



COLORADO IMMUNIZATION INFORMATION SYSTEM INVENTORY MODULE

2011



INVENTORY

- The new CIIS registry offers three levels of inventory control (set on a provider-by-provider basis).
 - Type 1 Inventory (No Inventory Control): Only School Users will have this option.
 - Type 2 Inventory (Partial Inventory Control): Captures Manufacturer and Lot information but through the Settings Module, not the Inventory Module.
 - Note: Type 2 Inventory is similar to inventory functionality in current CIIS.
 - **Type 3 Inventory: Full Inventory Control**
 - The Inventory Module is for Type 3 Inventory only.
 - Allows providers to enter beginning inventory and allows system to track inventory by dose through administration and/or adjustments.
 - Note: Type 3 Inventory is a separate training intended for providers who choose to use that module.
- All providers will initially have access to Type 2 Inventory Control, but may contact CIIS User Support to be granted Type 3 Inventory Control.



TYPE 3 FULL INVENTORY CONTROL OVERVIEW

- ◎ Tracks Manufacturer, NDC Code, Lot Number, Expiration Date, Funding Source, and Number of Doses On Hand.
- ◎ Inventory is managed through the Inventory Module.
 - Inventory items must be added before vaccinations can be administered.
 - Inventory items that are expired and/or have 0 doses remaining cannot be administered.



TYPE 3 FULL INVENTORY CONTROL

- Provides full tracking of every dose of vaccine.
- Automated decrementing of doses administered
- Inventory items can be transferred between inventory locations.
- Routine inventory reconciliation process
- Several inventory reports are available.



INVENTORY MODULE: SET-UP

Inventory Management begins with the set-up of inventory locations.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

The screenshot shows the CIIS web interface. At the top, a purple header bar displays the provider and clinic information. Below this is a navigation sidebar on the left with a menu. The 'Inventory' menu item is expanded, and the 'Locations' link is highlighted in yellow. A yellow callout box points to this link with the text: "Click the 'Locations' link located in the Inventory submenu." The main content area shows the 'Inventory Home' page with an information icon and a paragraph of text explaining the inventory module's purpose.

Inventory Home

The Inventory module assists you in tracking and understanding your inventory levels. Multiple inventory locations can be established to service any clinics. Inventory is automatically adjusted as vaccines and countermeasures are administered to patients, inventory is transferred between inventory locations, and inventory adjustments are created.

Home
+ Patients
Immunizations
Education
- Inventory
+ Vaccines
Locations
Reports/Forms
+ Settings

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Click the "Locations" link located in the Inventory submenu.



INVENTORY LOCATIONS AND CLINICS

To add a new inventory location, click the “Add Inventory Location” button. Note: Most Providers/Clinics will only have one inventory location.

Inventory Locations

Click "View" to see the details of an existing record or "Add Inventory Location" to create a new record.

Add Inventory Location

View

Code	Name	Status		
IZRUS CRA IN	IZ R US CRA INVENTORY	ACTIVE		View
IZ R US FP	IZ R US FP INVENTORY	ACTIVE		View
IZRUS CCK	IZ R US INVENTORY - CHERRY CREEK	ACTIVE		View
IZRUS DEP	IZ R US INVENTORY - DEPOT	ACTIVE		View
IZRUS INV	IZ R US MAIN INVENTORY	ACTIVE		View
IZRUSMOB5	IZ R US MOBILE 5	ACTIVE		View
IZRUS INV-MB	IZ R US MOBILE INVENTORY	ACTIVE		View
IZRUS MB2	IZ R US MOBILE INVENTORY 2	ACTIVE		View
IZRUS MB3	IZ R US MOBILE INVENTORY 3	ACTIVE		View
IZRUSMB4	IZ R US MOBILE INVENTORY 4	ACTIVE		View
IZRF	IZRFLAGLER	ACTIVE		View
IZRL	IZRLIMON	ACTIVE		View
IZRS	IZRSTRASBURG	ACTIVE		View
NCHD MGN	NCHD MORGAN	ACTIVE		View
NCHD REG	NCHD REGIONAL	ACTIVE		View

To view/edit a current inventory location, click the “View” button.”



ADD INVENTORY LOCATION

Enter the inventory location information. Note: Codes are identified by the User and must be unique across inventory locations AND clinics.

PROVIDER: IZ R US PROVIDER TYPE

Log Out



- Home
- Patients
- Immunizations
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- Inventory
 - Vaccines
 - Locations
 - Reports/Forms
 - Settings

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Inventory Locations

Click "Create"/"Update" to save. Click "Cancel" to return to the previous page.

Add

Code **Name** **Status**

Address

Mailing Address

Street # Prefix Street Name Type Suffix Unit # P.O. Box

City Other City County Other County

State Country Zip Code

Physical Address

Street # Prefix Street Name Type Suffix Unit # P.O. Box

City Other City County Other County

State Country Zip Code

Comments

Click the "Create" button to save your new inventory location information.

