# 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.
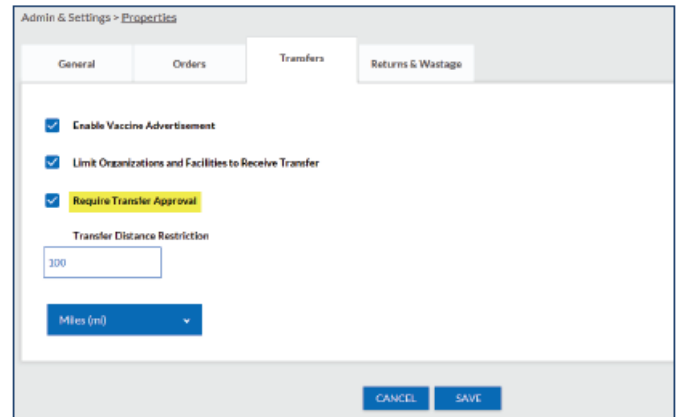
1. Click the **Admin & Settings** link in the navigation menu, then click the **Properties** button in the System Settings section of the Admin & Settings page.

2. On the Admin & Settings – Properties page that opens, click one of the four available tabs:

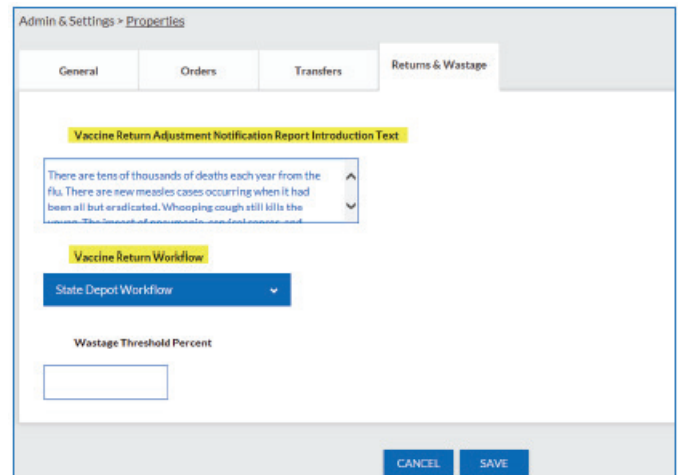   a. **General** – Includes general settings, cold storage settings, and import settings.
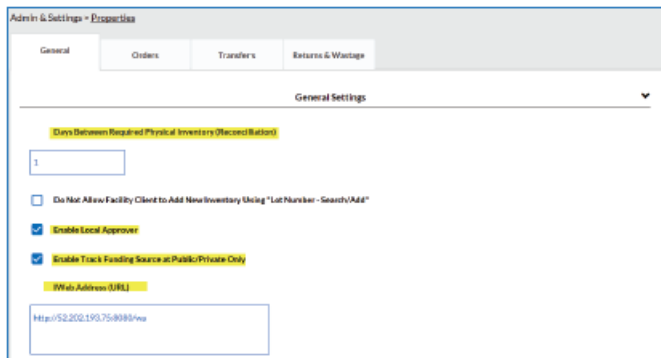
   

   b. **Orders** – Includes order workflow settings and organization/facility custom vaccine selection settings.
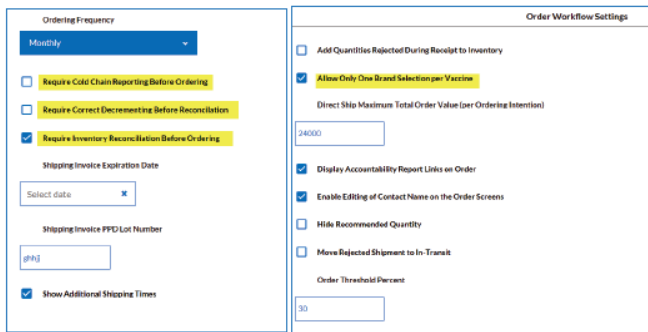
   

   c. **Transfers** – Includes settings related to transfers.

