Unlike how pharmacies utilize NCIR for routine vaccines (where doses are recorded as historical), pharmacies who choose to transition to NCIR to report COVID-19 vaccine administrations are **required** to manage inventory in NCIR.
## NCIR Usage for Pharmacies: Routine Vaccines Versus COVID-19 Vaccines

<table>
<thead>
<tr>
<th>Routine Vaccines</th>
<th>COVID-19 Vaccines</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Doses entered <em>historically</em></td>
<td>• Doses entered <em>using active inventory</em></td>
</tr>
<tr>
<td>• Inventory management (including reporting wastage/expired doses) - <strong>Not Required</strong></td>
<td>• Inventory management - <strong>Required</strong></td>
</tr>
</tbody>
</table>
Manage Inventory
Step 1 of 2: Navigate to Inventory

1. On the homepage, click **Manage Inventory**
2. On the Manage Inventory page, click **Show Inventory**
Step 2 of 2: Manage Inventory

From this screen you can add inventory, modify quantity, and show transactions for your inventory.

You can look at any combination of inventory in the NCIR by clicking on the radio button next to your selection. For example, if you want to see all your active, public vaccine click on the radio button next to Active and State.

Vaccine’s that will expire in less than 120 days will be highlighted in pink.
Manage Vaccine Orders
Steps to Order COVID-19 Vaccine
Step 1 of 4: Navigate to Allocation Request Form

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

Allocation Request Form

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.*
   0

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.*
   0

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.*
   0

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.
Steps for Accepting State-Supplied Orders
Step 1 of 4: Navigate to Manage Transfers

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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Sending Org/Site</th>
<th>Receiving Org/Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/06/2008</td>
<td>ORDER</td>
<td>Vaccine Distribution</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>04/06/2008</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/18/2005</td>
<td>ORDER</td>
<td>Vaccine Distribution</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>12/18/2005</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
Steps to Run an Inventory Reconciliation Report
An inventory reconciliation report will show you what the NCIR says you have in your inventory and give you room to write your actual count from your refrigerator so that you can begin to balance your inventory.

1. From the homepage, click **Inventory Report**.
Step 2 of 3: Select Criteria

1. Choose your **Site**.
2. Choose your **Funding Source**.
3. Click **Generate Report** when finished.

- Once you click on Inventory Report, you have the choice of what you want to appear in the report itself.
- Make sure that if your organization has multiple sites that you have the correct site selected or you can run the report for all the sites in a single organization.
- You can run the report for all private, all state supplied or both.
- These options give you a wider variety of ways to keep your inventory balanced.
Once you have counted the actual vaccine in your fridge and you compare it to what the NCIR says you have on hand, both columns should match. If they do not you need to run down the list of possible inventory discrepancies. (see next slide)
Steps for Modifying Quantity
Step 1 of 2: Modify Quantity

1. Click in the box next to the **Trade Name** in blue until the green check appears.
2. Click **Modify Quantity**
Step 2 of 2: Modify Quantity

1. Choose the **Action** from the drop down box. Either **Add** or **Subtract**.
2. Enter the **Amount** in doses that is being modified.
3. Choose the reason under the **Category** drop down box.

This screen will allow you to modify the quantity of as many vaccines as you choose on the previous screen. It is good to use this option if you have several lot numbers to edit.
Most Common Reasons to Modify Quantity

**Wasted Doses**: Select this option if there was any vaccine waste for a particular lot. When you select the Wasted Doses category, you will be required to enter the following:

**Error Correction**: Select this option if you have made any errors in entry to your private stock of vaccine. For example, you entered 100 instead of 10 for the quantity. You will also be required to enter a reason for error correcting. **Before you error correct any state supplied vaccines, you should call the NC Vaccines Help Desk, 1-877-873-6247, so that you may be guided in how to find errors before changing quantities in vaccine lots.**
Error Correction

When to Use Error Correction
• Use this category when adding to or subtracting from inventory doses that were keyed or documented incorrectly
  • i.e. if 100 is entered instead of 10

When NOT to Use Error Correction
• If inventory is expired
• If a storage and handling issue caused the dose to be unusable
• If the vaccine is pre-drawn and not used
Avoid Documentation Errors

• Enter all immunizations administered into the NCIR as soon as possible

• Only enter immunizations administered by you, under your username

• Document all doses that have been administered, transferred, wasted and/or expired in the NCIR

In Summary

• Error Correction should be used infrequently

• Use best practices to maintain vaccine inventory correctly in the NCIR

• If you are unable to reconcile your inventory, error correction should be your last option
Manage Transfers
Different Types of Transfers
## Definitions

