message:

1. Click **Send Message** to open the Automatic *VOMS* Messaging screen.
2. Select either or both options, **Email** and **Message**.
 - **Email** - If the receiving Organization (*IRMS*) or Facility has a shipping email address associated with their account in the application, select this option to email the message.
 - **Message** - This option will "send" the message so that it appears on the **Main > View Messages** screen.
3. Select the message type option:
 - **Default** - Select this option if you want to send the default message, which appears in the textbox next to the option. Click **Send** to send the default message.
 - **User Defined** - Select this option if you want to create a new message. Type the message in the textbox next to the option and click **Save & Send** when finished.

A red confirmation page will appear at the top of the screen when the message is sent.

Import VTrckS/McKesson Shipped Data

This option provides the ability to import *VTrckS* or McKesson shipped data into the database. After importing the data, you can receive the order, with the lot numbers and manufacturer data, in order to update the order status to *Shipped* and update the order details as appropriate.

NOTE: There are several factors to be aware of:

- If the Organization (*IRMS*) or Facility has the "Enable Auto-Receive" setting configured, the order status is set to *Received* and the lot numbers are added to inventory. If a row on the order does not have a lot number (for example, Varicella), a child order is created so that the remaining row can be received. If only a part of the Approved quantity is shipped, a child order is created so that the remaining row can be received.
- You must have the vaccine management and ordering permissions, and the IRMS must be a state approver in order to import these files.
- When a child order is created and the lot information has already been populated on the line, the lot, manufacturer, and expiration date information are populated on the child order.
- Child orders are not created if the **Administration > Properties > Vaccine Management > Add Quantities Rejected During Receipt** to Inventory is selected (enabled).

Once the file is loaded and a matching order is found, both the order and the order items are updated with the correct information. Afterward, the order can be received without entering the lot, manufacturer, or expiration data information.

TIP: The VTrckS file must be a database file (DBF). Comma separated value (CSV) is the required file type for the McKesson file.

To import VTrckS or McKesson data, click on the **Orders/Transfers > Import VACMAN Report** link in the menu. The Import VACMAN Order page displays. The following fields are shown on the page:

Field	Description
File Name	Click the Browse button, select the file, and then select the file type.
File Type	Select the type of file to import: VACMAN (or VTrcks) Direct Ship Export (DBF) McKesson File (Comma-Delimited)

Click **Clear** to erase the input fields and start over.

Click **Import** to start importing the selected file.

Click **View Logs** to open a text file to view any errors.

State/Local Vaccine Allocations

This option allows a state to manage vaccine allocations by facility and vaccine product. Only state and local health jurisdiction users have access to this option, which is controlled by the **State/Local Ordering Approver** permission.

Add State/Local Vaccine Allocations

To search for or add a state or local vaccine allocation, follow these steps:

1. Click **Orders/Transfers > State Vaccine Allocations** or **Local Vaccine Allocations**.
The State - Vaccine Allocation Maintenance or Local - Vaccine Allocation Maintenance page displays.
2. Click one of the buttons:
 - **Search** - Enter the search criteria and click **Search**. The search results will appear in the bottom half of the screen.
 - **Clear** - Click **Clear** to erase any previously entered/selected search criteria.

- **Add New Row** - (Only appears for state users.) Click **Add New Row** to add a new row to the allocations. See the [Add a New Row](#) section for more information.

The search criteria fields are as follows:

Field	Description
Status	Select a vaccine status: <ul style="list-style-type: none"> • Active • Inactive • --select-- (both active and inactive)
Vaccine Name	Select one or more vaccines in the list (CTRL+click to select multiple vaccines out of sequential order; Shift+click for multiple vaccines listed in sequential order).
Allocation Start Date Range	Enter the From and To dates in the MMDDYYYY format. Dates can be in the past or future.

The available fields and columns in the search results section are as follows:

Field	Description
Select Arrow Button	Click the arrow button in the <i>Select</i> column to open the add/edit page for allocations. <ul style="list-style-type: none"> • State users will open the page to add allocations for the LHJs. • <i>LHJ</i> users will open the page to add allocations for providers.
Vaccine Description	Displays the vaccine description as noted in the <i>VACMAN</i> vaccine settings.
Vaccine Name	The name of the vaccine as listed in the H33_ASIIS_VACC_CODE.ASIIS_DESCRIPTION table.
NDC Number	This is the same NDC number as listed in the <i>VACMAN</i> vaccine settings.
Doses Allocated	The total number of doses allocated, depending on whether the user is a state or LHJ users. Determines the table allocation used: <ul style="list-style-type: none"> • For state users - The parent allocation table is searched and joined to the child table to calculate the doses allocated. The aggregate doses allocated is always calculated at the state level. • For LHJ users - The child allocation table is searched and the allocation amount is retrieved.
Start Date	The allocation beginning date.
End Date	The allocation ending date.

Field	Description
Active	Indicates whether the current date is within range; designated with Yes or No.
Import (link)	Click this link to import vaccine allocations into the application. See the Import Vaccine Allocations topic for more information.
Export (link)	Click this link to export vaccine allocations. See the Export Vaccine Allocations topic for more information.

Add a New Row

This button only appears for state users. Once you click on the button, a new row appears in the Search Results section. Select a vaccine name from the Vaccine Description drop-down list. The vaccine name and NDC number will automatically populate, and the doses allocated field will display as zero. Enter a start and end date, but they cannot overlap with an existing date range for the same vaccine description.

Click Save, after which the allocation information will display in the Search Results section of the window, along with a confirmation message.

Add or Edit Vaccine Allocations

To edit a vaccine allocation, first navigate to the State/LHJ Vaccine Allocation - Search Results screen, and then click the arrow button in the *Select* column next to the allocation you want to edit. The Add/Edit Allocation page appears.

TIP: How LHJs are displayed in the search results list for state users depends on the Is Local Approver configuration setting.

Make any necessary changes to the allocation and click on one of the buttons:

- **Save** - Save the allocation additions and edits. Save frequently to avoid a timeout due to an inactive session.
- **Export** - Export the allocation(s) into a comma separated file. See the [Export Vaccine Allocations](#) section for more information.
- **Delete** - Delete the entire allocation within IWeb. Only state users are allowed to delete allocations. This action cannot be undone.
- **Cancel** - Return to the previous page without saving any changes.

The fields and columns on this page will be different depending on whether it is a state or LHJ vaccine allocation. The fields and columns in the Add/Edit Allocation section of the screen are as follows:

Field	Description
Select Arrow Button	Click the arrow button in the <i>Select</i> column to open the add/edit

Field	Description
	<p>page for allocations.</p> <ul style="list-style-type: none"> State users will open the page to add allocations for the LHJs. LHJ users will open the page to add allocations for providers.
Vaccine Description	Displays the vaccine description as noted in the VACMAN vaccine settings.
Vaccine Name	The name of the vaccine as listed in the H33_ASIIS_VACC_CODE.ASIIS_DESCRIPTION table.
NDC Number	This is the same NDC number as listed in the VACMAN vaccine settings.
Doses Allocated	<p>The total number of doses allocated, depending on whether the user is a state or LHJ users. Determines the table allocation used:</p> <ul style="list-style-type: none"> For state users - The parent allocation table is searched and joined to the child table to calculate the doses allocated. The aggregate doses allocated are always calculated at the state level. For LHJ users - The child allocation table is searched and the allocation amount is retrieved.
Start Date	The allocation beginning date.
End Date	The allocation ending date.
Active	Indicates whether the current date is within range; designated with Yes or No.
Import (link)	Click this link to import vaccine allocations into the application. See the Import Vaccine Allocations topic for more information.
Export (link)	Click this link to export vaccine allocations. See the Export Vaccine Allocations topic for more information.

The fields and columns in the details section of the page are as follows:

Field	Description
Select Arrow Button	<p>Click the arrow button in the <i>Select</i> column to open the add/edit page for allocations.</p> <ul style="list-style-type: none"> State users will open the page to add allocations for the LHJs. LHJ users will open the page to add allocations for providers.
Vaccine Description	Displays the vaccine description as noted in the VACMAN vaccine settings.
Vaccine Name	The name of the vaccine as listed in the H33_ASIIS_VACC_CODE.ASIIS_DESCRIPTION table.

Field	Description
NDC Number	This is the same NDC number as listed in the VACMAN vaccine settings.
Doses Allocated	The total number of doses allocated, depending on whether the user is a state or LHJ users. Determines the table allocation used: <ul style="list-style-type: none"> For state users - The parent allocation table is searched and joined to the child table to calculate the doses allocated. The aggregate doses allocated are always calculated at the state level. For LHJ users - The child allocation table is searched and the allocation amount is retrieved.
Start Date	The allocation beginning date.
End Date	The allocation ending date.
Active	Indicates whether the current date is within range; designated with Yes or No.
Import (link)	Click this link to import vaccine allocations into the application. See the Import Vaccine Allocations topic for more information.
Export (link)	Click this link to export vaccine allocations. See the Export Vaccine Allocations topic for more information.

Import Vaccine Allocations

State and LHJ users can import vaccine allocations. Importing the allocations will overwrite the existing data for those specific allocations.

1. Click **Orders/Transfers > State Vaccine Allocations** or **Local Vaccine Allocations**.
The State - Vaccine Allocation Maintenance or Local - Vaccine Allocation Maintenance page displays.
2. Enter search criteria and click **Search**.
3. Click the **Import** link for the specific vaccine in list search results list.
The Import Vaccine Allocations page displays.
4. Click **Choose File** and locate the file to import. The import file should only have two columns:
 - **VFC PIN** - The VFC PIN is validated against existing PINs in the registry. If the VFC PIN does not exist, it is rejected and the line is written to the log. State users can only import LHJs, so if the PIN exists but does not belong to an LHJ, it is rejected and written to the log. LHJ users, on the other hand, can only import providers under the control of their LHJ, so if the PIN does not belong to a provider in the user's LHJ, it is rejected and written to the log.
 - **Allocation Amount** - The allocation amount is validated as a whole number. If it is not a whole number, the line is written to the log.

For LHJ users, any allocation amount that would cause the LHJ to exceed the overall allocation is rejected and written to the log.

5. Click **Import**. After the file loads, a message appears with the number of allocation lines loaded.

To view the import log, click **View Logs**. A File Download dialog box appears, from which you can open the log in your default text editor (e.g., Notepad) or save the file.

Click **Clear** to clear the selected file and start over.

Export Vaccine Allocations

State and LHJ users can export vaccine allocations into a comma-separated value (CSV) file:

1. Click **Orders/Transfers > State Vaccine Allocations** or **Local Vaccine Allocations**.
The State - Vaccine Allocation Maintenance or Local - Vaccine Allocation Maintenance page displays.
2. Enter search criteria and click **Search**.
3. Click the **Export** link for the specific vaccine in list search results list.
The File Download dialog box appears.
4. Open or save the file.

Accountability Record Submission

This function is used to record the submission for accountability, such as receipt of the Temporary Log Report.

The **Administration > Settings > Properties > Vaccine Management > Display Accountability Report Links on Order** option and the **Administration > Settings > Accountability Requirements** settings must be enabled/configured.

Accountability on Create Order Page

If it has been configured, the accountability document/description, the date of last submission, and whether it is past due or not are displayed under the Order Set. This information cannot be edited; it is a reminder of what else needs to be submitted with the order.

View Accountability Records

Only users from a "state approver" Organization (IRMS) can view accountability records. To do so, click **Orders/Transfers > Accountability Submission**. The Accountability Record Update page displays.

Select one or more of the following search criteria and click **Find**. (For some Organizations/Facilities, a list appears automatically without conducting a search. If necessary, select search criteria to narrow down the list of records.) If you want to export the search results in a .csv document instead of displaying them on the page, click **Export**.

Field	Description
Organization (IRMS)	Select the Organization (IRMS) from the drop-down list.
Facility	Select the specific Facility from the drop-down list.
PIN	If necessary, select the PIN from the drop-down list.
Requirements	To narrow search results, enter the requirements number.
Due Date	Select All, Only Past Due, or Only Within Date from the drop-down list to narrow the search results.

Update/Receive Accountability Records

Before you can update or receive accountability records, you must first conduct a search (see the [View Accountability Records](#) section).

The search results list all of the accountability records for Organizations and facilities with a VFC PIN and there is a unique, separate row for each Accountability Requirement/Provider combination. State IIS users can update whomever submitted the documents and save the changes. The updates are then reflected on the Create Order and Approve Order pages.

On the Accountability Record Update page, click the checkbox(es) to select the Organization(s) from which you have received a report, or click **Select All**. The Current Submit Date defaults to the current date, but can be modified.

Click **Save** when finished.

Return Vaccines

Vaccines can be returned to the vendor for various reasons, such as expired or spoiled. In order to return vaccines, the Organization (*IRMS*) that is returning vaccines must have the Organization (IRMS) Maintenance option **Allow Vaccine Returns** enabled. Additionally, if the Organization (IRMS) is also the Vaccine Returns Depot, the **Is Vaccine Return Depot** option must be enabled. See [Organization Maintenance / Details](#) for more information.

Check with state specifics on returning vaccines. If the ordering is done at the Organization (IRMS) level and the Facility has inventory, the Facility will not use the wasted reasons. Instead, they will transfer inventory back to the Organization (IRMS) and the Organization (IRMS) will waste or deduct the inventory. If the Facility does order inventory, they can use the wasted reasons and the vaccine return will be done from the Facility.

Follow these steps to return a vaccine:

1. Click **Orders/Transfers > Create/View Orders**.
The Current Order/Transfer page appears.
2. Click the **Vaccine Return** button.
The Vaccine Return page displays.
3. Review the information, select a Shipping Label Method (Mail, Pickup, or Email) and enter the Return Quantity amount.
4. Click **Submit and Print Vaccine Return**.
The packing slip opens in a separate browser window or tab, where it can be printed.

Click **Cancel** to terminate the vaccine return and return to the previous screen.

The top section of the Vaccine Return screen displays the sending Organization (IRMS), Facility, and contact person's information, plus three shipping label options: Mail, Pickup, and Email.

