Different Types of Transfers
Definitions

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

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

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

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.
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**.
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.
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**.

You should see this message “Saved Successfully”.

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

### Transfer Item

<table>
<thead>
<tr>
<th>Remove</th>
<th>Transfer Quantity</th>
<th>Trade Name</th>
<th>Vaccine Group</th>
<th>Lot Number</th>
<th>Quantity Available</th>
<th>Active</th>
<th>Status</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10</td>
<td>Adacel</td>
<td>Td - Tdap</td>
<td>ADA1234</td>
<td>500</td>
<td>Y</td>
<td>Y</td>
<td>06/06/2009</td>
</tr>
</tbody>
</table>

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

### Add from Inventory

<table>
<thead>
<tr>
<th>Transfer Quantity</th>
<th>Trade Name</th>
<th>Vaccine Group</th>
<th>Lot Number</th>
<th>Quantity Available</th>
<th>Active</th>
<th>Status</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Acen-Imun</td>
<td>DTP/IM</td>
<td>22525</td>
<td>7</td>
<td>Y</td>
<td>Y</td>
<td>07/31/2009</td>
</tr>
<tr>
<td></td>
<td>Boostrix</td>
<td>Td - Tdap</td>
<td>11111</td>
<td>96</td>
<td>Y</td>
<td>Y</td>
<td>03/30/2000</td>
</tr>
<tr>
<td></td>
<td>Engerix.B Adult</td>
<td>HepB</td>
<td>111111</td>
<td>87.5</td>
<td>Y</td>
<td>Y</td>
<td>08/30/2009</td>
</tr>
<tr>
<td></td>
<td>Engerix.B Kids</td>
<td>HepB</td>
<td>212121</td>
<td>103</td>
<td>Y</td>
<td>Y</td>
<td>03/30/2009</td>
</tr>
<tr>
<td></td>
<td>Fluvirin</td>
<td>Influenza</td>
<td>32434</td>
<td>247</td>
<td>Y</td>
<td>Y</td>
<td>01/01/2010</td>
</tr>
</tbody>
</table>
Step 5 of 6: Complete Transaction

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

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.
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.

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

[Image of the user interface with options to accept or reject the transfer and a pop-up message.]
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
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.

**NOTE:** Fields marked with an asterisk * are required.
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.servicenowservices.com/csm_vaccine
Appendix
## NCIR Roles

<table>
<thead>
<tr>
<th>NCIR Role</th>
<th>Role Definition</th>
<th>Corollary Role in CVMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports Only</td>
<td>This person in NCIR is only able to search for clients and view/print client specific records.</td>
<td>N/A</td>
</tr>
<tr>
<td>Typical User</td>
<td>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.</td>
<td>Healthcare Provider</td>
</tr>
<tr>
<td>Inventory Control</td>
<td>Person who can manage inventory and ordering, as well as all of the functionality of the Typical user and Reports Only roles.</td>
<td>N/A</td>
</tr>
<tr>
<td>Administrator</td>
<td>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.</td>
<td>Location Manager</td>
</tr>
</tbody>
</table>