

## ALERT IIS: How to Manage your Inventory

The ALERT IIS inventory module allows users to manage their state-supplied and privately purchased vaccine inventory. Doses of vaccine are decremented from a clinic's inventory when immunizations are given and reported to ALERT. Users can set alerts for when vaccines are low on quantity or nearing expiration, and document and track reasons for modifying their quantity on hand.

All standard and super users have access to the Manage Inventory menu item. All clinics that receive state-supplied vaccine are required to use the ALERT IIS Inventory Module, which includes submitting an accurate inventory of state-supplied vaccine within 14 days of ordering state-supplied vaccine.

**This Inventory Module guide addresses the following topics:**

- **Viewing inventory**
- **Knowing when to reconcile your clinic's inventory**
- **Submitting reconciled inventory counts prior to ordering**
- **Viewing historical inventory counts**
- **When ALERT inventory and inventory on hand don't match: understanding inventory discrepancies**

**To view inventory in ALERT IIS:**

1. Log into ALERT IIS ([www.alertiis.org](http://www.alertiis.org)).
2. Click **Manage Inventory** under the Inventory section of the blue menu panel.
3. Click the **Show Inventory** button.
  - This screen displays all state-supplied and privately purchased non-expired vaccine. Users can opt to view only one vaccine funding source, or can opt to view active or inactive vaccine lots, by making the appropriate selections in the grey table header.

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organization AMJEN MEDICAL GROUP • user Marisa Polowitz • role ALERT Helpdesk/Trainer

**Manage Inventory**

Add Inventory .... Add Inventory

Modify Quantity On Hand.... Modify Quantity

Show Transactions.... Show Transactions

Show Previous Counts.... Inventory Count Listing

Print Inventory Shown Below.... Print

Return to the Previous Screen.... Cancel

Funding Source: Both Show  Active  Inactive  Non-Expired  Expired

Select	Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date
<input type="checkbox"/>	<a href="#">ActHib</a>	State	dol9			28	N	12/12/2013
<input type="checkbox"/>	<a href="#">Engerix-B Peds</a>	State	545d			50	N	12/12/2013
<input type="checkbox"/>	<a href="#">Fluzone</a>	State	29chi			48	N	12/12/2013
<input type="checkbox"/>	<a href="#">Gardasil</a>	State	Tart123	VIALS	00006-4045-41	10	Y	12/31/2013

## Knowing when to Reconcile your inventory on hand with your inventory in ALERT IIS.

The timing of when you balance, or reconcile, your inventory is critical for accuracy. Know how and when immunizations are sent to ALERT in order to reconcile your state-supplied vaccine inventory. Super users can view the most recent date that data were submitted to ALERT on the Edit Org screen.

**For clinics that enter immunizations directly into ALERT IIS:** Pick one day each month that inventory will be reconciled. Do a physical count of vaccine on hand at the end of this day. Then, when all immunizations administered through this day have been entered (but before any immunizations given after this day are entered) reconcile your physical and ALERT inventories.

**For clinics that send data to ALERT electronically on a routine schedule:** It's important to know when data files are sent electronically. Many organizations send data weekly or once every two weeks. Once you know when data are sent for your clinic, do a physical count of vaccine on hand and reconcile your inventory as close as possible to just after data are sent electronically.

**For clinics that send data to ALERT electronically in real time:** Because data are sent to ALERT at the time that immunizations are documented in the EHR, inventory can be reconciled at any time during the month.

For some clinics that send data electronically to ALERT, administered immunizations are not deducted from the clinic's inventory. These clinics still must manage their inventory in ALERT (i.e., enter vaccine shipments, and account for wasted, spoiled, or transferred doses), and will use the Modify Quantity function to adjust their number of doses on hand prior to submitting a reconciled inventory count. If your clinic sends data electronically and wants your inventory to automatically deduct doses administered, refer to your Health Educator.

All clinics must submit a reconciled inventory count prior to placing an order for state-supplied vaccine. Public clinics will continue to submit Monthly Vaccine Reports (MVRs). If you have questions about MVRs, contact your Health Educator.

### To submit a reconciled inventory count prior to ordering:

1. On the **Show Inventory** screen, in the Funding Source dropdown list, select **State-Supplied**. Set the radio buttons to the right of Funding Source to **Non-Expired**.
2. Click the **Print** button, and print the PDF report that displays. This report displays all non-expired, state-supplied vaccine.