The bottom section of the screen displays these fields/columns:

Field	Description
Return Quantity	<p>Enter a whole number for the return quantity. This includes vaccine returns to the Organization (IRMS)/Facility return depot. Transfers being returned to the depot displays in the Outbound Transfer section of the selected vaccine depot.</p> <div style="border: 1px solid black; padding: 5px;"> <p>TIP: The <i>Returned to the Depot</i> reason displays under the Other-In transaction type on the Inventory Transaction Report. <i>Unaccounted for in Provider Shipment</i> displays under the wasted and disposed transaction type on the Inventory Transaction Report.</p> </div>
Wasted Quantity	<p>The quantity that is returnable without counting the doses that were already returned.</p> <p>Example #1: The Facility had inventory of 14 doses of DTaP, wasted 10 doses from the Reconciliation screen, and returned 2 doses from the Vaccine Return screen, which were later accepted by the return depot. Now, on the Vaccine Return screen, the wasted quantity for DTaP shows 8 doses.</p> <p>Example #2: A provider had 14 doses of DTaP and wasted and returned 2 doses that were accepted into the depot, then reconciled 4 doses of the same lot number. Now on the Vaccine Return screen, only the 4 doses from the second transaction appear in the <i>Wasted Quantity</i> column.</p>
Vaccine	Name of the vaccine being returned.
Funding Source	Funding source associated with the vaccine being returned.
Lot Number	Lot number of the vaccine being returned.
Usable Quantity Available	The amount of usable vaccine that is available.

Field	Description
	If a return reason of Usable is selected, the return quantity validates against the <i>Quantity Available</i> column to ensure there is enough quantity. Returns of usable vaccine do decrement the available count.
Wastage Cost	Displays the cost from the Vaccine Settings screen. This is not the historical cost.
Expiration Date	Indicates the vaccine's expiration date.
Return Reason	This read-only field displays the adjustment reason selected on the Reconciliation screen for wasted doses. If the lot has multiple adjustment reasons, multiple lines will appear on the vaccine return. The Return Reason selected by the provider is the same Return Reason reflected in the depot.

Reprint a Packing Slip

To reprint a packing slip, follow these steps:

1. Click **Orders/Transfers > Search History** in the menu. The Search History screen displays.
2. Select the **Returns** option and click **Search**. A list of previously created returns appears.
3. Click the arrow button in the *Select* column next to the return number to display the vaccine return information.
4. Click **Reprint Packing Slip**.

Remove or Delete a Return

Registry Client users can remove or delete vaccine returns by line item or provider.

NOTE: This functionality is only available for returns created after the upgrade to IIS v. 5.15.11. Returns created prior to the upgrade will not display.

To remove or delete a return from the Vaccine Return page, click the **Remove** button in the *Option* column for the specific vaccine or lot number. Once the vaccine return has been removed/deleted, it will no longer be available (the action cannot be undone).

Modify Order Set

This option is available only if the system administrator has configured the **Administration > Properties > Vaccine Management** options **Enable Custom Order Set for Date Range** and **Enable Custom Order Set for PIN Range**. Additionally, the **Allow Online**

Orders option must be enabled for the Organization (*IRMS*) or Facility. See [Search/Add/Edit Organizations \(IRMS\)](#) for more information.

Based on the configuration of the date range and PINs, the Modify Order Set feature is available to providers under the Orders/Transfers menu for the selected Organization (IRMS) or Facility for the specific time period and PIN number range.

The user must be logged in under the Organization (IRMS)/Facility before they can modify an order set. This is similar to how the current Create Order option works. For example, IRMS users cannot place a vaccine order for a facility until they have selected the facility from the drop-down list (**Main > Select Facility**).

Follow these steps to modify an Order Set:

1. Select the appropriate Organization (IRMS)/Facility as necessary.
2. Click **Orders/Transfers > Modify Order Set**.
The Provider Order Set page appears, with either the vaccine order set or a dialog box. When modifying an order set, note that the system checks the status of vaccine orders and disallows/allows access to the vaccine selection as follows:

Disallow access to vaccine selection if *any orders* for the provider are in one of the following statuses:

- Backordered
- In Manual Review
- Pending Local Approval
- Pending State Approval
- Saved

When disallowed, the following message appears: *Vaccine Selection is not allowed. No custom order set was found for the given Organization (IRMS)/Facility. Please contact your Local Health Department.*

If a provider wants to add a vaccine that is not on their current order set, they are directed to contact their local health department for additional support. For example, if their current order set only contains Hep B, then only Hep B vaccines are available for selection. For vaccines on their list with a single brand choice (i.e., no other vaccines on the Vaccine settings share the same Vaccine Code), the vaccines display but without an option to change them, and they would remain a part of the provider's order set.

Allow access to vaccine selection if *all orders* for the provider are in one of the following statuses:

- Approved

- Archived
- Denied
- Pending CDC Approval
- Received
- Rejected
- Shipped
- *VTrckS* Batch History

The Provider Order Set page appears with the provider's existing order set. (This order set is the one that was created from the Facility Maintenance page.)

3. Click **Edit Vaccine Selections**. This allows the user to change the brand of the vaccine, but not the type. For example, DTaP might display two brand options, Daptacel or Infanrix, from which you can select one.
4. Modify the vaccines as necessary.
5. Click **Save** when finished.
6. On the dialog box that appears stating *Once you save you will not be able to edit the selections again. Are you sure you want to save these vaccine selections?*, click **OK**.

After **OK** is clicked, the system does a look-up with all existing order sets (when a new custom order set is created, that order set is included in future validations), and the following happens:

- If there is a match, that order set is applied to the provider or facility associated with the PIN and their order set updates to include the new product(s).
- If there is no match, the system creates a new order set and names it with the next sequential available name. For example, "State Supplied N001," where "001" comes from the order set number. Additional information about the logic includes the following:
 - IWeb uses a default naming convention of "State Supplied N###". The first system-created order set is named "State Supplied N001" and the next would be "State Supplied N002," and so on.
 - This option allows the system to keep a table of all of the order set numbers (values) that have been assigned to all system-generated order sets.
 - The administrator can then use the **Administration > Define Values > Define Order Set** option to manage these custom order sets.
 - The provider is associated with the same order set when the administrator changes the name of an existing order set. For example, PIN 123456 is assigned a new system-created order set of "State Supplied N001". The

administrator accesses the **Administration > Define Values > Define Order Set** option and changes the order set name of "State Supplied N001" to "State Supplied 108". PIN 123456 is then automatically linked to "State Supplied 108".

- The system administrator can then use the **Administration > Define Values > Define Order Set** Order Set Maintenance page's Sort Order field to initially sort the vaccines for the new system-created order set after it is created.

Cold Storage Units

This feature allows users to manage cold storage units and track temperatures. Users can also create a cold chain report that lists all of the code storage units found for a selected site and the recorded temperatures for those units.

Cold Storage is listed in the menu as **Orders/Transfers > Cold Storage**. If no cold storage units have been configured, the message *There is no cold storage unit(s) available for this Provider* appears at the top of the screen, along with an **Add Cold Storage Unit** button. Otherwise, the Manage Cold Storage Unit page displays.

Actions that can be performed in this area of the application are:

- [Add a Cold Storage Unit](#)
- [Cold Storage \(Physical\) Location](#)
- [Edit/Update a Cold Storage Unit](#)
- [Enter Temperatures for Cold Storage Units](#)
- [Change a Cold Storage Unit's Status to Active or Inactive](#)
- [View Previously Saved Temperature's User, Date, and Time](#)
- [Cold Storage Units on Provider Agreements](#)
- [Export Cold Storage Unit Information](#)
- [Enable the Freezer Options](#)
- [Enable the Upload Temperature Data Option](#)
- [Send Temperature Data to the State](#)

Add a Cold Storage Unit

Click **Orders/Transfers > Cold Storage** in the menu. If no cold storage units have been configured, click **Add Cold Storage Unit**. Otherwise, the Manage Cold Storage Unit page will display; click **Add** to add a new unit.

On the Add Cold Storage Unit page, select or enter the following information, then click **Save**. To add a freezer instead, click Add Freezer and enter the freezer details.

Field	Description
Refrigerator/Freezer Name	Enter the name of the cold storage unit for identification purposes. This field is required. NOTE: Only Active units appear in the list after the information is saved.
Refrigerator/Freezer Type	Select the cold storage unit type: Refrigerator or Freezer. This field is required.
Manufacturer	Enter the manufacturer name. This field is required.
Model Number	Enter the model number of the cold storage unit. This field is required.
Effective From	Click in the field and select a date from the calendar pop-up; this is the date the cold storage unit was added. Defaults to the current date. This field is required.
Purchase or Issue Date	Select the purchase or issue date.
Inactive Refrigerator/Freezer	Select this option if the cold storage unit is not active. Only active units appear in the list.
Thermometer Serial Number	Enter the thermometer serial number.
Thermometer Type	Select the thermometer type from the drop-down list. This field is required. If <i>Other</i> is selected, enter the type in the Other Device field (which becomes a required field).
Other Device	This field is empty unless the cold storage unit measuring device is set to <i>Other</i> . If Other is selected as the thermometer type, enter the type.
Temperature Scale	Select Celsius or Fahrenheit from the drop-down list. This field is required.
Date of Last Calibration	Select the last calibration date from the calendar pop-up. This field is required.
Calibration Expiration	Enter the calibration expiration date, if there is one.

Cold Storage (Physical) Location

An Alberta user with Cold Storage Physical Location access through their facility can edit the Depot Cold Storage Physical Location page by clicking **Orders/Transfers > Cold Storage Location** from the menu. This page allows a Depot to designate their own fridge, cart, and shelving. A Cold Storage Summary section is located near the bottom of the page to display the details.

To add a unit, click **Add Unit**. Only one unit can be added at a time, but a unit's name can be modified at any time.

To add a cart, click **Add Cart**. Only one cart can be added at a time. The names of new carts can be modified.

Select the Pick Exclusion option for a unit to exclude the selected unit and all carts located under it from being picked. If a unit is selected, all carts assigned to the unit become ineligible and a cart cannot be deselected if the unit is selected. However, if a unit is not selected, a cart or a combination of carts can be selected for Pick Exclusion individually.

After saving, the unit, cart, and shelf locations are available on the Lot Number Management page to allow assignment of a vaccine to the specific cold storage location. When a cart is assigned to a new cold storage unit, the locations of all vaccine lots are modified to indicate the new unit location.

To delete a cold storage unit or cart, select the option for that unit (or cart) in the Delete column and click **Delete Selected**. Note that if a cold storage unit is deleted, the assigned cold storage unit (in the *Cold Storage Unit Assigned* column) for each cart previously assigned to that unit is cleared and a new cold storage unit needs to be assigned. Click **Save** when finished.

Edit/Update a Cold Storage Unit

Only one cold storage unit can be edited/updated at a time. To edit or update a cold storage unit, click **Orders/Transfers > Cold Storage** on the menu.

On the page that appears, the cold storage units are displayed in columns in the Temperature Data section, in alphabetical order by name. If there are a lot of cold storage unit columns displayed, click on the +/- icon in a gray header box to collapse or expand the column for that unit.

To edit the information for a specific cold storage unit, click on the name of the unit. A pop-up box opens. Make any necessary changes and click **Save** when finished.

Enter Temperatures for Cold Storage Units

When entering temperatures for cold storage units, the scale displays in either Celsius or Fahrenheit, depending on the selected temperature scale when the unit was added.

Click **Orders/Transfers > Cold Storage** on the menu. The Enter Recorded Temperature page displays. If necessary, select the option to Display Inactive Units.

The cold storage units are listed in columns. If there are a lot of units displayed, you can collapse columns by clicking on the +/- icon in each gray header box. Hover the mouse over the cold storage unit name to see a list of recommended temperatures.

The Record Date From and Through (at the top of the screen) displays the current date by default. The dates are displayed from the Effective From date to the earlier of the Effective To date for each unit or the current date. If the units have different Effective From and Effective To dates, the earliest Effective From date and the earliest of either the Effective To date or the current date displays.

The fields in the Temperature Data section of the page are as follows:

Field	Description
Day	Displays the date the temperature is being entered. Defaults to the current date.
A.M. / P.M.	This column's information works with the <i>Time</i> column to indicate when the temperature was taken.
Office Closed	<p>If the office is/was closed at the time the temperature was taken, select this checkbox.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>NOTE: If this option is selected, temperatures can still be entered.</p> </div> <p>If the Require Cold Chain Reporting property is enabled and Office Closed is selected here, the temperature field is not a required field. If the property is enabled and Office Closed is <i>not</i> selected, the temperature field is required.</p>
Time	Enter the A.M. and P.M. times that the office is closed during regular business hours on the date displayed.
Cold Storage Unit Temperature Columns	<p>Each cold storage unit has its own column for entering temperature data. Enter the temperature decimal value in the field for that unit's column, in the row indicating the time the temperature was taken. You can hover the mouse over the unit's name to see a list of acceptable temperature ranges:</p> <ul style="list-style-type: none"> • Freezer in Centigrade: (-21.0) to (-15.0) °C • Freezer in Fahrenheit: (-5.0) to 5.0 °F • Refrigerator in Centigrade: 2.0 to 8.0 °C • Refrigerator in Fahrenheit: 35.0 to 46.0 °F <p>If the temperature entered is out of range, the field turns yellow and a warning message stating <i>Your recorded temperature is out of the acceptable range. Please verify</i> appears. Verify the temperatures and change them if necessary.</p>

When you have finished entering the temperatures for one or more cold storage units, click **Save**. A *Temperature readings recorded successfully* message appears at the top of the screen.

Change a Cold Storage Unit's Status to Active or Inactive

A cold storage unit has an Active status unless/until the Inactive option is selected (enabled). This can be done either when adding the cold storage unit for the first time, or later by click on the unit's name in the Temperature Data column and selecting the **Inactive** option in the pop-up details window.

To display inactive cold storage units (perhaps to re-activate them), select the **Display inactive units** option in the top section of the Enter Recorded Temperature screen (**Orders/Transfers > Cold Storage**).

View Previously Saved Temperature's User, Date, and Time

To see who entered temperature data for a specific cold storage unit, along with the date and time it was entered, go to the Enter Recorded Temperature screen (**Orders/Transfers > Cold Storage**) and click in the recorded temperature field. A pop-up message will display indicating the username, date, and time the temperature data was entered and saved.

Cold Storage Units on Provider Agreements

After a cold storage unit has been added, it becomes available to the provider agreement for submission to the state. Cold storage units can be added to provider agreements, in this manner:

- Cold storage units entered into a provider agreement directly are not available until the provider agreement is approved by the state.
- On provider agreement approval, the cold storage units are available for use through the cold storage link in the menu (**Orders/Transfers > Cold Storage**).

After a provider agreement is approved, the cold storage unit information automatically populates in the agreement at renewal. Likewise, if cold storage information is modified during the provider agreement renewal period, the information automatically updates in the cold storage section of the application.

Export Cold Storage Unit Information

To export the cold storage unit data to a CSV file, click **Orders/Transfers > Cold Storage** in the menu, scroll to the bottom of the screen, and click **Export**. Save or view the CSV file as needed.

