

ALERT IIS: How to Manually Add and Adjust Inventory

To begin using the Inventory Module in ALERT IIS, first users must manually enter their inventory on hand into the system.

From this point forward, your inventory on hand will automatically populate when state-supplied vaccine shipments are accepted. You will continue to manually add your privately purchased inventory.

This guide will address:

- Manually inputting vaccine inventory into ALERT IIS
- Manually adjusting vaccine inventory in ALERT IIS

Manually Inputting Inventory

1. Sign in to ALERT IIS (www.alertiis.org)
2. Click on **Manage Inventory** under the Inventory heading in the menu panel
3. Click on the **Show Inventory** button

The screenshot shows the ALERT IIS interface. The top navigation bar includes links for home, manage access/account, forms, related links, logout, and help desk. The user is logged in as Marisa Polowitz, a Super User for Wanda's Test Clinic. The main content area is titled 'Manage Inventory' and contains several buttons: 'Show Inventory for Sites...', 'Show Transactions for Sites...', 'Update inventory Alerts...', and 'Return to the Previous Screen...'. The 'Show Inventory' button is highlighted with a red arrow. Below these buttons, there are sections for 'Inventory Alerts' and 'Vaccine Order/Transfer Notification ...' with a table showing 2 orders shipped and 0 awaiting return shipment. At the bottom, there is a table for 'Active Inventory that is Going to Expire or Expired Lots with a Quantity ...' with one entry for Boostrix at Wandas Test Clinic.

| Type | Shipped | Awaiting Return Shipment | Rejected |
|-------------|--------------------------|--------------------------|----------|
| Order(s) | 2 | 0 | 0 |
| Transfer(s) | No Transfer Notification | | |

| Site Name | Trade Name | Lot Number | Funding Source | On Hand | Exp Date |
|--------------------|------------|---------------|----------------|---------|------------|
| WANDAS TEST CLINIC | Boostrix | lot_2.1.1.1.1 | State-Supplied | 150 | 01/01/2013 |

4. Click on the **Add Inventory** button

The screenshot shows the ALERT IIS interface. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Manage Inventory' and contains several buttons: 'Add Inventory ...', 'Modify Quantity On Hand...', 'Show Transactions...', 'Show Previous Counts...', 'Print Inventory Shown Below...', and 'Return to the Previous Screen...'. The 'Add Inventory' button is highlighted with a red arrow. Below these buttons, there is a section for 'Funding Source' with a dropdown menu set to 'Both' and radio buttons for 'Active', 'Inactive', 'Non-Expired', and 'Expired'. At the bottom, there is a table for 'Active Inventory' with one entry for ActHib.

| Select | Trade Name | Funding Source | Lot Number | Packaging | NDC | Inv On Hand | Active | Exp Date |
|--------------------------|------------|----------------|------------|-----------|---------------|-------------|--------|------------|
| <input type="checkbox"/> | ActHib | State | 32df3sd | vials | 49281-0545-05 | 560 | Y | 08/15/2014 |

5. The **Add Vaccine Inventory Information** screen will show.

The screenshot shows a web application interface for adding vaccine inventory information. The header includes navigation links like 'home', 'manage access/account', 'forms', 'related links', 'logout', and 'help desk'. The user is identified as 'Marisa Polowitz' with the role of 'Super User (Provider and LHD)'. The form is titled 'Add Vaccine Inventory Information' and is for the site 'WANDAS TEST CLINIC'. The form fields are: 'Trade Name' (Adacel), 'Manufacturer' (Sanofi Pasteur Inc.), 'NDC', 'Packaging', 'Lot Number', 'Dose', 'Expiration Date', 'Funding Source', 'Lot Active' (Yes), 'Quantity on Hand', and 'Cost Per Dose (\$)'. There are 'Save' and 'Cancel' buttons at the top right. The left sidebar shows navigation options like 'Patients', 'Immunizations', and 'Reports'.

