

# ALERT IIS Inventory Deduction Handout

This is a companion guide to the ALERT IIS Inventory Deduction Course.

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## How to run the Ad Hoc Report

The Ad Hoc List Report creates a list of selected patients. The list can include various details about patient's immunizations, which can help find problems with inventory deduction.

Step 1. Click "ad hoc list report"

### Reports

- reminder / recall
- check reminder status
- check reminder list
- manage custom letters
- the iqip product
- vaccine eligibility
- check vaccine elig status
- group patients
- check group status
- assessment report
- check assessment
- benchmark report
- check benchmark
- ad hoc list report**
- ad hoc count report
- ad hoc report status
- data exchange report
- check dx report status



Step 2. Answer the question "What items would you like to display on the report?"

Select **all items (8)** listed under "Most Common Items".

**\*TIP\* Use "Shift+Click" to select multiple consecutive items**

What items would you like to display on the report?

**Most Common Items**  
Birth Date  
Historical Immunization  
Patient First Name  
Patient Last Name  
Vaccination Date  
Vaccine  
Vaccine Eligibility  
Vaccine Lot

Add >

< Remove

< Remove All

Select "**Borrowed Inventory**", "**From Inventory**", "**Immunization Submitted Date**", and "**Inventory Funding Source**" under Immunization Items.

**\*TIP\* Use "Ctrl+Click" to add to previously selected items**

Click "Add" to move the selected items across

What items would you like to display on the report?

**Immunization Items**  
Borrowed Inventory  
CVX Code  
Dose Count  
From Inventory  
Immunization Submitted Date  
Inventory Funding Source  
NDC  
Owning Organization

Add >

< Remove

< Remove All

Step 3. Skip the question "How would you like the report to be sorted?"

How would you like the report to be sorted?

Item to sort on (not sorted) ▼

Order ☐ First-to-Last ☐ Last-to-First

A report takes longer to run if you want it to be sorted.

Step 4. Answer the question "How would you like to filter the data?"

This screenshot shows the 'How would you like to filter the data?' dialog box with five numbered annotations:

- 1**: Points to the 'Item to filter on' dropdown menu, which is set to 'Vaccination Date'.
- 2**: Points to the 'Comparison' dropdown menu, which is set to 'AFTER'.
- 3**: Points to the 'Value to compare to' text input field, which contains '12/01/2024'.
- 4**: Points to the 'Selected Filters' list, which contains 'Active Status EQUALS Yes' and 'Owned Immunization EQUALS Yes'.
- 5**: Points to the 'Add/Save Edit' button.

The dialog box also includes a 'Value to compare to' field with a calendar icon, an 'and' dropdown, and a list of filter types: Edit, Remove, And/Or, Group, and UnGroup.

This screenshot shows the 'How would you like to filter the data?' dialog box with two numbered annotations:

- 6**: Points to the 'Selected Filters' list, which now includes 'Active Status EQUALS Yes', 'Owned Immunization EQUALS Yes', and 'Vaccination Date AFTER 12/01/2024'.
- 7**: Points to the 'Generate' button at the bottom of the dialog box.

The dialog box also includes a 'Value to compare to' field with a calendar icon, an 'Add/Save Edit' button, and a list of filter types: Edit, Remove, And/Or, Group, and UnGroup.

Step 5. Export the Ad Hoc Report to review in Excel.

- You will need to click "Refresh" to manually update the "Status" column during "PROCESSING"

Ad Hoc Report Status					Refresh	Cancel
Report Type	Provider Organization	Started	Completed	Status	Row Count	
<a href="#">LIST</a>	ALERT CLINIC 4	12/17/2024 07:38 AM	12/17/2024 07:38 AM	DONE	1234	
LIST	ALERT CLINIC 4	12/24/2024 10:25 AM		PROCESSING	4321	

Ad Hoc Report Status					Refresh	Cancel
Report Type	Provider Organization	Started	Completed	Status	Row Count	
<a href="#">LIST</a>	ALERT CLINIC 4	12/17/2024 07:38 AM	12/17/2024 07:38 AM	DONE	1234	
<a href="#">LIST</a>	ALERT CLINIC 4	12/24/2024 10:25 AM	12/24/2024 10:25 AM	DONE	4321	

- Click on "Export as a XLSX".

**Ad Hoc Report Results**

What would you like to do with this report?

