

ALERT IIS Inventory Management Handout



The purpose of this training is to help clinics keep accurate inventory records to be in compliant with state and federal requirements.

Prerequisites

Must have ALERT IIS Standard User Account.

OIP Help Desk Contact Information

Monday – Friday, 9:00 am – 4:00 pm

Phone number: 1-800-980-9432

Email address: Vfc.help@odhsoha.oregon.gov

Table of Contents

Chapter 1: Overview and Background.....	4
1.1 Importance of Inventory Management	4
1.2 Resources Available	4
1.3 Cycle of Inventory of State-Supplied Vaccine	4
1.4 State-Supplied Vaccine Programs	5
1.5 Data Exchange and Inventory.....	5
1.6 Your Clinic.....	6
Chapter 2: Reconciling Inventory	7
2.1 Reading and Filtering Inventory	8
2.2 Editing Inventory	8
2.3 Reconcile Inventory	9
Step 1: Review Last Count	9
Step 2: Do a Current Count	9
Step 3: Troubleshoot	10
Step 4. Make Corrections	10
Step 5. Submit Reconciled Inventory.....	12
2.4 Show Transactions Report.....	12
Chapter 3: Ordering Inventory.....	14
3.1 Ordering Tiers and Requirements.....	14
3.2 Three Ways of Ordering Vaccine	14
State-Supplied Vaccine	14
Privately-Purchased Vaccine	15
Seasonal/Pandemic Vaccine	15
3.3 Tracking Orders	16
Chapter 4: Receiving Inventory	17
4.1 Reading the Transfer Screen and Finding Tracking Numbers	17
4.2 Receiving Inventory	18
4.3 Accepting Transfers	19
4.4 Adding Inventory	20
Modifying Quantity of Existing Inventory	20
Manually Adding Inventory	20

Barcode Scanner	22
4.5 Sending Transfers.....	22
Chapter 5: Non-viable Vaccine.....	25
5.1 Vaccine Stewardship	25
5.2 Excursions	25
5.3 Managing Non-viable Vaccine	25
5.4 Shipping Labels	27

Chapter 1: Overview and Background

Chapter 1 introduces the fundamentals of vaccine inventory management in ALERT IIS, emphasizing its importance for financial stewardship, equitable distribution, and legal compliance. It highlights key resources, outlines the monthly inventory cycle, describes the difference between private and public vaccine programs, and explains inventory related data exchange processes.

Learning Objectives

- You will learn why inventory management is important.
- You will learn about some of the OIP resources available to you.
- You will learn the cycle of inventory.
- You will learn about the state-supplied vaccine programs managed by OIP.
- You will learn about data exchange and inventory management.
- You will identify details about your clinic.

1.1 Importance of Inventory Management

Inventory is important for three big reasons.

- Financial stewardship to meet our CDC grant's strict reporting requirements
- Equitable distributing vaccine based on community need.
- State law that requires accounting for all state-supplied vaccine doses.

1.2 Resources Available

Resources to help you succeed in managing your clinic's inventory:

- Immunization Partner Update emails
- OIP Help Desk
- Oregon Vaccine Management Guide
- OIP Training Portal

1.3 Cycle of Inventory of State-Supplied Vaccine

1. **Administer Vaccine** - Staff members at your clinic gives a patient a vaccine.
2. **Record Vaccine Administration** - The immunization encounter is recorded directly in ALERT IIS or indirectly via an electronic health record (EHR). This should deduct a dose from the ALERT IIS inventory.



3. **Reconcile Inventory** - To be able to order more state-supplied vaccine, the clinic must reconcile their inventory in ALERT I-I-S.
4. **Order Vaccine** - Clinics can order vaccine in ALERT I-I-S within their correct ordering cycle.
5. **Ship Vaccine** - OIP receives and reviews the order for accuracy before sending it to the CDC. The CDC will send orders to distributors. The distributors will deliver the vaccine to the clinics based on the specified delivery days and times in ALERT IIS.
6. **Receive Vaccine** - The vaccine must be accepted physically and in ALERT I-I-S, which adds the vaccine to the clinic. Once the vaccine is added into your inventory, it can be used and the cycle starts all over.

1.4 State-Supplied Vaccine Programs

Vaccines for Children Only (VFC-only) are private clinics. The VFC program provides vaccines to eligible children and is funded by the CDC and facilitated by OIP. Pin numbers start with P.

Vaccine Access Program (VAP) are public clinics consists of the three programs. Pin numbers start with 0 (zero).

- VFC program as stated above.
- 317 program is a limited federal program for uninsured adults.
- Billables program is a state program that allows public clinics to use state-supplied vaccines for patients who do not qualify for VFC or 317 and pay back vaccines on a quarterly basis.

Age	Definition	Eligibility codes	Vaccine stock
0 through 18	Oregon Health Plan (OHP) or Medicaid	M	State
	No insurance	N	State
	American Indian or Alaska Native	A	State
	Underinsured	F (FQHC or RHC only)	State
19 +	Other state-supplied	O	State
	See 317 chart for eligibility requirements		
All ages	Privately insured children or adults with OHP or other insurance (No Rx, MMRV, Varicella or Pfizer COVID)	B	State
	Locally owned (privately purchased vaccines including Rx, MMRV, Varicella, and Pfizer COVID for privately insured children and all adults)	L	Private
	OIP special projects (rarely used)	S	Special project

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1.5 Data Exchange and Inventory

When recording immunization records, lot numbers and eligibility codes are used to make a match in the ALERT IIS inventory and a dose is subtracted. This process assumes inventory in ALERT IIS has a positive quantity, is active and unexpired.