Enable the Freezer Options

There are three freezer-related options that can be enabled or selected at the Organization (*IRMS*) level:

- Freezer average temperature of 5°F or colder
- Separate, insulated freezer door
- Freezer measuring device

To enable and/or configure these options, navigate to **Organization (IRMS) > Search/Add**, enter search criteria if necessary and click **Search**, and then click **Edit**. Scroll down to the Vaccine Management section and select either (or both of) the **Freezer average temperature of 5°F or colder** and **Separate, insulated freezer door** options.

For the **Freezer measuring device** option, select an item from the drop-down list (e.g., Standard, digital, etc.). If you select *Other*, enter the device name in the **Other Device** field below the list.

Click **Save** when finished with the options.

Enable the Upload Temperature Data Option

To be able to upload/import temperature data directly into the application, the **Upload Temperature Data** option must be enabled for the Organization (IRMS). To enable the option, navigate to **Organization (IRMS) > Search/Add**, enter search criteria if necessary and click **Search**, and then click **Edit**. Scroll down to the Vaccine Management section and select the checkbox for the **Upload Temperature Data** option. Click **Save** when finished.

Upload/Import Temperature Data

See the [Upload Temperature Data](#) section of the [Import Files \(Upload\)](#) topic.

Send Temperature Data to the State

A user with the correct access level and permissions can send temperature data for cold storage units to the state. To do this, navigate to **Import Menu > Temperature Upload** and click **Report to State** on the Temperature Upload page. The Temperature Report is sent to the state.

Provider Agreements

The Provider Agreements page can be accessed by clicking **Orders/Transfers > Provider Agreement** from the menu on the left, but only if an administrator has enabled the provider agreement options in the **Administration > Settings > Properties > Vaccine Management** section, and each Organization/Facility has enabled the **Allow Provider Agreements** option on their individual Maintenance pages. See [Facility Maintenance](#) for Organization/Facility settings information.

Search for and Approve Provider Agreements

If the **Administration > Properties > Vaccine Management** provider agreement options have been enabled, Registry Client users can search for and approve provider agreements that have been submitted from the application's home page.

To search for a provider agreement, follow these steps:

1. Click **Orders/Transfers > Provider Agreement** on the menu. The Provider Agreement Search page opens. The provider agreements may already be listed on the page. In that case, click on the arrow button in the *Select* column for a provider agreement to open it and view the details.

2. If the list of provider agreements does not automatically appear when this page opens, enter the search criteria and click **Search**. You can enter as little or as much information as you want to broaden or narrow your search.

The search criteria fields (if the list of provider agreements was not displayed when the page was opened) are as follows:

Field	Description
Organization (IRMS) Name	Select the Organization (IRMS) from the drop-down list. If none is selected, the Facility Name list is populated with all of the Facilities that have agreements in process.
Facility Name	Select the provider's Facility from the drop-down list. The list is based on the selected Organization (IRMS). If no Organization is selected, the list is populated with all of the Facilities that have agreements in process.
Medical License Number	Enter the provider's medical license number.
Federal Tax ID	Enter the provider's federal tax ID.
Phone Number	Enter the Facility's phone number.
Fax Number	Enter the fax number for the provider's site/Facility.
Email	Enter the email address for the Facility.
Status	Select a provider agreement status to search for.
Submit Date Range	Enter a date range for when the provider agreement was entered. Use the MMDDYYYY date format.
PIN	Select from and through provider PINs from the drop-down lists.

The returned search results are displayed at the bottom of the screen.

TIP: If no link appears in the *PDF-Frozen Vaccine* column in the search results, it is because the user did not answer "Yes" to all of the enrollment questions at the time the data was entered.

The following actions can be performed on the search results (if all of the links and buttons are available).

View/Edit/Approve a Provider Agreement

To select a provider to view or edit the information in order to approve it, click the arrow button in the *Select* column.

If the agreement already has an Approved status, the fields will be grayed out and cannot be edited. Otherwise, you can edit the status to Approved.

If the provider agreement is up for renewal, authorized users will see the **Add** button. Click it to renew the provider agreement.

If any fields have been edited or changed from the previous agreement, local and state approvers will see the modified fields in **bold red** text.

The following fields and descriptions are displayed on the Provider Agreement Add/Edit page, which opens when the arrow button in the *Select* column for a provider agreement is clicked. Note that these fields vary depending on state configuration settings and all fields may not appear, or use the same wording.

Field	Description
Approver Comments	Enter any comments related to the approval.
Status	Status of the provider agreement (Submitted, Approved, Returned)
VFC PIN	Provider's VFC PIN.
Organization (IRMS) Name	Provider's Organization (IRMS).
Facility Name	Name of the facility.
Agreement Signatory/Signature	Name of the person responsible for signing the agreement. NOTE: This field label becomes Certifying Provider Name on the Provider Agreement Add/Edit page.
Agreement Signatory Title	Title of the person responsible for signing the agreement. NOTE: This field label becomes Certifying Provider Title on the Provider Agreement Add/Edit page.
Is Information Sharing Agreement current?	Indicates whether or not the information sharing agreement is current (Yes/No).
Last Renewed	Year the provider agreement was last renewed.

Facility Address:

Field	Description
Street Address	First line of the facility's street address.
Street Address 2	Second line of the facility's address.
City	Facility's city name. This field is required for the First Responder application.
State	Facility's state. This field is required for the First Responder application.
County	Facility's county. Enter the city and state first.
Zip Code	Facility's zip code. This field is required for the First Responder application.

Vaccine Delivery Address:

Field	Description
Check if vaccine delivery address is the same as	Select this option if the vaccine delivery address is exactly the same

Field	Description
facility address	as the facility's address.
Street Address	First line of the vaccine delivery address.
Street Address 2	Second line of the vaccine delivery address.
City	City for the vaccine delivery address.
State	State for the vaccine delivery address.
County	County for the vaccine delivery address. Enter the city and state first.
Zip Code	Zip code for the vaccine delivery address.

Mailing Address:

Field	Description
Check if mailing address is the same as facility address	Select this option if the mailing address is exactly the same as the facility's address.
Street Address	First line of the mailing address.
Street Address 2	Second line of the mailing address.
City	City for the mailing address.
State	State for the mailing address.
County	County for the mailing address. Enter the city and state first.
Zip Code	Zip code for the mailing address.

Contact Details:

Field	Description
Type 1-5	Select the type of contact from the drop-down list. Examples: <ul style="list-style-type: none"> • Vaccine Delivery • Mailing • Facility
Contact Name 1-5 / Contact First Name, Middle Initial, and Last Name 1-5	Contact name: First, middle, last.
Phone Number 1-5	Contact's phone number.
Phone Number Extension 1-5	Contact's phone number extension.
Fax Number 1-5	Contact's fax number.
Email Address 1-5	Contact's email address.

Field	Description
Completed Annual Training 1-5	Indicates whether or not annual training was completed (Yes/No).
Type of Training Received 1-5	The type of training received. Examples: In Person, Offsite, Online.
Completed Annual Training Requirements	Enter the date that the annual training requirements were completed.
Method of Training Completion	The method of training. Examples: Online Training, Site Visit.

Vaccines Offered:

Field	Description
All ACIP Recommended Vaccines	Select this option if the provider offers all of the ACIP-recommended vaccines.
Offers Selected Vaccines	Select this option if the provider is a <i>specialty provider</i> that only offers specific vaccines, then select the appropriate options in this section. Also select specific vaccines that are offered.

Document days and times that you are able to receive vaccines:

Field	Description
Monday-Friday	Select the days and times the facility is open to receive vaccines. Select one or more days and select the start and end times (24-hour time). If there are two sets of start and end times, you can use them to indicate being closed during lunch time. For example, Monday 09:00-12:00 13:00-17:00.
Facility Type	Select the type of facility from the drop-down list. Examples: Private, Hospital, Public Health Department.
Facility Type Other	If Other is selected for facility type, enter the type of facility in this textbox.
Facility Comments	Enter any pertinent comments related to the facility/provider agreement.

After entering the information for at least the required fields, click **Save and Add Provider** to go to the Authorized Providers [Add/Edit] page.

Add a New Provider

On the Authorized Providers [Add/Edit] page, enter at least the physician or vaccinator's last name, first name, title, speciality and (if applicable) sub-specialty. Select Yes/No as to whether or not the provider is active with this practice, and enter his or her medical license number and NPI number (and, in some cases, the tax ID number), and then click **Add New Provider**. Continue adding new providers as needed. At least one physician/vaccinator is required.

Click **Save and Add Provider/Practice Profile** when finished adding new providers. The Provider/Practice Profile page opens.

For authorized users, the **View Provider/Practice Profile** button may display instead. See the [Approve the Provider Agreement](#) section for more information on this.

On the Provider/Practice Profile page, enter the information, answer the question about the data source, and click **Save and Certify Frozen Vaccine**. (Note that this button displays only if the **Administration > Settings > Properties > Vaccine Management > Enable Frozen Vaccine Certification for Provider Enrollment** option is enabled (selected).

The fields on the Provider/Practice Profile page are as follows:

Field	Description
VFC Vaccine Eligibility Categories	Enter the number of children for each age category (<1 year, 1-6 years, 7-18 years) who received each VFC vaccine listed. The total fields for each VFC vaccine type and age category automatically populate.
Non-VFC Vaccine Eligibility Categories	Enter the number of children for each age category (<1 year, 1-6 years, 7-18 years) who received each non-VFC vaccine listed. The total fields for each non-VFC vaccine type and age category automatically populate.
What data source (or type of data) was used?	Select the appropriate answer. Examples: Benchmarking, Medicaid Claims, Doses Administered, Billing System.

When the **Save and Certify Frozen Vaccine** button is clicked, the Cold Storage Unit page opens. If a qualified cold storage unit has not yet been set up in the application, a warning message appears. See the [Cold Storage Unit](#) topic for more information. Note that at least one cold storage unit (i.e., refrigerator) and its associated thermometer must be entered before moving forward.

If a cold storage unit has already been set up, many of the fields are pre-populated. Enter or update the fields as necessary and answer the questions, such as:

- Do you want to be certified for frozen vaccine (Varicella or MMRV)?
- Can freezer maintain an average temperature of 5° F or colder? (Temperature may be in Celsius instead.)
- Does freezer have a separate, insulated door?

At the bottom of the page are two additional options:

- By signing this document I certify that appropriate storage is in place for frozen vaccines.
- By signing this document I certify that I agree with the Terms and Conditions of participating as a State Supplied Vaccine Provider.

The wording of these two options may vary depending on configuration settings, but at least the second one must be read and selected. After selecting the option, an authorized signer can type their name in the textbox and click **Add Comments and Submit**, which opens the Provider Agreement Approval page.

Submit the Provider Agreement

On the Provider Agreement Approval page, select the **Organization (IRMS) Confirmed** option if it has been confirmed, enter any approver comments (in either or both the internal-use-only box and the external-view textboxes), and click **Submit**.

The Provider Agreement status changes to *Submitted*. Once the agreement has been reviewed and approved by the state, the status changes to *Approved*. If additional changes need to be made to the provider agreement, the state changes the status to *Returned* and adds a comment. The provider and facility then need to address the requested changes and resubmit the agreement for approval.

Approve the Provider Agreement

Authorized users may see the **View Certify Frozen Vaccine** button on the Provider/Practice Profile page. Click it to open the Frozen Vaccine Certification page and answer the questions. To approve the provider agreement, click **Approve Provider Agreement**. The Provider Agreement Approval page opens.

On the Provider Agreement Approval page, enter the approved date and expiration date, change the status if necessary, and enter any approver comments. Click **Save** when finished. The provider agreement now has the status of *Approved*.

View the Full PDF Agreement or Signature Page

To view the full provider agreement, click the **PDF** link in the *PDF-Full* column. To view just the signature page, click the **PDF Signature** link in the *PDF Signature Page* column. Each PDF will open in a new browser window. Click the **X** in the browser window to close the PDF when finished.

View/Edit/Approve a Frozen Vaccine Certification

To view, edit, or approve a frozen vaccine certification, click the arrow button in the *Select Frozen Vaccine* column.

Only approvers can approve the frozen vaccine certification. After verifying the data, click **Approve Provider Agreement** to display the Provider Agreement Approval screen and approve the agreement.

View the PDF of the Frozen Vaccine Certificate

To view the PDF version of the frozen vaccine certificate, click the **PDF-Frozen Vaccine** link in the *PDF-Frozen Vaccine* column.

Create an Organization (IRMS)

If the provider is enrolling for the first time and they do not have an IRMS already created in the system, a **Create Organization (IRMS)** link will appear for authorized users. Click it to create a new provider IRMS. This link will not appear if the IRMS is already in the system.

Delete a Provider Agreement Submitted in Error

Only approvers have the ability to delete provider agreements. Click the **Delete** button and follow any prompts to delete the provider agreement. This action cannot be undone.

Archive/Unarchive a Provider Agreement

Approvers can archive an older provider agreement to keep only the most current version on the list. Click the **Archive** button to archive a particular provider agreement. To unarchive an agreement, click **Un-Archive**.

Add a New Provider Agreement

Click **Add** to add a new provider agreement. However, the **Add** button will not appear if the search returns multiple agreements. A search with more specific criteria will provide fewer search results.

Export a Provider Agreement

To export all of the fields from the Provider Agreement Add/Edit page, all of the fields from the Frozen Vaccine Certificate page, and all of the fields from the Approval page, click **Export Agreement**.

Export a Provider

To export all of the fields from the Authorized Providers Add/Edit page, click **Export Provider**. The export also includes these fields: *VFC* PIN, facility name, shipping address, mailing address, fax number, provider last name, first name, middle initial, title specialty, status (Active/Inactive), medical license number, *NPI* number, yellow fever stamp indicator, certified physician name, and yellow fever stamp number.

Export a Provider or Practice Profile

To export all of the fields from the Provider/Practice Profile page, click **Export Provider/Practice Profile**. The export also includes the following fields: *VFC* PIN, facility

name, shipping address, mailing address, fax number, provider profile table fields and date, and the additional profile questions and data.

NOTE: The VFC Vaccine Eligibility categories are populated based on table settings in the Define and Map Eligibility categories. See the Vaccine Management chapter in the *IWeb Core Administration Guide* for more information.

Reports

Reports can be accessed from the **Reports** menu. In addition to specific details about each available report type, this section includes information on how to:

- [Generate a Report](#)
- [Schedule a Report](#)

The following report categories are available on the **Reports** menu, depending on permission level:

- [Report Module](#)
- [Province Reports](#)

Generated reports usually appear in a new browser window, from which they can be printed using the browser's print function..

The instructions for generating and printing reports are the same for all of the report types, although not all reports are able to be scheduled or exported.

