

North Carolina Immunization Registry (NCIR)

Ordering, Transferring and Inventory Management for COVID-19 Vaccine

User Guide

Last Updated: October 2022



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**



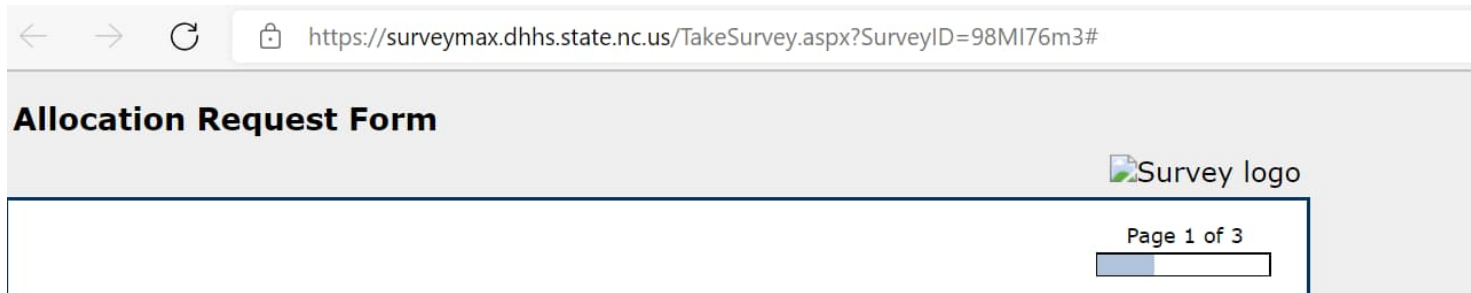
NCDHHS COVID-19 Response

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://app.smartsheet.com/b/form/dc032643b7cd4e659ef3403d9e91d7b6>



The screenshot shows a web browser window with the address bar displaying the URL: <https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyID=98MI76m3#>. The page title is "Allocation Request Form". Below the title, there is a "Survey logo" placeholder. At the bottom right of the form area, it says "Page 1 of 3" next to a progress bar.

Audience

Inventory
Control

Administrator

Step 2 of 4: Complete Provider Information

Fill out provider information and location information

Allocation Request Form

Page 1 of 3

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

Audience

- Inventory Control
- Administrator

Step 3 of 4: Complete Allocation Information

Complete allocation request information

Allocation Request Form

Page 2 of 3

Allocation Request

Please request vaccine doses below (inclusive of first and second doses).

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.*

Back

Next

Audience

- Inventory Control
- Administrator

Step 4 of 4: Complete Form

Complete form by selecting **Yes** to the final statements and clicking **Done**

Allocation Request Form

Page 3 of 3

Recorded Doses and Attestation

12. Please estimate the number of administered vaccinations that have not yet been recorded in CVMS.*

13. By clicking this box, I affirm that I have reviewed the list of providers in my area with on-hand inventory and that these providers do not have inventory that cover my need.*
☒ Yes

14. By clicking this box, I understand that we must have vaccine administrations recorded into the COVID-19 Vaccine Management System (CVMS) within 72 hours of administration. On behalf of the Parent Organization, I certify that we will act in good faith and to the best of our abilities to comply with all expectations.*
☒ Yes

Audience

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Control

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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

Step 1 of 4: Navigate to Manage Transfers

Click on **Manage Transfers**.

The screenshot displays the NCIR web application. The sidebar on the left contains the following sections:

- General**: system user manual
- Maintenance**: manage users, manage sites, manage clinicians, manage schedules
- Inventory**: manage inventory, **manage orders**, **manage transfers** (highlighted with a red box), shipping documents, request transaction sum, request vaccine usage, request wasted/expired, inventory report
- Clients**: manage client, enter new client
- Immunizations**: manage immunizations
- Reports**: request reminder, check reminder status, request callback, request new client form, request case extract

The main content area shows the following information:

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

announcements:

- NEW 03/17/2008 ~ [How to Report Duplicate Clients](#)
- NEW 02/13/2008 ~ [Ordering Authority Announcement](#)
- NEW 02/06/2008 ~ [Reminder - Double Surnames](#)
- NEW 02/05/2008 ~ [Hib Recommendations](#)
- NEW 02/05/2008 ~ [Vaccine Doses administered outside of the United States](#)
- NEW 02/04/2008 ~ [Recording Tdap immunizations](#)
- NEW 01/17/2008 ~ [Local Health Department Users](#)
- NEW 01/08/2008 ~ [Accepting Vaccine Orders](#)
- NEW 12/19/2007 ~ [Hib Announcement](#)

[more announcements](#)

release notes:

- NEW 02/01/2008 ~ [Release Version 7.2.3](#) NCIR Release Notes Version 7.2.3

[more release notes](#)

Vaccine Order/Transfer Notification ...

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

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
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Audience

Inventory
Control

Administrator

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.

Manage Transfer

Create a New Transfer.... New Transfer

Return to Manage Transfer 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
1/01/2021	TRANSFER	VACCINE DISTRIBUTION	GKANDERSON THE GREAT AND POWERFUL OZ	11/01/2021		

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
5/26/2020	TRANSFER	GKANDERSON THE GREAT AND POWERFUL OZ	VACCINE DISTRIBUTION	05/26/2020	11/01/2021		

Audience

Inventory
Control

Administrator

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**

Receive Transfer

Accept Entire Transfer... **Accept Transfer**

Reject Entire Transfer... Reject Transfer

Partially Accept Transfer... Partially Accept

Return to the Previous Screen... Cancel

Receiving Site

If you wish to accept all or part of this transfer, you must specify the site which will receive the inventory in this transfer.

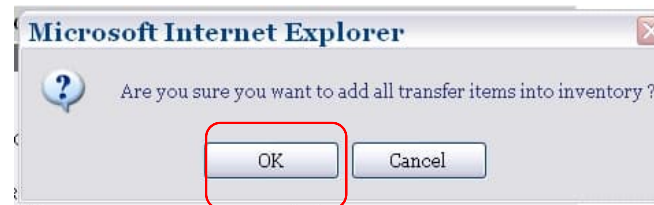
* Receiving Site GKANDERSON THE GREAT AND POWERFUL OZ

Transfer Between Organizations Created on 11/01/2021

Sending Entity		Receiving Entity	
Organization	VACCINE DISTRIBUTION	Organization	GKANDERSON THE GREAT AND POWERFUL OZ
Site	VACCINE DISTRIBUTION	Site	GKANDERSON THE GREAT AND POWERFUL OZ
Address	Contact the Immunization Branch at 1-877-873-6247, RALEIGH, NC 27609	Address	1 YELLOW BRICK ROAD LOUISBURG, NC 27549
Contact	NCR HelpDesk	Contact	GLINDA THE GOOD WITCH
Phone #	(877) 873-6247	Phone #	(919) 707-5585
Ship Date	11/01/2021		

Transfer Vaccine Item

Transfer Quantity	Vaccine Group	Trade Name	Lot Number	Expiration Date	Inventory Action	Shipping Information
200	COVID-19	COVID-19 Pfizer-BioNTech	PEDS-123	02/15/2022	Create New Lot	



Audience

Inventory Control

Administrator

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**.

Audience

Inventory
Control

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Transfer Successfully Accepted

Manage Orders

Create Order

Cancel

Order List Show: ☒ Current ☐ Historical ☐ Both

Current Orders

User	Submit Date
Steve Martinez	12/20/2006
Steve Martinez	12/20/2006
Steve Martinez	12/19/2006

Manage Inventory

Add Inventory for Site (GKANDERSON THE GREAT AND POWERFUL OZ).... Add Inventory

Modify Quantity On Hand for Selected Sites.... Modify Quantity

Show Transactions for Sites.... Show Transactions

Return to the Previous Screen.... Cancel

Site: GKANDERSON THE GREAT AND POWERFUL OZ Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ State ☐ Private ☒ All

Select	Trade Name	Lot Number	NDC	Inv On Hand	Active	State	Exp Date
<input type="checkbox"/>	COVID-19 Pfizer-BioNTech	PEDS-123	59267-1000-03	200	Y	Y	02/15/2022
<input type="checkbox"/>	FluMist	abcdef	66019-0109-10	195	Y	Y	12/31/2029
<input type="checkbox"/>	IPOL	123abc	49281-0860-10	328	Y	Y	03/14/2032

You can verify the vaccine has been entered into NCIR inventory.