[Export as Text](#)[Export as a XLSX](#)

Report 24947

ALERT Immunization Information System  
Report generated on 12/24/2024  
Report generated by Jessie Trainer  
ALERT CLINIC 4 - AL4444 - 001201

Filter conditions used for this report:

Patients associated with Selected Organization(s)

Active Status EQUALS Yes

AND

Owned Immunization EQUALS Yes

AND

Vaccination Date AFTER 12/01/2024

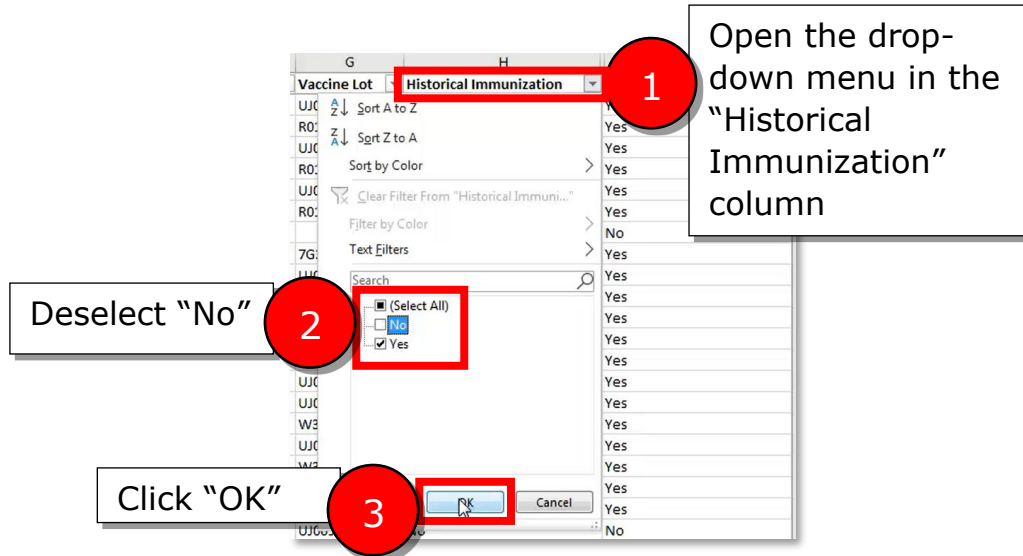
## Common Issues

There are several common issues caused by data entry mistakes.

### ***Problem 1: "Historical" is "Yes" when it should be "No"***

\*Doses sent from EHR as "Historical" will never deduct from ALERT IIS inventory

Step 1. Filter out "No" from the "Historical Immunization" column

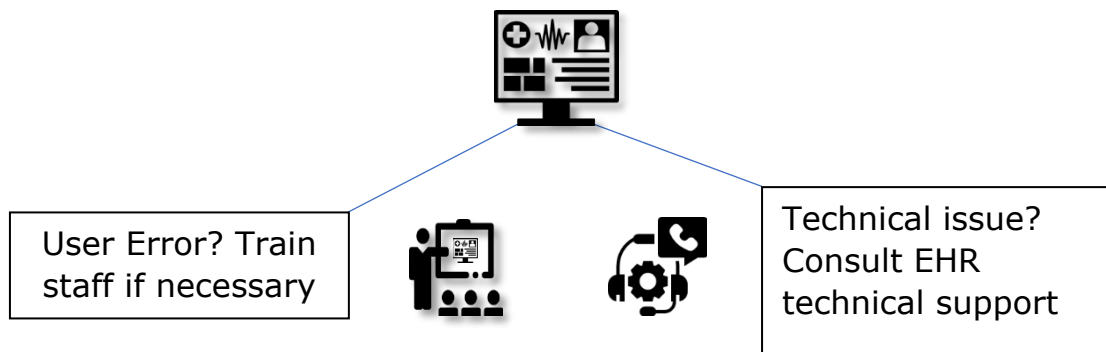


Step 2. Review "Historical Immunization" and "From Inventory Column"

\*A "Yes" in the "Historical Immunization" will always be matched by "No" in the "From Inventory" column.