This guide includes information about reports that are specific to the *VIMS* module. See the IWeb documentation for information about non-VIMS-related reported.

Generate a Report

To generate a report, first click on the appropriate report category in the Reports menu, then:

1. Click on a report title.
2. Enter the relevant report criteria and click **Create Report** at the bottom of the screen.
The report displays in a new window.
3. Use the browser's print options to print the report.
Close the report when finished.

Reset Report Criteria

To erase previously entered report criteria and start over, click **Reset**.

Export a Report

Some reports can be exported. To export a report, click **Export Report**.

Print a Report

This button only appears if a state has added and configured it. To print a report, click **Print Report** and select a printer from the Printer dialog box.

Send a Report to the System Administrator via Email

This button only appears if a state has added and configured it. To send a report to the system administrator after it has been generated, click **Email Report**. Click **OK** on the confirmation dialog box to confirm sending the report via email.

Once the report is emailed, a confirmation message appears at the top of the *VFC* Accountability Log Parameters window.

To cancel sending the report (abort the email process), click **Cancel**.

Create Mailing Labels

Some reports, such as the [Vaccine Return Adjustment Notification](#) report, can be printed to a Word document in mailing label format. The depot address information and the provider address information are exported to Word as mailing labels. The depot addresses will appear first in the document, followed by the provider addresses.

To print the report to Word as mailing labels, click **Create Mailing Labels**.

Return to the List of Reports

Click the **Back** button to return to the main Reports screen.

Facility Undefined Error

If there is no facility defined for an *IRMS*, the report output will display *Facility Undefined*. This means that the report will use the IRMS data instead of data from a facility.

Schedule a Report

Some reports have scheduling capabilities, allowing the user to schedule a report to run at a pre-determined date and time. These reports will have a **Schedule** button next to the report title.

NOTE: The Quartz job scheduling library is used to schedule reports. It pulls all of the scheduled reports into memory when Tomcat is started. If you edit a scheduled report, the changes are not implemented until Tomcat is restarted. However, you can immediately change the scheduling of a report by deleting it and then rescheduling it. Otherwise, the edited report schedule is not recognized until Tomcat restarts.

To schedule a report:

1. Click **Schedule**.
The Scheduler section appears under the selected report options.
2. Enter the scheduling criteria:
 - **Run now** - Select this to run the report immediately, and not schedule it for additional runs.
 - **Minute / Hour** - Select the hour and minute to run the report. Minutes are based on five second increments.
 - **Day of Month / Month** - To schedule the report to run on a certain date, select the day and month from the appropriate drop-down lists.
 - **Day of Week** - To schedule the report to run on the same day every week, select the weekday from the drop-down lists.
 - **Run once** - Select this checkbox to run the report once on the scheduled day and time, but then remove it from scheduling.
3. In the *Report can be accessed by* section, enter a user's first and/or last name and click **Search**. You can change the number of entries to be displayed in the *Search Results* section.
4. In the *Search Results* section, select one or more users to receive the scheduled report link by checking the checkbox next to their name(s).
5. Once all of the users have been selected, click **Select Users**.
The selected users will appear in the *Selected Users* section.
6. To remove any of the selected users, select them and then click **Remove Users**.
7. When you are finished, click **Schedule**.
The report will run on the scheduled day and time.

After a report is scheduled, it will appear in the Scheduled Reports menu under Received Reports.

Reset Schedule Criteria

To erase previously entered scheduling criteria and start over, click **Reset**.

Return without Saving

Click the **Back** button to return to the previous page without saving any entries.

Report Module

Report Module

Depending on your user access level, there are VIMS-specific reports available in the Report Module category (**Reports > Report Module** on the menu). See the IWeb documentation for information about other reports available in this category. This guide details the following reports:

Vaccinations:

- [Lot Number Summary](#)
- [Lot Usage and Recall](#)
- [Vaccine Lots to Expire](#)
- [Daily Inventory Report](#)

Vaccines for Children:

- [VFC Vaccinations Breakdown](#)
- [Vaccine Administered](#)
- [VFC Accountability Log](#)

Vaccine Management:

- [Inventory Transaction](#)
- [Inventory Submission Report](#)
- [Monthly Inventory Reconciliation Audit Report](#)
- [Cost Report by Lot Number](#)
- [Cold Chain Tolerance Exception](#)
- [Order History Comparison Report](#)
- [VIMS Vaccine Shipment Summary](#)
- [Vaccine Return Adjustment Notification](#)
- [Aggregate Wastage Report](#)
- [Vaccine Dispensed Report](#)
- [Vaccine Shipping Invoice](#)
- [Inventory Adjustment Report](#)

Administrative:

- [Usage Tracking](#)

Lot Number Summary Report

This report (**Reports > Report Module > Vaccinations > Lot Number Summary**) displays a list of active, non-expired lots, and orders/transfers for the specified *IRMS*/facility and the details, such as the current inventory counts and a count of the different categories to show where the inventory went (doses total, used, wasted, and available). Multiple vaccines can be selected. The *manufacturer* column displays a three-letter abbreviation and the number of doses wasted or expired. A subtotal has also been added for beginning doses, doses received, and doses transferred in.

This report is also available for the Mass Immunizations Application.

The **Aggregate by IRMS/Facility** option displays all of the inventory for a specific lot used throughout the registry and includes the locations and quantities of a particular lot number.

The *in-transit* column appears on the report when the Administrative - Property is enabled and when the order is "Ready for State Approval." At this point, the order displays as In Transit on the Lot Number Summary and Run Report of Distributed Doses vs. Administered Doses reports.

Field	Description
Include Order/Transfer Quantities	Select this option if you want to include the orders/transfers quantities. When selected, these columns will be added to the report: <ul style="list-style-type: none">• Doses Received• Transferred In• Transferred Out• Viable Returns
Limit Report By	<ul style="list-style-type: none">• Report Date, Expiration Date - To limit the report by a specific report date or expiration date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. NOTE: If Report Date is selected, the report displays a <i>Starting Number of Doses</i> column, which is the number of doses available at the beginning of the date range.• Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option.

Field	Description
	<ul style="list-style-type: none"> • Facility, Facility Group, Do Not Limit - Select the Facility or Facility Group from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Manufacturer - Select a specific manufacturer from the drop-down list. • Vaccines - From the box on the left, select one or more vaccines and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the box on the right, select the vaccine(s) and click <<. • Lot Number - Enter a lot number to limit the report by that criterion. • District/Region - Select a specific district or region from the drop-down list. • County/Parish - From the box on the left, select one or more counties/parishes and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected counties/parishes. Use the shift key to select multiple counties/parishes listed in order, and use the CTRL key to select counties/parishes that are out of sequential order. To remove one or more counties/parishes from the box on the right, select the county/parish and click <<. • Funding Type - Select the funding type option from the drop-down list. • Inactive Status - Select Active, Inactive or All (both) to limit by lot number status. • Expiration Status - Select Non-Expired, Expired, or All (both).
Display By	<ul style="list-style-type: none"> • Subtotal by Vaccine - Displays the subtotals according to vaccine name. • Aggregate by Organization (IRMS)/Facility - Displays the aggregate (combined) totals per organization (IRMS) or facility. NOTE: This option displays all of the inventory for a specific lot used throughout the registry, along with the locations and quantities of the specific lot number. • Separate Reports by Calendar Month - Displays separate tables by calendar month per the specified date range. • County/Parish - Displays separate tables by designated county/parish.
Order By	<ul style="list-style-type: none"> • Manufacturer - Groups the report by manufacturer name. • Expiration Date - Groups the report by expiration date. • Lot Number - Groups the report by lot number.

Lot Usage and Recall Report

This report (**Reports > Report Module > Vaccinations > Lot Usage and Recall Report**) displays a list of patients who have received a specific lot number (including the dose size) during a specified date range. It also provides an option to mark all selected vaccinations as Compromised so that patients can be recalled and re-vaccinated. Valid compromise reasons are:

- Given after Vaccine Expiration Date
- Stored at Unacceptable Temperatures prior to Administration
- Vaccine Lot Recalled

Once the report has displayed, mark all of the vaccinations as compromised by selecting a reason and clicking **Mark All Results as Compromised**.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option. • Facility, Facility Group, Do Not Limit - Select the Facility or Facility Group from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Active Lots, Inactive Lots, All Expired Lots - To limit the report by specific lot numbers in each of these categories, select one or more lot numbers from the box on the left and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected lot numbers. Use the shift key to select multiple lot numbers listed in order, and use the CTRL key to select lot numbers that are out of sequential order. To remove one or more lot numbers from the box on the right in each section, select the lot number(s) and click <<. • Date Range - To limit the report by a specific date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. • Lot Number - Enter a lot number to limit the report by that criterion. • District/Region - Select a specific district or region from the drop-down list.

Vaccine Lots to Expire Report

This report (**Reports > Report Module > Vaccinations > Vaccine Lots to Expire**) displays a list of all active, non-expired lots that are about to expire (or are set to expire within a specified number of days).

This report can be scheduled. See [Schedule a Report](#) for more information.

Field	Description
# of Days to Expire	Enter a whole number. This is a required field.
Organization (IRMS) Organization (IRMS) Group Do Not Limit	Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit . The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option.
Facility Do Not Limit	Select either a facility from the drop-down list or the Do Not Limit option.
VFC PIN	Select a VFC PIN from the drop-down list.
District/Region	Select the district or region from the drop-down list.
View By	The report can be ordered by one of the following categories: <ul style="list-style-type: none"> • District/Region • County/Parish • Zip Code • Organization (IRMS) • Organization (IRMS) Group • Facility • VFC PIN

Daily Inventory Report

This report (**Reports > Report Module > Vaccinations > Daily Inventory Report**) displays the daily inventory for any given vaccine or medication. The report lists the *IRMS* or facility, vaccine, starting inventory, date(s) (listed separately per date), total (by vaccine), and ending inventory.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS.

Field	Description
	<p>NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option.</p> <ul style="list-style-type: none"> • Facility, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Provider County - Select a provider county, parish, or borough from the drop-down list. • District/Region - Select a specific district or region number or name from the drop-down list. • Vaccines - From the box on the left, select one or more vaccines and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the box on the right, select the vaccine(s) and click <<. This is a required field. • Date Range - Enter the beginning and ending (<i>Through</i>) dates in the respective fields. This is a required field.
Aggregate By	<p>Select whether the aggregate report option should be based on:</p> <ul style="list-style-type: none"> • Organization (IRMS)/Facility • Provider County • District/Region
Sort By	<p>Select the category to use for sorting the report:</p> <ul style="list-style-type: none"> • Vaccine • Organization (IRMS)/Facility • Provider County • District/Region

VFC Vaccinations Breakdown Report

This report (**Reports > Report Module > Vaccines for Children > VFC Vaccinations Breakdown**) displays the breakdown of VFC status by the number of vaccinations given for a specified status and the number of patients who currently have that status on their IRMS's record. Multiple vaccines can be selected.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Vaccination Date Range - To limit the report by a specific vaccination date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields.

Field	Description
	<ul style="list-style-type: none"> • Patient Birth Date Range - Enter the beginning (<i>From</i>) and ending (<i>Through</i>) birth date for the range in the respective fields. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option. • Facility, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Vaccines - From the box on the left, select one or more vaccines and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the box on the right, select the vaccine(s) and click <<. • State - Select a state from the drop-down list. NOTE: A state must be selected before a county, parish, or borough is selected. • Patient County - Select a provider county, parish, or borough from the drop-down list. A state must be selected first. • Vaccinator - Select a vaccinator from the drop-down list. • Health Plan - Select a health plan from the drop-down list. • Race - Select a race from the drop-down list. • District/Region - Select a specific district or region number or name from the drop-down list.

Vaccine Administered Report

This report (**Reports > Report Module > Vaccines for Children > Vaccine Administered**) displays the total doses, including all administered doses regardless of whether they have been matched to inventory or not. Therefore, the totals on this report do not reconcile to the *Doses Used* column on the [Lot Number Summary](#) report, since that report column only includes doses that are successfully matched to inventory.

This report also displays the counts of vaccinations administered by dose number, age, vaccine, and (optionally) provider (*VFC* number). Multiple vaccines can be selected.

This report can be scheduled. See [Schedule a Report](#) for more information.

TIP: Depending on the state and the user's permissions, this report may be editable.

Field	Description
Reporter Information	<ul style="list-style-type: none"> • Person Completing Report - Enter the name of the person who is generating this report. • Phone Number - Enter the person's phone number
Limit Report By	<ul style="list-style-type: none"> • Vaccination Date Range - To limit the report by a vaccination date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) vaccination dates in the respective fields. • Vaccines - From the first box, select one or more vaccines and click the >> button to move the selected item(s) to the second box, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the box on the right, select the vaccine(s) and click <<. This is a required field. • Funding Type - Select the funding type (Public, Provider, or All) from the drop-down list. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option. • Facility, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.
Categorize Report	<ul style="list-style-type: none"> • Show Detail by Provider - Select this option to categorize the report by providers. • District/Region - To categorize the report by district or region, select this option.
Print Options	<ul style="list-style-type: none"> • By Vaccine - This option is enabled by default.

VFC Accountability Log Report

This report (**Reports > Report Module > Vaccines for Children > VFC Accountability Log**) displays a list of visit dates and the VFC eligibility and vaccinations given on those dates, and totals by vaccine and by VFC eligibility. If a Health Plan has been selected, an additional parameter (Include Health Plans) appears on the report and the main section of the report displays Health Plan-Public or Health Plan-Private in the *VFC Elig* column when the VFC status is ineligible. Additionally, the Total Visits/Patients (summary) section displays a column for *Health Plan-Public*.

There may be two additional buttons added to the report generation screen, **Print Report** and **Email Report**, if they have been added and configured by the state. See the [Generate a Report](#) section for more information.

This report can be scheduled. See [Schedule a Report](#) for more information.

NOTE: The *VFC Eligibility* column in the main report (at the top) continues to state "Not Eligible" for shots that were not VFC eligible, regardless of the patient's age. This shot will only appear in the table if the appropriate age range checkbox is selected. This may slow down the time needed to generate the report, since large datasets are required for the additional date calculations.

