North Carolina Immunization Registry (NCIR)

Ordering, Transferring and Inventory Management for COVID-19 Vaccine

User Guide

Last Updated: March 22, 2022
Steps to Order COVID-19 Vaccine
All COVID-19 vaccine is currently ordered outside of NCIR. Providers need to submit requests via the Allocation Request Form, available here:

https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#
Step 2 of 4: Complete Provider Information

Fill out provider information and location information

Allocation Request Form

Provider Information
Please enter your provider organization and location information below.

1. Parent Organization*

2. Please choose your provider location name*
   Select one from below list.
   PIN: Provider Location Name

3. If your "PIN - Provider Location Name" is not in the dropdown above, please enter it here:

4. Provider Contact Name*

5. Provider Contact Email*

6. Provider Contact Phone Number*

Next
Complete allocation request information

7. Please request the number of Pfizer doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Pfizer doses. Pfizer doses requested must be in multiples of 1170.*
   
8. Please request the number of Moderna doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Moderna doses. Moderna doses requested must be in multiples of 100.*

9. Please request the number of Janssen doses your provider location would like below (inclusive of first and second doses). Put '0' if you do not want any Janssen doses. Janssen doses requested must be in multiples of 100.*

10. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the name of the on-site coordinator to assist with the transfer.*

11. Your requested doses will likely be filled via transfer facilitated through this request form. Please provide the phone number of the on-site coordinator to assist with the transfer.*
Step 4 of 4: Complete Form

Complete form by selecting **Yes** to the final statements and clicking **Done**
Timeline for Ordering COVID-19 Vaccine
**Ordering Timeline**

1. Requests must be received by Thursday at 10am to be considered for shipment the following week.
2. NCDHHS will review all requests to ensure requests are in line with guidelines below.
3. Orders are confirmed on Friday.
4. Orders are delivered the following Tuesday or Wednesday.

**NOTE**: In most cases, denied requests will be due to insufficient administration history and/or forecasted booster dose demand at your site. Please only request direct allocation if you can administer the Minimum Order Quantity (MOQ) within 3 months of receipt.

If you believe your vaccine request was denied in error, please review the ordering guidelines below and resubmit with sufficient justification for how you will administer all doses within 3 months of receipt.
Steps for Accepting State-Supplied Orders
Click on **Manage Transfers**.
Step 2 of 4: Navigate to Your Order

1. Find your order under the **Inbound Transfers**.
2. Click on the **Create Date** in blue. This is going to take you to where you can view your order.
Step 3 of 4: Accept Transfer

1. You will see your order at the bottom of the screen. You must verify that these lot numbers and amounts match what you have on your invoice from the vaccine shipping box. If they do not match, please call the Help Desk at 877-873-6247.

2. Accept the transfer and it will be loaded into your inventory. Before you reject or partially accept your transfer you must call the Help Desk for assistance.

3. If your invoice matches the NCIR order, then you can accept it straight into your inventory by clicking Accept Transfer.

4. When you click Accept Transfer, you will see a pop-up message like below.

5. Click OK.
Step 4 of 4: Review

When you have successfully added your order into your NCIR inventory, then you will see the message below in red. You can double check to make sure your inventory is in the NCIR by going back to Manage Inventory and then clicking Show Inventory.

You can verify the vaccine has been entered into NCIR inventory.
Transferring COVID-19 Vaccine
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
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.
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**.
1. Choose your **Receiving Organization** as the facility that you are transferring vaccine to (NCIR only).

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.

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

You should see this message “Saved Successfully”
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.

<table>
<thead>
<tr>
<th>Vaccine Order/Transfer Notification...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>Order(s)</td>
</tr>
<tr>
<td>Transfer(s)</td>
</tr>
</tbody>
</table>

**Active Inventory that is Going to Expire...**

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Trade Name</th>
<th>Lot Number</th>
<th>On Hand</th>
<th>Public</th>
<th>Exp Date</th>
</tr>
</thead>
</table>

**Announcements:**

- **03/17/2008** = How to Report Oustide Clients
- **03/13/2008** = Ordering Authority Announcement
- **02/06/2008** = Reminder - Double Surveys
- **02/06/2008** = Hb Recommendations
- **02/05/2008** = Vaccine Doses Administered Outside of the United States
- **02/04/2008** = Recording Toddler Immunizations
- **01/17/2008** = Local Health Department Users
- **01/08/2008** = Accepting Vaccine Orders
- **12/13/2007** = Hb Announcement

**Release Notes:**

- **02/08/2008** = Release Version 7.2.3, NCR Release Notes Version 7.2.3

**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.
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.

You will see this pop up message that makes sure you want to add the vaccine into your inventory. Click **OK**.
COVID-19 Vaccine Transfers between NCIR and CVMS
NOTE: Cross-system transfers are not currently supported.

