



VOMS

Administrative Tasks QRG

v2.17.5



Administration Properties & Settings

The VOMS application has a number of settings that users with the Vaccine Ordering Management permission can configure. These settings are in the **Admin & Settings** category on the navigation menu.

1. Click the **Admin & Settings** link in the navigation menu, then click the **Properties** button in the System Settings section of the Admin & Settings page.
2. On the Admin & Settings – Properties page that opens, click one of the four available tabs:
 - a. **General** – Includes general settings, cold storage settings, and import settings.

- b. **Orders** – Includes order workflow settings and organization/facility custom vaccine selection settings.

- c. **Transfers** – Includes settings related to transfers.

- d. **Returns & Wastage** – Includes settings related to vaccine returns and wastage.

Archive Orders

Users with the Vaccine Ordering Management permission can archive approved, shipped, and ready-for-pickup orders.

- Click the **Admin & Settings** link in the navigation menu, then click the **Archive Orders** button in the Order Management section of the Admin & Settings page.

- On the Archive Order page that opens, enter search criteria and click Search to locate the order to archive. The search parameters include:
 - Organization/Facility** – Search for an order for a specific organization, facility, or PIN
 - Status** – Search for all orders, or for an order with a specific status, such as Approved, Shipped, or Ready for Pickup
 - Submit Date** – Enter a From and To date to search for an order within a specific date range

- Search results that meet the search criteria appear in the Search Results list. To sort the list, click on a column header.

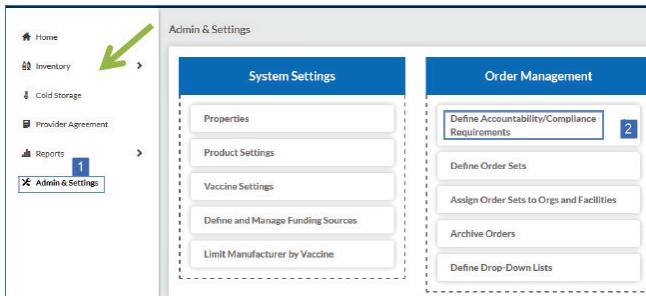
Search Results						
Selected	Organization/Facility PIN	Order #	Submit Date	Approved Date	Shipping Date	Status
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	117054	10/01/2014	10/02/2014		Approved
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	107928	07/01/2014	07/07/2014	07/09/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	106340	06/02/2014	06/11/2014	06/17/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	104774	05/01/2014	05/13/2014	05/19/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	101480	04/01/2014	04/11/2014	04/16/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	77067	07/01/2013	07/08/2013	07/08/2013	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	74696	05/01/2013	05/08/2013	05/08/2013	Shipped

- Either select individual orders to archive, or click the **Select All** button to select all of the orders to be archived.
- Once the orders are selected, click Archive to archive them. The orders are immediately archived and removed from the list.
- To search for an archived order, use the Search History feature. (See the *Search History Quick Reference Guide*.)

Accountability & Compliance Management

Accountability and Compliance Requirements are used when creating and approving orders and transfers. Authorized users can configure (define) accountability and compliance requirements by adding, editing, and inactivating the requirements.

1. Click the **Admin & Settings** link in the navigation menu, then click the **Define Accountability/Compliance Requirements** button in the Order Management section of the Admin & Settings page.



The page displays the previously defined accountability requirements.

Define Accountability/Compliance Requirements		
<input type="checkbox"/> Include Inactive		
Description	Days In Between	Inactive
-1VOMS testing	5	<input checked="" type="checkbox"/>
&=+Cold Storage Log	30	<input checked="" type="checkbox"/>
Accountability Testing	40	<input checked="" type="checkbox"/>
VOMS Testing	28	<input checked="" type="checkbox"/>
reconciling inventory	5	<input checked="" type="checkbox"/>
maximum interval of days between inventory reconciliation	5	<input checked="" type="checkbox"/>
Inventory Submission Report (Reconciliation)	4	<input checked="" type="checkbox"/>
Cold Storage Temperature Submission	30	<input checked="" type="checkbox"/>

2. To edit the number of days a user can go before completing an accountability/compliance submission, click the Edit icon (), make the changes, and click **Save**.

