

North Carolina Immunization Registry (NCIR)

Manage Transfers (Non-COVID-19 Vaccines)

User Guide

Last Updated: March 22, 2022



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



Different Types of Transfers

Definitions

organization NORTH CAROLINA IMMUNIZATION REGISTRY • user Rebecca Sweeney • role NCIR Help Desk

Manage Transfer

Create a New Transfer... New Transfer

Return to the Previous Screen... Cancel

Transfer List

Outbound Transfer

Outbound Transfers are when you transfer from your inventory to another site's inventory.

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
No Outbound Transfer.						

Inbound Transfer

Inbound Transfers are when you receive transfers from another site into your inventory.

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
12/19/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	12/19/2006		
05/08/2006	ORDER	Vaccine Distribution				

Historic Transfers are transfers that have been shipped and/or received.

Historic Transfer (last 7 days by default)

Show by Last Updated Date From: To: Refresh List

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date	Restock Date
04/08/2008	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	04/08/2008	04/08/2008		

Outbound Transfers to NCIR Users

Step 1 of 6: Navigate homepage

You can view any pending Inbound or Outbound transfers in the NCIR under the **Vaccine Order / Transfer Notification** portion of the Home Page. In addition to the **Manage Transfer** Screen.

1. Click **Manage Transfer**

The screenshot shows the NCIR homepage for a user named Rebecca Sweeney, Administrator at TEST ORGANIZATION. The left sidebar contains navigation menus for General, Maintenance, Inventory, Clients, Immunizations, and Reports. The 'Inventory' menu has 'manage transfers' highlighted with a red box. The main content area includes announcements, release notes, and a table titled 'Vaccine Order/Transfer Notification ...'. A yellow callout box points to the table with the text: 'When you have transfers that are in queue for one reason or another they will show up under the Vaccine Order/ Transfer Notification portion of the home page.'

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	1	0	0
Transfer(s)	0	0	1

Audience

Inventory Control

Administrator

Step 2 of 6: Navigate to New Transfer

Using the Manage Transfer function leaves an electronic trail from your facility to NCIP facility that you are physically transferring vaccine to.

1. To transfer vaccine to another provider on the NCIR, start by clicking **New Transfer**.

organization **NORTH CAROLINA IMMUNIZATION REGISTRY** • user **Rebecca Sweeney** • role **NCIR Help Desk**

Manage Transfer

Create a New Transfer.... **New Transfer**

Return to the Previous Screen... Cancel

Transfer List

Outbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
No Outbound Transfer.						

Inbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
12/19/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	12/19/2006		
05/08/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	08/25/2006		

Historic Transfer (last 7 days by default)

Show by Last Updated Date From: 04/01/2008 To: 04/08/2008 Refresh List

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date	Restock Date
04/08/2008	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	04/08/2008	04/08/2008		

Audience

Inventory Control

Administrator

Step 3 of 6: Complete Transfer Information

1. Choose your **Receiving Organization** as the facility that you are transferring vaccine to.
2. You can choose to transfer active and inactive vaccine to another provider. Click on the **OK** radio button next to your choice.
3. Enter the **Transfer Quantity** in the box next to the vaccine you are wanting to transfer. Remember to enter the amount in doses.
4. Click **Save** when you are ready to finish the transfer.

Audience

Inventory Control

Administrator

New Transfer

Sending Site: NORTH CAROLINA IMMUNIZATION REGISTRY

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 and Non-Expired Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date
<input type="text"/>	Acel-Imune	DTP/aP	22525	7	Y	Y	07/31/2008
<input type="text"/>	Adacel	Td - Tdap	ADA1234	500	Y	Y	08/08/2009
<input type="text"/>	Boostrix	Td - Tdap	11111	96	Y	Y	09/30/2008
<input type="text"/>	Engerix-B Adult	HepB	111111	87.5	Y	Y	06/30/2009
<input type="text"/>	Engerix-B Peds	HepB	212121	103	Y	Y	03/30/2009
<input type="text"/>	Fluvirin	Influenza	32434	247	Y	Y	01/01/2010
<input type="text"/>	Fluzone Pres-Free	Influenza	654-654	10200	Y	Y	06/30/2008
<input type="text"/>	Gardasil	HPV	1234z	89	Y	Y	05/05/2008
<input type="text"/>	Gardasil	HPV	GD5543	10	Y	Y	01/01/2009
<input type="text"/>	Menactra	Meningo	testuat	7	Y	Y	12/31/2009
<input type="text"/>	Pediarix	DTP/aP - HepB - Polio	65656	50	Y	Y	09/30/2008
<input type="text"/>	Recombivax-Adult	HepB	252525	98	Y	Y	03/30/2009
<input type="text"/>	Tripedia	DTP/aP	U1985CA	20	Y	Y	08/06/2008

Step 4 of 6: Navigate to Packing List

In order to finish this transfer, you must view or print the Packing List or Label. You will not be able to complete the transaction without doing this step. Click **Packing List**.

Edit Transfer: Create Date 04/11/2009 **Saved Successfully**

The vaccine that you are transferring will show up under **Transfer Item**.

