ALERT IIS: How to Manage your Inventory

The ALERT IIS inventory module allows users to manage their state-supplied and privately purchased vaccine inventory. Doses of vaccine are decremented from a clinic's inventory when immunizations are given and reported to ALERT. Users can set alerts for when vaccines are low on quantity or nearing expiration, and document and track reasons for modifying their quantity on hand.

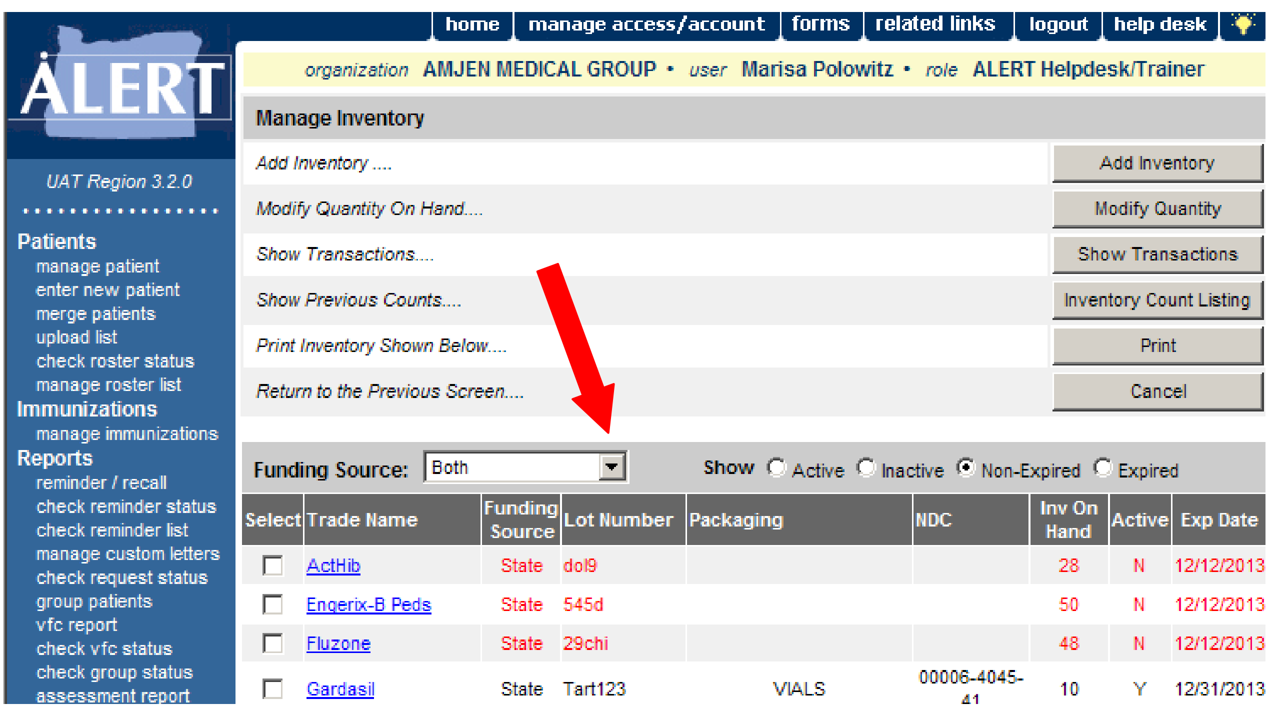
All standard and super users have access to the Manage Inventory menu item. All clinics that receive state-supplied vaccine are required to use the ALERT IIS Inventory Module, which includes submitting an accurate inventory of state-supplied vaccine within 14 days of ordering state-supplied vaccine.

This Inventory Module guide addresses the following topics:

- **Viewing inventory**
- **Knowing when to reconcile your clinic's inventory**
- **Submitting reconciled inventory counts prior to ordering**
- **Viewing historical inventory counts**
- **When ALERT inventory and inventory on hand don't match: understanding inventory discrepancies**

To view inventory in ALERT IIS:

1. Log into ALERT IIS (www.alertiis.org).
2. Click **Manage Inventory** under the Inventory section of the blue menu panel.
3. Click the **Show Inventory** button.
   - This screen displays all state-supplied and privately purchased non-expired vaccine. Users can opt to view only one vaccine funding source, or can opt to view active or inactive vaccine lots, by making the appropriate selections in the grey table header.