   

   d. **Returns & Wastage** – Includes settings related to vaccine returns and wastage.
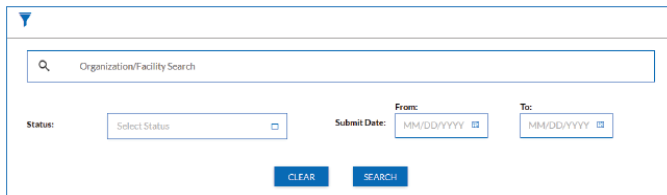
# Archive Orders

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

1. 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.
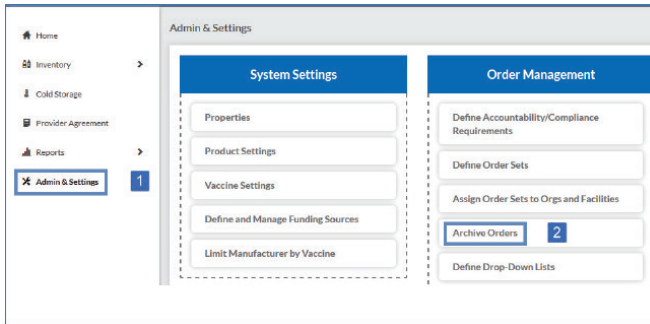
2. On the Archive Order page that opens, enter search criteria and click Search to locate the order to archive. The search parameters include:

   - **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

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

4. Either select individual orders to archive, or click the **Select All** button to select all of the orders to be archived.

5. Once the orders are selected, click Archive to archive them. The orders are immediately archived and removed from the list.

6. 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.
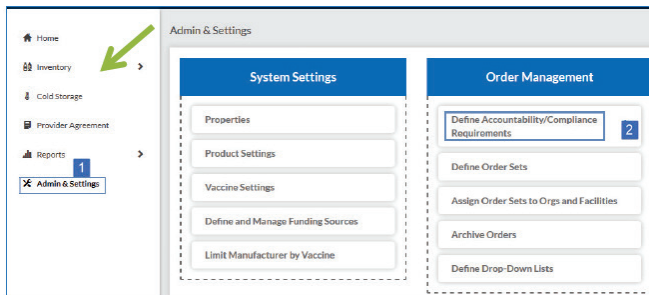


2. To edit the number of days a user can go before completing an accountability/compliance submission, click the Edit icon (⬚), make the changes, and click **Save**.

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**.
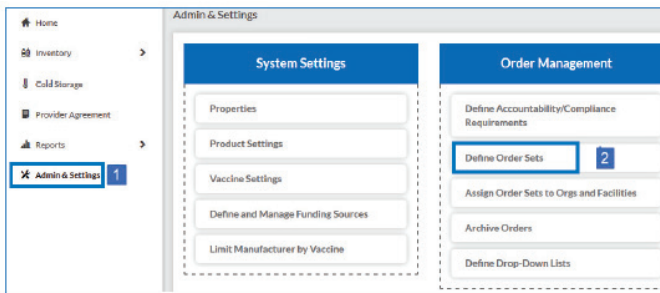
# Add & Define Order Sets

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.
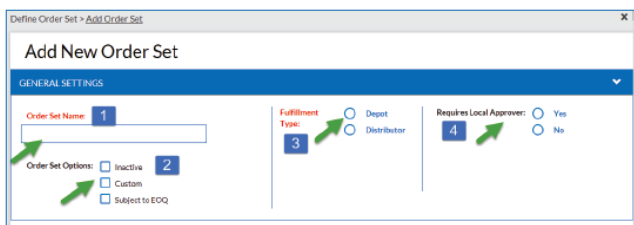


The page displays the previously defined order sets.



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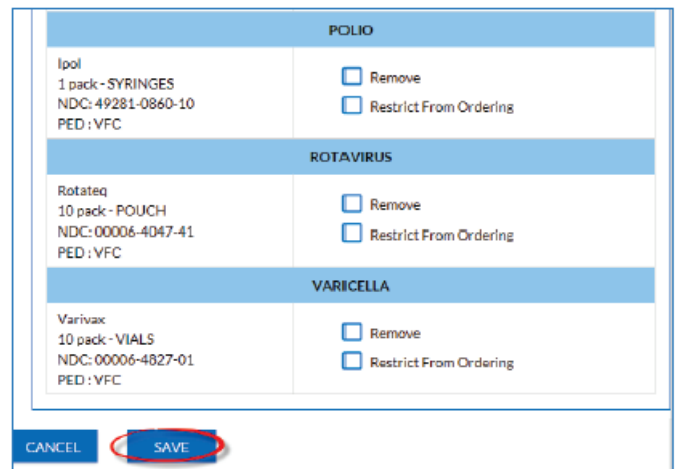