3. To add a new accountability/compliance requirement, click the Add button, enter a description for the requirement and the number of days in between submission requirements, and click **Save**.

ADD

Add & Define Order Sets

Authorized users can search for, view, add, define, and edit order sets.

Add a New Order Set

1. Click the **Admin & Settings** link in the navigation menu, then click the **Define Order Sets** button in the Order Management section of the Admin & Settings page.

The screenshot shows the 'Admin & Settings' page with the 'Order Management' section highlighted. Within 'Order Management', the 'Define Order Sets' button is circled with a blue box and labeled '2'. Other options include 'Define Accountability/Compliance Requirements', 'Assign Order Sets to Orgs and Facilities', 'Archive Orders', and 'Define Drop-Down Lists'.

The page displays the previously defined order sets.

The screenshot shows the 'Order Sets' page with a list of defined order sets: VFC PEDIATRIC, STATE SUPPLIED VACCS, PUBLIC VACCINES, SINGLE VACCINE SET, DEPOT ORDER SET 2, STATE SUPPLIED N2149, STATE SUPPLIED N2169, and Allocations.

2. Click the Add New Order Set button located at the top left of the page.

ADD NEW ORDER SET

3. On the Add New Order Set page, enter at least the required information (in red).

The screenshot shows the 'Add New Order Set' page. Required fields are highlighted in red: 'Order Set Name' (labeled '1'), 'Fulfillment Type' (labeled '3'), and 'Requires Local Approval' (labeled '4'). Other fields like 'Order Set Options' (labeled '2') are optional.

4. Add vaccines to the order set by clicking on a funding source to open it, selecting one or more vaccines, and clicking **Add to List**. Continue adding vaccines as needed.

The screenshot shows the 'ADD VACCINES' page. It lists funding sources: SPLIT, STATE, 317, and VFC. Under each source, a list of vaccines is shown with checkboxes. For example, under VFC, CMVIG, DTaP, and HPV, Quadrivalent are listed. A 'SELECT ALL' button is at the bottom left, and an 'ADD TO LIST' button is at the bottom right.

5. When finished adding vaccines to the order set, click **Save** (located at the bottom of the page).

The screenshot shows the 'POLIO' section of the order set details page. It lists Polio (1 pack - SYRINGES) and Rotavirus (10 pack - POUCH). Each item has 'Remove' and 'Restrict From Ordering' checkboxes. Below these are sections for 'ROTAVIRUS' and 'VARICELLA', each with its own list of items and checkboxes. At the bottom are 'CANCEL' and 'SAVE' buttons, with 'SAVE' being circled in red.

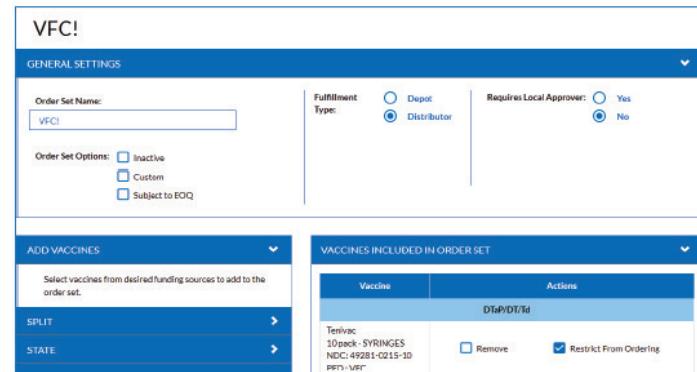
Search for and Edit an Order Set

1. On the main Define Order Set page, you can use the Search Order Set textbox to narrow the list of order sets. The list automatically narrows as you type into the textbox. You can search by either the name of the order set or the vaccine.



A screenshot of a search results page for an order set named "VFC!". The search bar at the top contains the text "VFC!". Below the search bar, there is a single result card with the heading "VFC!" and a small "Edit" button.

2. To edit an order set, search for it and/or locate it in the list and select it. The order set opens in the Define Order Set > Edit Order Set page.
3. Make the changes as needed (in the general settings and/or vaccines sections).



