Vaccine Inventory QRG

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Archive Body Sites

1. Navigate to the Vaccine: Body Sites / Admin Routes / VIS Sheets window: **Clinical tab > More (Reference Data group)** > **Immunization Codes**.
2. The window opens defaulted to the **Body Sites** tab.
3. Select the **Archive** checkbox.
4. Click **Save** .

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Archive Admin Routes

1. Navigate to the Vaccine: Body Sites / Admin Routes / VIS Sheets window: **Clinical tab > More (Reference Data group)** > **Immunization Codes**.
2. Select the **Admin Routes** tab.
3. Select the **Archive** checkbox.
4. Click **Save**.

   Note: Your practice should not edit or add to the admin route codes, since there are standards for transmitting this data between systems (Office Practicum and your Immunization Registry).

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Add and Modify Vaccine Information Statement (VIS) Sheets

Add a VIS Sheet

1. Navigate to the Code Tables window: **Practice Management tab > Coded Values**.
2. Under Code Table Purpose, select **VIS name/version.** The VIS sheets display in the bottom panel.
3. Click the **Add** button.
4. Enter the name of the VIS sheet in the **Description** field.

5. Enter the date of publication in the **Reference/Pub Date** field.
6. Enter a number in the **Sort** field to indicate where the VIS sheet is organized in the list.
7. Verify the **Archive** checkbox is deselected.
8. Click **Save**.

Modify an Existing VIS Sheet

1. Navigate to the Vaccine: Body Sites / Admin Routes / VIS Sheets window: **Clinical tab > More (Reference Data group)** > **Immunization Codes**.
2. Select **Vaccine Information Sheets** tab.
3. The below fields may be changed from the Vaccine Information Sheets tab:
   - **Publish Date**: Click the drop-down and select a date or enter a date in the field.
   - **Archive**: Click the checkbox if the VIS sheet is no longer used.

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Modify Vaccine Code Table

1. Navigate to the Vaccine Codes window: **Practice Management tab > More (Reference Data group) > Vaccine Products**.
2. To edit vaccine information, click the **Ellipsis** button next to the vaccine. Use the table below as a guide for editing vaccine information.

Field Name	Action
Vaccine name	Vaccine name cannot be changed.
Inventory name	May be changed. Typically used to identify the vaccine at the practice level.
Description	May be changed. Description of the vaccine that will be used internally. Will appear on the Immunizations Complete List tab.
CPT code	Populates the CPT code associated with the vaccine. The code may be updated if necessary.
CVX code	Populates the CVX code associated with the vaccine. The code may be updated if necessary. Use caution when changing. Reference the CDC site for CVX codes
ICD-10 code	Populates with the vaccine code Z23.
Dose size/units	Populates with the dose and unit for each vaccine.

Default VIS	The default VIS for the vaccine. To change, click the drop-down to choose from the list.
Route of administration	Typical route of administration. To change, click the drop-down and choose from the list.
Typical VFC eligibility	If any of your vaccine lots are specifically VFC or private stock, it would be reflected here. To change, click the drop-down and choose from the list.
Typical body site	Typically is left blank. To change, click the drop-down and choose from the list.
Typical infant body site	Typically is left blank. To change, click the drop-down and choose from the list.
Archived	If the vaccine is no longer used at the practice, select the Archived checkbox.

3. If you need to add a vaccine product description, GTIN and NDCID, follow the below steps.
    a. Click the **Add** button.
    b. Enter the vaccine product name in the **Product Description** field.
    c. Enter the **GTIN** and **NDCID** in their respective fields.
    d. Click the **Save** button.

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Add/Edit/Retire Vaccine Inventory

Add a Vaccine Lot

1. Navigate to the Vaccine Inventory window: **Practice Management tab > Manage Vaccine Inventory**.
2. Click the **New** button and complete the below fields. Use the table below as a guide for adding a vaccine lot.
   Note: OP Best Practice for entering vaccine inventory is to begin at the NDC ID. When an NDC ID is entered, the Inventory name and Vaccine Name is populated. If these fields do not automatically populate, then you should check Vaccine Products and update the NDC ID.

Field Name	Action
NDC ID	Enter the 11-digit number.
Inventory name	Populates the inventory name associated with the NDC ID found in Vaccine Products.
Vaccine name	Populates the vaccine name associated with the NDC ID found in Vaccine Products.
(Optional) GTIN	Global Trade Identification Number used to identify vaccines world-wide. Will populate if using a barcode scanner.

