This document was designed to provide you with Inventory Management best practices based on common questions we have received from providers. It is imperative that your location's physical inventory matches the virtual inventory in CVMS. NC DHHS reviews and allocates vaccine based on your location's inventory in CVMS. Any discrepancy may result in limited or denied vaccine allocation requests. Following the best practices below will provide an accurate picture of your available inventory.

If you have question after reviewing the best practices and recommendations below, please submit a Help Desk Ticket for assistance. Please see 'Step-6 Receiving and Managing Inventory in CVMS User Guide' in the list of CVMS User Guides and Recorded Trainings. If your provider location uses NCIR, please see the NCIR Managing Inventory Best Practices and Managing Inventory guide for steps on managing your location's inventory.

Frequently Asked Questions

Q. *When should I add 'new' inventory?*

A. New inventory should be counted and entered into CVMS immediately upon receipt at your location. New inventory should only be 'added' if it was received via direct shipment. If a transfer was sent to your location, you should confirm the product, lot# and doses received, and 'accept' it as an 'inbound transfer'. If the sending provider has not entered the transfer, please reach out to them directly to have it entered.

Q. *I have received multiple transfers and orders with the same lot # and expiration date. Is there a way to combine them?*

A. If you have multiple inventories with the same lot# and expiration date, you may use the 'consolidate available doses' button in CVMS to merge active inventories together. This will move all available doses to one inventory line-item. The other inventories will display '0' doses available.

Q. *How often should I reconcile my inventory?*

- It's best practice to perform a physical count and reconcile with your virtual count in CVMS at least once a week or more often if you are a large provider. If you find that your physical count differs from the virtual count, please see the **'Edit or Update Vaccine Inventory Record Details'** section in the Step 6 - Receiving and Managing Inventory CVMS User Guide in the list of CVMS User Guides and Recorded Trainings for steps on how to reconcile your location's inventory.
  - To download a simplified Inventory Report: go to the CVMS home screen, click on 'More', click 'reports', click 'All Reports' and use the search bar to find 'NC Inventory Report_Doses Available'

Q. *How should I track wasted/expired doses?*

A. To prevent reporting inconsistencies in your inventory, it is best practice to enter wastage events weekly when performing inventory reconciliation.
  - Wasted vaccine can be tracked using a spreadsheet that includes the following information: product, lot#, doses wasted, reason for waste, date of waste. Please see the template Inventory Tracking Spreadsheet linked here to track your vaccine inventory including wasted vaccine.
  - For guidance on how to create a wastage event, please see the **'Log Vaccine Wastage'** section in the Step 6 - Receiving and Managing Inventory CVMS User Guide in the list of CVMS User Guides and Recorded Trainings.

Q. *I transfer vaccine to other providers in my area. How should I track transfers for reconciliation?*

A. Transfers should be entered before the vaccine leaves your location. It is advisable that you track outbound transfers using your own system including the following information: Receiving provider,

product transferred, lot #, doses, expiry, date of transfer. This information is required to complete a transfer order in CVMS. For guidance on how to complete a transfer in CVMS please see the **'Transfer Vaccine Inventories Between Two Locations'** section in the Step 6 - Receiving and Managing Inventory CVMS User Guide in the list of [CVMS User Guides and Recorded Trainings](#).

- **Please note:** if you did not enter a transfer on time in CVMS, please create the transfer order in CVMS and submit a Help Desk ticket with the order number for assistance.

Q. *Why does CVMS say I have more or less inventory than I have on hand?*

A. There are three major reasons why your CVMS inventory may show a surplus or deficit compared to your physical count. Please reference the inventory troubleshooting guide below for recommendations on how to address inventory discrepancies.

Troubleshooting Inventory Discrepancies

There are three major reasons why your inventory may have a discrepancy: missing documentation, inventory discrepancies, missing wastage events.

1. Missing Administration Documentation

- If your location enters vaccine administrations manually, you will need to investigate any delays in documentation and address barriers to timely reporting. If your location is experiencing high volumes of administration and you are unable to keep up with the documentation, please reach out to CVMS_DES@dhhs.nc.gov for assistance with data entry.
- If your location uses CVMS Direct Integration, missing documentation may be the result of issues with the integration process. You can check your HCLM Error Report to investigate possible issues with integration.
  - o **CVMS Direct Integration Users only**: You can access your HCLM Error Report by navigating to the 'Reports' tab in CVMS then clicking 'All Reports' in the menu bar on the left-hand side of the screen then clicking 'HCLM EHR Error Report'.

2. Inventory Discrepancies

- Make sure all shipments and orders have matching inventory and that all transfers have been 'accepted' following the guidance provided in the user guide linked above. If you find inventory that does not have a matching shipment record, please see the **'Track Vaccine Shipment Notice'** section in the Step 6 - Receiving and Managing Inventory CVMS User Guide in the list of [CVMS User Guides and Recorded Trainings](#).
- Review your outbound transfers to make sure they have all been entered. This will ensure the doses are accurately decremented from your inventory.
- Review your 'inbound' transfers to confirm that all transfers have been accepted correctly. Please see the **'Transfer Vaccine Inventories Between Two Locations'** section in the Step 6 - Receiving and Managing Inventory CVMS User Guide in the list of [CVMS User Guides and Recorded Trainings](#).
- Review all inventories and search for 'duplicated' lot #s and available doses. If an 'inbound' transfer was 'added' as a new inventory, that product/lot # will have duplicative inventory (therefore creating an inaccurate surplus in inventory).

3. Missing Wastage Events

- After you have reviewed your inventory, confirmed that all doses have been documented and all transfers have been entered, you may waste out any remaining doses. It is imperative that wasted vaccines are tracked/entered on a weekly basis following the best practice guidelines above.

If you have question after reviewing the best practices and recommendations below, please submit a ticket through the [Help Desk Portal](#) or contact the Help Desk call center at (877) – 873 – 6247 for assistance.

If you have problems with your CVMS integration system, please reach out to your integration system support point of contact.