Transferring COVID-19 Vaccine

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

Create Date	Type	Sending Org:Site	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				

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		

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**

The screenshot shows the NCIR homepage. The left sidebar contains a menu with the following items: General (system user manual), Maintenance (manage users, manage sites, manage clinicians, manage schedules), Inventory (manage inventory, manage orders, **manage transfers**, shipping documents, request transaction sum, request vaccine usage, request wasted/expired, inventory report), Clients (manage client, enter new client), Immunizations (manage immunizations), and Reports (request reminder, check reminder status, request callback, request new client form, request case report). The main content area displays announcements, release notes, and a table titled 'Vaccine Order/Transfer Notification ...'. A yellow callout box points to the 'manage transfers' link and the table, stating: '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.'

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

announcements:

- NEW 03/17/2008 ~ [How to Report Duplicate Clients](#)
- NEW 02/13/2008 ~ [Ordering Authority Announcement](#)
- NEW 02/06/2008 ~ [Reminder - Double Surnames](#)
- NEW 02/05/2008 ~ [Hib Recommendations](#)
- NEW 02/05/2008 ~ [Vaccine Doses administered outside of the United States](#)
- NEW 02/04/2008 ~ [Recording Tdap Im](#)
- NEW 01/17/2008 ~ [Local Health Depa](#)
- NEW 01/08/2008 ~ [Accepting Vaccin](#)
- NEW 12/19/2007 ~ [Hib Announcemen](#)

[more announcements](#)

release notes:

- NEW 02/01/2008 ~ [Release Version 7](#)

[more release notes](#)

Vaccine Order/Transfer Notification ...

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

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
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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 (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.

Audience

Inventory
Control

Administrator

New Transfer

Sending Site

NORTH CAROLINA IMMUNIZATION REGISTRY

Save

Internal Receiving Site

or

Transfer all Expired

Receiving Organization

Cancel

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**.

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

Edit Transfer: Create Date 11/01/2021 **Saved Successfully**

Sending Site: GOTHAM CITY HEALTH CENTER

Internal Receiving Site: or

Receiving Organization: 123 Pediatrics

Note: Only those sites or organizations which have inventory set up are displayed.

Buttons: Save, Packing List, Label, Finish Trans, Ship, Cancel Transfer

Transfer Item

Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date
<input type="checkbox"/>	50	COVID-19 Moderna	COVID-19	COVIDYAY	9979	Y	Y	05/10/2120

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"/>	AFLURIA IIV4 P-Free, Ped	Influenza	HH449	50	Y	N	06/30/2022
<input type="text"/>	ActHib	Hib	ACTHIB987	500	Y	N	01/01/2080
<input type="text"/>	ActHib	Hib	NDCSRCOOL	3000	Y	N	01/01/2099
<input type="text"/>	Adacel	Td - Tdap/Pertussis	GHSK5554AB	796	Y	N	01/01/2089

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

Audience

Inventory Control

Administrator

Step 5 of 6: Complete Transaction

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

https://ncir-uat.dhhs.state.nc.us/reports/rwservlet?uat_packi...

NORTH CAROLINA IMMUNIZATION PROGRAM
PACKING LIST

Shipment Date:

SHIPPED FROM	To:
Mary Parkinson-Ivers	CAROLINE HELTON
NORTH CAROLINA IMMUNIZATION REGISTRY	Vaccine Distribution
NC DHHS, Division of Public Health, Immunization Branch	1330 ST MARYS STREET
1917 Mail Service Center	RALEIGH, NC, 27805-1
Raleigh, NC, 27892-1917	Phone: (877) 8738247

Phone: (919) 7158770

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	08/08/2009	10 0	\$24.95	\$249.50

one

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.

