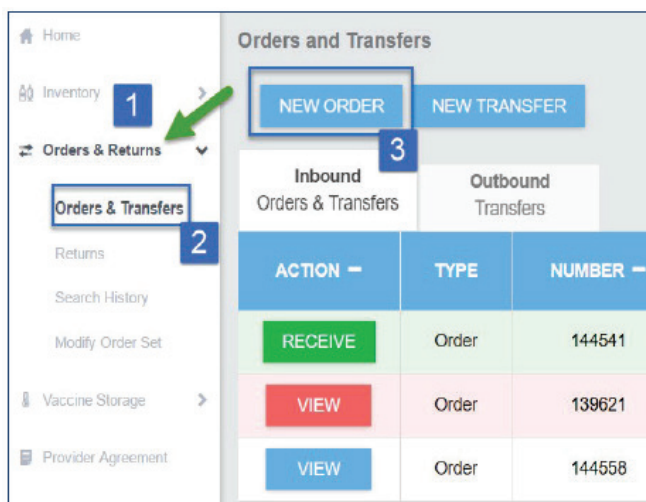


# Create a Vaccine Order

Users with the Allow Online Orders permission can create, edit, save, and submit vaccine orders. Depending on an organization/facility's configuration settings, some users may be required to document the cold chain, correct lot decrementing, and/or reconcile inventory before creating a new order. If the **Allow Only One Brand Selection per Vaccine** option is selected for the facility, providers are restricted from selecting multiple brands for the same vaccine in an order set. This allows for improved documentation accuracy.

## Create a New Order

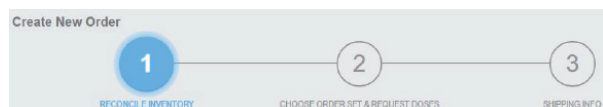
1. Click the **Orders & Returns > Orders & Transfers** link in the navigation menu, then click the **New Order** button on the Orders and Transfers page that opens.



2. On the Create New Order page that opens, the required workflow steps are displayed at the top of the page. The current step pulsates in blue to help identify the user's progress in the order process.

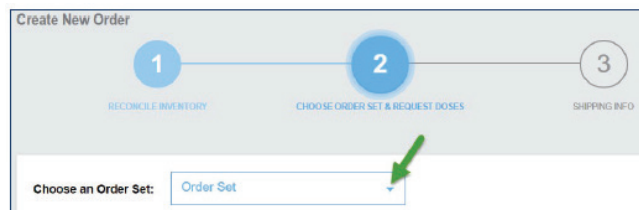
*Example:* If the user is required to reconcile inventory before creating a new order, Reconcile Inventory may appear as the first step in the workflow.

Refer to the *Inventory Reconciliation Quick Reference Guide* for further details.



## Choose an Order Set

3. Next, select an Order Set from the drop-down list. (If there is only one order set, there may not be a drop-down list.)



4. The following columns appear after an Order Set is selected:

- **Vaccine** – Vaccine name, manufacturer, packaging information, and NDC number
- **Funding Source** – Vaccine funding source, such as PUB (Public) or PRVT (Private)
- **Doses on Hand** – Current number of available doses
- **Doses Administered** – Number of doses that have been administered
- **Recommended Order Quantity** – Number of doses recommended for ordering. Can also see a history of the previous doses administered and the calculation
- **Doses Requested** – Number of doses requested for the order. Note that this amount must be equal to or above the minimum order quantity
- **Order is Urgent** – Toggle the slider on if the order is critical
- **Priority Reason** – If the order is marked as urgent, select a priority reason from the drop-down list
- **Comments** – Enter any order notes

5. Review the Recommended Order Quantity (ROQ) column for guidance on the recommended quantity of doses for ordering:

- If the vaccine has not been ordered before, the message *No Previous Order History* appears in the field
- If the vaccine has been ordered before, the ROQ appears as a button displaying the recommended quantity for ordering. Click the button to view information on how the amount was calculated

After clicking the recommended quantity button, the Recommended Order Quantity window pops up with a history of the previous doses administered and the calculation for the ROQ.

Vaccine	Funding Source	Doses On Hand	Doses Administered	Recommended Order Quantity	Doses Requested
HEP-A HEP-B 3 DOSE					
Hep A-Hep B Twinrix® Adult 10	STATE	0		No Previous History with this Vaccine	
DTaP/DT/dTdap					
Tdap Boostrix-Adacel 10	317	0		30	



### RECOMMENDED ORDER QUANTITY

Tdap Boostrix-Adacel 10 pack

DOSES ORDERED HISTORIC	
May 31 - June 29, 2014	10
May 31 - June 29, 2015	20
<b>Sum of Doses Ordered</b>	<b>30</b>
<b>Average Usage: Total # of Years With Data</b>	<b>15</b>

RECOMMENDED ORDER QUANTITY (ROQ)	
<b>Average Usage</b> (see above)	15
<b>Safety Stock:</b> Average 1 months	15
<b>Current Physical Inventory</b>	0
<b>Calculated ROQ:</b> (Avg. + Safety) - Current Inventory	30
<b>ROQ Rounded Up:</b> (Minimum Order Quantity)	30

7. In the Doses Requested field, enter the quantity of doses requested for the vaccines available in the Order Set.

8. Click **Next** to continue the ordering process. If you're not ready to continue with the order, click **Save**. This will create an order number, which will allow you to return to the order when you're ready to place the order.

Priority Reason

Order is  Urgent

Select Priority Reason

Comments

Type Order Comments

PREVIOUS
CANCEL
SAVE
NEXT

9. Depending on your state's settings, the ordering workflow may allow you to edit the delivery hours and verify shipping information. To edit the delivery hours, click the Edit icon (✎) in the Delivery Hours heading. Click **Save** when finished.

10. If there are any special delivery instructions, click the Delivery Instructions textbox and enter the information.

11. When finished updating the shipping information, click **Submit Order**. The Orders and Transfers page reopens with the new order added to the Inbound Orders & Transfers list.

Create New Order

1
2
3

SHIPPING ADDRESS

Organization: The Vista Clinic, PC  
Attn: 01017  
The Vista Clinic, PC  
300 W 8th Ave  
Sedona, AZ 86336

File address online services. For order may be auto-filled.  
To change your delivery address, please call (928) 361-5339

Priority Vaccine Coordinator: Matt Robinson  
Email: matt.robinson@vismc.com  
Phone: 505910112  
Fax: Unavailable

DELIVERY HOURS

Day	Start	End
Monday	8:00 AM - 5:00 PM	
Tuesday	8:00 AM - 5:00 PM	
Wednesday	8:00 AM - 5:00 PM	
Thursday	8:00 AM - 5:00 PM	
Friday	8:00 AM - 5:00 PM	
Saturday		
Sunday		

DELIVERY INSTRUCTIONS

Do not enter delivery hours here. Order will use Delivery Hours specified in the left for auto delivery items.

TU TH F 7:00PM 8:00 TO 8:00

PREVIOUS
CANCEL
SAVE
1
2
3
4



NEW ORDER		NEW TRANSFER		ORDER SEARCH		
ACTION	TYPE	NUMBER	SENDER	ORDER DATE	STATUS	
RECEIVE	Order	144541	McKesson	05/29/2016	Approved	
VIEW	Order	139211	McKesson	05/19/2015	Denied	
VIEW	Order	144559	McKesson	06/07/2016	Pending Local Approval	
VIEW	Order	145335	McKesson	06/30/2016	Pending Local Approval	