3. On the Add New Order Set page, enter at least the required information (in red).



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.
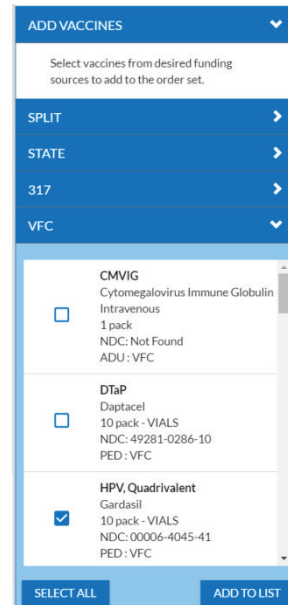


5. When finished adding vaccines to the order set, click **Save** (located at the bottom of the page).

# 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.

   🔍 Search Order Set

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).



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.)
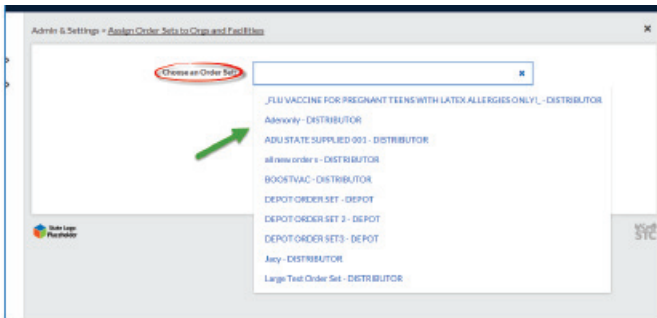


3. Once an order set is selected, two additional sections appear on the page, listing the Unassigned and Assigned organizations and facilities. In both sections, you can narrow the list by entering a facility name or PIN in the search field.
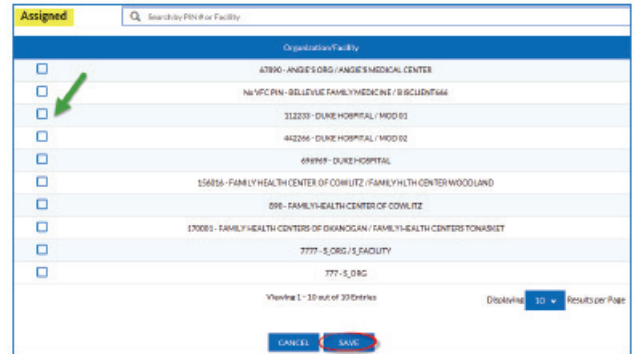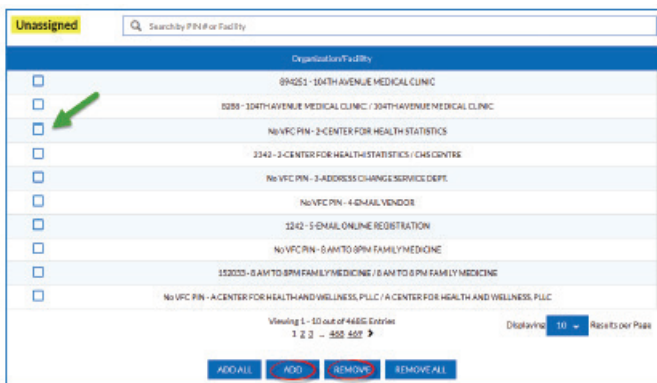




4. Note the following components on the page:

   a. **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.

   b. **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.

   c. **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.

   d. **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.

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.
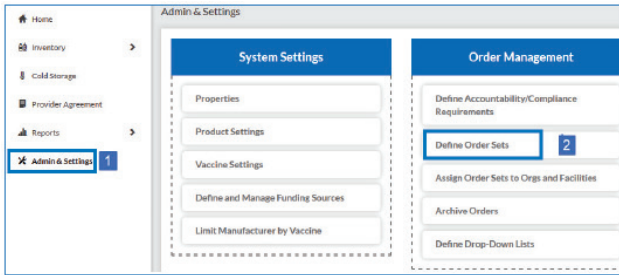


A list of order sets appears on the Define Order Set page.



2. 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.



