

ALERT IIS, Vaccine Stewardship & Inventory Management (...plus a lot of info on borrowing...)

Key Takeaways:

- Put privately purchased and state-supplied (VFC) vaccine into ALERT
- VFC vaccine comes in as an order transfer, no need to manually add it
- “Borrowing” in ALERT can be the result of incorrect coding; to correct this mistake, just fix the code (in EHR and ALERT)
- True borrowing has to be paid back (move vaccine in fridge and pay back in ALERT inventory); see reverse for directions
- Accountability relates to doses deducting from inventory
 - If you have a lot of manual adjustments, you are going to have lower accountability.

How to check on borrowing in ALERT IIS:

1. Run an **Ad Hoc List report** and include the item “Borrowed Inventory” in the “What items would you like to display on the report?” section, **or**
2. Run the **Show Transactions Report** to see any borrowing that has been tracked in ALERT. Go to **Manage Inventory** menu item, then click the “Show

Transactions” button:

Show Transactions

Enter dates in the Date Entered [From/To] fields and click View.

Borrowing and regular immunizations that deducted from inventory show up:

| Vaccine Transactions for Organization: Amjen Medical Clinic - AL9999 - P10002 | | | | | | | Record Count: 3 |
|---|------------|-----------------------------------|----------|-----|--------------|------------|-----------------|
| Site Name | Trans Date | Lot \ Funding Source \ Trade Name | Type | Qty | Patient Name | DOB | |
| Amjen Medical Clinic | 12/05/2017 | U5058AD \ State \ Menactra | Immunize | -1 | BROWN, LYDIA | 01/27/2007 | |
| Amjen Medical Clinic | 12/05/2017 | 2729X \ State \ Boostrix | Borrowed | -1 | BROWN, LYDIA | 01/27/2007 | |
| Amjen Medical Clinic | 12/05/2017 | 1224578 \ State \ Fluzone | Immunize | -1 | BROWN, LYDIA | 01/27/2007 | |

In this example, the patient was coded differently for the Boostrix than the other vaccines, because all vaccines are “State” funding source, but the Boostrix transaction shows “Borrowed -1” instead of “Immunize -1.” **This is not true borrowing** and does not need to go on the paper Borrowing Log or be paid back.

In the Ad Hoc report, each row would show Borrowed Inventory: No, Yes, No.



Documenting Borrowed Doses in ALERT IIS

Background: Sometimes, clinics need to borrow from one vaccine stock to immunize patients while they're in the office, rather than ask them to come back when the appropriate inventory is in stock. Sometimes borrowing happens by accident. Either way, the patient should always be coded to match their insurance status, regardless of which stock of vaccine is administered.

If there is a difference between the vaccine funding source and the patient's eligibility, ALERT will automatically detect this mismatch and record the transaction as a borrow. This is shown in the Transactions report (see previous page) or in the Ad Hoc List report, under the item "Borrowed Inventory," which returns the answers "yes", "no", or "null" (when the immunization did not deduct from inventory at all).

Payback in ALERT IIS: When the shipment comes in, you have to pay the borrow back in ALERT as well as in your fridge or freezer. These are the steps to pay back borrowed vaccine:

- 1) Add the new vaccine to ALERT IIS inventory (remember, your VFC order comes in as an Order Transfer; for privately purchased vaccine, use the Add Inventory button).
- 2) Take out the doses that were borrowed: Go to the Show Inventory screen, click on the trade name of the newly added vaccine and scroll to the bottom of the screen to subtract the borrowed dose(s) for the reason "Borrowed Out".
- 3) Now pay back the original stock that was borrowed from: Click on the Add New button and create an inventory lot with the same lot number as the newly added vaccine, but with the opposite funding source. Add however many doses you need to pay back to original amount borrowed. If you already have the same lot number in that inventory funding source, add doses to it using the reason "Borrowed In."

All the borrowing transactions will appear in the Show Transactions report like this:

Borrowed imm recorded at patient level (state-supplied vaccine given to private patient):

| Vaccine Transactions for Organization: Amjen Medical Clinic - AL9999 - P10002 | | | | | | | Record Count: 1 |
|---|------------|-----------------------------------|----------|-----|---------------|------------|-----------------|
| Site Name | Trans Date | Lot \ Funding Source \ Trade Name | Type | Qty | Patient Name | DOB | |
| Amjen Medical Clinic | 03/21/2017 | C4780AA \ State \ DAPTACEL | Borrowed | -1 | TEST, PATIENT | 11/20/2016 | |

Steps 1-3, vaccine entered & paid back after privately purchased vaccine has arrived:

| Vaccine Transactions for Organization: Amjen Medical Clinic - AL9999 - P10002 | | | | | | | Record Count: 3 |
|---|------------|-----------------------------------|-------------|-----|--------------|-----|-----------------|
| Site Name | Trans Date | Lot \ Funding Source \ Trade Name | Type | Qty | Patient Name | DOB | |
| Amjen Medical Clinic | 12/06/2017 | D5471AB \ Private \ DAPTACEL | REC | 100 | | | |
| Amjen Medical Clinic | 12/06/2017 | D5471AB \ Private \ DAPTACEL | BORROWEDOUT | -1 | | | |
| Amjen Medical Clinic | 12/06/2017 | D5471AB \ State \ DAPTACEL | REC | 1 | | | |

NOTE: if you create a borrowing transaction by mistake because you entered the wrong eligibility code, you should correct the eligibility code in the patient record in ALERT and your EHR and make a note that this was not "true borrowing" on the transactions report.