If you have any questions, please contact the NC Vaccines Help Desk by calling 1-877-873-6247 or by submitting a ticket https://ncgov.servicenowservices.com/csm_vaccine
Moving COVID-19 Vaccine from CVMS to NCIR (Transition)
If you have transitioned from CVMS to NCIR for managing COVID-19 vaccines, prior to the final transition date, your existing COVID-19 inventory will be transferred from CVMS to NCIR.
Reporting and Returning Expired Vaccine
Steps to Document Expired Vaccine
Step 1 of 4: Count Expired Vaccines and Navigate to Transfers Page

1. It’s a good idea to count your expired vaccines before you begin the process to document them in the NCIR. This helps ensure that the physical count of vaccines matches what the NCIR reports your facility as having on hand.

2. Click Manage Transfers
Step 2 of 4: Create New Transfer

1. You should get a pop-up for the expired vaccine. Click OK.
2. Click New Transfer.
3. Click Transfer All Expired.
Step 3 of 4: Enter Expired Dose Quantity

1. In the Transfer Quantity box, enter the number of doses that you are PHYSICALLY sending back. Make sure this number matches EXACTLY what the NCIR says you have (Quantity Available).

2. If it matches, move to the next step.

3. If the numbers DO NOT match call the NCIR Help Desk at 877-873-6247 and ask them to remove the excess doses from your inventory.

4. Enter a Preventive Action (e.g. “Use before expires”).
Step 4 of 4: Discard Expired Doses

DO NOT ATTEMPT TO SEND ANY COVID-19 VACCINE BACK TO MCKESSON SPECIALTY, THE STATE OF NORTH CAROLINA, OR THE CENTERS FOR DISEASE CONTROL AND PREVENTION.

PLEASE DISCARD OF ALL EXPIRED COVID-19 VIA THE PROTOCOLS OR PROCEDURES OF YOUR OFFICE.
Reporting Wasted Vaccine
Steps to Document Wasted or Spoiled COVID-19 Vaccine
Step 1 of 5: Navigate to Inventory Page

From the homepage, click Manage Inventory

Audience

Administrator
Step 2 of 5: Navigate to Inventory

Click **Show Inventory**.
Step 3 of 5: Select the Correct Vaccine

1. Click on the **State** or **Private** radio button to display only state or private vaccine.
2. Find each **Trade Name** and **Lot Number** for the vaccine that was wasted.
3. Click the **Select** box next to the vaccine so the check appears.
4. Click **Modify Quantity**.

<table>
<thead>
<tr>
<th>Select</th>
<th>Trade Name</th>
<th>Lot Number</th>
<th>NDC</th>
<th>In Stock Hand</th>
<th>Active</th>
<th>State</th>
<th>Y/N Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>COVID-19 Janssen</td>
<td>EUA4615162342</td>
<td>59676-0580-15</td>
<td>4991</td>
<td>Y</td>
<td>Y = Yes (i.e. state vaccine)</td>
<td></td>
</tr>
</tbody>
</table>
Step 4 of 5: Enter Wasted Dose Quantity

1. In the Modify Quantity On Hand section, choose 'Subtract' from the Action drop down list.
2. Enter the number of doses wasted in the Amount column.
3. Choose ‘Wasted Doses’ from the Category drop down box.
4. This brings up the Reason Wasted and Preventive Action boxes. Document what happened to the vaccine and how it can be prevented. Both of these boxes are required.
5. Click Save.
Reasons for Wastage

The following reasons may be recorded in the provided text box when using “Wasted Doses” in the Modify Quantity function to waste COVID-19 vaccine.

- Broken Vial/Syringe
- Expired Vaccine
- Failure to store properly upon receipt
- Lost or unaccounted for vaccine
- Mechanical failure Natural disaster/Power outage
- Open vial but all doses not administered
- Recall
- Storage Unit too cold
- Storage Unit too warm
- Vaccine drawn into syringe but not administered
- Vaccine spoiled in transit (Freezer/Warm)
- Insufficient Quantity – Pfizer (5 doses)
- Insufficient Quantity – Janssen (4 doses)
- Insufficient Quantity – Moderna (13 doses)
Step 5 of 5: Review Inventory

You are redirected back to the **Show Inventory** screen, where you can check to see that the dose(s) were subtracted.
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
<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>