Field	Description
Include VFC Ineligible Vaccinations for 0-18 Years of Age	Select this option to include VFC ineligible patients from ages 0-18. The counts are calculated using the shot date for each vaccination.
Include VFC Ineligible Vaccinations for 19+ Years of Age	Select this option to include VFC ineligible patients aged 19 and older. The counts are calculated using the shot date for each vaccination.
Display Totals Only	Select this option to display totals regardless of age.
Display Vaccines Given with Xs	Select this option to display an "X" instead of a lot number if no lot number exists.
Display all Lot Numbers	Select this option to display all of the lot numbers.
Display Valid Lot Numbers Only	Select this option to display only the vaccines that have valid lot numbers.
Limit Report By	<ul style="list-style-type: none"> • Vaccine Date Range - To limit the report by a vaccination date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) vaccination dates in the respective fields. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's IRMS. NOTE about IRMS Client and View users: A user with one of these two access levels can only run the report for either an IRMS or an IRMS Group when they are assigned to one or the other. If the user is not assigned to an IRMS Group, the IRMS drop-down list is not available as an option. • Facility, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • District/Region - Select a specific district or region number or name from the drop-down list.
Categorize Report	<ul style="list-style-type: none"> • Show Detail by Provider - Select this option to categorize the report by providers. • District/Region - To categorize the report by district or region, select this option.

Field	Description
Print Options	By Vaccine - This option is enabled by default.

Inventory Transaction Report

This report (**Reports > Report Module > Vaccine Management > Inventory Transaction Report**) displays a list of all of the inventory transactions in the Organization (IRMS) for all users during the specified date range, along with the transaction type and cost if the vaccine was ordered using the ordering functionality. The cost is based on the order approval date or, if the order approval date is not available, the cost is pulled based on the order submission date. Multiple vaccines can be selected. A total appears at the bottom of the report for the total number of doses for the Organization (IRMS) and the total cost of the doses. Specifically, the total number of doses calculates from the sum of the doses column, and the total cost calculates from the sum of the total cost column.

This report can also be exported into .csv format. Click **Export Report** and then **Open**, after which Microsoft Excel opens with the report results (if it is installed on your computer).

TIP: The *User* column displays the name of the user who received the order.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's Organization (IRMS). • Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Transaction Type - Select one or more transaction types. Use the shift key to select multiple transaction types listed in order, and use the CTRL key to select transaction types that are out of sequential order. NOTES: Selecting a transaction type causes the Transaction Sub-Type drop-down list to also display. Also, the "Returned to the Depot" reason appears under the "Other-In" transaction type on this report, and "Unaccounted For in Provider Shipment" appears under the Wasted & Disposed transaction type. • Transaction Date Range - To limit the report by the transaction date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) transaction dates in the respective fields. • Funding Type - Select a funding type from the drop-down list. • Vaccines - From the box on the left, select one or more vaccines and click the >> button to move the selected item(s) to the box on the right, which holds the list of selected vaccines. Use the shift key to select multiple

Field	Description
	<p>vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the box on the right, select the vaccine(s) and click <<.</p> <ul style="list-style-type: none"> • Lot Number - Enter a specific vaccine lot number. • Sort By - To sort the order of data on the report, select a choice from the drop-down list. Example choices included VFC PIN, IRMS, Facility, Vaccine Name, Report Date, and Transaction Type. • District/Region - Select a specific district or region number or name from the drop-down list. • Separate Reports by Calendar Month - To sort the report data into separate tables for each calendar month within the date range, first enter the transaction date range above and then select this option.

Inventory Submission Report

This report (**Reports > Report Module > Vaccine Management > Inventory Submission Report**) displays a listing of facilities that have submitted monthly inventory reports in the last 30, 60, and 90+ days, along with the last submitted date.

NOTE: This report is available to Registry Client users.

This report can also be exported into .csv format. Click **Export Report** and then **Open**, after which Microsoft Excel opens with the report results (if it is installed on your computer).

Field	Description
Limit Report By	<ul style="list-style-type: none"> • County/Parish - Limit the report by a specific borough, county or parish by selecting it from the drop-down list. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • Active Provider Agreement - Select this option to limit the report to only facilities that have active provider agreements. • Include Inventory Reported in the last 30 Days, Include Inventory Reported 31 to 60 Days, Include Inventory Reported 61 to 90 Days, and Include Inventory Reported over 90 Days - Select one or more of these ranges. The report will be organized by the selected criteria.

Monthly Inventory Reconciliation Audit Report

This report (**Reports > Report Module > Vaccine Management > Monthly Inventory Reconciliation Audit Report**) displays a list of facilities with completed monthly inventory, along with the submission date and the name of the person who submitted the data.

NOTE: This report is available to Registry Client users.

This report can also be exported into .csv format. Click **Export Report** and then **Open**, after which Microsoft Excel opens with the report results (if it is installed on your computer).

TIP: To view a detailed description of the clinic's reconciliation, click on the arrow next to that clinic's name. The reconciled inventory for that clinic displays.

Field	Description
Limit Report By	<ul style="list-style-type: none">• Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's Organization (IRMS).• Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit.• Report Date - To limit the report by a date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields.• VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.

Cost Report by Lot Number

This report (**Reports > Report Module > Vaccine Management > Cost Report by Lot Number**) displays a list of all of the lots grouped by vaccine, along with their associated manufacturers, the number of doses received, and costs (based on when the order was approved). Multiple vaccines can be selected.

NOTE: This report is available for Vaccine Management users.

Field	Description
Limit Report By	<ul style="list-style-type: none">• Ship Date Range - To limit the report by the shipping date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) shipping dates in the respective fields.• Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's Organization (IRMS).• Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit.• VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.• Funding Type - Select a funding type from the drop-down list.• Vaccines - From the first box, select one or more vaccines

Field	Description
	<p>and click the >> button to move the selected item(s) to the second box, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the second box, select the vaccine(s) and click <<.</p> <ul style="list-style-type: none"> • Provider Type - To limit the report by a specific provider type, select it from the drop-down list.

Cold Chain Tolerance Exception Report

This report (**Reports > Report Module > Vaccine Management > Cold Chain Tolerance Exception**) displays a list of temperature records that were out of range for a specific provider.

NOTE: This report is available for Vaccine Management users and can be scheduled. See [Schedule a Report](#) for more information. When scheduled, the report can be run for either the previous month's data or for a custom date range. Otherwise, if you run the report immediately, you must use the custom date range parameters.

If the **Administration > Properties > Vaccine Management > Display Accountability Report Links on Order** option is enabled, the **Cold Chain Report** button appears. Clicking this button on the Create Order page displays the editable page. However, clicking this button on the Approve Order page displays the Cold Chain report.

The number of days displayed is based on the Last Order Submitted date or the Order Frequency, whichever is earlier. If there is no order frequency, the displayed dates are based on the Effective From date until the current date. Any temperature not within the acceptable temperature range will display "Too warm" or "Too cold" in the *Comments* column on the report.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The default is the user's Organization (IRMS). • Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion. • District/Region - Select a specific district or region number or name from the drop-down list. • Include In-Range Measurements - Select this option to include the measurements that are in range. • Report Date Range - To limit the report by a date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields.

Order History Comparison Report

This report (**Reports > Report Module > Vaccine Management > Order History Comparison Report**) is used to review and compare order histories for two separate time periods for a specific date or range. It can be run by county (based on the county users assigned by the Organization (*IRMS*)/Facilities) or selected Registry Client users or a statewide aggregate. The report excludes denied and merged orders. Vaccine types can be selected individually or all together for specific time periods. Multiple vaccines can be selected.

The report will run based on the county assigned to the Organization (IRMS) and Facilities. Therefore, if data is inaccurate (for example, if the Organization or Facility does not have a county assigned) or if PIN values are incorrect (for example, a facility in Adams County has a PIN that is designated for Yakima county), the report may be inaccurate. The report does not display PIN values, only county names.

The report can be run at any time, but scheduling is recommended. See [Schedule a Report](#) for more information.

NOTE: This report is available for County View or Registry Client users.

Field	Description
Limit Report By	<ul style="list-style-type: none">• Patient/Provider County - Limit the report by a specific borough, county or parish by selecting it from the drop-down list. NOTE: When a county or parish is not selected, a list of all of the counties is returned, including the records that do not have order history in the specified time period. For the counties that did not order in the specified time period, a zero value is returned. When a county or parish is specified, the only data returned is for the one county/parish/borough that was selected.• Date Range 1 - Enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. This field is required.• Date Range 2 - Optionally enter a second vaccine date range.• Vaccines - From the first box, select one or more vaccines and click the >> button to move the selected item(s) to the second box, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the second box, select the vaccine(s) and click <<.

VOMS Vaccine Shipment Summary Report

This report (**Reports > Report Module > Vaccine Management > VOMS Vaccine Shipment Summary**) displays by type the doses that were shipped to a provider.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Current Active Providers Only - Select this option to limit the report only to providers that are currently active. • Certifying Providers Only - Select this option to limit by certifying providers only. • Site Type - Select a site type from the drop-down list. • Date Range - To limit the report by the date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. • District/Region - Select a specific district or region number or name from the drop-down list. • Borough/Census Area - Select a borough or census area from the drop-down list. • City - Select a specific city from the drop-down list. • Vaccines - From the first box, select one or more vaccines and click the >> button to move the selected item(s) to the second box, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the second box, select the vaccine(s) and click <<.

VIMS Vaccine Shipment Summary Report

This report (**Reports > Report Module > Vaccine Management > VIMS Vaccine Shipment Summary**) displays by type the doses that were shipped to a provider.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Current Active Providers Only - Select this option to limit the report only to providers that are currently active. • Certifying Providers Only - Select this option to limit by certifying providers only. • Site Type - Select a site type from the drop-down list. • Date Range - To limit the report by the date range, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. • District/Region - Select a specific district or region number or name from the drop-down list. • Borough/Census Area - Select a borough or census area from the drop-down list. • City - Select a specific city from the drop-down list. • Vaccines - From the first box, select one or more vaccines and click the >> button to move the selected item(s) to the second box, which holds the list of selected vaccines. Use the shift key to select multiple vaccines listed in order, and use the CTRL key to select vaccines that are out of sequential order. To remove one or more vaccines from the second box, select the vaccine(s) and click <<.

Vaccine Return Adjustment Notification Report

This report (**Reports > Report Module > Vaccine Management > Vaccine Return Adjustment Notification**) displays doses by vaccine type that were returned, doses received by the depot, and total adjustments to vaccine inventory by provider. It is run for a particular Organization (*IRMS*) or Facilities and is accessible by all users.

This report can also be exported as a Word document in mailing label format. Click **Create Mailing Labels** to print the labels to Word.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Return Date Range - To limit the report by a specific date range (of when the vaccine was returned and received by the depot and the total adjustments made to inventory by the provider), enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. NOTE: Use the date format MM/DD/YYYY. • Organization (IRMS) - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list. This is a required field. • Facility - Select the Facility from the drop-down list.. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.

Aggregate Wastage Report

This report (**Reports > Report Module > Vaccine Management > Aggregate Wastage Report**) displays data about the aggregate wastage of vaccines.

NOTE: Click on the blue hyperlinks to see detailed descriptions of the wasted vaccines.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Date Range - To limit the report by the date range of when the vaccine was wasted, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. Use the date format MM/DD/YYYY. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The Do Not Limit option will run the report for all of the organizations. • Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.

Vaccine Dispensed Report

This report (**Reports > Report Module > Vaccine Management > Vaccine Dispensed Report**) displays the current vaccine inventory, as well as distribution by vaccine type, vaccine type subset (various preparations and manufacturers), and vaccine lot numbers for depot lots. It tallies totals for the overall quantity and the various subsets for doses received, doses sent to providers, and available doses. It displays the cost per vaccine and total costs. The available columns are *Vaccine, First Received Date, Doses Received, Doses Sent, Cost, Lot Number, Expiration Date, and Available Doses*, as well as a subtotal by vaccine code and total by CVX code.

This report can be scheduled. See [Schedule a Report](#) for more information.

NOTE: This report is only available to users who are logged in as a Registry Client, logged in to a depot Organization (*IRMS*), and have orders that have been approved and shipped.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Lot First Received Date Range - To limit the report by the date range of when the lot was first received, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. Use the date format MM/DD/YYYY. This is a required field. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. NOTE: An Organization (IRMS) client (or view) user can only run the report for either an Organization (IRMS) or Group when they are assigned to it. If they are not assigned to the Organization (IRMS) or Group, this drop-down list will not be available. If this field displays on the screen, it is required. • Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.

Inventory Adjustment Report

This report (**Reports > Report Module > Vaccine Management > Inventory Adjustment Report**) allows Registry Client users to view and monitor adjustments that Organizations (*IRMS*) and Facilities make to vaccine inventory.

Field	Description
Vaccine Date Range	To limit the report by a vaccine date range, enter the From and To dates.

Field	Description
Percent Above Average Allowed Before Highlighting	To limit the report by a percentage above average, enter the percentage allowed.
Organization (IRMS) Organization (IRMS) Group Do Not Limit	To limit the report to a specific Organization (IRMS) or Organization Group, select from the corresponding drop-down list (after which the option will automatically be selected). Do Not Limit is the default.
Facility Do Not Limit	To limit the report to a specific Facility, select it from the drop-down list (after which the option will automatically be selected). Do Not Limit is the default.
VFC PIN	To limit the report to a specific VFC PIN, select it from the drop-down list.

To view the details of a line item on the report, click on the blue hyperlink.

Usage Tracking

This report (**Reports > Report Module > Vaccine Management (or Administrative) > Usage Tracking**) displays a list of users who have not logged in to the application for longer than the specified time periods (14, 30, 60, and 90 days), sorted by columns. This report can be used to find inactive users whose accounts may need to be inactivated.

This report is only available to registry level users (Registry Client, Registry View, and Provider Recruitment Client).

After clicking on the report name, the Usage Tracking Report Menu page opens. Enter the search criteria as detailed below:

Field	Description
Run By	
District/Region	To limit the report to a specific district or region, select it from the drop-down list.
Borough/Census Area	To limit the report to a specific borough or census area, select it from the drop-down list.
Organization (IRMS) Organization (IRMS) Group Do Not Limit	To limit the report to a specific Organization (IRMS) or Organization Group, select from the corresponding drop-down list (after which the option will automatically be selected). Do Not Limit is the default.
Facility Facility Group Do Not Limit	To limit the report to a specific Facility or Facility Group, select it from the drop-down list (after which the option will automatically be selected). Do Not Limit is the default.
VFC PIN	To limit the report to a specific VFC PIN, select it from the drop-down list.

Province Reports

To run province reports, authorized users can click the **Reports > Province Reports** link. The Province Reports page opens.

Available reports may depend on the province, as well as on the user's access level and permissions. Some reports can be scheduled to run during system off-peak hours. See [Schedule a Report](#) for more information.

Some of the available reports are as follows:

- [Vaccine Shipping Invoice](#)
- [Vaccine Location Report](#)
- [Alberta Aggregate Wastage Report](#)

Vaccine Shipping Invoice

This report (**Reports > Province Reports > Vaccine Shipping Invoice**) allows authorized users (with Order Approver access) to print vaccine shipping invoices to use with the **Approve** and **Print** buttons in the VIMS module. This specific report is also available in case of printer malfunction.