For inventory deduction to happen via data exchange it must be enabled in ALERT IIS. This should be the case for organizations participating in state-supplied vaccine programs.



Inventory must be managed in both systems, your EHR and ALERT IIS, for inventory deduction to occur. Receiving and reconciling inventory will need to occur manually in ALERT IIS.

Corrections to lot numbers and eligibility codes in immunization records may need to be made in both systems. Editing or deleting immunization records in the EHR may not always update ALERT IIS. Please consult with your EHR vendor or the ALERT IIS Data Exchange team for specific details.

Data Exchange team's email is ALERT_DataExchange@odhsoha.oregon.gov.

1.6 Your Clinic

Knowing if your clinic is private or public and how your clinic records immunizations will help you be successful as an inventory manager.

Chapter 2: Reconciling Inventory

Chapter 2 dives into ALERT IIS showing how to locate, read, filter and edit inventory. It introduces a five-step reconciliation process: reviewing the last report, counting inventory, troubleshooting discrepancies, making corrections, and submitting the report. You will learn how to use the Show Transactions report and use the reasons appropriately when correcting inventory.

The **Manage Inventory** section is where inventory lists, reports to see all inventory transactions and the ability to reconcile inventory are located. The **Show Inventory** button is where the vaccine inventory list is located along with other useful reports and the button to submit a reconciled inventory count report.

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 Breanna Smith, a Standard User, for ALERT CLINIC 3. The main content area is titled 'Manage Inventory' and contains several sections:

- Show Inventory for Sites....** (highlighted with a red box)
- Show Transactions for Sites....**
- Update inventory Alerts....**
- Return to the Previous Screen....**

Below these sections is the **Inventory Alerts** section, which includes a table for **Vaccine Order/Transfer Notification ...**:

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	No Order Notification		
Transfer(s)	3	0	2

Below this is the **Active Inventory that is Going to Expire or Expired Lots with a Quantity ...** section, which includes a table:

Site Name	Trade Name	Lot Number	Funding Source	On Hand	Exp Date
ALERT CLINIC 3	COVID-19 Pfizer 12+ (Purple Cap)	38833998	State-Supplied	50	12/31/2021
ALERT CLINIC 3	Pediarix	DX56789	State-Supplied	10	12/31/2021
ALERT CLINIC 3	IPOL	IP5466	Privately Purchased	20	11/30/2021

Below this is the **Inventory that is Running Low by Vaccine Group ...** section, which includes a table:

Vaccine Group	Funding Source	Quantity On Hand
No vaccine groups have a low inventory.		

Below this is the **Inventory that is Running Low by Trade Name ...** section, which includes a table:

Trade Name	Funding Source	Quantity On Hand
Adacel	Privately Purchased	4
FluMist	Privately Purchased	10
MMR II	Privately Purchased	0

2.1 Reading and Filtering Inventory

Vaccine inventory is displayed on the bottom of the screen.

Funding Source: Both		Show ☐ Active ☐ Inactive ☒ Non-Expired ☐ Expired						
select	Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date
☐	Adacel	State	12345	ADACEL 10X1 VIALS	49281-0400-10	187	Y	09/23/2024
☐	Adacel	Private	875678	5X1 SYRINGES	49281-0400-20	4	Y	11/19/2024
☐	Adacel	Private	DT978763			0	N	11/30/2024
☐	Boostrix	State	34567	BOOSTRIX 10X1 VIALS	58160-0842-11	90	Y	09/23/2024
☐	COVID-19 Janssen	State	12399a	5X10 VIAL, 2 CARTONS	59676-0580-05	50	Y	01/01/2034
☐	COVID-19 Janssen	State	2021GW886		59676-0580-05	20	Y	09/27/2024
☐	COVID-19 Janssen	State	TE92790		59676-0580-05	100	Y	11/30/2064
☐	COVID-19 Moderna	State	WQ083839	14 DOSE VIAL	80777-0273-98	200	Y	11/19/2024
☐	COVID-19 Pfizer 12+ (Purple Cap)	State	38833998	MULTI-DOSE VIAL, 6 DOSES	59267-1000-02	50	Y	12/31/2024
☐	COVID-19 Pfizer 12+ (Purple Cap)	State	GH0934803	6-DOSE VIAL, 3x25 VIALS	59267-1000-03	250	Y	11/30/2024
☐	COVID-19 Pfizer Peds 5-11 (Orange)	State	YU067896	10X10 MULTI-DOSE VIALS	59267-1055-04	200	Y	06/30/2024

- Alphabetized by **Trade Name** and then Lot Number
- **Filters** for funding source and radio buttons active/inactive, non-expired/expired.
- **Funding source** is important to note. Two rows can be identical, but the funding sources are different. It is important that clinics are paying attention to vaccine eligibility codes when recording immunizations so that vaccines are deducted from the correct stock. When giving a patient a vaccine and the eligibility code is marked as S, it deducts from the state supplied inventory. If marked with a B, it will deduct from the private supply.
- **Packaging** is used to describe how the vaccine will be coming.
- **Inventory On-Hand** is the always the number of doses not the number of vials or boxes.
- **Inactive** is indicated by red text. A vaccine may be inactive for several reasons such as the inventory for that vaccine's lot number was decremented to zero, the vaccine expired, or it was recalled and set to inactive by a user.
- **Pink rows** are vaccines about to expire.