ASSOCIATE CLINIC TO INVENTORY LOCATION

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US FAMILY PRACTICE 2

You should now see your saved inventory location. You can now associate clinics with your inventory location.



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Inventory Locations

Click "Create"/"Update"

Edit

Record saved on 6/1/2011 at 10:42:23 AM.

Code IZ FP 2 **Name** IZ R US FAMILY PRACTICE 2 **Status** ACTIVE

Address

Mailing Address

Street #	Prefix	Street Name	Type	Suffix	Unit #	P.O. Box
1111		1ST	ST			
City	Other City		County	Other County		
DENVER			DENVER			
State	Country		Zip Code			
COLORADO	UNITED STATES		80246			

Copy Mailing Address To Physical Address Clear Mailing Address

Copy Physical Address To Mailing Address Clear Physical Address

Physical Address

Street #	Prefix	Street Name	Type	Suffix	Unit #	P.O. Box
1111		1ST	ST			
City	Other City		County	Other County		
DENVER			DENVER			
State	Country		Zip Code			
COLORADO	UNITED STATES		80246			

Comments

Record saved on 6/1/2011 at 10:42:23 AM.

Associated Clinics

IZ R US CLINIC

IZ R US MOBILE CLINIC

Click the "Associated Clinics" dropdown menu and select the clinic that will use the inventory in this location.

Note: An Inventory Location may service several clinics (within the same provider) or multiple inventory locations can be defined for a single clinic.



ON-HAND INVENTORY

Vaccine Inventory On-Hand screen is the central location for managing inventory for a provider.

TEST, Log Out



- Home
- Patients
- Immunizations
- Education
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 - Vaccines
 - On-Hand**
 - Reconciliation
- Locations
- Reports/Forms
- Settings

Vaccine Inventory
This is a list of the
and click "Edit", "A
item. Select "Add N
Pending Inventory T

You can filter listed inventory by Inventory Location, Vaccine, Status, or Funding Source to more easily find a specific inventory item.

On-Hand Inventory

Inventory Location: (ALL) Status: ON-HAND
Vaccine: (ALL) Funding Source: (ALL)

Buttons: Edit, Adjustment, Transfer, Inquiry

	Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	
IZ R US CRA INVENTORY								
<input type="radio"/>	DTaP (Tripedia (0.5 mL vial))	PMC	49281-0288-15	12345	08/31/2011	Private	81	?
<input type="radio"/>	DTaP (Daptacel) (Daptacel (0.5 mL x 1 vial))	PMC	49281-0286-01	C3449BA	12/02/2011	Private	59	?
<input type="radio"/>	Hep A, adult (Vaqta (1.0 mL x 1 syr))	MSD	00006-4096-01	97854AA	11/18/2011	Public	4	?
IZ R US FP INVENTORY								
<input type="radio"/>	MPSV4 (Menomune) (10 dose)	PMC	49281-0488-91	1789	03/15/2013	Private	100	?
<input type="radio"/>	Tdap (Boostrix (.50 mL x 1 vial))	SKB	58160-0842-01	3652	03/15/2012	Private	50	?
IZ R US INVENTORY - CHERRY CREEK								
<input type="radio"/>	MMR (MMR II (0.5 mL x 10 vials))	MSD	00006-4681-00	0SAODFU	12/31/2012	Private	50	?
IZ R US INVENTORY - DEPOT								
<input type="radio"/>	MMR (MMR II (0.5 mL x 10 vials))	MSD	00006-4681-00	0SAODFU	12/31/2012	Private	49	?
IZ R US MAIN INVENTORY								
<input type="radio"/>	DTaP (Infanrix (0.5 mL x 1 vial))	SKB	58160-0810-01	12345657	07/15/2011		4	?
<input type="radio"/>	DTaP (Infanrix (0.5 mL x 1 vial))	SKB	58160-0810-01	12345	12/31/2011	Private	10	?
<input type="radio"/>	DTaP	PMC		123456M	08/30/2011			
<input type="radio"/>	DTaP	PMC		C3322BA	06/15/2011			

To view or add inventory, click the "On-Hand" link located under the Vaccines submenu within the Inventory menu.

List of inventory currently on-hand.



ON-HAND INVENTORY: KEY TERMS

- ◎ **Edit**: Make changes/updates to an existing line item.
- ◎ **Adjustment**: Account for non-immunization related modifications to the number of doses on-hand.
- ◎ **Transfer**: Move inventory from one location to another.
- ◎ **Inquiry**: Generate a listing of inventory transactions that meet the specified criteria.



ON-HAND INVENTORY

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Vaccine Inventory On-Hand

This is a list of the vaccine inventory currently on hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. Select "Add New Inventory" to add new inventory.