### Outbound Transfer

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org/Site</th>
<th>Receiving Org/Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/19/2006</td>
<td>ORDER</td>
<td>Vaccine Distribution</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>12/19/2006</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Inbound Transfer

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org/Site</th>
<th>Receiving Org/Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/03/2006</td>
<td>ORDER</td>
<td>Vaccine Distribution</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>04/03/2006</td>
<td>04/08/2008</td>
<td></td>
</tr>
</tbody>
</table>

### Historic Transfer (last 7 days by default)

Show by Last Updated Date From: [04/01/2008] to: [04/08/2008]

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org/Site</th>
<th>Receiving Org/Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
<th>Restock Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/03/2006</td>
<td>ORDER</td>
<td>Vaccine Distribution</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>04/03/2006</td>
<td>04/08/2008</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 (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.

---

**Receiving Organization**

- Acet-Immune
- Adacel
- Boostrix
- Enfermar
- Engerix
- Engerix-A
- FluB
- FluB Free
- Gardasil
- Gardasil HPV
- Menactra
- Menactra
- PedvaxHIB
- Recombivax-HB
- Tripedia

**Transfer Quantity**

- DTPa
- Tdap
- HAV
- IPV
- HAV
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
- MMR
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**.
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.

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org/Site</th>
<th>Receiving Org/Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/03/2009</td>
<td>TRANSFER</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>Vaccine Distribution</td>
<td>04/08/2009</td>
<td></td>
<td></td>
</tr>
<tr>
<td>04/28/2009</td>
<td>OUT</td>
<td>NORTH CAROLINA IMMUNIZATION REGISTRY</td>
<td>Vaccine Distribution</td>
<td>05/05/2009</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 Sender’s NCIR inventory and ready to Accept into the Receiver’s inventory.
Inbound Transfers
Step 1 of 3: Navigate homepage

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

---

**Audience**

- **Inventory Control**
- **Administrator**
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 via the [Immunization Inquiry Form](#).
Adding New Users
Step 1 of 6: Navigate to Manage Users

Select **Manage Users** from the left-side menu.
Click **Add User**.

**Provider Org Name**: 001 Final test organization

**Organization Code**: Final

* **Username**: Athena

* **User First Name**

* **User Last Name**

* **User Middle Initial**

* **Role**

* **Status**: Active or Inactive

**Street Address**

**Other Address**

**City**

* **State**

* **Zip**

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

**Audience**

**Administrator**
Step 3 of 6: Enter Username

Type in the Username.

**Note:** Usernames can be obtained by clicking “Register” on the NCIR log in page.
Step 4 of 6: Verify

Click Verify.

Add User

Provider Org Name: 001 Final test organization
Organization Code: Final

* Username: Athena

* User First Name
* User Last Name
User Middle Initial

* Role

* Status: Active

Street Address
Other Address
City
* State
Zip

NOTE: Fields marked with an asterisk * are required.

Audience

Administrator
Step 5 of 6: Confirm Information

The system will retrieve the user’s personal information. Confirm that the information is correct.
Choose the appropriate user **Role**. Click **Save**.
Things to Remember when Adding Users
Things to Remember when Adding Users

1. You cannot add a user who registered for an ‘individual account’ type. You will receive this error message:

   Validation Errors
   • Users who registered for an individual account type cannot be added. Only business, local or state government user types can be added. Please have the user reregister through NCID to create a user id with the appropriate user type.

• The user must re-register for a new account with NCID and select ‘Business Account’ type (*not applicable to LHDs).
Things to Remember when Adding Users

2. If the user has not registered correctly, has not activated their account through the email link from NCID, or if the user ID you entered was incorrect, you will get an error message.

Validation Errors

- Cannot add this user. This user is not defined in NCID.
3. Click **Find** with no names in the fields to see your full list of users.
Things to Remember when Adding Users

4. To inactivate, change the **Status** by clicking the ‘Inactive’ button.
Managing Clinicians
Clinician information is used to indicate the individuals who ordered and administered an immunization (i.e. **Ordering Authority** and **Administered By**).

Clinician information is required when documenting new immunizations.
Steps for Adding a Clinician
Step 1 of 4: Navigate to Manage Clinicians

Select **Manage Clinicians** from the menu on the left-side panel.
Step 2 of 4: Navigate to Add Clinician Screen

Select Add Clinician.
Step 3 of 4: Enter Role and Credentials

Select a Role and Credentials

- **Clinician**: An individual who physically immunizes clients (their name will be an option in the ‘Administered By’ pick list when documenting a new immunization)

- **Ordering Authority** is a MD, DO, PA, NP who signs standing orders for patients to receive vaccines (their name will be an option in the ‘Ordering Authority’ pick list when documenting a new immunization)

- **Ordering Authority/Clinician** is an individual with both of the above roles (their name will be an option in both pick lists when documenting a new immunization)
Step 3 of 4: Enter Role and Credentials

Select a Role and Credentials

‘Clinician’ credentials

Clinicians can be anyone in the organization who physically gives shots.