2.2 Editing Inventory

The system is forgiving, information can be corrected

1. Click on vaccine's trade name (hyperlink) associated with the lot number.
2. Make the desired changed to any of the fields.
3. Click **Save**
4. **Inventory was updated successfully** will appear in red at the bottom.
5. **Cancel** is the back button

2.3 Reconcile Inventory

For state-supplied vaccines, a reconciliation report is due once a month and the reconciled inventory must have been submitted within the last 14 days to submit an order for more vaccines. The purpose of the reconciliation report is to match what is physically on hand with what shows in ALERT IIS.

Step 1: Review Last Count

Inventory Count Listing will show the last time a reconciled inventory count was submitted. This can be helpful information when investigating why counts are off. Click on the blue link to see the reconciliation report. Click the **Show Inventory** button to return to the Manage Inventory screen.

The screenshot shows the 'Manage Inventory' interface. On the left, the 'Inventory Count Listing' window is open, displaying the organization 'ALERT CLINIC 3'. It shows a date range from 12/22/2020 to 12/22/2021. A table lists inventory counts, with one entry highlighted: '12/07/2021 02:35:19' by 'Breanna Smith' with a status of 'Pending'. On the right, the 'Manage Inventory' window has several buttons, with 'Inventory Count Listing' highlighted in a red box.

Step 2: Do a Current Count

Print is a tool for doing physical counts. A new tab or window will open of a PDF with the current inventory list, print the PDF and take it to the fridges and freezers to write down the number of doses on hand for each lot of vaccine.

The screenshot shows the 'Manage Inventory' interface. On the left, the 'Current ALERT IIS Inventory Count List' window is open, displaying a table of inventory counts. The table has columns: Trade Name, Funding Source, Lot Number, Packaging, NDC, Inv On Hand, Active, Exp Date, and In My Fridge/Freezer. The table lists four items: Adacel, Adacel, Boostrix, and COVID-19. The 'In My Fridge/Freezer' column is highlighted in a red box. On the right, the 'Manage Inventory' window has several buttons, with 'Print' highlighted in a red box.

Trade Name	Funding Source	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date	In My Fridge/Freezer
Adacel	State	12345	ADACEL 10X1 VIALS	49281-0400-10	187	Y	09/23/2024	
Adacel	Private	875678	5X1 SYRINGES	49281-0400-20	4	Y	11/19/2024	
Boostrix	State	34567	BOOSTRIX 10X1 VIALS	58160-0842-11	90	Y	09/23/2022	
COVID-19 Janssen	State	12399a	5X10 VIAL, 2 CARTRONS	59676-0580-05	50	Y	01/01/2036	

Step 3: Troubleshoot

The purpose of this step is to determine why the counts in the “Inv on Hand” column don’t match the “In my fridge/freezer” column. This step only needs to be done on the rows with mismatching numbers between the two columns. When troubleshooting, you are looking for three things:

- adding or subtracting doses,
- how many doses and
- what reason.

To find the reason you should consult,

- Wasted log
- Borrowing log
- Vaccine storage troubleshooting record

(For more detailed explanations about the reasons, see the Interpreting the reasons document.)

To dive deeper, use the following reports:

- Show transaction report
- Ad hoc reports (Inventory Deduction and Borrowing course in OIP Training Portal)
- Data exchange report (Data Monitoring course in OIP Training Portal)

Step 4. Make Corrections

Modify Quantity is used to make digital counts match physical counts. A reason must be given to change the quantity. Modify quantity can be done by individual vaccine or with multiple vaccines at once.

Modify Quantity Individually

1. Choose the **vaccine** by clicking on the hyperlinked name.
2. Scroll to the bottom to where it says **Modify Quantity on Hand**.
3. **Choose the action** of Add or Subtract
4. Put in the **amount** of doses.
5. Choose the **reason**, Receipt of Inventory.
6. Then choose **Save**.
7. It will say **Inventory was successfully added**
8. Press **Cancel** to return to previous screen

Manage Inventory

Add Inventory

Modify Quantity On Hand....

Add/Edit Inventory with 2D Barcode Scan... Barcode:

Show Transactions....

Show Previous Counts....

Print Inventory....

Return to the Main Menu

Add Inventory

Modify Quantity

Add / Edit Inventory

Show Transactions

Inventory Count List

Edit Vaccine Inventory Information

Site: ALERT CLINIC 3

Trade Name: Adacel

Manufacturer: Sanofi Pasteur Inc.

NDC: 49281-0400-10

Packaging: ADACEL 10X1 VIALS

Lot Number: 12345

Dose: .5

Expiration Date: 09/23/2024

Funding Source: State-Supplied

Lot Active: Yes

Quantity on Hand: 187

Cost Per Dose (\$):

Save

Cancel

Add New

Modify Quantity On Hand

Action: Add

Amount:

Reason: Receipt of Inventory

Modify Quantity for Multiple Lots

1. Select the lots that need adjusted by placing a checkmark in the Select column.
2. Click on **Modify Quantity**.
3. Under **Action**, choose to either Add or Subtract
4. Enter the **Amount** as the number of doses, not the quantity on hand.

Funding Source: Both

Select	Trade Name	Funding Source	Quantity
☒	Adacel	State	1
☐	Adacel	Private	8
☐	Adacel	Private	0
☐	Boostrix	State	3
☒	COVID-19 Janssen	State	1

Manage Inventory

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

Return to the Previous Screen....

Save

Cancel

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Funding Source	Inv On Hand	Action	Amount	Reason
Adacel	12345	State	187	Add		Receipt of Inventory
COVID-19 Janssen	12399a	State	50	Add		Receipt of Inventory
DAPTACEL	C7469A	Private	74	Add		Receipt of Inventory
Engerix-B	67890	State	90	Add		Receipt of Inventory

- Choose a **Reason** for adjusting the quantity. Here is a [guide](#) that contains descriptions for each reason.
- Click **Save** to update.