ⓘ

Pending Inventory Transfers

On-Hand Inventory

Inventory Location: (ALL) Status: ON-HAND
 Vaccine: (ALL) Funding Source: (ALL)

Vaccine (Brand)	Mfg	Lot No	Exp Date	Funding Source	Doses
IZ R US CRA INVENTORY					
<input type="checkbox"/> DTaP (0.5 mL vial)	PMC	8-15 12345	08/31/2011	Private	
<input type="checkbox"/> Aptacel (0.5 mL x 1 vial)	PMC	96-01 C3449BA	12/02/2011	Private	
<input type="checkbox"/> (1.0 mL x 1 syr)	MSD	96-01 97854AA	11/18/2011	Public	
IZ R US INVENTORY - CHERRY CREEK					
<input type="checkbox"/> MMR (MMR II (0.5 mL x 10 vials))					
IZ R US INVENTORY - DEPOT					
<input type="checkbox"/> MMR (MMR II (0.5 mL x 10 vials))	MSD	00006-4681-00 OSAODFU	12/31/2012	Private	49 ⓘ
IZ R US MAIN INVENTORY					
<input type="checkbox"/> DTaP (Infanrix (0.5 mL x 1 vial))	SKB	58160-0810-01 12345657	07/15/2011	Private	4 ⓘ
<input type="checkbox"/> DTaP (Infanrix (0.5 mL x 1 vial))	SKB	58160-0810-01 12345	12/31/2011	Private	10 ⓘ

View Pending Transfers

Add New Inventory

Edit Inventory Line Item

Create an Adjustment

Transfer Inventory to Another Location

Run a transaction inquiry for a line item

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ADD NEW INVENTORY

Step 1: Enter the information for the new inventory.

Note: If the data is an exact match to existing inventory, the doses will be added to the existing line item (see next slide).

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC



Vaccine Inventory

Click "Create" to save the record

Vaccine Manufacturer Codes

Add

Date	<input type="text" value="06/01/2011"/>
Inventory Location	<input type="text" value="IZ R US PROVIDER TYPE 3 > IZ FP 2 - IZ R US FAMILY PRACTICE 2"/>
Vaccine Mfg NDC Brand	<input type="text" value="DTAP-HEPB-IPV (PEDIA SKB 58160-0811-51 PEDIARIX (0.5 M"/>
Lot Number	<input type="text" value="21213Y"/>
Expiration Date	<input type="text" value="10/31/2012"/>
Funding Source	<input type="text" value="PUBLIC"/>
Doses Adjusted	<input type="text" value="20"/>
Comments	<input type="text"/>

Funding Source options are now at the inventory dose level. You have three options: Public (e.g., VFC), Private, and Special Projects (e.g., ARRA Grant).

Step 2: Click the "Create" button to save your information.

Note: The system will remain on this screen so that you may continue to add more inventory. Once you have finished adding inventory, click the "Cancel" button to take you back to the Vaccine Inventory On-Hand screen.

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ADD NEW INVENTORY: POSSIBLE DUPLICATE

Similar to the patient search screen, the system looks for similar line items to help minimize the chance of duplicates.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US C

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Vaccine Inventory

Click "Create" to save the record or "Cancel" to return

Vaccine Manufacturer Codes

Add

Date 06/01/2011

Inventory Location IZ R US PROVIDER TYPE 3 > IZ FP 2 - IZ R US FAMILY PRACTICE 2

Vaccine | Mfg | NDC | Brand DTaP-HEPB-IPV (PEDIA | SKB | 58160-0811-46 | PEDIARIX

Lot Number 21213Y

Expiration Date 10/31/2012

Funding Source PUBLIC

Doses Adjusted 10

Comments

Possible Duplicates

The following Inventory items have been found with similar criteria. If any of the following record(s) are the inventory item you are trying to create, select the item below.

Vaccine	Mfg	NDC	Lot No	Exp Date	Fund Src	Doses On-Hand	
DTaP-HepB-IPV (Pedia (Pediarix (0.5 mL x 10 syr))	SKB	58160-0811-51	21213Y	10/31/2012	Public	20	<input type="button" value="Add To On-Hand"/>

Click the "Proceed with Create" button if the data entered is correct.

Click the "Add to On-Hand" button to add the doses to the associated line item.



EDIT INVENTORY

Vaccine Inventory On-Hand

This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. Select "Add New Inventory" to add new inventory.

Add New Inventory



Pending Inventory Transfers

Step 2: Click the "Edit" button.

On-Hand Inventory

Inventory Location

(ALL)

Status

ON-HAND

Vaccine

(ALL)

Funding Source

(ALL)

Edit

Adjustment

Transfer

Inquiry

	Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	
IZ R US CRA INVENTORY								
<input checked="" type="radio"/>	DTaP	SKB		1234	08/31/2011	Private	99	
<input type="radio"/>	DTaP (Daptacel)	PMC		C3449BA	12/02/2011	Private	60	
<input type="radio"/>	DTaP	SKB		7896	11/20/2011	VFC	50	
IZ R US MAIN INVENTORY								
<input type="radio"/>	DTaP-IPV (Kinrix)				4/2011	Adult 317	100	
<input type="radio"/>	H1N1 Flu 09-Nasal				0/2012	H1N1	49	
<input type="radio"/>	H1N1 Flu 09-P Free				1/2011	H1N1	40	
<input type="radio"/>	DTaP-HepB-IPV (Pedia				9/2012	Other Public	25	
<input type="radio"/>	HepA, adult				8/2011	Other Public	49	
<input type="radio"/>	HepB, ped/adol (Recombivax (0.5 syringe))				1/2013	Other Public	14	

Step 1: Click the radio button to select the inventory line item you would like to edit.