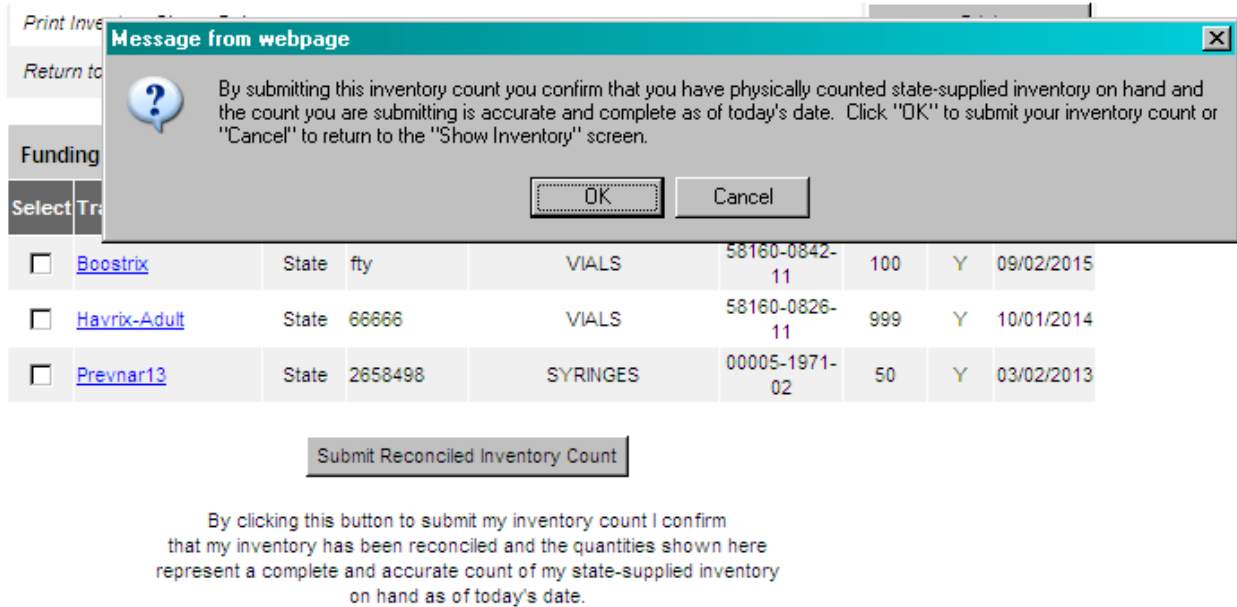
Current ALERT IIS Inventory Count Count  
AMJEN MEDICAL GROUP, P99999, AL9999  
02/01/2013, State-Supplied and Private, Non-Expired

Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date	In My Fridge/Freezer
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3. Take this report to your vaccine refrigerators and freezers, and count the number of doses of each lot number. Write the number of actual doses on hand in the **In My Fridge/Freezer** column.
4. If the number of doses on hand for any lot numbers does not match the number of doses in your ALERT inventory, check the box next to those lots click **Modify Quantity** to correct the number of doses in ALERT.

Refer to the last section for troubleshooting tips for when your actual inventory on hand and your ALERT inventory don't match.

- Once your actual doses on hand and your ALERT inventory match, click the **Submit Reconciled Inventory Count** button.
- You will receive a pop-up to confirm that your doses on hand match your ALERT IIS inventory. Click **OK**, or click **Cancel** if you have inventory corrections to make.



Print Inventory  
Return to

Funding  
Select Tr

**Message from webpage**

By submitting this inventory count you confirm that you have physically counted state-supplied inventory on hand and the count you are submitting is accurate and complete as of today's date. Click "OK" to submit your inventory count or "Cancel" to return to the "Show Inventory" screen.

OK Cancel

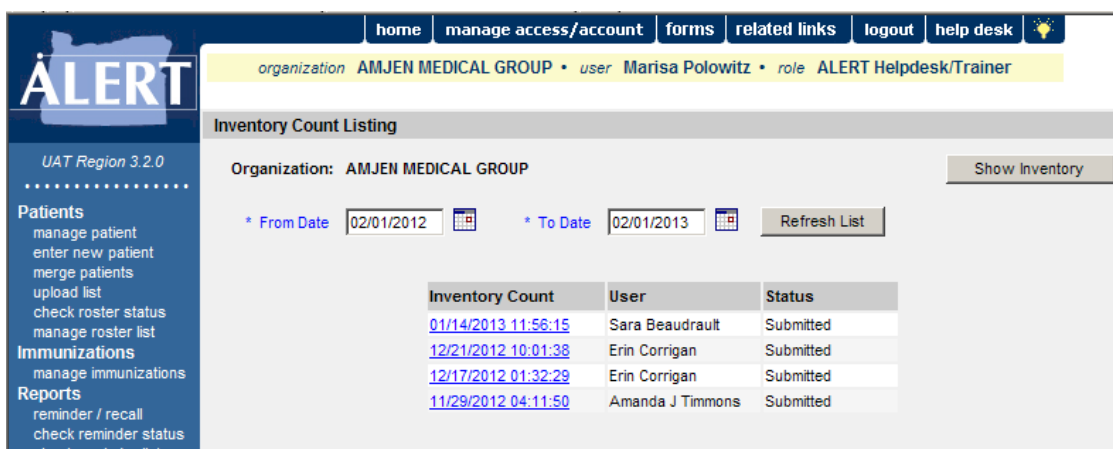
<input type="checkbox"/>	<a href="#">Boostrix</a>	State	fty	VIALS	58160-0842-11	100	Y	09/02/2015
<input type="checkbox"/>	<a href="#">Havrix-Adult</a>	State	66666	VIALS	58160-0826-11	999	Y	10/01/2014
<input type="checkbox"/>	<a href="#">Prevnar13</a>	State	2658498	SYRINGES	00005-1971-02	50	Y	03/02/2013