A screenshot of the "Edit Order Set" page for "VFC!". The page is divided into two main sections: "GENERAL SETTINGS" and "VACCINES INCLUDED IN ORDER SET".

GENERAL SETTINGS:

- Order Set Name: VFC!
- Fulfillment Type: Depot (radio button selected)
- Requires Local Approver: No (radio button selected)
- Order Set Options:
 - Inactive (checkbox)
 - Custom (checkbox)
 - Subject to EOQ (checkbox)

VACCINES INCLUDED IN ORDER SET:

Vaccine	Actions
DTaP/DT/Td	
TetraVac 10 pack - SYRINGES NDC:49281-0215-10 PRM-VFC*	<input type="checkbox"/> Remove <input checked="" type="checkbox"/> Restrict From Ordering

4. Click **Save** when finished making changes.

Assign Order Sets to Organizations/Facilities

Users with the Provider Ordering and Vaccine Ordering Management permissions can assign and manage order sets for multiple providers.

1. Click the **Admin & Settings** link in the navigation menu, then click the **Assign Order Sets to Orgs and Facilities** button in the Order Management section of the Admin & Settings page.
2. On the Admin & Settings > Assign Order Sets to Orgs and Facilities page that opens, select an order set from the drop-down list. (To deselect an order set, either click the X next to the name or delete the text in the field.)

The screenshot shows a dropdown menu titled "Choose an Order Set". The options listed are:
 - FLU VACCINE FOR PREGNANT TEENS WITH LATEX ALLERGIES ONLY! - DISTRIBUTOR
 - Admistry - DISTRIBUTOR
 - ADU STATE SUPPLIED 001 - DISTRIBUTOR
 - all new orders - DISTRIBUTOR
 - BOOSTVAC - DISTRIBUTOR
 - DEPOT ORDER SET - DEPOT
 - DEPOT ORDER SET3 - DEPOT
 - Jerry - DISTRIBUTOR
 - Large Text Order Set - DISTRIBUTOR

3. Once an order set is selected, two additional sections appear on the page, listing the Unassigned and Assigned organizations and facilities. In both sections, you can narrow the list by entering a facility name or PIN in the search field.

The screenshot shows the "Unassigned" section of the page. It includes a search bar labeled "Search by PIN# or Facility" and a list of organizations/facilities. At the bottom of the list are buttons for "ADD ALL", "ADD", "REMOVE", and "REMOVE ALL".
 The list includes:
 - 03981 - 104TH AVENUE MEDICAL CLINIC
 - No VFC PIN - 2 CENTER FOR HEALTH STATISTICS
 - 2342 - 3 CENTER FOR HEALTHSTATISTICS / CHS CENTRE
 - No VFC PIN - 3 ADDRESS CHANGE SERVICE DEPT.
 - No VFC PIN - 4 MAIL VENDOR
 - 342 - 5 EMAIL ONLINE REGISTRATION
 - No VFC PIN - 6 AM TO 8 PM FAMILY MEDICINE
 - 152030 - 8 AM TO 8PM FAMILY MEDICINE / 8 AM TO 8 PM FAMILY MEDICINE

The screenshot shows the "Assigned" section of the page. It includes a search bar labeled "Search by PIN# or Facility" and a list of organizations/facilities. At the bottom of the list are buttons for "CANCEL" and "SAVE".
 The list includes:
 - AT890 - ANGIE'S ORG / ANGIE'S MEDICAL CENTER
 - N4VFCRNP - BELLEVUE FAMILY MEDICINE / 81G1D7666
 - 31223 - DURE HOSPITAL / MHD 03
 - 44226 - DURE HOSPITAL / MHD 02
 - 69898 - DURE HOSPITAL
 - 15616 - FAMILY HEALTH CENTER OF COVILTZ / FAMILY HEALTH CENTER WOODLAND
 - 080 - FAMILY HEALTH CENTER OF COVILTZ
 - E70001 - FAMILY HEALTH CENTERS OF CHANOGAN / FAMILY HEALTH CENTERS TONASKET
 - 7777 - 5.ORG / 5.FACILITY
 - 777 - 5.0.DG