6. Select **Trade Name** from the drop down list. **Manufacturer** will auto-complete.
7. **NDC** stands for National Drug Code. The NDC drop-down is auto-populated based on the Trade Name you selected. Choose the NDC that matches what is on your vaccine package. It is important that this field is correctly completed, as it is used by the state when ordering vaccine and is also the determining factor in the functionality of the inventory module.
8. **Packaging** refers to the type and quantity of doses in each package. (For example: 1x10 VIALS means a 10-pack of single-dose vials.) Once you have selected an NDC the system will auto-populate the packaging drop-down, just choose the packaging description to select it.
9. Enter the **Lot Number** of the vaccine.
10. Select the **Dose** from the dose drop-down list.
11. Enter the **Expiration Date**.
12. In **Funding Source** enter whether the vaccine is **State-Supplied** or **Privately Purchased**.
13. **Lot Active** defaults to Yes. New vaccine being added to inventory must be entered as Active. (This determines whether it is available to enter in patient records.)
14. Enter the number of vaccine doses received in **Quantity on Hand**.
15. When you are sure the information has all been entered correctly, click on the **Save** button.

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organization Wanda's Test Clinic • user Marisa Polowitz • role Super User (Provider and LHD)

Edit Vaccine Inventory Information

Site: WANDAS TEST CLINIC

Trade Name: DAPTACEL

Manufacturer: Sanofi Pasteur Inc.

NDC: 49281-0286-10

Packaging: VIALS

Lot Number: 1122334455

Dose: .5

Expiration Date: 01/01/2015

Funding Source: State-Supplied

Lot Active: Yes

Quantity on Hand: 50

Cost Per Dose (\$):

Modify Quantity On Hand

Action: Add

Amount:

Reason: Receipt of Inventory

inventory was updated successfully.

16. The message “Inventory was inserted successfully” will display at the bottom of the screen.

- To add the next lot of vaccine, click the **Add New** button.
- If you are finished adding vaccine, click **Cancel** to return to the Show Inventory screen.
- The **Modify Quantity on Hand** section shows at the bottom of the page after entering vaccine, in case the originally entered quantity needs to be adjusted. To reduce the number of vaccine entered, select subtract in the **Action** drop-down list; to increase, select Add, and enter the number of doses to alter in the **Amount** text box. Select the **Reason** from the drop-down list. When finished, click **Save**. The message “Inventory was updated successfully” will display at the bottom of the screen.

Adjusting Existing Inventory

1. Click on **Manage Inventory** under the Inventory heading in the menu panel.
2. Click on **Show Inventory**.

The screenshot shows the 'Manage Inventory' section of the ALERT system. The user is logged in as Marisa Polowitz, a Super User. The page has a navigation menu on the left with categories like Patients, Immunizations, Reports, and Inventory. The main content area includes buttons for 'Show Inventory for Sites...', 'Show Transactions for Sites...', 'Update inventory Alerts...', and 'Return to the Previous Screen...'. A red arrow points to the 'Show Inventory' button. Below these buttons is a table for 'Inventory Alerts' showing 'Vaccine Order/Transfer Notification ...' with columns for Type, Shipped, Awaiting Return Shipment, and Rejected. At the bottom, there is a table for 'Active Inventory that is Going to Expire or Expired Lots with a Quantity ...' with columns for Site Name, Trade Name, Lot Number, Funding Source, On Hand, and Exp Date. The first row shows 'WANDAS TEST CLINIC' for 'Boostrix' with lot number 'lot_2.1.1.1.1' and 150 units on hand, expiring on 01/01/2013.

3. Select the vaccine lots you wish to adjust by clicking in the box of the desired vaccine under the “Select” heading. (You may adjust more than one at a time)

This screenshot shows the 'Manage Inventory' page with a list of vaccine lots. The 'Funding Source' is set to 'Both' and the 'Show' options are 'Active', 'Inactive', 'Non-Expired', and 'Expired'. The table lists various vaccines with columns for 'Select', 'Trade Name', 'Funding Source', 'Lot Number', 'Packaging', 'NDC', 'Inv On Hand', 'Active', and 'Exp Date'. A red arrow points to the 'Modify Quantity' button. Another red arrow points to the checkbox for 'DAPTACEL', which is selected. The 'DAPTACEL' row shows 50 units on hand, expiring on 01/01/2015.