Step 5. Submit Reconciled Inventory

The actual submitting process is very simple, just click the **Submit Reconciled Inventory Count** button at the bottom of the inventory list. A pop-up message will appear asking for confirmation that physical counts and quantity modification steps were completed. Click **OK**.

☐	Pediarix	Private	T75830		11	20	Y	12/31/2023
☐	Pediarix	Private	T75831			20	Y	12/31/2023
☐	Proquad	State	45678	10X1 VIALS	00006-4171-00	100	Y	09/24/2022
☐	Proquad	Private	45678	10X1 VIALS	00006-4171-00	80	Y	09/24/2022

Highlighted rows are set to expire soon...

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.

2.4 Show Transactions Report

Show Transactions is a detailed report that shows all transactions, similar to a bank statement. This report can help determine why counts between ALERT IIS and on-hand/fridge numbers are not matching up.

Manage Inventory

Add Inventory

Modify Quantity On Hand...

Add/Edit Inventory with 2D Barcode Scan... Barcode:

Show Transactions...

Show Previous Counts...

Print Inventory

Return to the

Add Inventory

Modify Quantity

Add / Edit Inventory

Show Transactions

Inventory Count Listing

Vaccine Transactions for: ALERT CLINIC 3- AL1113 - P33333

Date Entered [From]:

To:

Date shot was given [From]:

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

Display Last

Records

View

Cancel

1. Enter the date range into the **Date Entered** fields.
2. Filter options include:
 - a. **Username** filters by a specific user or all in the clinic.
 - b. **Transaction type** filters by transaction or all types.
 - c. **Site name** will default to the current clinic.
 - d. **Trade or Lot** filters by lot number, trade name or funding source.
 - e. **Display List** defaults to 200. Increase this to at least **2000** to make sure all the transactions are listed.
3. Then click **View**.
4. Notice that individual transactions are at the top of the report and there is a summary at the bottom.
 - a. **Transaction count** is the number of times the transaction description has occurred. Transaction value is the number of individual occurrences.
 - b. **Immunization Given** is a one-to-one deduction when a dose is administered and automatically recorded in ALERT IIS.
 - c. **Doses Administered** is the manual adjustment done during the reconciliation process when the fridge count did not match ALERT IIS numbers. This is the most common reason for adjusting inventory.
5. Use **Cancel** buttons to go back to Show Inventory

Chapter 3: Ordering Inventory

Chapter 3 focuses on ordering vaccines in ALERT IIS. It explains the ordering tiers and requirements to be able to place state-supplied vaccine orders. It outlines three ordering methods based on funding source and vaccine type, and provides guidance for each. Finally, it shows how to track orders in ALERT IIS to monitor status and delivery timelines.

Learning Objectives

- You will learn about ordering tiers and requirements.
- You will learn about three ordering methods: state-supplied, privately-purchased, and seasonal/pandemic.
- You will learn how to track orders.

3.1 Ordering Tiers and Requirements

To place an order, you must

- place an order within the ordering tier
- have the vaccine delivery hours, delivery address, and delivery contact filled out on the Edit Organization page
- and have reconciled inventory within the last 14 days.

3.2 Three Ways of Ordering Vaccine

State-Supplied Vaccine

To place an order for state supplied vaccine, navigate to the correct screen by clicking Manage Orders under Inventory. And then clicking the create order button.

Create Order

VFC PIN
P33333

initiating Organization
ALERT CLINIC 3

initiating User
Jessie Trainer

Org Phone

Org Fax

Order Date
12/30/2024

Delivery Contact
PHELPS WINIFRED

Delivery Address
123 APPLE STREET

GREENHORN,OR
97877-

Delivery Days/Hours
Tuesday 8 AM - 5 PM
Wednesday 8 AM - 12 PM, 1 PM - 5 PM
Thursday 8 AM - 12 PM, 1 PM - 5 PM

Submit Order

Cancel

Order the number of doses of vaccine that are needed.
Allow approximately 2 weeks for delivery.

Pediatric State-Supplied Vaccine

Doses	Vaccine	Trade Name	Manufacturer	Packaging	NDC	Min Order Qty	Doses Given	Doses on Hand	Lot Numbers	Exp Date
	DTaP	Infanrix	GlaxoSmithKline	10X1 SYRINGES	58160-0810-52	10				
	DTaP,5 pertussis antigens	DAPTACEL	Sanofi Pasteur Inc.	10X1 VIALS	49281-0286-10	10		0	2CA54C3 0 2CA77C1 0 3CA03C3 18 3CA25C1	04/07/2025 04/30/2025 09/30/2025 04/30/2026
	DTaP-HepB-IPV	Pediarix	GlaxoSmithKline	10X1 SYRINGES	58160-0811-52	10				
	DTaP-IPV	Kinrix	GlaxoSmithKline	10X1 SYRINGES	58160-0812-52	10				
	DTaP-IPV	Quadracel	Sanofi Pasteur Inc.	10x1 VIALS	49281-0564-10	10		0	U7908AA	10/03/2025
	DTaP-IPV	Quadracel	Sanofi Pasteur Inc.	10X1 SYRINGE	49281-0564-15	10		1	U7838AA	07/27/2025
								10	U8009AB	01/31/2026
								10	U8200CB	06/30/2026

Step 1: Determine the details for the order including vaccine, packaging and quantity. There are several considerations.