4. Note the following components on the page:

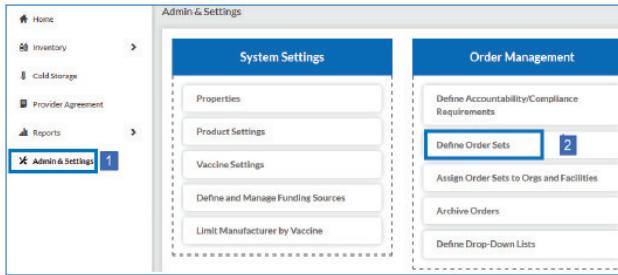
- Unassigned Search Field** – Use the search field above the Unassigned list of organizations/facilities to narrow the list. Enter a few characters of the name or PIN. The list narrows as text is entered into the field.
- Select Unassigned Checkbox** – Select one or more organizations/facilities in the Unassigned list to assign them to the order set, then click **Add**. The organizations/facilities then move to the Assigned list.
- Assigned Search Field** – Use the search field above the Assigned list of organizations/facilities to narrow the list. Enter a few characters of the name or PIN. The list narrows as text is entered into the field.
- Select Assigned Checkbox** – Select one or more organizations/facilities in the Assigned list to remove them from the order set, then click **Remove**. The organizations/facilities then move back to the Unassigned list.

5. After assigning (or unassigning) organizations and facilities to an order set, click **Save** to save the changes.

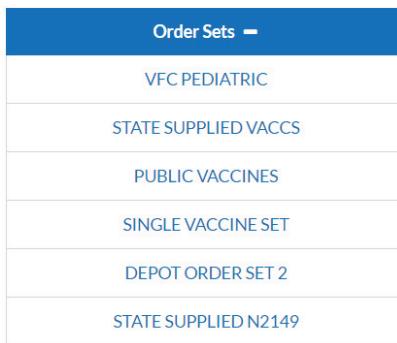
Modify Assigned Order Sets

Authorized users can edit an existing Order Set that has already been assigned to an organization/facility.

- Click the **Admin & Settings** link in the navigation menu, then click the **Define Order Sets** button in the Order Management section of the Admin & Settings page.



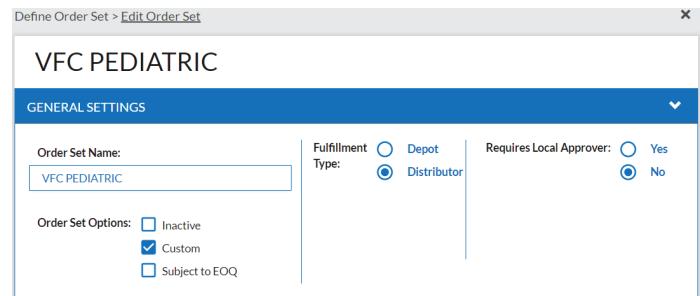
A list of order sets appears on the Define Order Set page.



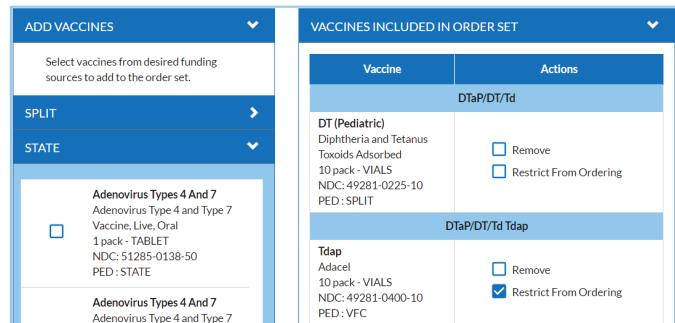
- Use the search field to narrow down the list of order sets. The list automatically narrows as you type a few characters of an order set or vaccine name.



- In the list of order sets, click on the name of the order set that needs to be updated.
- In the General Settings section of the Define Order Set > Edit Order Set page that opens for the selected order set, update any information as needed.



- Add or remove any vaccines from the order set as needed.



