

## ALERT IIS: How to Transfer Vaccine

ALERT IIS allows you to transfer vaccines between sites within your organization, or between two unrelated organizations.

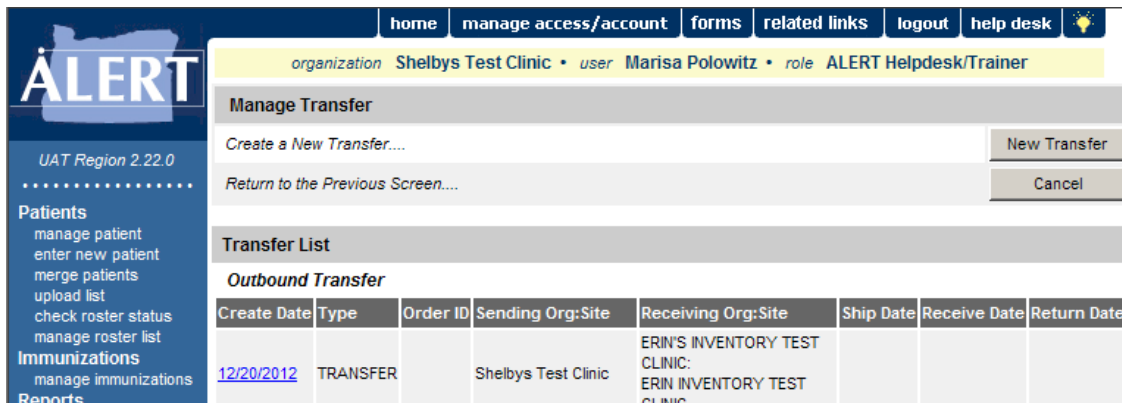
**\*\*Remember: You must follow proper packing/shipping procedures when transferring vaccine\*\***

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### Creating a New Transfer

1. Click **Manage Transfers** under the Inventory heading in the menu panel.
2. Click **New Transfer**.
3. Verify that the vaccine is in your organization's inventory in ALERT IIS.



Create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
12/20/2012	TRANSFER		Shelbys Test Clinic	ERIN'S INVENTORY TEST CLINIC: ERIN INVENTORY TEST CLINIC			

4. The **Sending Site** will always be the organization you are logged in under.  
(Ignore **Internal Receiving Site**)

organization Shelby's Test Clinic • user Marisa Polowitz • role ALERT Helpdesk/Trainer

**New Transfer**

Sending Site: SHELBY'S TEST CLINIC [Save]

Internal Receiving Site: [ ] or [Cancel]

Receiving Organization: [ ]

Note: Only those sites or organizations which have inventory set up are displayed.

**Add from Inventory** Show  Active and Non-Expired  Inactive or Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
[ ]	ACAM2000	Smallpox	75432	10	Y	S	12/21/2013
[ ]	ActHib	Hib	dol9	20	Y	S	12/12/2013
[ ]	Adacel	Td/Tdap - DTP/aP	C3491AA	10	Y	S	07/29/2013

5. Select the **Receiving Organization** where the transfer is being sent.
6. Choose between **Active and Non-Expired** and **Inactive or Expired** to view the correct lots of vaccine by selecting the radio button for your choice.
7. Enter the number of doses for each of the trade names being transferred in the **Transfer Quantity** field.
8. Click **Save**.

**NOTE:** The site you are transferring to will only allow transfers if the organization information includes a valid vaccine delivery address and a person listed as the vaccine contact. It is the role of the Super User at your organization to maintain this information. Please call the ALERT IIS Help Desk if you are having problems or get an error message about the recipient.

9. The message “Saved Successfully” will appear. However, your transfer will not be finished until you have completed the following steps.

organization Shelby's Test Clinic • user Marisa Polowitz • role ALERT Helpdesk/Trainer

**Edit Transfer: Create Date 01/31/2013** **\*\*Saved Successfully\*\***

Sending Site: SHELBY'S TEST CLINIC [Save]

Internal Receiving Site: [ ] or [Packing List] [Label]

Receiving Organization: AMJEN MEDICAL GROUP [Finish Trans] [Ship]

Note: Only those sites or organizations which have inventory set up are displayed.