The screenshot displays the 'Manage Transfer' interface. At the top, a blue banner reads 'Transfer Successfully Shipped'. Below this, there are links for 'Create a New Transfer....' and 'Return to Manage Transfer Screen....', along with 'New Transfer' and 'Cancel' buttons. The main section is titled 'Transfer List' and contains two tables: 'Outbound Transfer' and 'Inbound Transfer'. The 'Outbound Transfer' table has columns for Create Date, Type, Sending Org:Site, Receiving Org:Site, Ship Date, Receive Date, and Return Date. It shows two entries: one for a successful transfer on 11/01/2021 and another for a rejected transfer on 03/08/2010. The 'Inbound Transfer' table has similar columns and shows one entry for a vaccine distribution on 11/01/2021. At the bottom, there is a 'Historic Transfer' section with a date range filter (From: 10/25/2021, To: 11/01/2021) and a 'Refresh List' button. Below the filter is a table header for historic transfers, but it states 'No Historic Transfer'.

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
11/01/2021	TRANSFER	GOTHAM CITY HEALTH CENTER	123 Pediatrics	11/01/2021		
03/08/2010	REJECTED	GOTHAM CITY HEALTH CENTER	HYDE COUNTY HEALTH DEPARTMENT	03/08/2010	08/27/2010	

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
11/01/2021	TRANSFER VACCINE DISTRIBUTION		GOTHAM CITY HEALTH CENTER	11/01/2021		

Historic Transfer (last 7 days by default)

Show by Last Updated Date From: 10/25/2021 To: 11/01/2021 Refresh List

Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date	Restock Date
No Historic 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.

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.

ncir

Production Region 7.2.3

General
system user manual

Maintenance
manage users
manage sites
manage clinicians
manage schedules

Inventory
manage inventory
manage orders
manage transfers
shipping documents
request transaction sum
request vaccine usage
request wasted/expired
inventory report

Clients
manage client
enter new client

Immunizations
manage immunizations

Reports
request reminder
check reminder status
request callback
request new client form
request case extract

home | change password | logout | help desk

organization TEST ORGANIZATION • user REBECCA SWEENEY • role Administrator

announcements:

- NEW 03/17/2008 ~ [How to Report Duplicate Clients](#)
- NEW 02/13/2008 ~ [Ordering Authority Announcement](#)
- NEW 02/06/2008 ~ [Reminder - Double Surnames](#)
- NEW 02/05/2008 ~ [Hib Recommendations](#)
- NEW 02/05/2008 ~ [Vaccine Doses administered outside of the United States](#)
- NEW 02/04/2008 ~ [Recording Tdap Immunizations](#)
- NEW 01/17/2008 ~ [Local Health Department Users](#)
- NEW 01/08/2008 ~ [Accepting Vaccine Orders](#)
- NEW 12/19/2007 ~ [Hib Announcement](#)

[more announcements](#)

release notes:

- NEW 02/01/2008 ~ [Release Version 7.2.3](#) NCIR Release Notes Version 7.2.3

[more release notes](#)

Vaccine Order/Transfer Notification ...

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

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	Public	Exp Date
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Audience

Inventory
Control

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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.

Audience

Inventory
Control

Administrator

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		

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 form titled "Receive Transfer". It has four buttons: "Accept Transfer", "Reject Transfer", "Partially Accept", and "Cancel". Below these is a "Receiving Site" section with a dropdown menu set to "NORTH CAROLINA IMMUNIZATION REGISTRY". A yellow box highlights a "Microsoft Internet Explorer" pop-up window with the message "Are you sure you want to add all transfer items into inventory?". An arrow points to the "OK" button in the pop-up. Below the pop-up, there is contact information for two individuals and a "Transfer Vaccine Item" table.

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

COVID-19 Vaccine Transfers between NCIR and CVMS

Transferring COVID-19 Doses 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

Audience

Inventory
Control

Administrator

Moving COVID-19 Vaccine from CVMS to NCIR (Transition)

Moving COVID-19 Vaccine from CVMS to NCIR

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.