- When finished updating the entire order set, click the **Save** button at the bottom of the page.

Archive Orders

Users with the Vaccine Ordering Management permission can archive approved, shipped, and ready-for-pickup orders.

- Click the **Admin & Settings** link in the navigation menu, then click the **Archive Orders** button in the Order Management section of the Admin & Settings page.

- On the Admin & Settings > Archive Orders page that opens, enter search criteria and click **Search** to locate the order to archive. The available search parameters include:
 - Organization/Facility** – Search for an order with a specific organization or facility name or PIN.
 - Status** – Search for an order with a status of Approved, Shipped, or Shipped or Ready for Pickup (or use the default, All).
 - Submit Date** – Search for an order within a specific date range.

- Orders that meet the search criteria appear in the Search Results list. To sort the list, click on a column header.

Search Results						
Selected	Organization/Facility PIN →	Order # →	Submit Date →	Approved Date →	Shipping Date →	Status →
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	117054	10/01/2014	10/02/2014		Approved
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	107928	07/01/2014	07/07/2014	07/09/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	106340	05/02/2014	06/11/2014	06/17/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	104774	05/01/2014	05/13/2014	05/19/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	101480	04/01/2014	04/11/2014	04/16/2014	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	77087	07/01/2013	07/08/2013	07/08/2013	Shipped
<input type="checkbox"/>	Child and Adolescent Clinic/Child and Adolescent Clinic 156099	74696	05/01/2013	05/08/2013	05/08/2013	Shipped

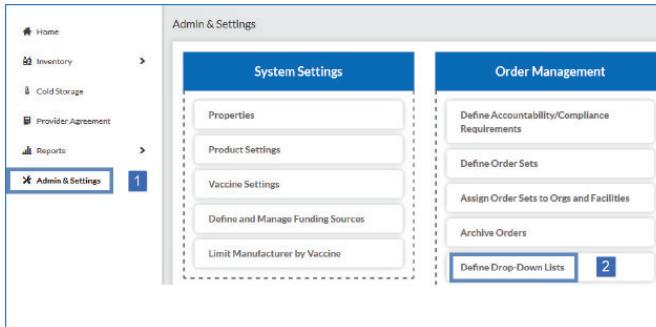
- Select one or more orders using the checkboxes, or click the **Select All** button to select all of the orders displayed on the page.
- After selecting one or more orders, click **Archive**. The selected orders are immediately archived and removed from the list. The archived orders can be found later by using the Search History feature.

<input checked="" type="checkbox"/>	Bellevue Family Medicine 431BEL	146490	03/01/2017	03/01/2017		Approved
			1 2 3 ... 99 100 ➤	Displaying 10	Results per Page	ARCHIVE

Define Drop-Down Lists

Authorized users can define specific drop-down lists that are used within the application.

- Click the **Admin & Settings** link in the navigation menu, then click the **Define Drop-Down Lists** button in the Order Management section of the Admin & Settings page.



- To narrow the list of defined drop-downs, use the Search field.
- Select a drop-down list to define by clicking on its name. Example drop-down list categories include:

- Facility Contact Type
- Freezer Type
- Lot Inactivation Reason
- Presentation of Vaccine Vials, Syringes, Etc.
- Reason for Rejecting a Shipment
- Reason for Rejecting an Order
- Refrigerator Type
- Temperature Measuring Device
- Vaccine Management Exception
- Vaccine Return Reason
- VOMS Priority Reasons
- VTrckS/McKesson to SIIS Mapping for Manufacturer Codes

- Edit a drop-down value's description by clicking the Edit icon () for that value in the row. Change the description and click **Save**.
- To add another value to the drop-down list, click the **Add Row** button (located under the last value in the selected list). Enter a unique value name and a description, then click **Save**.
- After adding a new row and before clicking **Save**, the new row can be deleted by clicking the Delete icon () located on the far right of the value row. After the row has been saved, it can't be deleted. Instead, deselect the Display icon to hide it from users.
- To enable a drop-down list value to display in the drop-down list when it appears to users, click the Display option. Values with the Display option disabled do not appear in the application's drop-down lists.