EDIT INVENTORY

Click the “Update” button to save your changes and return to the Vaccine Inventory On-Hand screen.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC



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Vaccine Inventory Item

Click "Update" to save the record or "Cancel" to return to the previous page.

Edit

Read-only fields



Update

Cancel

Inventory Location

IZ R US CRA INVENTORY

Vaccine

DTAP

Doses (initial)

100

Doses (current)

81

Vacc | Mfg | NDC | Brand

DTAP | PMC | 49281-0288-15 | TRIPEDIA (0.5 M)

Lot Number

12345

Expiration Date

08/31/2011

Funding Source

PRIVATE

Orig. Exp. Date

Note that modifying this inventory item will also change the following items:

- ALL inventory transactions (e.g. adjustments and vaccinations) for the selected item
- ALL vaccination records where a dose of the selected inventory item has been administered

Clear



Update

Cancel

Use this screen to edit select information about an inventory line item.
NOTE: Changes made here affect ALL transactions (including immunizations) associated with the line item.



INVENTORY ADJUSTMENT

Use inventory adjustments to account for non-immunization related modifications to the number of doses on-hand.
Enter a positive number to increase inventory and a negative number to decrease it.

Vaccine Inventory Adjustment

Click "Create" to save the record or "Cancel" to return to the previous page. i

Add

Date

Inventory Location

Vaccine | Mfg | NDC

Lot Number

Expiration Date

Funding Source

Doses On-Hand

Reason

Doses Adjusted

Comments

Positive number increases the inventory. Enter a negative number to decrease it.

Reason dropdown menu:

- EXPIRED
- WASTED
- IMPROPERLY STORED
- BROKE VIAL
- EXTRA
- RECONCILIATION
- RECALLED
- ADD INITIAL INVENTORY

Click the "Create" button to save the record and return to the Vaccine Inventory On-Hand screen.



INVENTORY TRANSFER

Use inventory transfers to move inventory from one location to another. Inventory can be moved within a provider's locations.

Vaccine Inventory Transfer

Click "Create" to save the record or "Cancel" to return to the previous screen.

Add

Create **Cancel**

Date: 02/15/2011

Source Inventory Location

Inventory Location: IZ R US PROVIDER TYPE 3 > IZRUS CRA IN - IZ R US CRA INVENTORY

Vaccine | Mfg | NDC: DTAP | SKB |

Lot Number: 1234

Expiration Date: 08/31/2011

Funding Source: PRIVATE

Doses On-Hand: 99

Destination Inventory Location

Inventory Location: IZ R US PROVIDER TYPE 3 > IZ R US FP - IZ R US FAMILY PRACTICE

Doses Transferred: 20 (The quantity will be immediately decremented from the Source Inventory Location and added to the Destination Inventory Location when marked as 'Received'.)

Authorized By: DUGGER, KIM (→)

Comments:

Create **Cancel** **Clear**

Enter the necessary information and click the "Create" button to save the record and return to the Vaccine Inventory On-Hand screen.



INVENTORY TRANSFER

To view and receive pending inventory transfers, click the “Pending Inventory Transfers” link located on the Vaccine Inventory On-Hand screen.

Vaccine Inventory On-Hand

This is a list of the vaccine inventory currently on hand. To view and receive pending inventory transfers, click the “Pending Inventory Transfers” link located on the Vaccine Inventory On-Hand screen. Below are links to perform actions on the selected item. Select “Add New Inventory” to add new

[Pending Inventory Transfers](#)

On-Hand Inventory

Inventory Location	Status
(ALL) ▼	(ALL) ▼
Vaccine	Funding Source
(ALL) ▼	(ALL) ▼

Edit

Adjustment

Transfer

Inquiry

	Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand	
IZ R US CRA INVENTORY								
<input type="radio"/>	DTaP-IPV (Kinrix)	SKB		123456X	08/04/2011	Adult 317	0	?
<input type="radio"/>	DTaP	SKB		1234	08/31/2011	Private	79	?
<input type="radio"/>	DTaP (Daptacel)	PMC		C3449BA	12/02/2011	Private	60	?



INVENTORY TRANSFER

Inventory Transfers must be received before they are considered part of the “to” or destination inventory location. Inventory Transfers can be cancelled by the “from” or source location.

Vaccine Inventory

This is a list of pending inventory transfers. Click "Received" to mark the selected inventory transfer as received. Click "Update" to edit the transfer or "Delete" to remove it.

