


**ALERT IIS**

**Vaccine Inventory Management & Accountability**

*(...plus a lot of info on borrowing...)*



OIP Orientation for Private VFC Providers  
August 2019

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**Accountability & the Oregon VFC Program**

- **Why does it matter?**
  - It's state law
  - Provides assurance that vaccine is getting to the intended population
  - Gives us insight into a clinic's need for training & support
  - Enables continued participation in VFC



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**Accountability & the Oregon VFC Program**

- **Accountability is...**
  - Clear transactions for the use of all vaccine, down to the patient immunization record level.
- **The Vaccine Accountability Report...**
  - Captures all inventory transactions that occurred within a given time period, including if and how inventory is manually modified.
- **ALERT will also track borrowing**



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### Vaccine Inventory Management Means...

- **Adding both VFC & private stock to ALERT inventory.**
  - Accepting electronic order transfers in ALERT when vaccine arrives in the clinic.
- **≥ 95% of doses accounted for in ALERT IIS.**
  - Valid VFC eligibility code for each immunization given.
  - Dose on immunization record deducts from inventory with a matching vaccine lot number.
  - Reconcile doses that were not given to patients.
  - No more than 5% wasted/spoiled/expired combined
- **Borrowing** is a rare occurrence (not flu)




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### Borrowing on the Transactions Report...

Vaccine Transactions for Organization: Erin's Test Clinic - ORGB - 001002							Record Count: 4	
Site Name	Trans Date	Lot	Funding Source	Trade Name	Type	Qty	Patient Name	DOB
Erin's Test Clinic	02/21/2019	P935T5	Private	Fluzone Pres-Free	Borrowed	-1	BROWN, LIZ	01/27/1968
Erin's Test Clinic	02/21/2019	H015749	State	Pneumovax 23	Immunize	-1	BROWN, LIZ	01/27/1968
Erin's Test Clinic	02/21/2019	N7086Z	State	Fluzone Pres-Free	Immunize	-1	BROWN, LYDIA	01/27/2010
Erin's Test Clinic	02/21/2019	C2688AA	Private	Adacel	REC	20		




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### Finding borrowing another way... Ad Hoc List Report!




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ALERT  
Production Region 5.4.0

home | manage access/account | forms | related links | logout | help desk

organization: Oregon Immunization Program • user: Erin Corrigan • role: ALERT System Administrator

**Create a Customized List Report**

What items would you like to display on the report?

Most Common Items

Birth Date  
Patient First Name  
Patient Last Name  
Vaccination Date  
Vaccine  
Vaccine Eligibility  
Vaccine Lot  
Historical Immunization

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

How would you like to filter the data?

Item to filter on: Owned Immunization  
Comparison: EQUALS  
Value to compare to: Yes  
and and  
Add/Save Edit

Selected Filters

Active Status EQUALS Yes  
AND  
Owned Immunization EQUALS Yes

Edit  
Remove

Include **Borrowed Inventory, From Inventory** and **Inventory Funding Source** to show borrowing on the Ad Hoc report

**Create a Customized List Report**

What items would you like to display on the report?

Most Common Items

Immunization Items  
Borrowed Inventory  
From Inventory  
Inventory Submitted Date  
Inventory Funding Source  
NDC  
Owning Organization

Most Common Items

Birth Date  
Patient First Name  
Patient Last Name  
Vaccination Date  
Vaccine  
Vaccine Eligibility  
Vaccine Lot  
Historical Immunization

Item to filter on: Owned Immunization  
Comparison: EQUALS  
Value to compare to: Yes  
and and  
Add/Save Edit

Selected Filters

Active Status EQUALS Yes  
AND  
Owned Immunization EQUALS Yes

Edit  
Remove

Oregon Health Authority

**Ad Hoc List Report & Borrowing**

Birth Date	Patient First Name	Patient Last Name	Vaccination Date	Vaccine	Vaccine Eligibility	Vaccine Lot	Historical Immunization	Borrowed Inventory	From Inventory
10/17/2016	Carmen	Miranda	11/5/2018	Flu quadrivalent injectable	M	UI982AB	No	No	Yes
10/17/2016	Carmen	Miranda	11/5/2018	HepA-Ped 2	M	R013858	No	No	Yes
10/25/2017	Davey	Crockett	11/6/2018	Varicella	B	R018141	No	(null)	No
9/16/1999	Indira	Gandhi	11/5/2018	Meningococcal	B	T6A301	No	(null)	No
10/17/2016	Nadia	Comineci	11/5/2018	Hib-PRP-T	M	UI944AAB	No	No	Yes
5/25/2008	Walt	Whitman	11/6/2018	Flu quadrivalent injectable	M	UI982AA	No	Yes	Yes

