





# VOMS

## Administrative Tasks QRG

v. March 2018





## **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.

Admin & Settings = <u>P</u> r	operties			
General	Orders	Transfers	Returns & Wastage	
			General Settings	•
Days Between	en Required Physical Inve	entory (Neconci Bation)		
1				
_				
Do Not Aller	w Facility Client to Add N	iew Inventory Uning "Lo	t Number - Search/Add*	
Enable Local	Approver			
🗹 Erable Traci	Funding Source at Public	k/Private Only		
Web Addre	99 (URL)			
Htp://52.202.199	.75:0080/wa			

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

Ordering Frequency	Order Workflow Settings
Monthly v	Add Quantities Rejected During Receipt to Inventory
Require Cold Chain Reporting Bafore Ordering	Allow Only One Brand Selection per Vaccine
Require Correct Decrementing Before Reconciliation	Direct Ship Maximum Total Order Value (per Ordering Intention)
Require Inventory Reconciliation Before Ordering	24000
Shipping Invoice Expiration Date	Display Accountability Report Links on Order
Select date X	Enable Editing of Contact Name on the Order Screens
Shipping Invoice PPD Lot Number	Hitle Recommended Quantity
shhij	Move Rejected Shipment to In-Transit
Show Additional Shipping Times	Order Threshold Percent
	30

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

Admin & Settings > Pr	operties			
General	Orders	Transfera	Returns & Wastage	
_				
Cnable Vacci	ne Advertisement			
Limit Organia	zations and Facilities to R	Receive Transfer		
_				
Require Tran	ster Approval			
Transfer Dist	ance Restriction			
100				
Miles (m)	<b>.</b>			
-				
			CANCEL SAV	15

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

Admin & Settings > <u>Pn</u>	operties			
General	Orders	Transfers	Returns & Wastage	
There are tens of th Plu. There are new with been all but end(call but end). Vaccine Return State Depot Woo	nousands of deaths each y neasles cases occurring v ted. Whooping cough stil	when it had II kills the	Text	
			CANCEL SA	/E



## **Archive Orders**

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

Inventory	>		and the second
		System Settings	Order Management
Cold Storage			C
Provider Agreement		Properties	Define Accountability/Compliance Requirements
Reports	>	Product Settings	Define Order Sets
Admin & Settings	1	Vaccine Settings	Assign Order Sets to Orgs and Facilities
		Define and Manage Funding Sources	
		Limit Manufacturer by Vaccine	Archive Orders 2 Define Drop-Down Lists

- 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

<b>Q</b> 0	rganization/Facility Search			
atus:	Select Status	Submit Date:	From: MM/DD/YYYY 🚥	To: MM/DD/YYYY 🖾

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

Selected	Organization/Facility PIN —	Order# -	Submit Date —	Approved Date -	Shipping Date —	Status
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	117054	10/01/2014	10/02/2014		Approv
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	107928	07/01/2014	07/07/2014	07/09/2014	Shippe
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	106340	06/02/2014	06/11/2014	06/17/2014	Shippe
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	104774	05/01/2014	05/13/2014	05/19/2014	Shippe
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	101480	04/01/2014	04/11/2014	04/16/2014	Shippe
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	77067	07/01/2013	07/08/2013	07/08/2013	Shippe
	Child and Adolescent Clinic/Child and Adolescent Clinic 156009	74696	05/01/2013	05/08/2013	05/08/2013	Shippe

- 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.

 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.

Home			
1 Inventory	2	System Settings	Order Management
Cold Storage		Properties	Define Accountability/Compliance Requirements
Reports	>	Product Settings	Define Order Sets
CAdmin & Settings		Vaccine Settings	Assign Order Sets to Orgs and Facilities
		Define and Manage Funding Sources	Archive Orders
		Limit Manufacturer by Vaccine	

The page displays the previously defined accountability requirements.

		Include
Description	Days In Between	Inactive
-1VOMS testing	5	
&=+Cold Storage Log	30	
Accountability Testing	40	
VOMS Testing	28	
reconciling inventory	5	
maximum interval of days between inventory reconciliation	5	
Inventory Submission Report (Reconciliation)	4	
Cold Storage Temperature Submission	30	

- To edit the number of days a user can go before completing an accountability/compliance submission, click the Edit icon (<sup>™</sup>), 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.

Home			
inventory	>	System Settings	Order Management
Cold Storage			
Provider Agreement		Properties	Define Accountability/Compliance Requirements
Reports	>	Product Settings	Define Order Sets 2
Admin & Settings		Vaccine Settings	Assign Order Sets to Orgs and Facilities
		Define and Manage Funding Sources	Archive Orders
		Limit Manufacturer by Vaccine	Define Drop-Down Lists
		h	· · · · · · · · · · · · · · · · · · ·

The page displays the previously defined order sets.

Order Sets 🗕
VFC PEDIATRIC
STATE SUPPLIED VACCS
PUBLIC VACCINES
SINGLE VACCINE SET
DEPOT ORDER SET 2
STATE SUPPLIED N2149
STATE SUPPLIED N2169
Allocations

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).