Knowing when to Reconcile your inventory on hand with your inventory in ALERT IIS.

The timing of when you balance, or reconcile, your inventory is critical for accuracy. Know how and when immunizations are sent to ALERT in order to reconcile your state-supplied vaccine inventory. Super users can view the most recent date that data were submitted to ALERT on the Edit Org screen.

For clinics that enter immunizations directly into ALERT IIS: Pick one day each month that inventory will be reconciled. Do a physical count of vaccine on hand at the end of this day. Then, when all immunizations administered through this day have been entered (but before any immunizations given after this day are entered) reconcile your physical and ALERT inventories.

For clinics that send data to ALERT electronically on a routine schedule: It's important to know when data files are sent electronically. Many organizations send data weekly or once every two weeks. Once you know when data are sent for your clinic, do a physical count of vaccine on hand and reconcile your inventory as close as possible to just after data are sent electronically.

For clinics that send data to ALERT electronically in real time: Because data are sent to ALERT at the time that immunizations are documented in the EHR, inventory can be reconciled at any time during the month.

For some clinics that send data electronically to ALERT, administered immunizations are not deducted from the clinic's inventory. These clinics still must manage their inventory in ALERT (i.e., enter vaccine shipments, and account for wasted, spoiled, or transferred doses), and will use the Modify Quantity function to adjust their number of doses on hand prior to submitting a reconciled inventory count. If your clinic sends data electronically and wants your inventory to automatically deduct doses administered, refer to your Health Educator.

All clinics must submit a reconciled inventory count prior to placing an order for state-supplied vaccine. Public clinics will continue to submit Monthly Vaccine Reports (MVRs). If you have questions about MVRs, contact your Health Educator.

To submit a reconciled inventory count prior to ordering:

1. On the **Show Inventory** screen, in the Funding Source dropdown list, select **State-Supplied**. Set the radio buttons to the right of Funding Source to **Non-Expired**.
2. Click the **Print** button, and print the PDF report that displays. This report displays all non-expired, state-supplied vaccine.

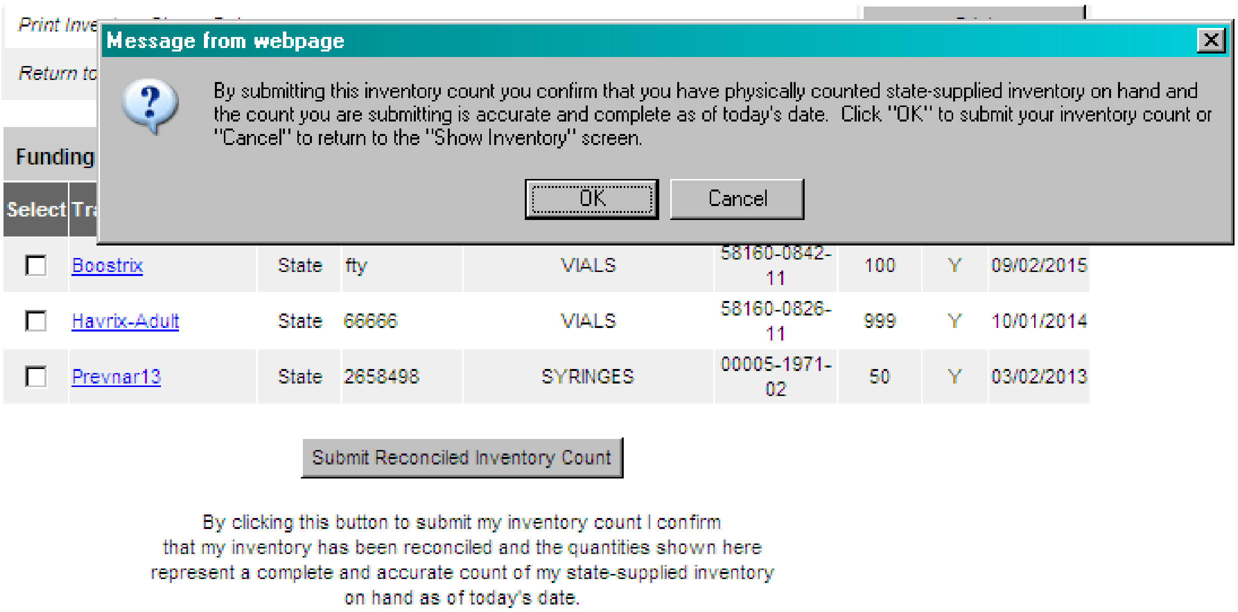
Current ALERT IIS Inventory Count Count
AMJEN MEDICAL GROUP, P99999, AL9999
02/01/2013, State-Supplied and Private, Non-Expired

Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date	In My Fridge/Freezer

3. Take this report to your vaccine refrigerators and freezers, and count the number of doses of each lot number. Write the number of actual doses on hand in the **In My Fridge/Freezer** column.
4. If the number of doses on hand for any lot numbers does not match the number of doses in your ALERT inventory, check the box next to those lots click **Modify Quantity** to correct the number of doses in ALERT.

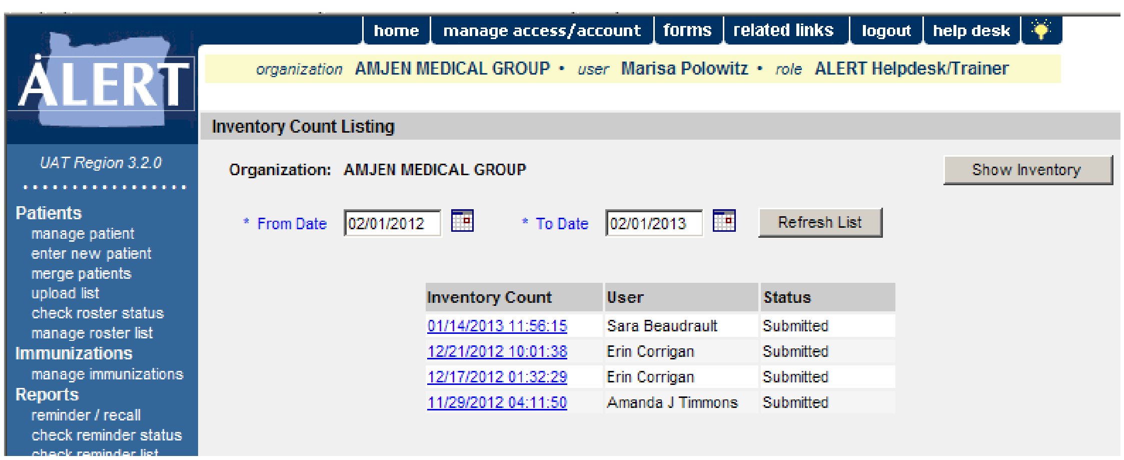
Refer to the last section for troubleshooting tips for when your actual inventory on hand and your ALERT inventory don't match.

5. Once your actual doses on hand and your ALERT inventory match, click the **Submit Reconciled Inventory Count** button.
6. You will receive a pop-up to confirm that your doses on hand match your ALERT IIS inventory. Click **OK**, or click **Cancel** if you have inventory corrections to make.



To view a list of Inventory Counts submitted by your clinic:

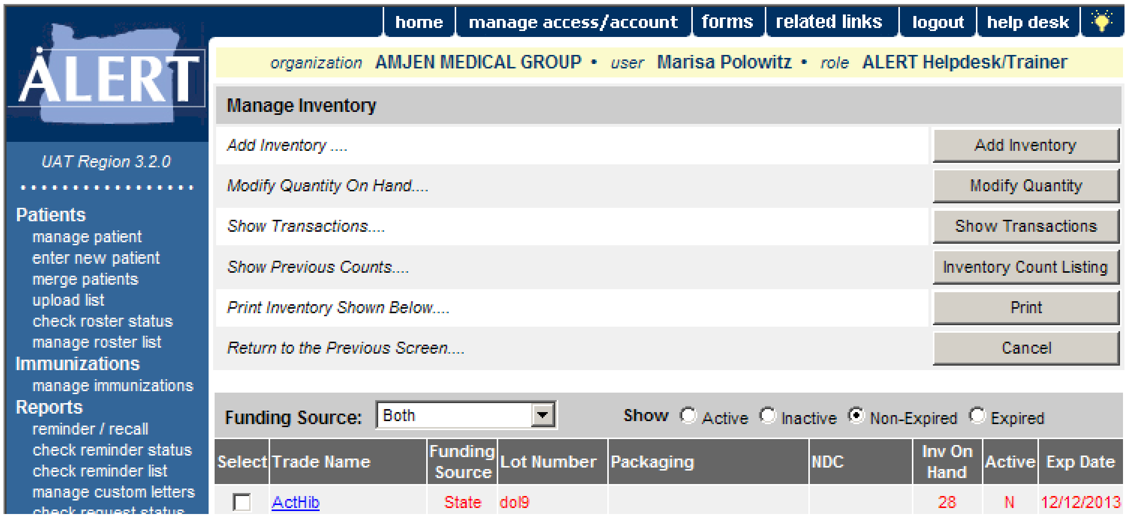
1. On the **Show Inventory** screen, click the **Inventory Count Listing** button.
2. You will see a list of inventory counts of non-expired, state-supplied vaccines submitted within the past year. You can use the **From date** and **To date** to view reports submitted in a different time period.