Pending Incoming Inventory Transfers

Vaccine	Dosage	NDC	Lot	Funding Source	Mfg	Source Location		
Receiving Location: IZ R US FAMILY PRACTICE								
DTaP	20		1234	Private	SKB	IZ R US CRA INVENTORY	?	Received

Pending Outgoing Inventory Transfers

Vaccine	Dosage	NDC	Lot	Funding Source	Mfg	Receiving Location		
Source Location: IZ R US CRA INVENTORY								
DTaP	20		1234	Private	SKB	IZ R US FAMILY PRACTICE	?	Delete
Source Location: IZ R US MAIN INVENTORY								
Hib (PedvaxHIB)	25	00006-4797-00	NDC TEST 2	Other Public	MSD	CDPHE IMM PROGRAM	?	Delete

Reports

- Pending Incoming Transfers
- Pending Outgoing Transfers

Generate reports of incoming and/or outgoing transfers.

View/delete pending outgoing inventory transfers.



INVENTORY INQUIRY

Inventory Inquiries are used to generate a listing of inventory transactions that meet the specified criteria. Enter your criteria and click the “Run Report” button.

Inventory Transaction Inquiry

Enter the selection criteria and click “Run Report”

Report Selection Criteria

Provider
IZ R US PROVIDER TYPE 3

Inventory Location
IZ R US PROVIDER TYPE 3 > IZRUS CRA IN - IZ R US CRA INVENTORY

Vaccine
DTAP

Funding Source
PRIVATE

Manufacturer
GLAXOSMITHKLINE (FORMERLY SMITHKLINE BEECHAM)

Lot Number
1234

Batch Name

Expiration Date Range
From: [] Through: []

Transaction Date Range
From: [] Through: []

Output Type: PDF HTML Extract File - Delimiter: []

Run Report **Cancel**

Inventory Inquiry report output types include: PDF, HTML or Extract File, (e.g., Excel).



INVENTORY INQUIRY



Colorado Immunization Information System Inventory Transaction Inquiry

February 15, 2011

Provider = IZ R US PROVIDER TYPE 3, Inventory Location = IZ R US PROVIDER TYPE 3 > IZRUS CRA IN - IZ R US CRA INVENTORY, Vaccine = DTaP, Funding Source = Private, Manufacturer = GlaxoSmithKline (formerly SmithKline Beecham), Lot = 1234

Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg	NDC	Lot No	Fund Src	Exp Date	Type	Doses
1924	IZ R US CRA INVENTORY	IZ R US FAMILY PRACTICE	02/15/2011	DTaP	SKB		1234	Private	08/31/2011	TFR	(20)

Created By: IMA TEST on 02/15/2011 12:06:09

Updated By: IMA TEST on 02/15/2011 12:06:09

Comments:

Authorized By: DUGGER, KIM

1564			09/14/2010	DTaP	SKB		1234	Private	08/31/2011	ADJ	(1)
								Adjustment Reason:		Other	

Created By: LAURA MEYER on 09/14/2010 13:36:02

Updated By: LAURA MEYER on 09/14/2010 13:36:02

Comments: RECALLED

1548			09/01/2010	DTaP	SKB		1234	Private	08/31/2011	ADJ	100
								Adjustment Reason:		Add Initial Inventory	

Created By: LINDA STREMMING on 09/01/2010 09:08:53

Updated By: LINDA STREMMING on 09/01/2010 09:08:53

Comments:

Transaction Type Totals

INV ADJ	
Add Initial Inventory	100
Other	(1)
	<hr/>
	99
INV TRANSFER	<hr/>
	(20)

Results of Inventory Transaction Inquiry report based on selected criteria.

Patient Information for VAC transactions reflect the Patient's Name and ID at the date/time the vaccination was administered.



INVENTORY RECONCILIATION

Inventory Reconciliations are similar to balancing your checkbook. The goal is to reconcile the amount of inventory physically on-hand with the amount in the system.

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC Welcome IMA TEST, Log Out

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Vaccine Inventory Reconciliation

Click "View" to see the record. Add Reconciliation

Create a new reconciliation.

Search Criteria

Inventory Location: (ALL) | Inventory Location Status: (ALL)

Begin Date (from): | Begin Date (to): | End Date (from): | End Date (to): | Reconciliation Status: (ALL)

Sort by: Audit Date (descending) Inventory Location, Begin Date (descending)

Run Report

Search Results - 8 record(s)

Status	Description	Begin Date	End Date	Authorized By	Inv Summary	
IZ R US MAIN INVENTORY						
Closed	SAMPLE RECON	07/22/2010	08/02/2010	LINDA STREMMING		View
Open	TEST	02/16/2011	04/30/2011			View
IZ R US CRA INVENTORY						
Closed	TEST	01/01/2000	03/31/2011			View
IZ R US MOBILE INVENTORY 3						
Open	TEST RUN-KD	01/01/2011	02/28/2011	IMA TEST		View
IZ R US MAIN INVENTORY						
Open	NDC TEST	01/01/2011	02/15/2011	NICHOLE LAMBRECHT		View
Open	CATCH-UP	08/03/2010	12/31/2010			View
sed	SAMPLE RECON	07/01/2010	07/21/2010			View
sed	INITIAL	01/01/2000	06/30/2010	RAY SEGELKE		View

Click the "Reconciliation" link located within the Inventory Vaccines submenu.