‘Ordering Authority’ and ‘Clinician / Ordering Authority’ credentials

An Ordering Authority is an individual who is licensed by the state of North Carolina to authorize the giving of immunizations to a client.
Step 4 of 4: Add the Clinician

Fill out all required information. Be certain to move your site to “Selected Sites.” Then click Save.
Reporting and Returning Expired Vaccine
Steps to Document Expired Vaccine
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 5: 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 5: 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 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 5: Print Packing List (Non-COVID-19 Vaccine)

1. Click **Save** (and make sure you see the blue “Saved Successfully” message).
2. Click **Packing List**.
3. Print the Packing List. You MUST do this in order to finish the transfer. (This will popup in a separate window, if you have your popup blocker on, click **Allow**).
Step 5 of 5: Ship Transfer (Non-COVID-19 Vaccine)

1. Click Ship
2. Verify ship date (do not change the date)
3. Click Ship again.
4. Look for the "Transfer Successfully Shipped" message

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**.

**Audience**

**Administrator**

Y = Yes (i.e. state vaccine)
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 obtain from vial, expected 6)
- Insufficient Quantity – Janssen (4 doses obtain from vial, expected 5)
- Insufficient Quantity – Moderna (13 doses obtain from vial, expected 14)
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.
New vs. Historical Immunizations
New vs. Historical Immunizations (1 of 2)

- Immunizations are documented as “new” or “historical” depending on whether or not they were given using inventory managed in the NCIR.

  Inventory managed in the NCIR: Inventory that has been added (i.e. Lot Number, NDC, Quantity on Hand) in the NCIR and is being tracked in the NCIR. To view NCIR-managed inventory, click Manage Inventory and then Show Inventory.

- If the dose IS from NCIR-managed inventory, document as a New Immunization Entry.

- If the dose is NOT from NCIR-managed inventory, document as a Historical Immunization.
New Immunization Entry

- Doses from inventory managed by an organization in the NCIR

Historical Immunization

- Immunizations entered into NCIR, but not using an organization's current inventory (such as when recording an out-of-state record)
Adding and Editing New Immunizations
Steps for Adding New Immunizations
Step 1 of 4: Navigate to Client Record

1. Locate client record.

2. Select **History/Recommend**.

Once you have located your client’s record, you can start documenting new immunizations by selecting the: **History/Recommend** button.
Step 2 of 4: Choose Method of Entering Immunization

There are 2 ways to enter a live immunization from inventory.

1. New Immunization Entry

2. Add Selected

Both options will take you to the same entry screen. However, you must select the vaccines that you would like to document manually when New Immunization is clicked. Add Selected will add the selected immunizations (via the green check marks) automatically for you.
### Step 3 of 4: Enter Live Immunization Details

1. Choose your organization in the **Organization Site** drop down box

2. Choose your **Ordering Authority**

3. Choose who administered the shot

![Image of immunization record form]

**Make sure the vaccine is selected**

**Current Age:** 3 years, 19 days

**Active immunization inventory on:** 05/20/2009

**Defaults for new immunizations**

<table>
<thead>
<tr>
<th>Immunization</th>
<th>New</th>
<th>Organization Site</th>
<th>Ordering Authority</th>
<th>Administered By</th>
<th>Administered On</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTP/PolI</td>
<td></td>
<td>Jay's Test Org</td>
<td>Doctor, Head</td>
<td>Sampson, Brock</td>
<td>05/20/2009</td>
</tr>
<tr>
<td>HepA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Activated Expired</td>
</tr>
</tbody>
</table>
4. Choose the date the shot was administered either by typing in the date or clicking on the calendar. (Note: you can leave the date administered box empty and it will default to the current date)

5. When you click on the calendar it will pop up and default to the current day. Click OK.

6. When you're finished click OK.
Step 3 of 4: Enter Live Immunization Details (cont.)

You must first verify the patient’s Eligibility by selecting from the drop down box. You will not be able to progress past this screen without completing this step. The choices in the drop down box are the same choices that were available on the VAL forms.

Notice that as you choose vaccines, the VIS Publication Date will display at the bottom with the most current date. You can choose the date of the actual copy that the patient received by clicking on the drop down box.

Click ‘OK’ once you are finished.
The shots that you have entered will appear under the **History** section on the **History/Recommend** screen.
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