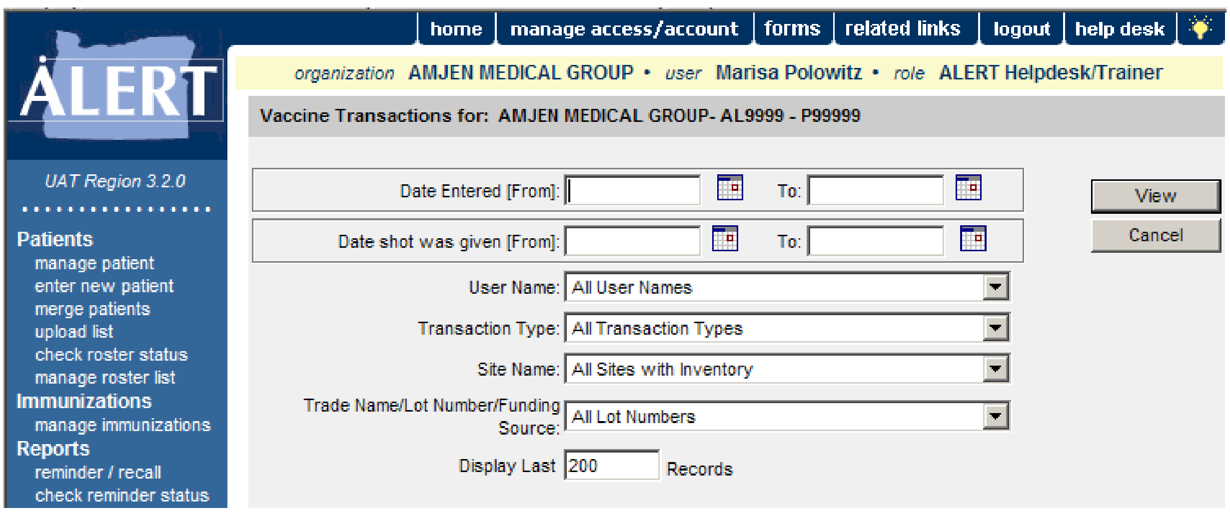
3. Click on the blue hyperlinks in the date field to view reports.
4. Click the **Show Inventory** button to return to the previous screen.

When your ALERT Inventory and your Doses on Hand Don't Match – Troubleshooting Tips

1. On the **Show Inventory** screen, click the **Show Transactions** button.



2. Enter a date range in the **Date Entered** row. Use the date of your last reconciled inventory count as the **From** date field, and today's date in the **To** date field.
3. Set up the criteria you'd like to view on the Show Transactions report. You can limit the report to a certain lot number or to certain transaction types. Do not put any dates in the Date shot was given fields.



4. Click the **View** button to run the report.
5. Use this report to try to pinpoint the cause of the error. It shows all inventory transactions during the report timeframe. If an immunization you gave does not appear, it was not deducted from inventory. Some common errors include:
   - All administered doses have not yet been entered into ALERT
   - An incorrect lot number was entered
   - Administered doses reported through data exchange were rejected due to errors in the data exchange message
   - The "From ALERT IIS Inventory" button was not checked on the Enter New Immunizations screen in the ALERT User Interface screen.
   - Doses that were transferred in or out were not documented using the Manage Transfer screens.
6. Once you've discovered the cause of the error, use the **Modify Quantity** button to correct the number of doses in your ALERT IIS inventory.