Field	Description
Shipment Date	Enter the From and Through shipment dates, after which this option is automatically selected.
Order Number	Enter an order number, after which the option is automatically selected.
Organization (IRMS)	Select an Organization (IRMS) from the drop-down list.
Facility	Select a Facility from the drop-down list.

Vaccine Location Report

This report lists the vaccines located in each cold storage unit for a specific Organization (IRMS)/Facility. Select an Organization (IRMS) and Facility before running the report.

To run this report, click the **Reports > Province Reports > Vaccine Location Report** link. The Vaccine Location Report page opens, with another Vaccine Location Report link. Click that second Vaccine Location Report link to create the Vaccine Count/Location Report in a new browser tab. Use the browser's print function to print the report.

Alberta Aggregate Wastage Report

This report (**Reports > Province Reports > Alberta Aggregate Wastage Report**) includes wastage reasons, vaccines, and funding type.

NOTE: Click on the blue hyperlinks to see detailed descriptions of the wasted vaccines.

Field	Description
Limit Report By	<ul style="list-style-type: none"> • Date Range - To limit the report by the date range of when the vaccine was wasted, enter the beginning (<i>From</i>) and ending (<i>Through</i>) dates in the respective fields. Use the date format MM/DD/YYYY. • Organization (IRMS), Organization (IRMS) Group, Do Not Limit - Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit. The Do Not Limit option will run the report for all of the organizations. • Facility, Facility Group, Do Not Limit - Select the Facility from the drop-down list, or select Do Not Limit. • VFC PIN - Select a VFC PIN from the drop-down list to limit the report by this criterion.
Wastage Reasons	To restrict the report to one or more wastage reasons, select them in the list.
Vaccines	To restrict the report to one or more vaccines, select them in the Unselected box and click the Add button to move them to the Selected box. To remove a vaccine from the report, select it in the Selected box and click Remove , which moves the vaccine back to the Unselected box.
Funding Source	To restrict the report to a specific funding source, select it from the drop-down list.

Import / Export

This section covers importing (uploading) and exporting (downloading) files. Click a link to jump to that section:

- [Import Files \(Upload\)](#)
- [Export Files \(Download\)](#)

Import Files (Upload)

Files can be imported (uploaded) directly to the state registry. The options that display depend on your user access level and permissions. The following options are available:

- [Batch Vaccinations](#)
- [DTT/HL7](#)
- [HL7 Realtime](#)
- [VTrckS Upload](#)
- [Temperature Data](#)

There are different file specifications depending on the billing system.

Once the file is imported by the facility, the state will import it into the registry.

TIP: A scheduler, such as the Microsoft Scheduler, can be used to set up automatic running/processing of files or reports, such as the DTT imports.

Batch Vaccinations

When importing batch vaccinations, the vaccination that ends up in the master record is the one that contains the most information. (For example, the specific vaccine type, administered shot, lot number, combination vaccine, etc.) A procedure is used to score the immunization to determine if the incoming or existing shot is the "winner" for the master record. The score is determined as follows:

Administered shot (historical is null)	1
Specific vaccine type	2
Has a lot number	3
Combination vaccine	1
Total possible score	7

DTT/HL7

This option (**Imports > DTT/HL7** from the menu) allows users to send patient information files that original in the facility's patient management system (or other source that matches the import type requirements). This includes Remote Clinic contraindications and ENCD data. Users need the DTT Imports and the Define Profile permissions.

NOTE: ENCD is used to notify the state when a person under the age of 18 has died. This data can be accepted in order to stop mailings from being sent to deceased children. The ENCD file is loaded through the DTT and run through the normal deduplication logic. All records from this file will be marked with an inactive status of *deceased*. If a record already exists for the patient, that record is updated. If a record does not exist, a new record is created.

The following tasks can be performed from the DTT/HL7 Import window:

- Import (an existing Data Profile)
- Define (a new) Data Profile
- Edit an Existing Data Profile
- Print a Data Profile Report
- View Import Logs

The maximum import file size is 100 MB.

The DTT will commit 50,000 records to the database at one time, which is about every ten minutes. This varies, however, depending on machine speed and how many columns are in the DTT profile.

A new feature of the application allows new DTT profiles to be created in order to include Patient School and Grade information.

Lead Module

Authorized users can import lead files. Click the **Imports > DTT/HL7** link to open the DTT/HL7 Import page. Select the lead profile from the Select Import Profile drop-down list. (To define the data profile, click the **Define Data Profile** button, enter the required information, and click Evaluate Sample Line. Map the fields to the database fields and click **Submit Definitions** when finished.) Browse and select the file to import, then click **Import**. Click **View Import Logs** to verify the results.

Solutions to Common ACS Errors

The DTT import process will correctly identify the records with the following common problems from the ACS file:

- **0Y (zero + Y) can become OV (letters O + V)** - Any letter O in the mail code of the keyline is treated as a zero, and any letter V in the mail code of the keyline is treated as a letter Y.
- **Language Code can be incorrect** - If the language code contains an S, assume it is Spanish; otherwise, assume it is English. Also, if a mail code starts with the letter I, assume it is INPKT.

State-Configurable Options for HL7 Uploads

There are several state-configurable options that can be configured to help with DTT/HL7 imports/uploads.

Additional Fields

A state-configurable option is available that may require the following fields to be entered when performing a DTT import: Patient *VFC* Status, Patient Race, Patient Ethnicity, and Patient Gender (sex).

Prevent Short Names from Overriding Full Names

A state-configurable option can be set to prevent short names from overwriting full names during a batch DTT/HL7 import. For example, if "Chris" is imported, the short name "Chris" does not overwrite the full name "Christopher."

Prevent Unnamed Baby Names from Overriding Existing Names

Another state-configurable option can be set to prevent incoming unnamed babies (i.e., Baby, Baby Boy, Baby Girl, Newborn Boy, Girl, FC1, FC2, FC3, MC1, MC2, MC3) to overwrite demographic information. This option operates as though the user selected the Do Not Overwrite Demographic Information flag when importing via the DTT. For more information, see the [Update Settings](#) section of the [HL7 Uploads Settings](#) topic.

Deduplication Date Merging

The vaccination deduplication logic merges and treats the vaccination date as the same date if the dates are within the number of dates set (via a state-configurable administrative property). The current logic for checking if vaccinations are on the same day continues to check only against the current date for that direct data entry. This new logic applies to deduplication of batch loads and any scenario where vaccinations are re-linked.

Decrement Lots Given at Facilities

If the **Allow Imports to Decrement *IRMS* Inventory** option is enabled for the facility (see [Search/Add/Edit Facilities](#)), IRMS-associated lots are able to be decremented by immunizations given at facilities, especially for RPMS sites using the HL7 Realtime data upload.

If inventory is imported into HL7 or DTT with this decrement option selected, the logic will first look at the facility for available inventory and, if no inventory exists, the inventory will be decremented at the IRMS level.

If no inventory exists for either the facility or the IRMS, the import line will show an error with the existing message that the inventory cannot be decremented.

If the facility does not have the **Allow Imports to Decrement IRMS Inventory** option is not selected (disabled), the existing functionality will apply. The facility must have inventory or else the line will show an error.

HL7 Realtime

This option (**Imports > HL7 Realtime** from the menu) allows authorized users to upload patient information via HL7 in "realtime" (as it happens).

VTrckS Upload

This option is used to import the Vaccine Order History file.

Upload Temperature Data

Information about temperature can be uploaded into the application for tracking purposes.

Enable/Disable the Upload Temperature Data Option

The **Upload Temperature Data** option must be set in order to be able to upload the data. To set this option for an Organization (IRMS):

1. Log in.
2. Click **Organization (IRMS) > Search/Add** on the menu.
3. Enter criteria to search for the specific Organization (IRMS) and click **Search**.
4. If a list of Organizations appears in the search results section, click the arrow button next to the correct name; otherwise, the specific Organization (IRMS) Maintenance (Details) page will open. Click the **Edit** button on this page.
5. Scroll down to the Vaccine Management section toward the bottom.
6. Select the **Upload Temperature Data** option and click **Save**.

To disable the option, follow the above instructions to return to the page, select the option remove the checkmark from the checkbox, and click **Save**.

Temperature Monitoring Data Profile

To set the temperature monitoring settings and data profile information, follow these steps:

1. Log in.
2. Click **Import Menu > Temperature Upload** on the menu.
3. On the main page, select **Cold Storage**.
4. The **Select Import Profile** field should be empty ("--select--"). To create the first Import Profile, click **Define Data Profile**.
5. Enter a name for the new profile and click **Continue**.

Import Temperature Monitoring File

Assuming you are already logged in, follow these steps to import the file:

1. Click **Import Menu > Temperature Upload** on the menu.
2. Select the Cold Storage Unit for which you are importing temperatures.
3. Select your Import Profile from the data logger.
4. Select the file.
5. Click **Import**.

To verify the file was successfully uploaded and imported, follow these steps:

1. Click **Import Menu > Temperature Upload** on the menu.
2. Click **View Logs**.
3. On the View Logs screen, click the arrow button next to the log you want to view.
A message appears at the top describing a successful upload or any errors.

Export Files (Download)

Immunization Registry users can send (export or download) patient information files that will eventually be imported into Provider Billing and Patient Management systems. These patient information files may contain information such as patient demographics, vaccinations, facilities, lot imports (inventory into facilities only), physician/vaccinator, and lead data.

The available export types that appear on your menu will depend on your assigned access level and permissions, but may include the following:

- DTT
- Remote Clinic
- HL7 Batch
- [Agg Reporting](#)

For information about the export types not included in this document, see the IWeb documentation.

Agg Reporting Exports

Agg Reporting is used to export data from IWeb. The link displays for Registry Client users regardless of whether or not they have selected an Organization (*IRMS*). The following data fields for a specific IRMS or facility are included:

- Partner ID
- Reporting Organization
- Campaign / Event
- Countermeasure
- Manufacturer / Lot Number
- Age Groups
- Recipient Tier
- Dosage Group

Additional specific fields include clinic dates, *VFC* pin, export type (H1N1 or NPIP), number of matches found, CVX code, date range, totals per dose (1-3), and age grouping (1-7). A total of each, along with a grand total at the bottom, is also included.

The export file is created using applicable information contained in the Pandemic Influenza Aggregate Vaccine Doses Data Exchange Requirements and is a pipe-delimited flat file. States can upload the export file to *CRA* per the CDC's instructions.

This can also be run as a scheduled report. See [Reports](#) for more information.

To create the export file, select **Exports > Agg Reporting** from the menu on the left. The following mandatory and optional fields can be configured on the main page:

Field	Description
Campaign	Select a valid campaign name from the drop-down list. Note that this may be a required field.
Clinic Dates	Enter the From and To dates in the MMDDYYYY format. This field is required. Note that the date will appear in YYYYMMDD format in the report.
Organization (IRMS) Organization (IRMS) Group Do Not Limit	Select the Organization (IRMS) or Organization (IRMS) Group from the drop-down list, or select Do Not Limit . The default is the user's IRMS.
Facility Do Not Limit	Select either a facility from the drop-down list or the Do Not Limit option.
VFC PIN	Select a VFC PIN from the drop-down list.
Export Type	Select the export type. This field is required. The available options are: <ul style="list-style-type: none"> • NPIP

Field	Description
	<ul style="list-style-type: none"> • H1N1 (does not limit by campaign) • DAX2010

Reset Report Criteria

To erase previously entered report criteria and start over, click **Reset**.

Create Export

To create an export file, click **Export Report**. The file will either download automatically or the File Download dialog box will open and prompt for a location to save the file.

Schedule Report

To schedule the report to run at a future date and time, click **Schedule**. See [Schedule a Report](#) for more information.

Create Report

To generate and display the report in a new browser window with the option to print, click **Create Report**. To print the report after it displays, click **Print Report** and select a printer from the Printer dialog box (or use your browser's print option).

Settings

One great feature about the applications is that you can configure many settings to your organization's needs.

The settings options that are available to you under the **Settings** menu (and other menus) will depend on the application you are logged in to and your access level and permissions. The settings provide a method for administrators to set up defaults that will expedite the data entry process by automatically populating drop-down menus and fields for all of the installed applications and modules.

The overall categories of settings are listed below, but only the settings categories related to the VOMS module are included in this document. For standard IWeb settings, see the IWeb documentation.

- [Personal](#)
- [Forecast](#)
- [HL7 Uploads](#)
- Organization (IRMS) settings - see the IWeb User Guide
- [Facility](#) (available only for users who are registry clients, *IRMS* clients, or facility clients with the Default Vaccination Management permission)
- Administration (available as a separate menu) - see the IWeb User Guide

Each of the default setting sections has **Add**, **Edit**, and **Remove** buttons, although the **Edit** and **Remove** buttons only display for existing default settings.

Personal Settings

Personal Settings

Personal settings (**Settings > Personal** from the menu) are used in various places throughout the application to automatically pre-populate, which saves data entry time. There are eight categories of personal settings, but only four are related to the VOMS module and are discussed in this guide. See the IWeb documentation for information about the other Personal settings.

- [Lot Default Settings](#)
- [VIS Publication Date Default Settings](#)
- [Vaccine Default Volume Settings](#)
- [User Preferences Default Settings](#)

The personal settings automatically populate the data fields primarily on the patient demographic and vaccination screens.

For registry clients, *IRMS* clients, and facility clients users that have the Default Vaccination Management permission configured, a checkbox can appear directly above patient settings. This permission allows facility settings to be established for an entire facility. Click the checkbox to override the settings.

At the top of the Personal Settings page are a plus (+) and minus (-) sign. Click the plus (+) sign to expand all of the default settings, and click the minus (-) sign to close them. Alternately, you can open and close each section individually.

At the top of the page is a **Use Facility Settings** option. Select this option to have the configured Facility settings override the personal settings.

To access the fields in a section to enter information, click the **Update** or **Add** button for that section. Click **Save** when finished entering information.

CAUTION: Remember to save your changes! If you click on a link in the menu before saving your changes, the changes are lost.

If an error occurs, the error message appears in red at the top of the screen.

Lot Default Settings

A state-configurable option for facility inventory managers can be set up for a facility to allow the use of facility-wide lot number defaults. If a user does not have lot number defaults set up in their personal settings, the inventory manager's defaults are used. However, if the user does have lot defaults set up in their personal settings, they override the facility inventory manager's settings.

To access these settings, click **Settings > Personal > Lot Defaults**. The Lot Defaults section expands on the Personal Settings page.

