NEW MEXICO IMMUNIZATION INFORMATION SYSTEM

INVENTORY TRAINING PARTICIPANT GUIDE
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Welcome

This course will cover part 1 of the inventory module to include on-hand inventory management, orders and returns.

Once all required trainings and quizzes have been completed, you can request your login credentials that include your user name, a temporary password and a link to the information registry.

*Because the security of patient information must be maintained, users must not share login credentials.*
Learning Objectives

By the end of this course, you should be able to:

- How to use the inventory module.
- Understand On-Hand inventory.
- Define what Reconciliations are.
- How to add inventory.
- How to make an inventory adjustment.
- How to transfer inventory.
- How to place an order.
- Receive a vaccine order.
- Returning a vaccine order.
Inventory Module

The Inventory module is accessed by expanding "Inventory" on the left-hand menu.
By expanding "Vaccines" you will be able to access different functions of the inventory module.
On-Hand Inventory

The Inventory On-Hand Screen is a quick way to view all the inventory items on hand at every Inventory Location within your organization.

Reconciliation

The inventory reconciliation feature in NMSIIS provides a spreadsheet-based view to assist in the process of reconciling the inventory transactions in the system with the actual inventory that is on hand in your refrigerator.

As inventory is added, adjusted, administered, and transferred, the system automatically summarizes this data.
Vaccine Orders

Providers and clinics participating in the Vaccines for Children program or other state funded program will have access to the Vaccine Inventory Order and the Vaccine Returns Screens. The Vaccine Inventory Order Screen is a quick way to view all the vaccine orders for every clinic within your organization.

Vaccine Orders

The Vaccine Returns Screen is a quick way to view all vaccine returns for one or more clinics.

Vaccine Returns
Vaccine Shipments

The Vaccine Shipments features in NMSIIS provide the ability to receive vaccine orders.

Locations

The inventory location screen allows the user to maintain inventory locations. An inventory location is a physical storage location that contains the actual inventory for one or more clinics. All inventory transactions are associated with an inventory location - therefore, inventory locations must be defined to make use of the inventory module. There is no limit to the number of inventory locations a user can create, but a clinic must have at least one inventory location associated with it to give vaccinations or administer treatments.
Add Inventory

Once you have an inventory location created you can go ahead and add vaccine inventory through the on-hand option.

Click the add new inventory button.
On this screen you will need to enter all the required fields.

Enter the effective date of this inventory adjustment. By default, the system will populate this field with the current system date.

From the list of values provided, select the Inventory Location for which an adjustment is to be made.

Choose the vaccine, manufacturer, NDC, and Brand that is to be added from the list of values and add the remaining information about the vaccine.

Once all the information has been entered you will click the create button.
Adjustment

Back on the on-hand inventory screen you will now see the inventory associated to your site or sites. You can use the filter options to choose different views.

If you need to edit or make an adjustment to your vaccine, you can click on the action button. From the drop down, you can select from the available options. Edit will allow you to make changes.

Selecting adjustment, can be used to increment or decrement inventory for any unique combination of criteria. This feature is vital to maintaining system inventory level, so it reflects physical inventory. An adjustment is not to be used in place of administering a vaccine.

To do an adjustment, you will need to select the date the adjustment occurred, the adjustment reason and the doses adjusted.
Transfer

In certain circumstances you may need to transfer inventory.

Transferring inventory entails moving vaccine doses from one inventory location to another. Transfers must be initiated in the system by the inventory location that will be sending vaccine. You are required to notify your regional immunization program staff of all transfers of publicly funded vaccine.

Vaccine Inventory Transfer

Add

Date/Time: 07/10/2018 11:40 AM
Source Inventory Location

Inventory Location: INV_ABQ_BESTCARE_PHARMACY
Vaccine Mfg NDC: DTAP-HEPB-IPV (PEDIA) | SKB | 58160-0811-52
Lot Number: 05464-3824
Expiration Date: 07/31/2019
Funding Source: PRIVATE PURCHASE
Doses On-Hand: 10
Container Id:

Destination Inventory Location

Inventory Location: ACME HOSPITAL > ACME_ABQ_INV

Doses Transferred: 2
Equivalent Cases
Authorized By: RODRIGUEZ TIMOTHY
Inventory Picked By: RODRIGUEZ TIMOTHY
Inventory Picked Date: 07/10/2018
QA Approved By: RODRIGUEZ TIMOTHY
QA Approved Date: 07/10/2018
Shipped Date: 07/10/2018
Comments

(The quantity will be immediately decremented from the Source Inventory Location and added to the Destination Inventory Location when marked as received.)
The location receiving the transfer will need to accept the vaccine. To do this, a user can click on the hyperlink notification.

On this screen, users will be able to view all incoming transfers as well as the status of outgoing transfers. To accept a transfer, you will need to select "received".

On the following popup, you will need to enter the actual date the inventory was received.

After you have received a transfer, both inventory locations will have their on-hand inventory updated to reflect the transfer.
Ordering Vaccine

Now let’s go over placing an order in NMSIIS. To place an order we will begin at the vaccine orders screen and select add new vaccine order.

If your default provider is not a VFC or State program provider you will get an error message and won’t be able to place an order.

Verify the contact information and delivery hours are correct, you can also add special instructions if you have any. If everything is correct you can check the acknowledgement and proceed to the next step. If information is incorrect or needs to be updated, you can contact the NMSIIS helpdesk or you can use the clinic tools module to update certain information. The clinic tools module will be covered in another video.

After your order has been submitted you will need to verify the status, your order status should read "submitted for approval"

Your order will go to program staff for review and processing.
Returning Vaccine

Next well talk about returning vaccine. Similar to ordering, the returns feature is only usable for VFC and state programs.

A vaccine return will need to be completed for each vaccine and reason, for example, you would do one return for dtap that was expired and another return for dtap that was wasted. Start by selecting the clinic. Verify the information and click the acknowledgement.

On the next screen, begin by typing a vaccine, manufacturer or NDC. Then select from the inventory on hand. Enter the number of doses being returned and click add return. Once completed, doses will automatically be removed from the on hand. Program will review and approve your return. Under certain circumstances program may reject a return at which point the doses will be added back to the on hand until the issue has been resolved.

This concludes this portion of the inventory module.
Additional Resources

NMSIIS Online Help Guide

NMSIIS Immunization Program Overview

NMSIIS Quick Reference Guide - Standard User

NMSIIS Policies and Procedures
https://nmhealth.org/publication/view/help/929/