Click the print icon to generate an Inventory Summary by Funding Source report.

Filter list (optional) of existing reconciliations by entering your search criteria and clicking the "Run Report" button (see next slide).

List of existing reconciliations. Click the "View" button to open existing reconciliation.



INVENTORY RECONCILIATION: FILTERED SEARCH RESULTS

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Welcome IMA TEST, [Log Out](#)



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Vaccine Inventory Reconciliation

Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record.

[Add Reconciliation](#)



Search Criteria

Inventory Location

(ALL)

Inventory Location Status

(ALL)

Begin Date (from)

07/01/2010

Begin Date (to)

08/15/2010

End Date (from)

08/01/2010

End Date (to)

09/15/2010

Reconciliation Status

(ALL)

Sort by

- Audit Date (descending) Inventory Location, Begin Date (descending)

[Run Report](#)

Search Results - 1 record(s)

Status	Description	Begin Date	End Date	Authorized By	Inv Summary		
IZ R US MAIN INVENTORY							
Closed	SAMPLE RECON	07/22/2010	08/02/2010	LINDA STREAMMING			View

You now see the filtered search results that contain only the reconciliation(s) meeting your search criteria.

Click the "View" button to view the details of the reconciliation.



ADD INVENTORY RECONCILIATION

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Welcome IMA TEST, Log Out



- Home
- + Patients
- Immunizations
- Education

Vaccine Inventory Reconciliation

Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record.

Add Reconciliation



Search Criteria

Inventory Location

(ALL)

Begin Date (from)

Begin Date (to)

End Date (from)

Inventory Location Status

(ALL)

Reconciliation Status

(ALL)

Sort by

Run Report

To add an inventory reconciliation, click the "Add Reconciliation" button located on the Vaccine Inventory Reconciliation screen.

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Open	TEST	02/16/2011	04/30/2011				View
IZ R US CRA INVENTORY							
Closed	TEST	01/01/2000	03/31/2011				View
IZ R US MOBILE INVENTORY 3							
Open	TEST RUN-KD	01/01/2011	02/28/2011	IMA TEST			View
IZ R US MAIN INVENTORY							
Open	NDC TEST	01/01/2011	02/15/2011	NICHOLE LAMBRECHT			View
Open	CATCH-UP	08/03/2010	12/31/2010				View
Closed	SAMPLE RECON	07/01/2010	07/21/2010				View
Closed	INITIAL	01/01/2000	06/30/2010	RAY SEGELKE			View



ADD INVENTORY RECONCILIATION

Step 1: Select your inventory location.

PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Vaccine Inventory Reconciliation

Click "Create"/"Update" to save the record or

Step 3: Enter an End Date. Note: Begin Date automatically set based on ending date of previous reconciliation.

Add

Inventory Location

IZ R US PROVIDER TYPE 3 > IZRUS INV - IZRUS MAIN INVENTORY

Description	Begin Date	End Date
TEST RECON JUNE	05/01/2011	06/01/2011

Status	Authorized By
OPEN	DUGGER, KIM (-)

Create Cancel

Log Out

Step 2: Enter a description of the reconciliation in the "Description" field.

Step 4: Select the Status. Note: As this is a new reconciliation, the status will default to "Open."

Step 5: Select the person who authorized this reconciliation. Note: Click the blue icon to auto-populate your user name.

Step 6: Click "Create" button to save your record.



VIEW/EDIT/CLOSE INVENTORY RECONCILIATION



- Home
- + Patients
- Immunizations
- Education
- Inventory
 - Vaccines
 - On-Hand
 - Reconciliation
 - Locations
 - Reports/Forms
 - + Settings

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Vaccine Inventory Reconciliation

Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record.

Search Criteria

Inventory Location: (ALL) Inventory Location Status: (ALL)

Begin Date (from): End Date (from): Reconciliation Status: (ALL)

Sort by: Audit Date (descending) Inventory Location, Begin Date (descending)

Search Results - 11 record(s)

Status	Description	Begin Date	End Date	Authorized By	Inv Summary		
IZ R US MAIN INVENTORY							
Open	TEST RECON JUNE	05/01/2011	06/01/2011	KIM DUGGER			<input type="button" value="View"/>
IZ R US MOBILE INVENTORY 3							
Open	TEST RECON KD	05/01/2011	06/01/2011	KIM DUGGER			<input type="button" value="View"/>
IZ R US FP INVENTORY							
Open							<input type="button" value="View"/>
IZ R US M...							
Closed							<input type="button" value="View"/>
Open							<input type="button" value="View"/>
IZ R US C...							