- The Vaccine Management guide clearly states that clinics should keep six weeks of all ACIP recommend vaccine on hand unless you are a specialty clinic.
- Determine how much vaccine to order. The doses on hand, lot numbers, and expiration dates are pulled from your current state-supplied vaccine inventory to help you determine how many doses of which vaccines to order. It is NOT indicative of what lot numbers you will be receiving.
- Consider other factors like the time of year and holidays, like school starting and school exclusion day, and vaccine delivery blackouts.
- Packaging refers to the vaccine presentation's packaging (vials or syringes) and are listed on separate rows.
- Be sure to meet the minimum order quantity shown in the Min Order Qty field, and order in multiples of that minimum.
- Only vaccines which are approved for your organization will be available to order. And availability is subject to change.
- Orders can take up to two weeks to arrive.

Step 2: Enter the number of doses that you wish to order in the # doses column.

Step 3: Click the Submit Order button. Once you submit your order, the Oregon Immunization Program will review the order before sending it off to be filled.

Privately-Purchased Vaccine

Privately purchased vaccines are ordered on the commercial market. Please see the manufacturer or distributors websites for ordering privately purchased vaccine. As stated in the Oregon's vaccine stewardship law, all privately-purchased vaccine must be added to your ALERT IIS inventory.

Seasonal/Pandemic Vaccine

For seasonal vaccines like flu, pandemic and other special situations, a different ordering process is used. There are three main steps: Requesting, allocating and drawing down.

1. **Requesting:** OIP notifies clinics when requesting is open via the Oregon Immunization Partner Update emails. Then clinics request the amount they want through the season or situation. In the spring, OIP asks clinics to "prebook" flu vaccine, this is a specific kind of request that estimates the amount your clinic will use for the following season.
2. **Allocating:** When vaccine is available, OIP allocates vaccine based upon requests.

3. **Drawing down:** Once vaccine has been allocated. Clinics can draw down or order vaccine throughout the season or situation.

OIP communicates via the Oregon Immunization Partner Update emails for vaccines that use this ordering method and throughout the process. For more detailed information, See the Seasonal/Pandemic Vaccine Ordering Process in ALERT IIS tipsheet.

3.3 Tracking Orders

Vaccine orders typically take a week to arrive once an order has been approved in ALERT IIS. This may vary due to holidays and weekends, weather and vaccine supply issues.

From the Manage Orders page track the status of your order.

- **Pending** – Order has not been reviewed and can be modified or cancelled.
- **In Progress** – Order is in review and can only be modified or canceled by OIP. Call the OIP Help Desk for assistance.
- **Sent to Distributor** – Order has been sent to CDC for approval and to McKesson to be filled. Orders can no longer be modified or cancelled.
- **Shipped** – The full order has been filled and shipped. Hover over quantity to see tracking numbers.

Chapter 4: Receiving Inventory

Chapter 4 covers receiving vaccine inventory physically and in ALERT IIS. First, you will learn how to read the transfer screen and locate tracking numbers. Once the inventory arrives, there are four steps to verify the order is complete and accurate. You'll learn how to accept the state-supplied vaccine transfers in ALERT IIS and add privately-purchased inventory. Lastly, sending transfers to other clinics is demonstrated.

Learning Objectives

- You will learn how to read the transfer screen and find tracking numbers.
- You will learn the four steps of receiving inventory.
- You will learn how to accept orders in ALERT IIS.
- You will learn how to add inventory in ALERT IIS.
- You will learn how to send transfers in ALERT IIS.

4.1 Reading the Transfer Screen and Finding Tracking Numbers

The screenshot shows the ALERT IIS interface. The left sidebar contains a menu with options like 'Training Region 5.0.0', 'Patients', 'Inventory', and 'Reports'. The main content area displays the 'Manage Transfer' screen. At the top, there's a header for 'ALERT CLINIC 3' and a user profile for 'Breanna Smith'. Below this, there's a 'Vaccine Order/Transfer Notification' section with a table showing the status of various orders. The 'Transfer List' section is divided into 'Outbound Transfer' and 'Inbound Transfer' tables. The 'Outbound Transfer' table lists several transfers, including one that was 'REJECTED' and others that are 'TRANSFER' or 'PARTIALLY ACCEPTED'. The 'Inbound Transfer' table shows a single transfer that was received on 12/08/2021. A red arrow points from the 'Inventory' section in the left sidebar to the 'Manage Transfer' screen.

Create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
1/30/2021	REJECTED		ALERT CLINIC 3	ALERT Clinic 2	11/30/2021	12/08/2021	
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	LAByrnth Medical Center	12/07/2021		
2/01/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/01/2021		
1/30/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2			
1/29/2021	TRANSFER		ALERT CLINIC 3	LAByrnth Medical Center	11/29/2021		
9/28/2021	PARTIALLY ACCEPTED		ALERT CLINIC 3	ALERT Clinic 2	09/28/2021	09/28/2021	

Create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
2/08/2021	TRANSFER		ALERT Clinic 2	ALERT CLINIC 3	12/08/2021		

Manage Transfers contains details about all incoming and outgoing transfers. Each transfer contains details about the sending organization, receiving organization, and

lists of items shipped. Transfers can be from either OIP orders of state supplied vaccines or from other LPHAs and clinics.

- **Inbound Transfers** are shipments the clinic is receiving.
- **Outbound Transfers** are shipments the clinic is sending.
- **Historical Transfers** are completed transfers.
- The **Create Date** initiates the transfer process, detailing the sender, receiver, and items being shipped.
- The **Ship Date** is important. It verifies that the package has been shipped by the clinic. If the ship date is not filled in the receiving organization will not be able to accept the transfer.
- The **Receive Date** is the date the shipment has been received. A transfer is not complete until it has been received.