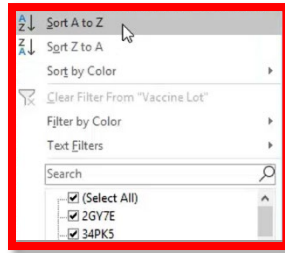
Patient Last Name	Vaccination Date	Vaccine	Vaccine Eligibility	Vaccine Lot	Historical Immunization	From Inventory
AVCIL	12/17/2018	Zoster Live			Yes	No
GEBRETEUSAE	12/20/2018	HepB-Peds			Yes	No
GEDAM	1/1/2019	HepB-Peds			Yes	No
FEI	1/7/2019	HepB-Peds			Yes	No

Step 3. Fix the issue - check that immunization was entered correctly in the EHR.



## Problem 2: The lot number is incorrect

Step 1. Sort by lot number



Step 2. Look for inconsistencies in lot numbers between the EHR and ALERT IIS.

Some common inconsistencies:

- "O" (the letter) instead of "0" (the number)
- Use the package lot number instead of the vial

L	UJ009BA	No
L	UJ009BA	No +



Step 3. Fix the issue

- Delete the entry in ALERT\*
- Look up patient records and correct lot in EHR
- Corrected lot numbers will be resent to ALERT



**\*NOTE:** This is the one of the only times we advise deleting anything in ALERT. Once deleted, the entry cannot be recovered in ALERT. Resend the corrected entry from your EHR immediately.

## Problem 3: Mismatch between eligibility codes and lot numbers

Step 1. Review eligibility codes along with lot numbers

"Sort A to Z"

2

1

Drop down the filter menu on the "**Vaccine Eligibility**" column

"Sort A to Z"

4

3

Drop down the filter menu on the "**Lot Number**" column

The image contains two side-by-side screenshots of a software interface. Both screenshots show a dropdown menu for sorting, with 'Sort A to Z' selected. The left screenshot has a red circle with the number '2' pointing to the dropdown arrow and a red circle with the number '1' pointing to a callout box that says 'Drop down the filter menu on the "Vaccine Eligibility" column'. The right screenshot has a red circle with the number '4' pointing to the dropdown arrow and a red circle with the number '3' pointing to a callout box that says 'Drop down the filter menu on the "Lot Number" column'. Both screenshots also show a search bar and a list of items with checkboxes.

Review the columns together to determine causes of errors

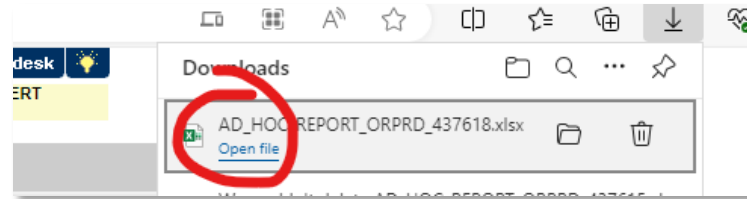
5

F	G	H	I	J
Vaccine	Vaccine Eligibility	Vaccine Lot	Borrowed Inventor	From Inventory
HepB-Peds			(null)	No
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes
HPV9	M	1957404	No	Yes

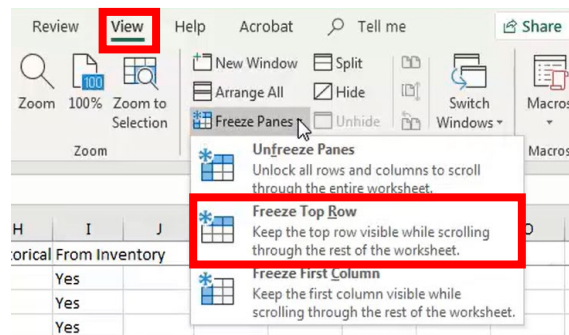
# Excel Tips

This section explores ways you can work with information in Excel to organize and look for issues.

i. **Open the downloaded file in Excel.** **\*NOTE\*** This process will vary based on your browser and operating system.

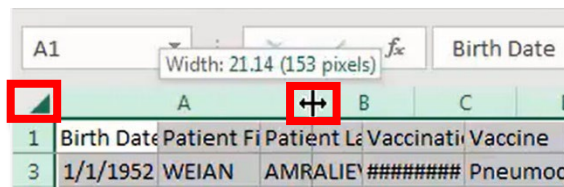


ii. **Freeze the top row in Excel.** You can keep the top row visible.