Oregon Health Authority

### Ad Hoc List Report & Borrowing

- From Inventory:  
*Can be Yes, no, or blank*
- Borrowed Inventory:  
*Can be Yes, no, or (null)*
- If immunization did not deduct from inventory, ALERT will not be able to show as borrowed
  - No Inventory Transaction
  - Borrowing on Ad Hoc will be (null)



### Ad Hoc List Report & Borrowing Detail

Vaccine	Vaccine Eligibility	Vaccine Lot	Borrowed Inventory	From Inventory	Inventory Funding Source
MMR	M	R024905	Yes	Yes	PRIVATE
DTaP-IPV	M	27D9A	No	Yes	STATE
HepB-Peds	B	R007212	Yes	Yes	STATE
HepB-Peds	M	R007212	No	Yes	STATE
HepB-Peds	M	ROO7212	(null)	No	
Hib-PRP-T	B	UI987AAA	No	Yes	PRIVATE

- Only doses that deduct inventory will show "Borrowed" Yes/No
- If doses do not deduct inventory, "Borrowed" will show (null) and Funding Source will be blank



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### Correcting Borrowing

- Most of the time, it is a coding problem.

WRONG	RIGHT
State-supplied vaccine coded B	VFC is coded M, N, or A, for kids only!
Adult with Medicaid/OHP coded M	Insured patients – and all adults – must be coded B

- *Correct the coding = fix the problem*
- No need to delete or resend immunization if all other information is correct



### Correct in EHR and ALERT

- ALERT will not take code updates via data exchange – to fix in ALERT:

Immunization Record						
Vaccine Group	Date Admin	Series	Vaccine (Trade Name)	Dose/Owned?	Reaction	Hi (P) Edit
HepB	06/25/2015	1 of 3	HepB Adult (Recombivax Adult ®)	Full		
Influenza- seasonal	06/29/2017		Flu quadrivalent injectable phos (Fluzone Quad PP 0.5mL ®)	Full		
PneumoPoly 23	06/29/2017	1 of 2	Pneumococcal 23 (Pneumovax 23 ®)	Full		

- Only track on paper Borrowing Log if truly borrowed

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### Paying Back Borrowing

- If the wrong vaccine was used, it is a truly borrowed dose
- Must be paid back and tracked on Borrowing Log
- Move vaccine in fridge and in ALERT Inventory

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### Reasons

Reason for Modifying	Explanation/When to Use
Receipt of Inventory	Doses of vaccine that were received from the Oregon Immunization Program or distributor and added to your inventory. (Transfers will be automatically added to inventory when using Manage Transfers from within the IIS.)
Error Correction	Inventory quantity was entered incorrectly; the correction could be adding or subtracting from quantity on hand. (To change an error in the lot #, dose, or other non-quantity data, click on the vaccine name hyperlink from the Show Inventory screen and edit details as needed.)
Doses Returned	Doses of vaccine that were returned to you; this should not be used routinely because any doses you transfer should be done using the Manage Transfers feature and rejected or returned doses will be automatically added back to your inventory.
Doses Transferred	Doses of vaccine that were transferred to another site. This is used when the doses WERE NOT transferred using the Manage Transfers feature in the IIS. (Transfers are automatically deducted from inventory when using Manage Transfers in ALERT.)
Doses Recalled	Doses of vaccine recalled by the manufacturer.
Doses Administered	Doses of vaccine that were administered but were not automatically deducted from your inventory by the IIS (for example, because you reported them by electronic data exchange or did not have the "From ALERT IIS Inventory" box checked in the Enter New Immunization screen).
Borrowed In	Doses of vaccine added to inventory to pay back vaccine that was given to a patient with a mismatch between vaccine eligibility code and vaccine lot funding source.
Borrowed Out	Doses of vaccine subtracted from inventory when you have given an immunization from a lot whose funding source does not match the patient's vaccine eligibility code; only use this as a manual adjustment when you did not take the immunization from inventory at the time of vaccination.
Spoilage reported by Provider	Doses of vaccine that were spoiled due to causes other than fridge malfunction or failure to store properly upon receipt; an example would be a vial of vaccine left out of the fridge overnight.
Lost or damaged in transit to Provider	Doses of vaccine that never arrived or that were unusable when they did arrive (temp excursion, broken vials, etc.).
Failure to store properly upon receipt by Provider	Doses of vaccine that were accepted by the provider but not stored properly and so were spoiled.
Refrigeration failure reported by Provider	Doses of vaccine that were spoiled due to temperature excursion.
Lost or unaccounted for in Provider inventory	Doses of vaccine that can't be accounted for after being received and entered into inventory (you can't find the vaccine).
Other – Not Usable, reported by Provider	Use to reconcile inventory when vaccine was wasted or damaged (e.g., broken vial in box or patient refused vaccine after drawing it up) and nothing else is appropriate.