To find tracking numbers

1. In ALERT IIS, click on “Manage Transfers”
2. In the “Inbound” section, click on create date.
3. Hover over line items to see shipment tracking numbers.

Transfer Vaccine Item						
Transfer Quantity	Vaccine Group	Trade Name	Lot Number	Funding Source	Inventory Action	Order Line #
100	Td/Tdap - DTP/aP - HepB - Hib - Polio	Vaxelis	U7921AA	State	Merge with Existing Lot	1
40	HPV	Gardasil 9	Y008119	State	Create New Lot	2
	Shipment Tracking # 1Z81W6330170406435 Carrier UPS1			State	Merge with Existing Lot	3
30	Hib	ActHib	UK168AC	State	Merge with Existing Lot	4
30	Meningo	MenQuadfi	U8375AA	State	Create New Lot	5
20	MMR - Measles - Mumps - Rubella	MMR II	Y003499	State	Merge with Existing Lot	6
60	Rotavirus	RotaTeq	2037483	State	Merge with Existing Lot	7
30	Td/Tdap - DTP/aP	Adacel	U8252AA	State	Merge with Existing Lot	8
60	Varicella	Varivax	Y015100	State	Create New Lot	9

4.2 Receiving Inventory

1. Unbox: immediately open shipment.
2. Check: check temperature indicators and ensure vials are intact.
3. Accept: compare brands, expiration dates, lot numbers and quantities to order transfer in ALERT IIS. Accept order.
4. Store: rotate stock and put away vaccine.

If there are any issues, call the OIP Help Desk.

4.3 Accepting Transfers

To add state-supplied vaccine to the inventory list, the clinic will need to accept the order transfer, in ALERT.

1. Click on **create date hyperlink** in ALERT. Select the hyperlinked date of the inbound transfer.

Manage Transfer

Create a New Transfer....

Return to the Previous Screen....

Transfer List

Outbound Transfer

create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
1/30/2021	REJECTED		ALERT CLINIC 3	ALERT Clinic 2	11/30/2021	12/08/2021	
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	LAByrinth Medical Center	12/07/2021		
2/01/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/01/2021		
1/30/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2			
1/29/2021	TRANSFER		ALERT CLINIC 3	LAByrinth Medical Center	11/29/2021		
9/28/2021	PARTIALLY ACCEPTED		ALERT CLINIC 3	ALERT Clinic 2	09/28/2021	09/28/2021	

Inbound Transfer

create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
12/08/2021	TRANSFER		ALERT Clinic 2	ALERT CLINIC 3	12/08/2021		

2. Options for receiving transfers:
 - a. **Accept Transfer** will accept the whole transfer. Verify the physical inventory matches the ALERT IIS order transfer.
 - b. There are **Reject** and **Partially Accept** options - do not use these buttons. If there is an issue with the order, please contact the Provider Services Help Desk.
3. A pop-up will ask "Are you sure you want to add all transfer items into inventory?" Click **OK**. ALERT IIS will drop all the lots into the clinic inventory and go back to the previous transfer screen.

Receive Transfer

Accept Entire Transfer....

Reject Entire Transfer....

Partially Accept Transfer....

Return to the Previous Screen....

Transfer Between Organizations Created on 12/08/2021

Sending Entity	Receiving Entity
Organization ALERT Clinic 2 Site ALERT Clinic 2 Address 800 NE OREGON ST. STE 370 PORTLAND, OR 97232 Contact LEAH JOHNSON Phone # (971) 352-0625 Ship Date 12/08/2021	Organization ALERT CLINIC 3 Site ALERT CLINIC 3 Address 123 APPLE STREET GREENHORN, OR 97877 Contact BREANNA WESTON Phone #

4.4 Adding Inventory

VFC /VAP clinics are required to add private vaccine stock into ALERT IIS. This is **NOT** the process for adding state-supplied vaccine.

Modifying Quantity of Existing Inventory

1. If the vaccine with the same lot and expiration date, already exists in your inventory, click on the hyperlinked **vaccine** name.
2. Scroll to the bottom to where it says **Modify Quantity on Hand**.
3. **Choose the action** of Add.
4. Put in the **number** of doses.
5. Choose the **reason**, Receipt of Inventory.
6. Then choose **Save**.
7. It will say **Inventory was successfully added**
8. Press "**Cancel**" to return to previous screen.

The screenshot displays the 'Edit Vaccine Inventory Information' form in the ALERT IIS system. The form is titled 'Edit Vaccine Inventory Information' and shows details for 'Site: ALERT CLINIC 3'. The vaccine information includes: Trade Name: Adacel, Manufacturer: Sanofi Pasteur Inc., NDC: 49281-0400-10, Packaging: ADACEL 10X1 VIALS, Lot Number: 12345, Dose: .5, Expiration Date: 09/23/2024, Funding Source: State-Supplied, Lot Active: Yes, Quantity on Hand: 187, and Cost Per Dose (\$): . The 'Modify Quantity On Hand' section at the bottom is highlighted with a red box and contains the following fields: Action: Add (selected), Amount: (empty), and Reason: Receipt of Inventory (selected). An orange arrow points from the 'Modify Quantity' button in the 'Manage Inventory' sidebar to the 'Edit Vaccine Inventory Information' form.

Manually Adding Inventory

1. Before adding inventory, make sure the lot does not already exist in the inventory. If it does, use modifying quantity.