You will now see your saved reconciliation on the Vaccine Inventory Reconciliation screen. Click "View" to view details of your reconciliation.



CLOSE INVENTORY RECONCILIATION

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC

Welcome IMA TEST, Log Out



- Home
- Patients
- Immunizations
- Education
- Inventory
- Vaccines

Vaccine Inventory Reconciliation

Click "Create"/"Update" to save the record or "Cancel" to return to the previous page.

Edit

Inventory Location

IZ R US MAIN INVENTORY

Print

Description

SAMPLE RECON

Begin Date

07/22/2010

End Date

08/02/2010

Status

CLOSED

Authorized By

LINDA STREAMMING



Delete

Update

Cancel

Print a "worksheet" view of the reconciliation (to complete physical count).

Inventory By Doses

Vaccine (Brand) Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory		
H1N1											
H1N1 Flu 09-P Free SKB AC31BAC33 04/11/2011	40	0	0	0	0	0	0	0	40		?
Private											
DTaP PMC C3322BA 06/15/2011	60	0	-1	0	0	0	-1	0	58		?
DTaP (Infanrix (0.5 mL x 1 vial)) SKB 58160-0810-01 12345657 07/15/2011	0	25	0	0	0	-5	0	0	20		?
DTaP (Daptacel) PMC C3449BA 12/02/2011	80	0	0	0	0	0	0	0	80		?
Hep A, adult (Havrix (1 mL x 1 vial)) SKB 58160-0826-01 AHAVB408BA 09/16/2012	60	0	-1	0	0	0	0	0	59		?
Hep A, ped/adol (Vaqta (0.5 mL x 1 syr)) MSD 00006-4095-01 0415702 13/2013	60	0	0	0	0	0	0	0	60		?

You cannot close a reconciliation until everything balances.

Enter the current, actual inventory on-hand.



INVENTORY RECONCILIATION

- **Reconciliation**: Reconcile the amount of inventory physically on-hand with the amount in the system.
- **Vaccine** - Lists the name, manufacturer, lot number, NDC Code, and expiration date of each line item.
- **Beginning Inventory** - Always the same value as the ending inventory count on the previous reconciliation. This will be the same after the 1st reconciliation is created. (System generated)
- **Inventory Received** - Count of all doses added to the inventory location between the beginning and end dates. (System generated)
- **Inventory Administered** - Count of all doses administered between the beginning and end dates. (System generated)



INVENTORY RECONCILIATION

- **Inventory Transferred** - Count of all doses transferred in or out of the inventory location between the beginning and end dates. (System Generated)
- **Inventory Recalled** - Count of all doses included in inventory adjustment transactions for doses recalled between the reconciliation period. (System Generated)
- **Inventory Expired or Wasted** - Count of all doses included in inventory adjustment transactions for expired or wasted doses that are entered between the beginning and end dates of the reconciliation period. (System Generated)
- **Inventory Unaccounted** - Count of doses entered as “Reconciliation Inventory Adjustment” transactions during the reconciliation period.
 - Recalculated every time the Update button is pressed.



INVENTORY RECONCILIATION

- ◎ **Inventory Delta (+ or -)** – Delta (i.e., change or difference) between the number of vaccine doses on-hand and the number of doses documented in the system in one of the above categories.
 - Recalculated every time the update button is pressed.
- ◎ **Ending Inventory** – Enter the actual number of doses on hand for each inventory line item in this field.
- ◎ **Print Icon** – Displays an inventory transaction report for the indicated line item over the same time period of the inventory reconciliation.



INVENTORY REPORTS

- All Inventory Reports are located in the Reports/Forms Module under the Inventory Management – Vaccines Report Group.
- You can access some reports directly within the Inventory Module (e.g. Inventory Transaction Inquiry and Inventory Summary by Funding Source).



INVENTORY REPORTS

PROVIDER: IZ R US PROVIDER TYPE 3, CLINIC: IZ R US CLINIC Welcome IMA TEST, [Log Out](#)



- Home
- Patients
- Immunizations
- Education
- Inventory
 - Vaccines
 - On-Hand
 - Reconciliation
 - Locations
 - Reports/Forms**
 - Settings

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Birth vaccinations

- Patient Detail with Services
- Patient List By Insurance Source
- Patient List/Counts By Clinic Report
- Patient Roster
- Patients First Seen
- Patients with Vaccine Refusals

Category Patient Count Report

- VFC Eligible Patients over age 18
- VFC Vaccination History

Data Quality - User

- Patients with Possible Duplicate Vaccinations
- Possible Patient Duplicates
- Shots Before Birth
- User Vaccination Details
- Vaccines Added but not Administered

Inventory Management - Vaccine

- Inventory Adjustment Inquiry
- Inventory On-Hand
- Inventory Pending Transfers
- Inventory Summary By Funding Source
- Inventory Transaction Inquiry
- Inventory Transfer Inquiry
- Monthly Immunization Report (VFC and Other Public-Funded)
- Possible Duplicate Inventory Report

CoCASA

- Export Data for CoCASA

LPHA

- Export Data for CoCASA (County/Zip Code Level)

To view Inventory Reports, click the Reports/Forms link located in the menu.