You should see this message "**Saved Successfully**"

Transfer Item

Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date
<input type="checkbox"/>	10	Adacel	Td - Tdap	ADA1234	500	Y	Y	08/08/2009

*NOTE: Fields marked with an asterisk * are required.*

Add from Inventory Show Active and Non-Expired Inactive and Non-Expired Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date
<input type="text"/>	Acel-Imune	DTP/aP	22525	7	Y	Y	07/31/2008
<input type="text"/>	Boostrix	Td - Tdap	11111	96	Y	Y	09/30/2008
<input type="text"/>	Engerix-B Adult	HepB	111111	87.5	Y	Y	06/30/2009
<input type="text"/>	Engerix-B Peds	HepB	212121	103	Y	Y	03/30/2009
<input type="text"/>	Fluvirin	Influenza	32434	247	Y	Y	01/01/2010

Audience

Inventory Control

Administrator

Step 5 of 6: Complete Transaction

Once back to the **Edit Transfer** screen, click **Ship** twice to complete transaction.

**NORTH CAROLINA IMMUNIZATION PROGRAM
PACKING LIST**

Shipment Date:

SHIPPED FROM Mary Parkinson-Ivers NORTH CAROLINA IMMUNIZATION REGISTRY NC DHHS, Division of Public Health, Immunization Branch 1917 Mail Service Center Raleigh, NC, 27692-1917 Phone: (919) 7158770	To: CAROLINE HELTON Vaccine Distribution 1330 ST MARYS STREET RALEIGH, NC, 27605-1101 Phone: (877) 8736247
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IMPORTANT NOTES ON RECEIVING VACCINES:
. Verify lot, expiration and quantity against the packing list.

Vaccine	Lot Number	Expires	Doses	Cost/Dose	Total Cost
Tdap (Adacel - Sanofi Pasteur (Aventis Pasteur, Pasteur Merieux Connaught; Connaught Laboratories))	ADA1234	06/08/2009	10 0	\$24.95	\$249.50

Unknown Zone

Engerix-B Peds	HepB	212121	103	Y	Y	03/30/2009
Fluvirin	Influenza	32434	247	Y	Y	01/01/2010

The Packing List will come through as a pop up box, so make sure that you have your pop up blocker turned off if it is on. You can print this slip out if you would like to, otherwise just click the **X** in the corner to close the window. When you close the box you will be sent back to the **Edit Transfer** screen.

Audience

Inventory Control

Administrator

Step 6 of 6: Check Transaction Details

If the transfer was completed, you will see the message in blue Transfer Successfully Shipped and the transfer will show up under Outbound Transfer.

Manage Transfer Transfer Successfully Shipped

Create a New Transfer... New Transfer

Return to the Previous Screen... Cancel

Transfer List

Outbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
04/08/2008	TRANSFER	NORTH CAROLINA IMMUNIZATION REGISTRY	Vaccine Distribution	04/08/2008		

Inbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
12/19/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	12/19/2006		
05/08/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	08/25/2006		

Historic Transfer (last 7 days by default)

Show by Last Updated Date From: To: Refresh List

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date	Restock Date
04/08/2008	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	04/08/2008	04/08/2008		

Note:

- If a “Ship Date” does not appear on the Outbound Transfer, then the transfer was not finished.
- If the date of transfer is different than the current date shown, then type the correct date in the box next to “Enter Ship Date”.
- Once the Transfer is completed, the vaccine is immediately removed from the Senders NCIR inventory and ready to Accept into the Receivers inventory.

Audience

Inventory Control

Administrator

Inbound Transfers

Step 1 of 3: Navigate homepage

Click **Manage Transfers** and pending inbound transfers can be seen under the Inbound Transfer heading.

The screenshot shows the NCIR homepage for a user named REBECCA SWEENEY, Administrator at TEST ORGANIZATION. The navigation menu on the left includes sections for General, Maintenance, Inventory, Clients, Immunizations, and Reports. The 'Inventory' section has 'manage inventory', 'manage orders', and 'manage transfers' (highlighted in red). The main content area features announcements, release notes, and a table for Vaccine Order/Transfer Notification.

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	1	0	0
Transfer(s)	0	0	1

Audience

Inventory Control

Administrator

Step 2 of 3: Find Transfer

Inbound Transfers can be state supplied vaccine orders or transfers from another provider. The process of accepting these inbound transfers is the same, no matter the type.

Find your transfer and click on the **Create Date** link in blue.

Manage Transfer

Create a New Transfer...

Return to the Previous Screen...

Transfer List

Outbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
04/08/2008	TRANSFER	NORTH CAROLINA IMMUNIZATION REGISTRY	Vaccine Distribution	04/08/2008		

Inbound Transfer

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
04/08/2008	TRANSFER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	04/08/2008		
12/19/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	12/19/2006		
05/08/2006	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	08/25/2006		

Historic Transfer (last 7 days by default)

Show by Last Updated Date From: To:

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date	Restock Date
04/08/2008	ORDER	Vaccine Distribution	NORTH CAROLINA IMMUNIZATION REGISTRY	04/08/2008	04/08/2008		

Audience

Inventory Control

Administrator

Step 3 of 3: Accept Transfer

To accept this transfer into your inventory, click on **Accept Transfer**. You should only accept your transfer after you have verified lot number, expiration date, and amount shipped. If your invoice matches the NCIR then accept.