Manufacturer	Click the drop-down and select from the list or begin typing in the field.
Lot number	Click in the field and enter the vaccine lot number.
Expiration date	Click in the field and enter the vaccine expiration date or select from the calendar.
Funding source	Click the Private or VFC radio button. The setting of the funding source determines when the vaccine lot is available to use, depending on the insurance plan.
(Optional) VFC eligibility usage	Click the drop-down menu and select an option below. Typically used when the Funding source should allow all patients to receive the vaccine. ● Select **VFC Only** for VFC insurance vaccines only. ● Select **Not VFC** for private insurance vaccines only. ● Select **All Pats** to allow for VFC and private insurance.
Practice location	Defaults to the location of the logged-in user. Click the drop-down arrow to select a different location from the list.
(Optional) Cost per dose	Click in the field and enter the cost per dose.
Total doses in lot	Click in the field and enter the total number of vaccines received.
Doses used	This field remains at 0 until you begin to document the vaccines within a patient's chart.
Last updated	This field is automatically time stamped with the date/time on the workstation being used to update the vaccine inventory.
Notes	Enter any information pertaining to the vaccines' shipment or usage upon receipt. If you would like to enter a company or brand name of the vaccine, enter it here.
Borrowed status (+)	Informs you if the vaccine entry was created from the VFC inventory or the Non-VFC inventory, and also triggers reminders that you owe VFC or Non-VFC lots.
Payback Status	Once you have returned the borrowed doses to VFC or Non-VFC inventories, mark the lot as Item was Paid Back and it will remove it from your borrowed lots list.
Date started using	Defaults to the current date. To change, click the drop-down menu and select a date from the calendar.
Availability	Set the radio button to the availability of the vaccine. The default availability is Active. ● **Active** : Lot is active and available to use for vaccine documentation. ● **Inactive**: Allows a lot to be entered into the inventory but it will not be available until your practice is ready to start administering the lot to patients. ● **Retired**: All used lots, expired lots, or lots that were entered incorrectly should be retired so they are not in the active lot view.
(Optional) Retired date	Used when you retire a lot to make note of the date.

Edit a Vaccine

1. Navigate to the Vaccine Inventory window: **Practice Management tab > Manage Vaccine Inventory**.
2. Highlight the vaccine to edit and click the **Ellipsis** button.
3. After changes are made, click the **Save** button.

   Note: You cannot edit the following fields once the vaccine has been used: Vaccine name, Manufacturer, Lot number or Expiration date. If the information is incorrect, you must retire the lot and add it correctly.

Retire a Vaccine

1. Navigate to the Vaccine Inventory window: **Practice Management tab > Manage Vaccine Inventory**.
2. Highlight the vaccine to retire and click the **Ellipsis** button.
3. Click the **Retired** radio button in the **Availability** field.
4. Click the drop-down arrow in the **Retired date** field and select the date the vaccine was retired.
5. Click the **Save** button.

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Run Vaccine Reports

Grid Report

The Grid Report is typically used to reconcile your vaccine inventory.

1. Navigate to the Vaccine Inventory window: **Practice Management tab > Manage Vaccine Inventory**.
2. Click the **Show/Hide/Move Column** button to show or hide columns. Deselect or select the columns that need to display on the report.
3. Click the **Print Grid** button.

   Note: To only print VFC Stock, select **True** from the **VFC Stk** filter prior to clicking Print Grid. To only print Private Stock, select **False** from the **VFC Stk** filter prior to clicking Print Grid.

Lot # Report

The Lot # Report is typically used to view patients administered a vaccine for a specific lot number and date range.

1. Navigate to the Vaccine Inventory window: **Practice Management tab > Manage Vaccine Inventory**.
2. Highlight a vaccine.
3. Click the **Print Lot #** button.
4. Complete the report parameters.

   a. **Include vaccines administered on**: All dates checkbox is selected by default. Click the **From** and **To** drop-down to enter a date range.
   b. **Manufacturer Lot Number:** Select the radio button to show all lots that have the listed lot number.
   c. **OP-assigned Lot ID**: Select the radio button to show the vaccine lot assigned the listed lot ID.
   d. **All lots used in this period:** Select this checkbox when reporting for all vaccine lots within a date range.
5. Click **OK**.

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