Audience

Inventory
Control

Administrator

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**

Audience

Administrator

home | change password | logout | help desk

organization TEST ORGANIZATION • user Athena Roberts • role Administrator

announcements:

- NEW 02/15/2016 ~ [NCIR Meaningful Use Registration Portal](#)
- NEW 02/04/2016 ~ [2016 Immunization Schedules](#)
- NEW 12/21/2015 ~ [Pentacel® Vaccine Delay Guidance](#)
- NEW 12/08/2015 ~ [Pentacel Update](#)
- NEW 11/19/2015 ~ [Holiday Shipping](#)
- [more announcements](#)

release notes:

- NEW 10/01/2015 ~ [Release Version 9.5.0](#) NCIR Release Notes Version 9.5.0
- [more release notes](#)

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)		No Order Notification	
Transfer(s)		No Transfer Notification	

Active Inventory that is Going to Expire ...

Site Name	Trade Name	Lot Number	On Hand	State	Exp Date
TEST ORGANIZATION	Imovax Rabies ID	123456	998	N	06/01/2016
TEST ORGANIZATION	RabAvert	abcdef	998	N	07/01/2016
TEST ORGANIZATION	YF-VAX	test_yfvax	97	N	06/30/2016
Wright Way Peds	Adacel	AD4857894	1	N	03/29/2016

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**.

Audience

Administrator

Lot Number: C3818AA Vaccine Name: Dtap-Hib-IPV Trade Name: Pentacel Expiration Date: 01/15/2013
All expired state-supplied inventory must be transferred to the state.
Please transfer this inventory to the State via the manage transfer menu option.

Note: There are additional expired lots in inventory.

OK

Manage Transfer

Create a New Transfer....

New Transfer

Return to Manage Transfer Screen....

Cancel

New Transfer

Sending Site TEST ORGANIZATION ▼

Save

Internal Receiving Site ▼ or

Transfer all Expired

Receiving Organization ▼

Cancel

Note: Only those sites or organizations which have inventory set up are displayed.

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").

Audience

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Internal Receiving Site or

Receiving Organization

Note: Only those sites or organizations which have inventory set up are displayed.

Transfer Item									
Remove	Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date	* Preventive Action
<input type="checkbox"/>	<input type="text" value="10"/>	Boostrix	Td - Tdap/Pertussis	AC52B056BB	10	N	Y	07/01/2012	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="7"/>	Boostrix	Td - Tdap/Pertussis	AC52B060CA	7	N	Y	09/17/2012	<input type="text"/>

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.



Audience

Administrator

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**

UAT Region (T4) 9.6.0

General
system user manual
Maintenance
manage users
manage sites
manage clinicians
manage physicians
manage schedules
manage schools
mass vax definition
Inventory
manage inventory
manage orders
manage transfers
shipping documents
request transaction sum
request vaccine usage
request wasted/expired
inventory report
vaccine accountability
inventory count
Clients
manage client
mass vax grid entry
Immunizations
manage immunizations
Reports
request reminder
check reminder status
request callback
request new client form
request case extract
check request status
request vfc reports
check vfc status
assessment report
check assessment
benchmark report
check benchmark

home change password logout help desk

organization TEST ORGANIZATION • user Athena Roberts • role Administrator

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TEST ORGANIZATION	YF-VAX	test_yfvax	97	N	08/30/2016
Wright Way Peds	Adacel	AD4857894	1	N	03/29/2016

Audience

Administrator

Step 2 of 5: Navigate to Inventory

Click **Show Inventory**.