The screenshot shows a web interface for receiving a transfer. At the top, there are four buttons: 'Accept Transfer', 'Reject Transfer', 'Partially Accept', and 'Cancel'. Below these is the 'Receiving Site' section, which includes a dropdown menu currently set to 'NORTH CAROLINA IMMUNIZATION REGISTRY'. A yellow callout box with a question mark icon and the text 'You will see this pop up message that makes sure you want to add the vaccine into your inventory.' is overlaid on the interface. The pop-up message is titled 'Microsoft Internet Explorer' and asks 'Are you sure you want to add all transfer items into inventory?'. It has 'OK' and 'Cancel' buttons, with a yellow arrow pointing to the 'OK' button and the text 'Click OK' next to it. Below the pop-up, there are contact details for two individuals: CAROLINE HELLON (Phone # (877) 873-6247) and Mary Parkinson-Rivers (Phone # (919) 715-6770). At the bottom, there is a 'Transfer Vaccine Item' table with one row of data.

Transfer Quantity	Vaccine Group	Trade Name	Lot Number	Inventory Action
10	Polio	IPOL	12123	Create New Lot

*NOTE: Fields marked with an asterisk * are required.*

Audience

Inventory Control

Administrator

Outbound Transfers to Non-NCIR Users (Non-COVID-19 Vaccine)

Step 1 of 3: Select Transfer

When you get ready to transfer vaccine to a provider that is not currently using the NCIR, you will still need to be able to subtract that vaccine from your inventory so that your vaccine count is accurate.

1. Start by going to **Manage Inventory** and then click **Show Inventory**
2. Choose the vaccine you want to transfer by clicking the **Select** box next to the Trade Name until you see a black check

Manage Inventory

Add Inventory for Site (CAROLINE'S NEW ORG FOR TESTING PURPOSES)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Site: Show Active Inactive Non-Expired Expired
 Public Private All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input checked="" type="checkbox"/>	Adacel	C2609AA	6094	Y	Y	02/23/2009
<input type="checkbox"/>	Adacel	H3845U	500	Y	N	09/09/2009

Audience

Inventory Control

Administrator

Step 2 of 3: Modify Quantity

After choosing the trade name you are directed to the Modify Quantity screen.

1. Choose **Subtract** as the Action as you are subtracting this vaccine from your current inventory
2. Enter the **Amount** in doses that you are going to transfer
3. Under the category drop down choose '**Transfer to Provider**'
4. Click **Save** when you are finished.

Manage Inventory

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

Save

Return to the Previous Screen...

Cancel

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
Adacel	C2609AA	6094	Subtract ▼	100	Receipt from Inventory ▼

Receipt from Inventory
Receipt from Provider
Return to Provider
Transfer to Provider
Wasted Doses
Error Correction

*NOTE: Fields marked with an asterisk * are required.*

Audience

Inventory
Control

Administrator

Step 3 of 3: Review Inventory

Manage Inventory

Add Inventory for Site (CAROLINE'S NEW ORG FOR TESTING PURPOSES)....

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

You will be able to see that the vaccine has been subtracted from your inventory by going to your **Show Inventory** screen.

Site: Show Active Inactive Non-Expired Expired
 Standalone Private All

Select	Trade Name	Lot Number	Inv On Hand	Active	Public	Exp Date
<input type="checkbox"/>	Adacel	C2609AA	5994	Y	Y	02/23/2009
<input type="checkbox"/>	Adacel	H3845U	500	Y	N	09/09/2009

Audience

Inventory Control

Administrator

NOTE: When you have finished modifying the quantity of vaccine you have transferred, you will still need to document that transfer with the Immunization Branch. You can do this by going to the **Show Transaction** report and running the report. You will need to choose **Transfer to Provider** as the transaction type. Print out the report and write the name of the practice that you transferred vaccine to and then fax that report to the Immunization Branch at 1-800-544-3059



Where to Go for More Help?



Questions?

Contact your Regional Immunization Program Consultant (RIC)

The RIC Coverage Map with contact information is located on the Immunization Branch website:

<https://www.immunize.nc.gov/contacts.htm>

NC Vaccines Help Desk

1-877-873-6247

(Monday – Friday 7:00 AM – 7:00 PM ET and Saturday 8:00 AM – 4:00 PM ET)

https://ncgov.servicenow.com/csm_vaccine

Appendix

NCIR Roles

NCIR Role	Role Definition	Corollary Role in CVMS
Reports Only	This person in NCIR is only able to search for clients and view/print client specific records.	N/A
Typical User	Person who can manage, including add and edit, clients in NCIR, as well as manage inventory and ordering. This role also has all of the functionality of the Reports Only role.	Healthcare Provider
Inventory Control	Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.	N/A
Administrator	Person who can manage organization users, sites, and clinicians in NCIR. They run practice-level reports, including reminder/recall. This role also has all of the functionality of the Reports Only, Typical User, and Inventory Control roles.	Location Manager