Add New Order Set			
GENERAL SETTINGS			~
Order Set Name 1 Order Set Options: Inactive 2 Custom Custom Subject to ECQ	Fuffilment Type: 3 Depot Distributor	Requires Local Approver: O Yes	

 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.

ADD VACC	CINES 🗸	
	accines from desired funding to add to the order set.	
SPLIT	>	
STATE	>	
317	>	
VFC	~	
	CMVIG Cytomegalovirus Immune Globulin Intravenous 1 pack NDC: Not Found ADU: VFC	•
	DTaP Daptacel 10 pack - VIALS NDC: 49281-0286-10 PED : VFC	
	HPV, Quadrivalent Gardasil 10 pack - VIALS NDC: 00006-4045-41 PED : VFC	•
SELECT AL	L ADD TO LIST	

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



#### Add & Define Order Sets

### 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.

Q Search Order Set
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- 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).

SENERAL SETTINGS						
Order Set Name: VFC Order Set Options: Inactive Custem Subject to EOQ	Fulfillment Type:	~	epot istributor	Requires Local A	pprover: () ()	Yes No
IDD VACCINES 👻	VACCINES	INCLUDE	D IN ORDEF	RSET		
Select vaccines from desired funding sources to add to the order set.	v	ccine		٨	ctions	
	DTaP/DT/Td					
SPLIT >						

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.

- 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.
- 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 and order set, either click the X next to the name or delete the text in the field.)



 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.



Assigned	Q Searchity PIN # or Facility			
	Organization/Facility			
	47090 - ANGLES ORG / ANGLES MEDICAL CENTER			
	No VEC PIN - BELLEVUE FAMILY/MEDICINE / B ISCHENTIGG			
- P	312278 - DUKE HOBMEAL / MOD 03			
	442266 - DURE HOBPITAL / MOD 02			
	678767 - DUKZ HOBYTAL			
	156816 - FAMILY HEALTH CENTER OF CONIUTZ / FAMILY HUTH CENTER WOOD LAND			
	899 - FAMILY HEALTH CENTER OF COWLITZ			
	120001 - FAMILY HEALTH CENTERS OF DRANOGAN / FAMILY HEALTH CENTERS TONASKET			
	7777-5_ORG/5_FACUTY			
	777-5_08G			
	Viewing 1 - 10 out of 30 Printies Displaying 10 v Results per Pag			
	CANETA SAVE			

- 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.

inventory	>	System Settings	Order Management
Cold Storage			
Provider Agreement		Properties	Define Accountability/Compliance Requirements
A Reports	,	Product Settings	Define Order Sets 2
🛠 Admin & Settings 1		Vaccine Settings	Assign Order Sets to Orgs and Facilities
		Define and Manage Funding Sources	Archive Orders
		Limit Manufacturer by Vaccine	Define Drop-Down Lists

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.

	Search Order Set
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- 3. 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.

Define Order Set > <u>Edit Order Set</u>				×
VFC PEDIATRIC				
GENERAL SETTINGS				~
Order Set Name: VFC PEDIATRIC Order Set Options: Inactive Custom Subject to EOQ	Fulfillment ( Type:	) Depot ) Distributor	Requires Local Approver: O	Yes No

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

ADD VACCINES			VACCINES INCLUDED IN ORDER SET		
	vaccines from desired funding is to add to the order set.		Vaccine	Actions	
				DTaP/DT/Td	
SPLIT STATE		* *	DT (Pediatric) Diphtheria and Tetanus Toxoids Adsorbed 10 pack - VIALS NDC: 49281-0225-10	Remove     Restrict From Ordering	
	Adenovirus Types 4 And 7 Adenovirus Type 4 and Type 7 Vaccine, Live, Oral 1 pack - TABLET NDC: 51285-0138-50 PED : STATE		PED : SPLIT		
			C	DTaP/DT/Td Tdap	
			Tdap Adacel 10 pack - VIALS	Remove	
	Adenovirus Types 4 And 7 Adenovirus Type 4 and Type 7		NDC: 49281-0400-10 PED : VFC	Restrict From Ordering	

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



## **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.

inventory	>	System Settings	Order Management
Cold Storage			
Provider Agreement		Properties	Define Accountability/Compliance Requirements
Reports	>	Product Settings	Define Order Sets
Admin & Settings	1	Vaccine Settings	Assign Order Sets to Orgs and Facilities
		Define and Manage Funding Sources	Archive Orders
		Limit Manufacturer by Vaccine	Define Drop-Down Lists 2

- 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

- Edit a drop-down value's description by clicking the Edit icon (<sup>C</sup>) 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**.
- To delete a value in a drop-down list, click the Delete icon (<sup>©</sup>) located on the far right side of the value's row. Note that only user-added values can be deleted.
- 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.

Display
<b>~</b>
<b>~</b>