Audience

Administrator

The screenshot shows a web application interface for 'UAT Region 7.2.3'. On the left is a blue sidebar with navigation links: 'System Monitoring' (manage exceptions, check report status, show users), 'General' (system user manual), and 'Organizations' (switch organizations, manage organizations). The main content area has a yellow header bar with the word 'DESK'. Below this is a 'Manage Inventory' section with four rows of links and buttons: 'Show Inventory for Sites....' with a 'Show Inventory' button (highlighted with a red box), 'Show Transactions for Sites....' with a 'Show Transactions' button, 'Update inventory Alerts....' with an 'Update Alert Prefs' button, and 'Return to the Previous Screen....' with a 'Cancel' button. Below the 'Manage Inventory' section is an 'Inventory Alerts' section with a link 'Vaccine Order/Transfer Notification ...'.

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

more CITY HEALTH CENTER).... Add Inventory

Modify Quantity On Hand for Selected Sites.... Modify Quantity

Show Transactions for Sites.... Show Transactions

Return to the Previous Screen.... Cancel

Site: GOTHAM CITY HEALTH CENTER

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ State ☐ Private ☒ All

Select	Trade Name	Lot Number	NDC	Inv On Hand	Active	State	Exp Date
<input type="checkbox"/>	AFLURIA IV4 P-Free, Ped	HH449	33332-0220-20	50	Y	N	06/30/202
<input type="checkbox"/>	ActHib	ACTHIB987	49281-0545-03	500	Y	N	01/01/208
<input type="checkbox"/>	ActHib	NDCSRCOOL	49281-0545-03	3000	Y	N	01/01/209
<input type="checkbox"/>	Adacel	GHSK5554AB	49281-0400-10	796	Y	N	01/01/208
<input type="checkbox"/>	Bexsero	TH10MI	46028-0114-01	4689	Y	Y	05/08/235
<input type="checkbox"/>	Boostrix	ILUVTAP	98765-4321-00	997	Y	Y	12/31/209
<input type="checkbox"/>	COVID-19 AstraZeneca	YALLNEEDVACCINE	00310-1222-15	9999	Y	Y	09/10/208
<input checked="" type="checkbox"/>	COVID-19 Janssen	EUA4815162342	59676-0580-15	4991	Y	Y	05/12/205

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**.

Manage Inventory

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

Return to the Previous Screen....

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
COVID-19 Janssen	EUA4815162342	4991	Subtract ▾	10	Wasted Doses ▾

* Reason Wasted:

Insufficient Quantity - Pfizer (5 doses)

* Preventive Action:

Staff have been trained on preparation techniques.

Audience

Administrator

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)

Audience

Administrator

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.

Audience

Administrator

Manage Inventory

Add Inventory for Site (GOTHAM CITY HEALTH CENTER)....

Add Inventory

Modify Quantity On Hand for Selected Sites....

Modify Quantity

Show Transactions for Sites....

Show Transactions

Return to the Previous Screen....

Cancel

Site: GOTHAM CITY HEALTH CENTER

Show ☒ Active ☐ Inactive ☐ Non-Expired ☐ Expired
☐ State ☐ Private ☒ All

Select	Trade Name	Lot Number	NDC	Inv On Hand	Active	State	Exp Date
<input type="checkbox"/>	AFLURIA IV4 P-Free, Ped	HH449	33332-0220-20	50	Y	N	06/30/2022
<input type="checkbox"/>	ActHib	ACTHIB987	49281-0545-03	500	Y	N	01/01/2080
<input type="checkbox"/>	ActHib	NDCSRCOOL	49281-0545-03	3000	Y	N	01/01/2099
<input type="checkbox"/>	Adacel	GHSK5554AB	49281-0400-10	796	Y	N	01/01/2089
<input type="checkbox"/>	Bexsero	TH10MI	46028-0114-01	4689	Y	Y	05/08/2355
<input type="checkbox"/>	Boostrix	ILUVTDAP	98765-4321-00	997	Y	Y	12/31/2099
<input type="checkbox"/>	COVID-19 AstraZeneca	YALLNEEDVACCINE	00310-1222-15	9999	Y	Y	09/10/2080
<input type="checkbox"/>	COVID-19 Janssen	EUA4815162342	59676-0580-15	4991	Y	Y	05/13/2055

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

For help desk hours or to submit a ticket, please click the link below:

https://ncgov.servicenowservices.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