**Transfer Item**

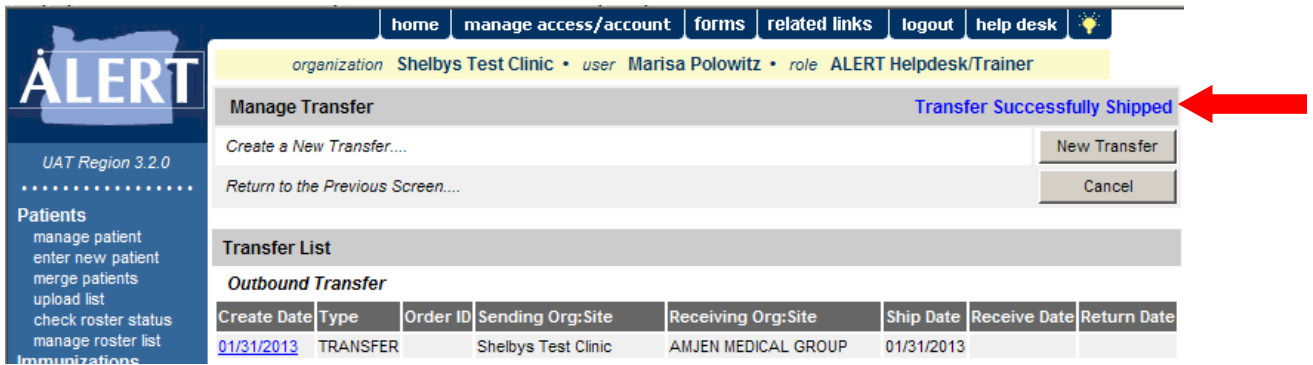
Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
<input type="checkbox"/>	10	Adacel	Td/Tdap - DTP/aP	C123AA	95	Y	S	11/30/2014

**Add from Inventory** Show  Active and Non-Expired  Inactive or Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
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10. Click on **Packing List** or **Label**. The packing list is very useful to include in the box with the vaccine transfer. **\*\*You must have Pop-Ups enabled in Internet Explorer to view the packing list.\*\***
11. Click on **Ship** to go to the final screen where you can actually ship the transfer. The date field defaults to today's date, and can be changed to up to one week before or after the current date.

12. To complete the transfer, you must click **Ship** again, so that the message “Transfer Successfully Shipped” appears.



- Once you click Ship, the vaccine will be removed from your inventory.
- There will be a ship date in the “Ship Date” column. It will remain there until the receiving site accepts the transfer.

## Accepting Orders as Transfers, Accepting and Rejecting Transfers

Orders placed with the State will show as incoming transfers in ALERT IIS, with an accompanying Order ID. Transfers made through ALERT IIS and received by the provider organization must be accepted, rejected, or partially accepted so ALERT IIS can properly track and post inventory.

### To Accept, Reject or Partially Accept a Transfer:

1. On the **Manage Transfers** screen, click on the **Create Date** hyperlink of the transfer you wish to accept or reject.
2. This will take you to the **Receive Transfer** screen. On this page, you have the option to **Accept Transfer**, **Reject Transfer**, **Partially Accept** or **Cancel** (which will take you back to the **Manage Transfers** screen).



- Click **Accept Transfer** to accept the entire transfer into your ALERT IIS Inventory. The message “Are you sure you want to add all transfer items into inventory?” will appear. Click **OK** to continue.

organization Shelby's Test Clinic • user Marisa Polowitz • role ALERT Helpdesk/Trainer

**Receive Transfer**

Accept Entire Transfer...

Reject Entire Transfer...

Partially Accept Transfer...

Return to the Previous Screen...

**Transfer Between Organizations Created on 12/28/2012**

Sending Entity	Receiving Entity
<b>Organization</b> AMJEN MEDICAL GROUP <b>Site</b> AMJEN MEDICAL GROUP <b>Address</b> 1240 SE 20TH WAY, SUITE 200  TROUTDALE, OR 97060 <b>Contact</b> JANE Williams <b>Phone #</b> (503) 252-1499 x668 <b>Ship Date</b> 12/28/2012	

**Message from webpage**

Are you sure you want to add all transfer items into inventory ?