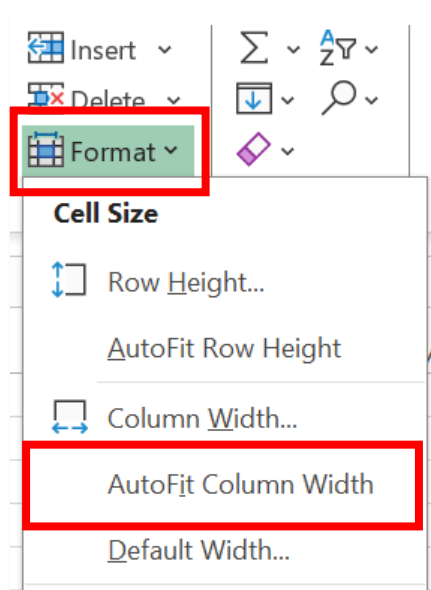


iii. **Increase the size of the columns.** We recommend two (2) methods.

- i. Click the top left arrow.
- ii. Drag column A.
- iii. All other columns will automatically match width.



- i. Drop down "Format" on the "Home" tab.
- ii. Select "AutoFit Column Width".





iv. **Sort information.** You can use "Custom Sort" to organize columns.

1 Select "Custom Sort" from the filter dropdown on the "Home"

2 Click "Add Level" to add another sort column

3 Select "Vaccine Lot" from the "Sort by" drop down menu.

4 Select "Vaccine Date" from the "Then by" drop down menu.

v. To filter columns, add the filter icons and use the drop-down menu in the column header.

1 Add filters to columns

2 Drop down the filter menu on the "Historical"

3 Deselect "Yes"

4 Click "OK"

**5** Drop down the filter menu on the "Borrowed Inventory" column

**6** Uncheck the items you don't want to see (e.g. **uncheck "No"** to focus on the borrow and/or nulls)

"(null)" - ALERT doesn't know what inventory the vaccine came from because the lot number given doesn't match anything in ALERT. The dose does not deduct from ALERT's inventory causing the count to be off.

"No" - ALERT does not see the vaccine as borrowed

"Yes" - ALERT sees the vaccine as borrowed

## Glossary

Items to filter on:	
Patient Factors	
Active Status	Whether the patient is active or inactive for the user's organization.
Age Range	Returns patients within a specified age range.
Birth Date	Birth Date of the Patient
City	City where patient currently resides.
Comment	Comments related to the patient.
County of Birth	Birth County of the patient.
County of Residence	County where the patient currently resides.
Gender	Gender of the Patient.
Has 2 or More Immunizations	Filters patients as specified that have two or more immunizations.
Language Preference	Patient's preferred language.
Patient ID	Patient's ID for the organization.
Primary Care Physician	Patient's Primary Care Physician.
School	Patient's school.
State	State where patient currently resides.
Zip	Zip Code where patient currently resides.

<b>Immunization Factors</b>	
Administering Clinician	Clinician who administered the immunization.
CVX Code	CVX Code of an administered vaccine.
Display Inadvertent Vaccine Group	Display allowable inadvertent vaccines for vaccine group. (i.e. Tdap vaccine for DTP/aP vaccine group)
Dose Count	Dose Number in the series
From Inventory	Whether the immunization was deducted from the organization's inventory.
Historical Immunization	Whether the immunization was a new/administered or historical immunization.
Owned Immunization	Whether the immunization was given by the user's organization.
Source of Last Update	Displays how the immunization was entered (user interface, electronic data exchange, etc).
Trade Name	The Trade Name of the immunization.
Vaccination Date	Date the vaccination was administered.
Vaccine	Vaccine that was administered
Vaccine Eligibility	Vaccine Eligibility Code for the vaccine administered
Vaccine Group	Vaccine Group of vaccination that was administered.
Vaccine Lot	The lot number of the vaccine that was administered.
Valid Immunization	Whether the immunization is valid.
<b>Comparison</b>	
BEFORE	Used for dates
EQUALS	Same in comparison
NOT EQUAL TO	Not the same in comparison
AFTER	Used for dates
BETWEEN	Used for dates or age ranges
IS	Exact equivalent
IS NOT	Not the equivalent
<b>Selected Filters</b>	
Edit	Edit an applied filter
Remove	Remove an applied filter
And/Or	Changes the operator between 'And' and 'Or' depending upon which is initially selected. Requires at least two filters to be applied.
Group	Groups filter selections together into one logical statement.
Ungroup	Removes grouped filtered sections