To add a new lot default, enter the information and click **Add**. All of the fields are required.

To edit an existing lot default, click **Edit**, make the updates, and then click **Update**.

To remove an existing default, click **Remove**. Be careful when removing defaults, as this action cannot be undone.

Field	Description
Vaccine Description	Select the vaccine for which you are entering defaults. The defaults for this vaccine will automatically pre-populate when this field appears on a screen/page. This is a required field.
Manufacturer	Click in the field to see a list of valid choices. Click the arrow next to the name of a manufacturer to select that manufacturer to use as

Field	Description
	the default. This is a required field. Click Cancel to return to the defaults section with the previously entered default information intact but no manufacturer selected, or click Clear to return to the defaults section with all of the data fields erased.
Lot Number	This is the manufacturer's lot number chosen when the Select Lot Number window appears and a selection is made. Click in the field to open the Select Lot Number window. This is a required field.
Expiration Date	Select the date to use as the default expiration date. This is a required field.
Lot Facility	This is the manufacturer's facility chosen when the Select Lot Number window appears and a selection is made. This is a required field.
Funding Source	This is retrieved when the Select Lot Number window appears and a choice is made. It indicates whether the lot number was publicly supplied or not. This is a required field.

VIS Publication Date Default Settings

The vaccine information sheet (*VIS*) is a publication containing information regarding an immunization. These information sheets are periodically updated, reprinted, and tracked from within the application.

A system administrator can set up an *IRMS* VIS publication date default that will automatically populate the VIS publication date fields within the application if the user does not define any VIS default date settings. However, if the user does have VIS date defaults configured, they override the system administrator's settings.

If the user is using both the Mass Immunization application and the IWeb Core application, the default settings will appear in both applications.

To access these settings, click **Settings > Personal > VIS Publication Date Defaults**. The VIS Publication Date Defaults section expands on the Personal Settings page.

To add a new VIS publication date default, select a vaccine description and enter at least one date, then click **Add**. Only the vaccine description is required.

To edit an existing VIS publication date default, click **Edit**, make the updates, and then click **Update**.

To remove an existing VIS publication date default, click **Remove**. Be careful when removing defaults, as this action cannot be undone.

Field	Description
Vaccine Description	Select the vaccine for which you are entering default VIS publication

Field	Description
	dates. The default VIS publication dates for this vaccine will automatically pre-populate when this field appears on a screen/page. This is a required field.
Publication Date 1	Enter the date of the publication for each antigen of the vaccine, in MMDDYY format.
Publication Date 2 - 4	Enter the date of the publication for each composite shot, in MMDDYY format.

Vaccine Default Volume Settings

To access these settings, click **Settings > Personal > Vaccine Default Volume**. The Vaccine Default Volume section expands on the Personal Settings page. These settings are used to set up the default for the vaccine amount that will automatically pre-populate on the Vaccination Detail and Vaccination Add/Edit screens.

To add a new vaccine volume default, enter the information and click **Add**. Both fields are required.

To edit an existing vaccine volume default, click **Edit**, make the updates, and then click **Update**.

To remove an existing vaccine volume default, click **Remove**. Be careful when removing defaults, as this action cannot be undone.

Field	Description
Vaccine	Select the vaccine for which you are entering default volume. The default volume for this vaccine will automatically pre-populate when this field appears on a screen/page. This is a required field.
Dosage Default	Enter the dosage amount to be displayed on the Vaccination Detail and Vaccination Add/Edit screens, in decimal format without "cc". (For example, enter 1.0) This is a required field.

User Preferences Default Settings

To access these settings, click **Settings > Personal > User Preferences**. The User Preferences section expands on the Personal Settings page. These settings are the user's personal default settings. Click **Update** to access the options and configure your default settings. Click **Save** when finished.

The settings that can be configured in this section are as follows:

Field	Description
Always use defaults on patient edit	When enabled, the default settings listed in Personal Settings will override existing values in the Patient Demographic Record. On the Patient Edit screen, the checkbox to populate defaults will

Field	Description
	automatically be selected.
Default Patient Search Version	<p>Select either the simple or advance search configuration to use as the default lookup for the patient search. This setting can be overridden by the user on the Patient Search window, however. If this setting is not configured here, the default will be the simple search type.</p> <ul style="list-style-type: none"> • Simple - Uses any combination of first name or initial, last name or initial, birthdate, WIC ID, <i>SIIS</i> patient ID or barcode, and chart number. • Advanced - Uses any combination of first name, last name, birthdate; or first name, last name, birthdate, guardian first name or mother's maiden name, street, city, state, zip, and phone number.
Default Patient Search Field	<p>Select which field the cursor is placed in when a screen displays. This is useful when using a barcode scanner (e.g., position the cursor in the SIIS Patient ID/Barcode field on the Patient Search window for easy barcode scanning). The default cursor position when this is not set is the patient's First Name. The other two options are Last Name and SIIS Patient ID/Barcode.</p>
Patient Name Order	<p>Select in which order the patient name should be displayed: First Then Last, or Last Then First.</p>
Automatic City / State / Zip Code / County Population	<p>When this option is selected, these fields will automatically populate when they appear on any screen: City, State, Zip Code, Borough/County, or Census Area Population fields. To disable the automatic population of these fields, deselect the checkbox.</p> <div style="border: 1px solid black; padding: 5px; background-color: #f0f0f0;"> <p>NOTE: If the country is not the United States, this option must be deselected (disabled) to allow both letters and numbers to be entered into the Zip Code field on the Patient Add/Edit screens.</p> </div>
Use Arrow Navigation on Vaccination View/Add Screen	<p>This setting is state-configurable and enables a user to use the keyboard's arrow keys to navigate around on the Vaccination View/Add screen. To enable the use of the keyboard arrow keys for navigation, select this option. To disable the use of the arrow keys for navigation, deselect the option.</p>
Vaccine List Sort Order	<p>Use this setting to configure the preferred order of vaccines on the Lot Number List screen. Examples:</p> <ul style="list-style-type: none"> • Facility Group, Facility • Facility • Expiration Date (default order is the nearest date on top) • Manufacturer (second order) • Lot Number (third order)
Default Application	<p>If the user has access to multiple applications, this option allows the user to select which application should be considered the default application. For example:</p>

Field	Description
	<ul style="list-style-type: none"> • Standard (IWeb) • First Responder • Mass Immunizations • Provider Recruitment
Set Low Inventory Quantity for Orders	This option is available only for Vaccine Management users. The option provides the ability to set the expected order frequency at the provider level, in addition to the registry level. The value also represents the quantity that will be reached before an alert is displayed in the alerts option in the Order/Transfers menu. For more information, see Orders .
Increment Recall Count	Select this option to automatically have the increment recall count option selected on the Reminder Recall screen. This option can be overridden by the user on the Reminder Recall screen. The default is to have increment recall count option deselected (disabled) on the Reminder Recall screen.
DTT Decrement Vaccine Inventory Default	Select this option to automatically have the decrement vaccine option selected on the Vaccine Inventory and DTT Import screens. This option can be overridden by the user. For more information, see DTT/HL7 .
Default Reminder/Recall Screen	Select either Simple or Advanced to have either the simple or advanced Reminder Recall screen display for the user.
Maximum Recall Tries	Select the maximum number of times a patient should be reminded about recalls (1-20).

Forecast Settings

Use the Forecast Settings (**Settings > Forecast**) to select which vaccine families to include in Action Report forecasts, and to set the maximum patient age for that vaccine family.

To include a vaccine family in the Action Report forecasts, select the checkbox for that vaccine family in the *Include* column. To set a maximum patient age (optional), enter a number in the textbox and then select **Days**, **Weeks**, **Months**, or **Years** in the drop-down list.

When you are finished, click the **Save** button. To cancel without saving, simply click a menu link on the left or click **Back**.

CAUTION: Remember to save your changes! If you click on a link in the menu before saving your changes, the changes will be lost.

If an error occurs, the error message appears in red at the top of the screen.

HL7 Uploads Settings

Administrative users can use the HL7 uploads settings (**Settings > HL7 Uploads**) to create default settings related to HL7 uploads, which allow customization between systems. The changes affect the HL7 realtime imports. The six categories of HL7 Uploads default settings are:

- [HL7 Settings](#)
- [General Settings](#)
- [Update Settings](#)
- [Observation Settings \(ORU Only\)](#)
- [Query Settings \(VXQ Only\)](#)
- [Record Export Options for Queries and Updates](#)

The HL7 uploads settings automatically populate the data fields on the HL7-related screens. For more information about HL7 uploads, see the [Import/Export](#) topics.

When you are finished updating the default settings for HL7 uploads, click the **Save** button. Changes take effect immediately. To cancel without saving, simply click a menu link on the left or click **Back**.

CAUTION: Remember to save your changes! If you click on a link in the menu before saving your changes, the changes are lost.

If an error occurs, the error message will appear in red at the top of the screen.

HL7 Settings

There are two default settings in this first section:

Field	Description
Incoming Account	Select the default user name of the logged in user.
Allow HL7 user to modify these settings	Select this option to allow HL7 users to modify the default settings. To deny access to this screen for general HL7 users, deselect (disable) the option. The default is to not allow users to modify the HL7 settings (deselected).

General Settings

Field	Description
Application Type	Select the type of application to which this account is associated. This setting changes the format of sent messages and how messages are interpreted when received by this account. Examples:

Field	Description
	<ul style="list-style-type: none"> • CDC Standard - Messages only include fields explicitly defined by CDC standard documents. • McKesson DFT - Messages are formatted to the newer standard. • MiSys DFT - Messages are formatted to the older standard. • QS-Insight - This is the same as CDC Standard. • STC-IWeb - Messages include support for IWeb-specific fields and data. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: Typically, STC-IWeb should be selected. This option accepts messages following the CDC standard, but also allows for custom features and variations in the implementation.</p> </div>
MRN identifier	<p>HL7 messages contain multiple patient identifiers in a repeating list. This setting indicates which patient identifier is the medical record number (MRN). Enter the correct identifier for messages that will be received by this account:</p> <ul style="list-style-type: none"> • MR - Medical Record Number • PT - Patient Identifier • [blank] - If no identifier is to be sent, leave the field blank • Other Value - Enter any other value that is defined by the sender <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>NOTE: This field is typically set only one time and saved.</p> </div>
Registry ID identifier	<p>Enter the patient identifier that will be used to represent the patient's ID in the state registry. Example: SR (default)</p>
General logging	<p>Select the level of logging that should occur during normal transactions when no errors occur:</p> <ul style="list-style-type: none"> • None - No specific information will be logged about the message. • Minimal - A minimal amount of data will be logged, but the actual message data will not. • Verbose - The entire message and the response will be logged. Although this option takes up space, this is the option normally chosen.
Error logging	<p>Select the level of logging that should occur during transactions when an error occurs:</p> <ul style="list-style-type: none"> • None - No specific information will be logged about the error. • Minimal - A minimal amount of data will be logged about the error. • Verbose - Detailed information will be logged about the error. This option can help with troubleshooting, but takes up more space.

Field	Description
Code table mappings	<p>A code table mapping is an XML description that indicates how coded values should be translated into and out of the application. Use this setting to define mappings for HL7 files that do not follow the CDC standards for code values. Example:</p> <pre><code-value-map> <table id="FACILITY"> <import value="2508" code="3LY05"/> </table> </code-value-map></pre> <p>In the above example, the provider uses the number 2508, while the state registry uses 3LY05. An import value for each provider should be added.</p> <p>NOTE: This mapping is important for vaccine inventory.</p>

Update Settings

Field	Description
Deduplicate	<p>Select when you want the incoming data to be scheduled for the deduplication process. All incoming data is eventually deduplicated. The options are:</p> <ul style="list-style-type: none"> • Scheduled - This option prevents the Deduplicate checkbox from appearing on the HL7 Realtime Server page. This is the default for all new interfaces. • Immediately - This option automatically selects the Deduplicate checkbox on the HL7 Realtime Server page. Interfaces that were previously checked will now have this option. • User Selected - This option does not automatically select the Deduplicate checkbox on the HL7 Realtime Server page and allows the user to make the choice.
Hash ID by sender	<p>This option is rarely used. On the rare occasion that the sending system collects data from different systems and sends the information in one account, the MRN ID can be hashed to make it unique. To do this, the sending facility (MSH-4) and sending application (MSH-3) are concatenated together and then hashed to generate a unique sequence of characters (the hash), which is prepended to the MRN listed in the record using a colon. For example, if the patient MRN is 975779 and the resulting hash is 3780937371, the registry stores the MRN as 3780937371:975779. This new ID is then submitted to IWeb as the patient's MRN.</p> <p>This method ensures that even if two entities within the data stream assign the same MRN, they will appear as different MRNs after they are hashed.</p> <p>CAUTION: This option will make user searches by MRN in IWeb difficult, because the MRN will not include the strange set of</p>

Field	Description
	characters unique to the sending facility.
Newborn first name matcher	<p>This option is used to create a placeholder name for babies that have not yet been named. IWeb supports and recognizes standard placeholder first names such as <i>newborn</i>, <i>baby girl</i>, and <i>baby boy</i>, but sending systems may use other naming conventions such as <i>FC-Jones Jones</i> (female child of Ms. Jones with the possible last name of <i>Jones</i>) that may not be recognized by IWeb. To standardize incoming placeholder names, a regular expression can be entered into this field to match against first names.</p> <p>If the regular expression matches against a first name, it is then replaced with the name <i>Newborn</i>.</p> <p>Leaving this field blank turns this feature off.</p>
Accept if not older than	<p>This option can be used if patients older than a certain age (e.g., 18) are not to be accepted when sent by sending systems. IWeb will reject/ignore patient records that exceed the set age. To enable this feature, enter a cutoff age (in years) that is greater than 0.</p> <p>For example, if the value of 18 is entered, all patients aged 19 and older will not be accepted, but all patients aged 0 through 18 will be accepted.</p>
Unknown vaccination handling	<p>This option determines what is done when a vaccine code is received but is not recognized. Select one of the following options:</p> <ul style="list-style-type: none"> • Default - Unrecognized vaccine codes in Vaccination in Financial (DFT) messages are ignored, but in all other messages they are added. • Always Add - Unrecognized vaccine codes are added as unknown vaccinations. • Always Ignore - Unrecognized vaccine codes are skipped as if they were never sent. Select this option if you expect to receive unrecognized vaccine codes and want to skip them. • Always Reject - Unrecognized vaccine codes and containing messages are rejected with error messages. Select this option if you never expect to receive unrecognized vaccine codes and want to reject the messages if they occur.
Update Current Patients	<p>Select this option (enable it) to always update a patient's demographics when patient data is uploaded, whether or not the uploaded data is the most current information on the patient. This option is selected (enabled) by default and will overwrite current patient demographics.</p> <p>If this option is not selected (disabled), the interface checks first for a patient with the same MRN that has already been submitted by this provider. If such a patient exists, the patient update is skipped. Vaccinations included with the message are added to the record. Deselect (disable) this option when old information is to be uploaded and the current demographics are already in IWeb for some or all</p>