Submit Reconciled Inventory Count

By clicking this button to submit my inventory count I confirm that my inventory has been reconciled and the quantities shown here represent a complete and accurate count of my state-supplied inventory on hand as of today's date.

### To view a list of Inventory Counts submitted by your clinic:

- On the **Show Inventory** screen, click the **Inventory Count Listing** button.
- You will see a list of inventory counts of non-expired, state-supplied vaccines submitted within the past year. You can use the **From date** and **To date** to view reports submitted in a different time period.



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**ALERT**

UAT Region 3.2.0

Patients  
manage patient  
enter new patient  
merge patients  
upload list  
check roster status  
manage roster list

Immunizations  
manage immunizations

Reports  
reminder / recall  
check reminder status  
check reminder list

**Inventory Count Listing**

Organization: AMJEN MEDICAL GROUP [Show Inventory](#)

\* From Date 02/01/2012 \* To Date 02/01/2013 [Refresh List](#)

Inventory Count	User	Status
<a href="#">01/14/2013 11:56:15</a>	Sara Beaudrault	Submitted
<a href="#">12/21/2012 10:01:38</a>	Erin Corrigan	Submitted
<a href="#">12/17/2012 01:32:29</a>	Erin Corrigan	Submitted
<a href="#">11/29/2012 04:11:50</a>	Amanda J Timmons	Submitted

- Click on the blue hyperlinks in the date field to view reports.
- Click the **Show Inventory** button to return to the previous screen.

## When your ALERT Inventory and your Doses on Hand Don't Match – Troubleshooting Tips

1. On the **Show Inventory** screen, click the **Show Transactions** button.

The screenshot shows the ALERT web interface. At the top, there are navigation buttons: home, manage access/account, forms, related links, logout, and help desk. Below this, the user information is displayed: organization AMJEN MEDICAL GROUP, user Marisa Polowitz, and role ALERT Helpdesk/Trainer. The main section 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 'Show Transactions...' button is highlighted. Below this, there are filters for Funding Source (Both), Show (Active, Inactive, Non-Expired, Expired), and a table of inventory items. The table has columns: Select, Trade Name, Funding Source, Lot Number, Packaging, NDC, Inv On Hand, Active, and Exp Date. One row is visible with Trade Name 'ActHib', Funding Source 'State', Lot Number 'do9', and Exp Date '12/12/2013'.

2. Enter a date range in the **Date Entered** row. Use the date of your last reconciled inventory count as the **From** date field, and today's date in the **To** date field.
3. Set up the criteria you'd like to view on the Show Transactions report. You can limit the report to a certain lot number or to certain transaction types. Do not put any dates in the Date shot was given fields.

The screenshot shows the ALERT web interface for configuring a report. At the top, there are navigation buttons: home, manage access/account, forms, related links, logout, and help desk. Below this, the user information is displayed: organization AMJEN MEDICAL GROUP, user Marisa Polowitz, and role ALERT Helpdesk/Trainer. The main section is titled 'Vaccine Transactions for: AMJEN MEDICAL GROUP - AL9999 - P99999'. It contains several filter fields: Date Entered [From] and To, Date shot was given [From] and To, User Name (All User Names), Transaction Type (All Transaction Types), Site Name (All Sites with Inventory), Trade Name/Lot Number/Funding Source (All Lot Numbers), and Display Last (200) Records. The 'View' button is highlighted.

4. Click the **View** button to run the report.
5. Use this report to try to pinpoint the cause of the error. It shows all inventory transactions during the report timeframe. If an immunization you gave does not appear, it was not deducted from inventory. Some common errors include:
  - All administered doses have not yet been entered into ALERT
  - An incorrect lot number was entered
  - Administered doses reported through data exchange were rejected due to errors in the data exchange message
  - The "From ALERT IIS Inventory" button was not checked on the Enter New Immunizations screen in the ALERT User Interface screen.
  - Doses that were transferred in or out were not documented using the Manage Transfer screens.
6. Once you've discovered the cause of the error, use the **Modify Quantity** button to correct the number of doses in your ALERT IIS inventory.