3. In the list of order sets, click on the name of the order set that needs to be updated.

4. 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.
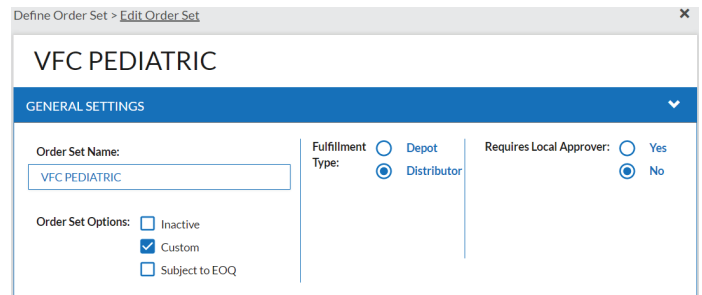


5. Add or remove any vaccines from the order set as needed.
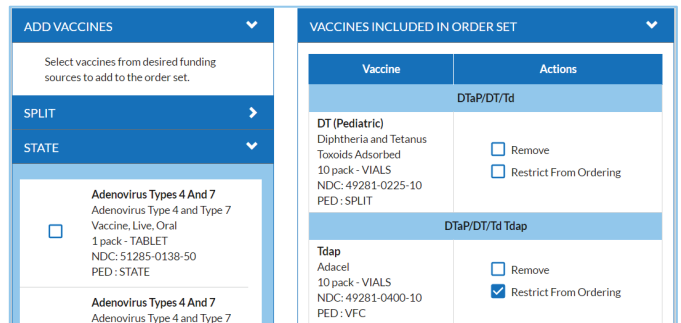


6. When finished updating the entire order set, click the **Save** button at the bottom of the page.

# Archive Orders

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

1. 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.
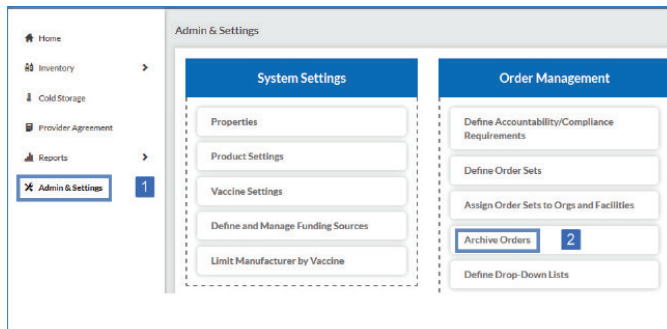
2. On the Admin & Settings > Archive Orders page that opens, enter search criteria and click **Search** to locate the order to archive. The available search parameters include:

    a. **Organization/Facility** – Search for an order with a specific organization or facility name or PIN.

    b. **Status** – Search for an order with a status of Approved, Shipped, or Shipped or Ready for Pickup (or use the default, All).

    c. **Submit Date** – Search for an order within a specific date range.
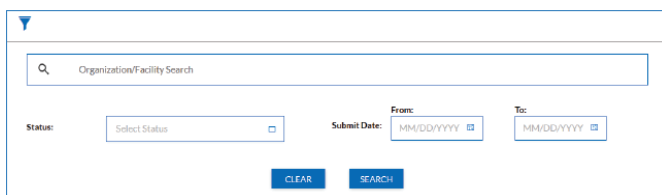
3. Orders that meet the search criteria appear in the Search Results list. To sort the list, click on a column header.

4. Select one or more orders using the checkboxes, or click the **Select All** button to select all of the orders displayed on the page.

5. 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.

# Define Drop-Down Lists

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

1. 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.
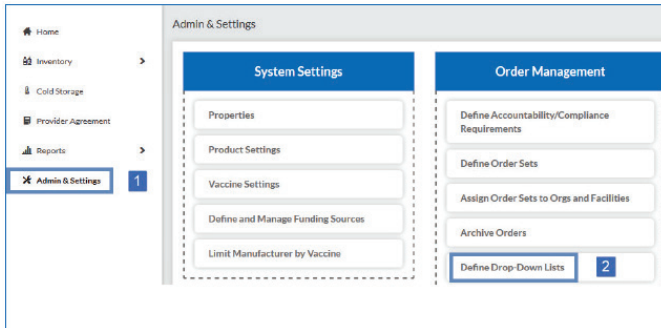


2. To narrow the list of defined drop-downs, use the Search field.

3. 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

4. Edit a drop-down value's description by clicking the Edit icon (⬚) for that value in the row. Change the description and click **Save**.

5. 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**.

6. 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 the value row. After the row has been saved, it can't be deleted. Instead, deselect the Display icon to hide it from users.

7. 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.