### 3. The Vaccine Accountability Report

Oregon Immunization Program										Oregon Vaccines for Children	
Vaccine Accountability Report - Lionadh-Hylen Pediatrics											
Org Code: KL1234				VFC PIN: P1234							
Report time frame:	Month 7, 2016 - Month 8, 2016			Report date: 09/16/2016			Funding Source: Both				
This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza vaccine.											
Detailed Accountability Data by Vaccine Group and Lot											
Vaccine Group	Lot Number	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
Rotavirus	ALL	1	28	-2	0	0	0	0	27	28	100.00%
Td/Tdap	2728X	0	10	0	0	0	0	0	8	8	80.00%
Td/Tdap	AMG2195	0	17	0	0	0	-5	0	10	15	88.24%
Td/Tdap	C4690BA	0	5	0	0	0	0	0	5	5	100.00%
Td/Tdap	C3902AA	0	19	-1	0	0	0	0	12	13	68.42%
Td/Tdap	M00537	0	20	0	0	0	0	0	10	10	50.00%
Td/Tdap	ALL	0	71	-1	0	0	-5	0	45	51	71.83%
Vaccella	K021933	3	0	0	0	0	0	0	0	0	0.00%
Vaccella	L024252	4	0	-1	0	0	0	-3	0	4	100.00%
Vaccella	L032396	0	20	-2	0	0	-2	0	14	18	90.00%
Vaccella	M006157	0	20	0	0	0	0	0	20	20	100.00%
Vaccella	ALL	7	40	-3	0	0	-2	-3	24	42	89.38%
ALL	ALL	101	488	-22	-2	-3	-22	-19	418	513	87.45%

### What Lowers Accountability...

- **Doses not deducting from Inventory.**
  - Use Ad Hoc List report to troubleshoot common problems:
  - Typos in lot number from EHR
  - Use the lot number on the outer packaging.
    - Not all vaccines have the same lot number on all the components.
    - Ex: Pentacel and Menveo.
  - Entering a lot number with the letter "O" instead of the number "0".
  - If entering directly in ALERT, don't forget to check the "From ALERT IIS Inventory" checkbox:

Enter New Immunization  
From ALERT IIS Inventory ☒



### What Lowers Accountability...

#### REMEMBER:

The goal is to have a transparent audit trail. Manually modifying inventory does not allow that.

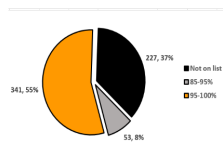
- **Manually modifying large amount of inventory.**
  - Frequent use of "Doses Administered" lowers accountability.
    - This means that immunizations on the patient record did not deduct from inventory.
    - Use Ad Hoc List report to identify problems.
- **Eligibility code issues.**
  - No eligibility code sent to ALERT.
  - Coding adults as "M" or Medicaid Eligible.
    - ALERT IIS will reject the eligibility code for adults coded as "M".
    - Should be coded as "B" for Billable



## VFC Quarterly Achieving Excellence List...

### Vaccine Accounting Excellence Recognition

**CONGRATULATIONS** to the clinics who made the list this quarter for achieving vaccine accounting excellence. To acknowledge the hard work of those clinics that are close to meeting the requirement, we report two lists: a gold and a silver category. The gold category lists clinics who have met or exceeded the 95% inventory accountability standard. The silver category lists those clinics who met 85-95% accountability. Your effort improves patient immunization records and assures our federal partners that vaccines are getting to the patients who are entitled to them.




#### In Quarter 4 of 2018:

341 clinics met the gold criteria for excellent vaccine inventory accounting.  
53 clinics met the silver criteria for very good vaccine inventory accounting.  
55% of VFC-participating clinics are **either meeting or exceeding** the vaccine inventory accounting requirements of the program, and another 8% of you are nearly there!


## ALERT IIS training resources

Live webinars/on-demand content  
Learn more about ALERT IIS reports to help you improve your accountability and identify borrowing



**ALERT**  
IMMUNIZATION INFORMATION SYSTEM

HOURS of OPERATION:  
Mon-Fri , 9-4



**oregon**  
vaccines for children

**ALERT IIS Help Desk**  
800-980-9431  
[alertiis@state.or.us](mailto:alertiis@state.or.us)

- Reset passwords
- Set up new user account
- Report duplicate patient records
- Functionality questions

**VFC Help Desk**  
971-673-4VFC  
[VFC.help@state.or.us](mailto:VFC.help@state.or.us)

- Vaccine ordering
- Temperature excursions
- VFC compliance
- VFC certification