**Transfer Vaccine Item**

Transfer Quantity	Vaccine Group	Trade Name	Lot Number	Funding Source	Inventory Action	Order Line #
20	Hib	ActHib	do19	State	Create New Lot	

**NOTE:** If you have an issue with your order, please contact the [OIP Help Desk](#) or the sending organization before Rejecting or Partially Accepting a transfer.

- Click **Reject Transfer** to reject all of the transfer items. Enter **Rejection Reason** in the drop-down list, and then click **Reject**.

**NOTE:** You must return ship any rejected transfer items.

organization Shelby's Test Clinic • user Marisa Polowitz • role ALERT Helpdesk/Trainer

**Reject Entire Transfer**

Enter Rejection Reason

**Transfer Between Organizations Created on 12/28/2012**

Sending Entity	Receiving Entity
<b>Organization</b> AMJEN MEDICAL GROUP <b>Site</b> AMJEN MEDICAL GROUP <b>Address</b> 1240 SE 20TH WAY, SUITE 200  TROUTDALE, OR 97060 <b>Contact</b> JANE Williams <b>Phone #</b> (503) 252-1499 x668 <b>Ship Date</b> 12/28/2012	<b>Organization</b> Shelby's Test Clinic <b>Site</b> SHELBY'S TEST CLINIC <b>Address</b> 456 W FOURTH  KLAMATH FALLS, OR 97000 <b>Contact</b> SUPER USER <b>Phone #</b> (541) 123-4567

**Transfer Vaccine Item**

Transfer Quantity	Trade Name	Vaccine Group	Lot Number
20	ActHib	Hib	do19

- Click **Partially Accept** to accept some of the transfer items into your ALERT IIS Inventory. Enter the number of doses accepted in the **Amount Accepted** text box. Then select the **Rejection Reason** from the drop-down list. Click **Save** to finish.

- For a detailed list of explanations for Rejection Reasons, please see the User Manual.  
**NOTE:** You must *PHYSICALLY RETURN SHIP* any rejected transfer items.

The screenshot shows the ALERT web application interface. At the top, there are navigation tabs: home, manage access/account, forms, related links, logout, and help desk. Below these, the user's session information is displayed: organization Shelby Test Clinic, user Marisa Polowitz, and role ALERT Helpdesk/Trainer.

The main content area is titled "Partially Accept Transfer". It contains a "Partially Accept Transfer..." form with a "Save" button and a "Return to the Previous Screen..." button with a "Cancel" button. A red arrow points to the "Save" button.

Below this is a section titled "Transfer Between Organizations Created on 12/28/2012". It displays details for the sending and receiving entities:

Sending Entity		Receiving Entity	
<b>Organization</b>	AMJEN MEDICAL GROUP	<b>Organization</b>	Shelbys Test Clinic
<b>Site</b>	AMJEN MEDICAL GROUP	<b>Site</b>	SHELBY'S TEST CLINIC
<b>Address</b>	1240 SE 20TH WAY, SUITE 200 TROUTDALE, OR 97060	<b>Address</b>	456 W FOURTH KLAMATH FALLS, OR 97000
<b>Contact</b>	JANE Williams	<b>Contact</b>	SUPER USER
<b>Phone #</b>	(503) 252-1499 x668	<b>Phone #</b>	(541) 123-4567
<b>Ship Date</b>	12/28/2012		

Below the transfer details is a section titled "Transfer Vaccine Item". It contains a table with columns: Vaccine Group, Trade Name, Lot #, Inventory Action, Transfer Qty, Amount Accepted, and Rejection Reason. A red arrow points to the "Rejection Reason" dropdown menu.

Vaccine Group	Trade Name	Lot #	Inventory Action	Transfer Qty	Amount Accepted	Rejection Reason
Hib	ActHib	do19	Create New Lot	20	20	