| Select | Trade Name | Funding Source | Lot Number | Packaging | NDC | Inv On Hand | Active | Exp Date |
|-------------------------------------|-----------------------------------|----------------|------------|--|---------------|-------------|--------|------------|
| <input type="checkbox"/> | ActHib | State | 32df3sd | vials | 49281-0545-05 | 560 | Y | 08/15/2014 |
| <input type="checkbox"/> | ActHib | Private | FDD1005-1 | | | 20 | Y | 12/31/2013 |
| <input type="checkbox"/> | Adacel | State | C3491AA | | | 30 | Y | 07/29/2013 |
| <input checked="" type="checkbox"/> | Boostrix | Private | 123456789 | BOOSTRIX INJECTION SUSPENSION .5 ML SYR | 00007-0842-41 | 25 | Y | 12/29/2014 |
| <input checked="" type="checkbox"/> | DAPTACEL | State | 1122334455 | VIALS | 49281-0286-10 | 50 | Y | 01/01/2015 |
| <input type="checkbox"/> | Engerix-B Peds | State | 1234 | VIALS | 58160-0820-11 | 61 | Y | 12/16/2013 |
| <input type="checkbox"/> | Engerix-B Peds | State | AHAVB453AA | | | 20 | Y | 02/25/2013 |
| <input type="checkbox"/> | Engerix-B Peds | Private | AHAVB453AA | | 58160-0820-52 | 20 | Y | 12/15/2013 |
| <input type="checkbox"/> | Fluarix Pres-Free | State | ku89dee | FLUARIX TipLok Syringe - NO NEEDLE / 0.5mL | 58160-0876-46 | 65 | Y | 08/25/2015 |
| <input type="checkbox"/> | IPOL | State | X1245 | | | 20 | Y | 12/31/2013 |
| <input type="checkbox"/> | IPOL | State | x1245 | | | 20 | Y | 10/10/2015 |
| <input type="checkbox"/> | Kinrix | State | AC20B172AA | | | 18 | Y | 03/04/2013 |
| <input type="checkbox"/> | PedvaxHIB | State | 1R17Y | | | 20 | Y | 09/23/2013 |

4. After selecting the lots to be adjusted, click on **Modify Quantity**.

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organization Wanda's Test Clinic • user Marisa Polowitz • role Super User (Provider and LHD)

ALERT

UAT Region 2.22.0

Patients
manage patient
enter new patient

Immunizations
manage immunizations

Reports
reminder / recall
check reminder status
check reminder list
manage custom letters
check request status
vfc report
check vfc status

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites... Save

Return to the Previous Screen... Cancel

Modify Quantity On Hand for Selected Site(s)

| Trade Name | Lot Number | Funding Source | Inv On Hand | Action | Amount | Reason |
|------------|------------|----------------|-------------|--------|--------|----------------------|
| Boostrix | 123456789 | Private | 25 | Add | | Receipt of Inventory |
| DAPTACEL | 1122334455 | State | 50 | Add | | Receipt of Inventory |

- On the modify quantity screen, select whether you would like to add doses or subtract doses from inventory on the **Action** heading for each lot.

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ALERT

UAT Region 2.22.0

Patients
manage patient
enter new patient

Immunizations
manage immunizations

Reports
reminder / recall
check reminder status
check reminder list
manage custom letters
check request status

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites... Save

Return to the Previous Screen... Cancel

Modify Quantity On Hand for Selected Site(s)

| Trade Name | Lot Number | Funding Source | Inv On Hand | Action | Amount | Reason |
|------------|------------|----------------|-------------|----------|--------|----------------------|
| Boostrix | 123456789 | Private | 25 | Add | 5 | Receipt of Inventory |
| DAPTACEL | 1122334455 | State | 50 | Subtract | 10 | Error Correction |

- Enter the **Amount** you would like to adjust. Select the **Reason** from the drop-down list.
- Click **Save** when you are sure that no other corrections are needed. This will take you back to the **View Inventory** page.