Field	Description
	patients. Disabling this option will prevent current patient records from being overwritten.
Insert patient as historical (non-owned)	<p>Select this option (enable it) to mark patient information as historical or non-owned. This will keep ownership from changing because of an update. This option is useful when loading data for non-owning entities (such as mobile shot clinics) or when loading initial data dumps that include many patients that are no longer seen by this clinic.</p> <p>This option is also useful when a new provider is brought on board and he has multiple years of legacy data. Loading this data with the option disabled could overwrite the registry data by changing the vaccination owner.</p>
Insert vaccination as historical	<p>Select this option to mark vaccinations in HL7 as Administered or Historical. Some interfaces do not do this, so IWeb assumes that all vaccinations are Administered.</p> <div data-bbox="597 758 1414 856" style="border: 1px solid black; padding: 5px;"> <p>NOTE: If a sending system does not properly indicate historical shots, it may be necessary to select this option to force all vaccinations to be read as Historical.</p> </div>
Update registry inventory	<p>Select this option to flag the record so that the deduplicator will update the vaccination inventory amounts.</p> <div data-bbox="597 940 1414 982" style="border: 1px solid black; padding: 5px;"> <p>NOTE: Lot inventories must be set up prior to importing data.</p> </div>
Map vaccination VFC Eligible from PV1-20	<p>Selecting this option indicates that the patient reserve table should be used when mapping vaccinations that are VFC-eligible during an HL7/DTT import.</p>
Use Facility ID from HL7 v2.5 location	<p>Select this option to use the facility ID from the HL7 V2.5 location (section 11-4) when the provider uses HL7 V2.5.</p>
<p>Insert if sent:</p> <ul style="list-style-type: none"> - Primary facility - Administered-at location - Primary physicians - Vaccinators 	<p>If an option below is selected, the data will be inserted into the registry if it is sent:</p> <ul style="list-style-type: none"> • Primary facility - This information will be inserted into the registry when the facility name and ID are sent. • Administered-at location - This information will be inserted into the registry when the location name and ID are sent. • Primary physicians - This information will be inserted into the registry when the primary physician names and IDs are sent. • Vaccinators - This information will be inserted into the registry when the vaccinator names and IDs are sent. <div data-bbox="597 1612 1414 1822" style="border: 1px solid black; padding: 5px;"> <p>NOTES:</p> <p>It is recommended that these fields be left unselected (disabled). However, if they are selected (enabled), overall administration is reduced and the data is inserted.</p> <p>If not selected (disabled), the facility and physician IDs should be</p> </div>

Field	Description
	<p>mapped under code table settings.</p> <p>If selected (enabled), the following validation steps are performed before a new facility or physician is created:</p> <p><u>Facility Validations</u></p> <ol style="list-style-type: none"> 1. <i>IRMS</i> does not exist or is inactive. 2. Facility ID was not provided or is invalid. 3. Facility name was not provided. 4. Facility name already exists as another facility ID. 5. More than one facility exists in this IRMS with the same name. <p><u>Physician Validations</u></p> <ol style="list-style-type: none"> 1. IRMS does not exist or is inactive. 2. Physician ID was not provided or is invalid. 3. Physician last name was not provided. 4. Physician name already exists in this IRMS with a different physician ID. 5. Facility ID is invalid, does not exist, or is mismatched (exists in another IRMS).
Responses returned	<p>This option indicates what type of response is returned for a message. The default action is determined by the value of <i>MSH-16</i> in each message. This can be overridden here, in which case it will apply to all messages received regardless of the value in MSH-16. If MSH-16 does not specify an action, the message is always sent a response. The choices are:</p> <ul style="list-style-type: none"> • Defined by Incoming Message - IWeb looks at the value in MSH-16 to determine what action to take. If it is blank or there is another value, it will be treated the same as Always Acknowledge. • Always Acknowledge - Always sends back response messages. • Never Acknowledge - Never sends back response messages. • Only for Errors - Only sends back responses when an error has occurred. <p>NOTE: It is important to set this option properly, especially when Reciprocal Batch Update is enabled. Sending systems that expect to receive a batch update may not want to receive any response; turning off (disabling) the responses here will stop that from happening.</p>
Varicella history-of-disease code	<p>Some systems store Varicella History-of-Disease as a special immunization code, although it normally should be sent as a contraindication. Use this setting to specify the code used by another system.</p>
Patient VFC Eligibility Private Insurance code	<p>Select an option to indicate the value from the VFC status list that corresponds to private insurance.</p>

Field	Description
	<p>This field is used primarily by the state of Washington. It maps the V10 option to a specific value for VFC-eligible lookups. Private Insurance is not usually included in the list of standard options for the VFC-eligible lookups, but this option allows V10 to be mapped to that, or for any other custom VFC-eligible option.</p> <p>NOTE: If the provider sends V01 (Not Eligible), the setting will map that to private insurance. If that setting is not configured, V01 will continue to reflect as Not Eligible.</p>
Assume Guardian for blank Relationship code	Select this option to assume a blank Relationship code means the person is the patient's guardian.

Observation Settings (ORU Only)

NOTE: These options apply only to ORU messages received from laboratory interfaces. They do not apply to regular vaccination updates such as VXUs. As of version 5.11.x, the existing logician (GE Centricity) interface has been changed to accommodate a single OBS term per vaccination.

Field	Description
Consent filter	<p>Select the type of consent filter to apply:</p> <ul style="list-style-type: none"> • No filter • Assume non-consented, accept consented only • Assume consented, ignore non-consented
Consent code	Enter the code identifying where the consent value is recorded in the ORU.
Consented value	If the consent filter is Assume non-consented , a consent code must be specified. All records with this consent value will be accepted; all others will be ignored.
Refused value	If the consent filter is Assume consented , a non-consent code value must be specified. All records with this non-consent value will be ignored, and all others will be accepted.
Assume administered	<p>Immunizations reported through a laboratory record include information about when an immunization was recorded. Use this option to indicate when an immunization should be considered administered. Example options:</p> <ul style="list-style-type: none"> • No • If recorded today • If recorded today or yesterday • If recorded today or in the last 2 days
Observation definition	Enter the XML definition that defines the codes that represent immunizations.

Field	Description
Unknown code handling	Select the value to handle the unknown codes: <ul style="list-style-type: none"> • Default • Always Add • Always Ignore • Always Reject

Query Settings (VXQ Only)

NOTE: HL7 users may query the registry for patient records. This section defines the options available when the registry is queried.

Field	Description
Strict exact match	Select this option if the first name, last name, and birthdate must all match for an exact match designation when a user queries for a patient by MRN or <i>SIIS</i> ID.
Query using	Select all of the options that can be used to find a match in the registry. Each query is run in turn and the results are appended to the previous results. If the first query, Advanced Search, is always run, it examines the entire patient query to find a match. If an exact match is found, it is returned without running the additional queries. The additional queries include: <ul style="list-style-type: none"> • First, Last, Guardian First, and Mother Maiden Names • Birth Number • Medicaid • <i>SSN</i> • First Name, Last Name, Birth Date • First Name, Last Name (Exact) • First Name, Last Name (Phonetic) • Phone • First Initial, Last Initial, Birth Date • First Initial, Birth Date • Birth Date • First Name (Exact) • First Name (Phonetic) • Last Name (Phonetic)
Maximum number of matches	Enter, as a whole number, the maximum number of possible matches that can be returned for one query.
Enforce user agreement	Select this option to force HL7 users to follow the user agreement protocol when making queries, if a user agreement has been defined.

Field	Description
	For example, if this option is selected (enabled) and the HL7 account sends a query request but the user account has not previously accepted the user agreement, the user is redirected to the user agreement page to accept it before the query is performed.
Return master patient address	Select this option to return the master patient address when queried.
Return all normally private demographic fields from the master patient record	Select this option to include demographic fields from the master patient record that are normally considered to be private.

Record Export Options for Queries and Updates

These options apply when data is queried or sent as updates from IWeb.

Field	Description
Send as next of kin: - Facility - Organization (IRMS) - Physician	Select one or more of these options to have the specified information sent as the next of kin for patients that have received vaccinations from the facility, IRMS, and/or physician, or are owned by the facility, IRMS, and/or physician. The options and the information sent are: <ul style="list-style-type: none"> • Facility - Facility name, address, phone number, contact name, fax number, and email address. • Organization (IRMS) - IRMS name/number, address, phone number, contact name, fax number, and email address. • Physician - Physician name, address, phone number, contact name, fax number, and email address.
Return vaccination forecast (queries only)	Select this option to allow vaccination forecast queries to be returned, since some systems cannot handle the new forecasting information that is returned in a VXR. Select the option to enable the return of vaccination forecast (queries only). Deselected (disabled) is the default, which turns the vaccination forecast off.
Send vaccination deletes	Select this option to enable the vaccination record to include deleted vaccinations. <div style="border: 1px solid black; background-color: #ffffcc; padding: 5px;"> CAUTION: Some systems do not accept deletes and will add them as Administered vaccines. </div>
Send vaccinations as historical	Select this option to mark all vaccinations as historical when sent.
Send contraindications	Select this option to send contraindications.
Send TB Indurations	Select this option to send TB indurations values in the OBX segment when a PPD test (CVX code 96) is returned.

Field	Description
Send Multiple Birth Count	Select this option to send multiple birth counts.
Send name, sex, DOB from reserve record	Select this option to send the name, sexual gender, and date of birth reported by the HL7 user's IRMS instead of the values in the master record. This is public information. The reserve record is the original data. NOTE: This setting should only be used when the provider's business process ensures that the patient was submitted prior to the query or update request. If the patient does not have a reserve record, the patient name will not be included in the PID segment.
Exclude: - Vaccinations with no CPT code - Vaccinations with no CVX code - Vaccinations last updated by this HL7 account - Vaccinations outside query range - Vaccinations outside query range and not new patient	Select the options that should be excluded: <ul style="list-style-type: none"> • Vaccinations with no CPT code • Vaccinations with no CVX code • Vaccinations last updated by this HL7 account • Vaccinations outside query range • Vaccinations outside query range and not new patient
Indicate vaccination given at	Select Facility or Organization (IRMS) if you want to include where the vaccination was given.

Facility Settings

Authorized users can configure Facility settings from the **Settings > Facility** menu link, which opens the Facility Settings page. These settings establish the default entries for fields on various pages.

The following settings can be configured on this page:

Setting	Description
Patient Defaults	Click the click to update link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include: <ul style="list-style-type: none"> • Primary Care Physician • Facility (pre-populated based on Facility selected; not editable) • Language

Setting	Description
	<ul style="list-style-type: none"> • Birth Country • Birth State • City • State • Zip Code • County/Parish • Phone Area Code • District/Region
Vaccination Defaults	<p>Click the click to update link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include:</p> <ul style="list-style-type: none"> • Vaccinator • Facility (pre-populated based on Facility selected; not editable)
Anatomical Injection Site Defaults	<p>Click the click to add link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include:</p> <ul style="list-style-type: none"> • Vaccine Description (required) • Anatomical Injection Site • Anatomical Route (required) • Age Range (required) <p>To edit an existing entry, click the Update link for that vaccine. To delete an entry, click the Delete link for that vaccine.</p>
Lot Defaults	<p>Click the default lot numbers link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include:</p> <ul style="list-style-type: none"> • Organization (IRMS), Organization (IRMS) Group, or Do Not Limit (defaults to selected Organization) • Facility, Facility Group, or Do Not Limit (defaults to the selected Facility) • VFC PIN • Active Lots (select lots and use the left or right arrows to move between the Unselected and Selected boxes)
VIS Publication Date Defaults	<p>Click the click to add link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include:</p> <ul style="list-style-type: none"> • Vaccine Description (required) • Publication Date 1-4 <p>To edit an existing entry, click the Update link for that vaccine. To</p>

Setting	Description
	delete an entry, click the Delete link for that vaccine.
Vaccine Default Volume	<p>Click the click to add link and select or enter the values that will appear as the default values on related pages. Click Save when finished selecting values. Options include:</p> <ul style="list-style-type: none"> • Vaccine (required) • Dosage Default (required) <p>To edit an existing entry, click the Update link for that vaccine. To delete an entry, click the Delete link for that vaccine.</p>
Opt Out of State-Wide Reminder Recall for Your Facility	<p>To opt Facility patients out of inclusion in reminder/recall notification patient lists, select this option. See the IWeb User Guide for more information.</p> <div style="border: 1px solid black; padding: 5px;"> <p>NOTE: The Administration > Settings > Properties > Patient Settings > Enable Organization (IRMS)/Facility Settings for Opt-In/Opt-Out of State-Wide Reminder/Recall Activities option must be enabled (selected) for this settings link to appear in the menu.</p> </div>

Glossary

A

ACS: Address Correction Service, provided by the US Postal Service to inform users about changes of address

B

BOMEX: BOard of Medical EXaminers

C

CPT: Current Procedural Terminology

CRA: The CDC's Countermeasure and Response Administration system.

D

Deduplication: A compression method used to remove duplicate data.

DTT: Data Translator Tool - a component of IWeb

DX: Diagnosis

E

ENCD: Early Notification of Childhood Death

F

FTE: First-Time Enterer

H

HEDIS: Health plan Employer Data and Information Set

I

IMS: Immunization Management System

IRMS: Information Request Management System

L

LHJ: Local Health Jurisdiction

M

MI / MISA: Mass Immunization / Mass Immunization Stand Alone

MRN: Medical Record Number

MSH-15: An HL7 message accept acknowledgement type

MSH-16: An HL7 application acknowledgement type

N

NAIC: National Association of Insurance Commissioners

NDC: National Drug Code

NPI: National Provider Identifier

S

SIF: Schools Interoperability Framework

SIIS: State-wide Immunization Information System

SSN: Social Security Number (United States)

T

TXN: Transaction

V

VACMAN: VACCine MANagement software

VAERS: Vaccine Adverse Event Reporting System

VFC: Vaccines for Children

VIMS: Vaccine Inventory Management System

VIS: Vaccine Information Sheet

VOMS: Vaccine Ordering Management System

VTrckS: Vaccine Tracking System (Centers for Disease Control and Prevention)

W

WIC: Women, Infants, and Children. A special supplemental nutrition program in the United States.