Inventory Reports are located under the Inventory Management – Vaccine Report Group.



MONTHLY IMMUNIZATION REPORT: PDF OUTPUT EXAMPLE

http://165.127.126.140/webbiznet_co/WebCode/reports/ImmunizationMonthly/View.aspx?InvLocRecID=22 - Windows Internet Explorer pro
http://165.127.126.140/webbiznet_co/WebCode/reports/ImmunizationMonthly/View.aspx?InvLocRecID=227&title=Monthly Immunization Report (VFC and State)

Colorado Immunization Information System
Monthly Immunization Report (VFC and State)

Wednesday, March 2, 2011

Period	Beg Date	End Date	Authorized By	Practice/Facility:
SAMPLE RECON	07/22/2010	08/02/2010	LINDA STREAMMING	IZ R US PROVIDER TYPE 3 - IZ R US MAIN INVENTORY VFC PIN: 1123 4300 CHERRY CREEK DRIVE SOUTH GLENDALE, CO 80246 County: DENVER Phone: 303-692-2650 Fax: Contact: Email:

VFC Vaccine Summary									
Vaccine	Beginning Inventory	Vaccine Received	Vaccine Administered	Vaccine Transferred In/Out	Vaccine Recalled	Vaccine Expired or Wasted	Unaccounted For	Long/Short	Ending Inventory
DTaP	40	0	0	(10)	0	0	0	0	30
DTaP-HepB-IPV (Pedia	59	0	0	0	0	0	0	0	59
HepA, ped/adol	60	100	(1)	0	0	0	0	0	159
HepB, ped/adol	0	60	(2)	0	0	0	0	0	58
Hib	30	0	0	0	0	0	0	0	30
MMR	70	0	(1)	0	0	0	0	0	69
PCV-13 (prevnar)	10	0	0	0	0	0	0	0	10
Polio-IPV	100	0	(4)	0	0	0	0	0	96
Tdap	70	0	(2)	0	0	0	0	0	68
Totals:	439	160	(10)	(10)	0	0	0	0	579

FOOTER LINE 1
FOOTER LINE 2
Page 1 of 3



INVENTORY RECONCILIATION

Tips for more successful reconciliations:

- ⦿ Physical counts **MUST** be completed at the **END** of the day on the End date.
- ⦿ Reconciliations should **NOT** be closed until **AFTER** all immunizations for the period have been entered into CIIS.
- ⦿ When entering adjustments or other transactions to correct discrepancies, the date on the entry **MUST** be within the Beginning and End dates of the system.
- ⦿ Complete and accurate data entry is **KEY!!!**
- ⦿ Good data entry makes reconciliation easier and more efficient .
- ⦿ Poor data entry makes reconciliation difficult and time consuming.



EXERCISE 4: INVENTORY MODULE – ADD INVENTORY

- Add an inventory location.
- Associate your clinic to the inventory location you just added.
- Add at least five new inventory items, e.g. DTaP, MMR, Hep B, etc....
 - Note: When adding inventory, add at least 50 doses to be able to adjust, transfer, etc...
- Administer at least five of the newly added vaccines.



EXERCISE 5: INVENTORY MODULE – ON-HAND INVENTORY

- Once you have completed Exercise 4, practice using the following features located on the On-Hand Inventory screen:
 - Edit at least one inventory line item.
 - Adjust at least one inventory line item to account for vaccine that was wasted, recalled, etc...
 - Transfer doses between inventory locations.
 - Run an Inventory Transaction Inquiry report.



EXERCISE 6: INVENTORY MODULE - RECONCILIATION

- Add a reconciliation that includes the vaccine you added, transferred, adjusted, etc... in previous exercises.
- View the reconciliation you just created.
- View the Monthly Immunization Report to become familiar with the criteria and output.



Accessing the Training Website

- URL/Website address for the CIIS new registry **training** website:
 - http://ciitest.state.co.us/webiznet_co/Login.aspx
- Please note: The above website is a simulated, training environment. Do not enter real data as it will not transfer to the live application on go-live.
- Generic User Name and Password for the training website:
 - User Name: **ciisuser**
 - Password: **ciisuser1!**
 - Remember: The user name is not case sensitive though the system will auto-convert it to all caps. The password is case sensitive.
- **Have fun learning and playing in the new system!**



QUESTIONS?

- ◎ Please contact your CIIS Coordinator.
- ◎ CIIS User Support:
 - 1-888-611-9918
- ◎ CIIS General Email:
 - cdphe.dcdciis@state.co.us
- ◎ CIIS Website: www.ColoradoIIS.com