2. Click **Add Inventory**
3. Fill out the fields. Blue fields are required.
 - a. **Trade Name** is selected from the drop-down menu. This will autofill the Manufacturer.
 - b. **Lot Number** from the vaccine box. Do not use the lot number on the vial or syringe.
 - c. **Dose** for the vaccine. This can be found on the package insert.
 - d. **Expiration Date** located on the box. If it just lists the month and year, use the last day of month – e.g., if packing slip says 9/2023, should put 09/30/2023 as expiration date.
 - e. **Funding Source** will always be Private because clinics should not be manually adding state-supplied vaccine.
 - f. **Quantity on Hand** is the total number of doses, not number of vials.
4. Click **Save**
5. **Inventory was inserted successfully** will appear in red at the bottom.
6. **Cancel** is the back button.

The screenshot shows two overlapping windows. The background window is titled 'Manage Inventory' and contains buttons for 'Add Inventory', 'Modify Quantity', and 'Add / Edit Inventory'. The 'Add Inventory' button is highlighted with a red rectangular box. A red arrow originates from this box and points towards the foreground window. The foreground window is titled 'Add Vaccine Inventory Information' and contains the following fields:

- Site: ALERT CLINIC 3
- Trade Name: ACAM2000 (dropdown menu)
- Manufacturer: Sanofi Pasteur Inc. (dropdown menu)
- NDC: (dropdown menu)
- Packaging: (dropdown menu)
- Lot Number: (text input field)
- Dose: (dropdown menu)
- Expiration Date: (text input field with a calendar icon)
- Funding Source: (dropdown menu)
- Lot Active: Yes (dropdown menu)
- Quantity on Hand: (text input field)
- Cost Per Dose (\$): (text input field)

At the top right of the foreground window are 'Save' and 'Cancel' buttons.

Barcode Scanner

1. Click inside the **Barcode field**.
2. Scan barcode.
3. There are three possible options:
 - a. Zero matches
 - b. One match
 - c. Two matches
4. Select the match or click “Add New”
5. Fill out all the blue fields that aren't populated.
6. Click **Save**.
7. **Inventory was inserted successfully** will appear in red at the bottom.
8. **Cancel** is the back button.

4.5 Sending Transfers

Clinics can send vaccine to each other but remember that there is a physical and digital component. The physical aspect is following proper cold chain and shipping instructions that the VFC trainings cover. The digital component is reflecting the physical shipment in ALERT IIS. Remember ALERT IIS needs to match what is happening in the real world. This is a requirement of being able to provide state-supplied vaccine.

Manage Transfer

Create a New Transfer...

Return to the Previous Screen...

Transfer List

Outbound Transfer

Create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
1/30/2021	REJECTED		ALERT CLINIC 3	ALERT Clinic 2	11/30/2021	12/08/2021	
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/07/2021		
2/07/2021	TRANSFER		ALERT CLINIC 3	LAByrinth Medical Center	12/07/2021		
2/01/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/01/2021		
1/30/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/30/2021		
1/29/2021	TRANSFER		ALERT CLINIC 3	ALERT Clinic 2	12/29/2021		
9/28/2021	PARTIALLY ACCEPTED		ALERT CLINIC 3	ALERT Clinic 2	12/28/2021		

Inbound Transfer

Create Date	Type	Order ID	Sending Org:Site	Receiving Org:Site
2/08/2021	TRANSFER		ALERT Clinic 2	ALERT Clinic 3

New Transfer

Sending Site: ALERT CLINIC 3

Internal Receiving Site: or

Receiving Organization:

Note: Only those sites or organizations which have inventory set up are displayed.

Add from Inventory

Show ☒ Active and Non-Expired ☐ Inactive or Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
	Adacel	Td/Tdap - DTP/aP	12345	187	Y	S	09/23/2024
Out of Stock	Adacel	Td/Tdap - DTP/aP	875678	-46	Y	P	11/19/2024
	Boostrix	Td/Tdap - DTP/aP	34567	90	Y	S	09/23/2022
	COVID-19 Janssen	COVID-19	2021GW886	20	Y	S	09/27/2022
	COVID-19 Janssen	COVID-19	12399a	50	Y	S	01/01/2036
	COVID-19 Janssen	COVID-19	TE02790	100	Y	S	11/30/2036

1. Under **Manage Transfer**, select **New Transfer**
2. The **Sending Site** is the clinic's organization and should autofill.
3. The **Receiving Organization** is the organization where vaccines are being sent.

- a. Every clinic that has a delivery address, hours and contact information appears on this drop-down list.
 - b. Just because they are on the list does not mean they are allowed to receive vaccine. Clinics are responsible for verifying that a clinic can receive state-supplied vaccine by asking them or calling the help desk.
 - c. Some clinics can have multiple locations, verify the transfer is being sent to the correct clinic location. Verify with the address or ORG code.
4. In the **Transfer Quantity** column put in the amount, in doses, being sent.
 5. Then click **Save** and the screen will refresh with the message ****Saved Successfully**** at the top right– but the process is not done yet, this transfer still needs to be shipped.
 6. Make changes and verify information.

dit Transfer: Create Date 12/23/2021 **Saved Successfully**

Sending Site ALERT CLINIC 3

Internal Receiving Site or

Receiving Organization ALERT Clinic 2 - P02222

Note: Only those sites or organizations which have inventory set up are displayed.

Transfer Item	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
☐	10	Adacel	Td/Tdap - DTP/aP	12345	187	Y	S	09/23/2024

dd from Inventory Show ☒ Active and Non-Expired ☐ Inactive or Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Funding Source	Expiration Date
Out of Stock	Adacel	Td/Tdap - DTP/aP	875678	-46	Y	P	11/19/2024
	Boostrix	Td/Tdap - DTP/aP	34567	90	Y	S	09/23/2022
	COVID-19 Janssen	COVID-19	2021GW886	20	Y	S	09/27/2022
	COVID-19 Janssen	COVID-19	12399a	50	Y	S	01/01/2036

7. Click the **Packing List** button before ship. It is strongly recommended that a packing list is included with the vaccine shipment and another copy is kept for the clinic records.

8. Click the **Ship** button.

Ship Transfer

Enter Ship Date12/23/2021

Ship

Cancel

Transfer Between Organizations Created on 12/23/2021

Sending Entity	Receiving Entity
Organization ALERT CLINIC 3 Site ALERT CLINIC 3 Address 123 APPLE STREET GREENHORN,OR 97877 Contact BREANNA WESTON Phone #	Organization ALERT Clinic 2 Site ALERT Clinic 2 Address 800 NE OREGON ST. STE 370 PORTLAND,OR 97232 Contact LEAH JOHNSON Phone # (971) 352-0625

Transfer Vaccine Item

Transfer Quantity	Trade Name	Vaccine Group	Lot Number
10	Adacel	Td/Tdap - DTP/aP	12345

9. Change the **Ship Date** to the date the vaccine will be sent.
10. Verify all information on this screen before shipping.
11. Click on the **Ship** button again. The screen will revert to the manage transfer screen and indicate **Transfer Successfully Shipped** in the upper right corner.

Chapter 5: Non-viable Vaccine

Chapter 5 focuses on managing non-viable vaccines, those that are expired, spoiled, or wasted. It revisits vaccine stewardship and explains what constitutes an excursion. Then details how to manage each type of non-viable vaccine both physically and in ALERT IIS. The chapter concludes with an overview of how shipping labels are generated and sent to your clinic.

Learning Objectives

- You will learn about vaccine stewardship.
- You will learn about temperature excursions.
- You will learn how to manage non-viable vaccines.
- You will learn how shipping labels are delivered to your clinic.

5.1 Vaccine Stewardship

Good vaccine stewardship ensures that your organization is doing everything possible to prevent expired, wasted and spoiled vaccine.

Follow the proper protocols as outlined in the [Oregon Vaccine Management Guide](#) and [CDC's Storage and Handling Toolkit](#).

5.2 Excursions

A temperature excursion is any temperature reading outside of the recommended ranges in the manufacturers' package insert. Temperature excursions or inappropriate storage conditions for any vaccine require immediate action.

When out-of-range temperatures occur for more than half an hour or more than one degree Celsius, the Oregon Immunization Program requires state-supplied vaccine organizations to immediately relocate the vaccine to stable backup unit and label vaccines "Do Not Use." And contact the Provider Services Help Desk to determine viability

5.3 Managing Non-viable Vaccine

Non-viable vaccine is any vaccine that cannot be administered to a patient. [How to Report Non-Viable Wasted, Spoiled or Expired Vaccine](#)

There are three types:

- **Expired** vaccine is past the expiration date.
- **Spoiled** vaccine was stored incorrectly. This could be during shipping or due to a temperature excursion.

- **Wasted** vaccine has been opened and cannot be administered. For example, a patient changed their mind after the dose was drawn. Or a multi-dose vial has gone past the beyond-use-date.

Expired Vaccine

Managing expired vaccines is a concerted effort between CDC's Vaccine Tracking system (called vtrcks), ALERT I-I-S and your clinic. Note this is not used for open vaccine vials or syringes or punctured multidose vials. Click each step to learn more.

1. Once state-supplied vaccine expires, a return label will automatically be generated and sent to the organization's mailing address. You must let the vaccine expire in ALERT I-I-S inventory so that a return label is shipped. This is an automated process.
2. Move the vaccine out of the storage unit and hold while you wait for return label.
3. Once you receive the shipping label, you can package and ship.

Spoiled Vaccine

Spoiled vaccine is vaccine that was stored incorrectly. Remember – this is NOT opened vials or syringes or punctured multidose vials.

1. Vaccine that has spoiled out of the fridge, should not be returned to the fridge. When the vaccine spoils in the fridge, move it out immediately. Store the vaccine in an out of the way location while you wait for a return label.
2. Adjust inventory and use the appropriate reason. A return label will automatically be generated for spoiled state-supplied vaccine and sent to the organization's mailing address for the following reasons:
 - a. "Spoilage Reported by Provider"
 - b. "Lost or damaged in transit to Provider"
 - c. "Failure to store properly upon receipt by Provider"
 - d. "Refrigeration failure reported by Provider"
3. Once you receive the shipping label, you can package and ship.

Wasted Vaccine

Wasted vaccine, vaccine that is opened and cannot be used. This includes punctured multi-dose vials.

1. Adjust inventory in ALERT IIS using the "Other – not usable, Reported by Provider" reason.
2. Dispose syringes and vials in your sharps container or in the way that it is approved by your organization.

5.4 Shipping Labels

Shipping labels are generated by CDC's Vaccine Tracking system, Vtrcks, which is connected to ALERT I-I-S. Shipping labels will automatically be generated for five reasons

- The expiration date has been reached.
- Spoilage Reported by Provider.
- Lost or damaged in transit to Provider.
- Failure to store properly upon receipt by Provider.
- Refrigeration failure reported by Provider.

These labels will then be mailed to your organization's mailing address on the Edit organization page in ALERT IIS. If you don't receive a shipping label after 30 days, please contact the Providers Services Help Desk.