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# Vaccine Inventory Management & Accountability

*(...plus a lot of info on borrowing...)*



# What to Expect

- Oregon Stewardship Law
- Vaccine Inventory Management
- Borrowing
- Accountability
  
- Possibly Fun Quiz
  
- Resources for the Future

# Oregon's Vaccine Stewardship Law

## Requirements:

- Inventory management in ALERT IIS
- Staff training
- Reconcile inventory prior to ordering
- Report all immunizations to ALERT IIS within 14 days

# Vaccine Inventory Management Means...

- **Adding both VFC & private stock to ALERT inventory.**
  - Accepting electronic order transfers in ALERT when vaccine arrives in the clinic.
- **≥ 95% of doses accounted for in ALERT IIS.**
  - Valid VFC eligibility code for each immunization given.
  - Dose on immunization record deducts from inventory with a matching vaccine lot number.
  - Reconcile doses that were not given to patients.
  - No more than 5% combined wasted/spoiled/expired
- **Borrowing** is a rare occurrence

# Vaccine Inventory Management & Borrowing

- **ALERT tracks borrowed inventory**
  - Mismatch between eligibility code and inventory funding source
- **Might be an eligibility coding problem or true borrowing**
- **True borrowing must be paid back**

# Borrowing on the Transactions Report...

Vaccine Transactions for Organization: ERIN'S PRIVATE CLINIC - AL000N - 00000N

Record Count: 4

Site Name	Trans Date	Lot \ Funding Source \ Trade Name	Type	Qty	Patient Name	DOB
ERIN'S PRIVATE CLINIC	06/07/2023	ML9801P \ State \ AFLURIA Quad PF	REC	10		
ERIN'S PRIVATE CLINIC	06/07/2023	ML9801P \ State \ AFLURIA Quad PF	Borrowed	-1	BROWNING, LIAM	09/12/2018
ERIN'S PRIVATE CLINIC	06/07/2023	R020683 \ Private \ MMR II	Immunize	-1	BROWNING, LIAM	09/12/2018
ERIN'S PRIVATE CLINIC	06/07/2023	R020683 \ Private \ MMR II	Immunize	-1	BROWN, LIZ	01/27/1968

# **Finding borrowing another way...**

## **Ad Hoc List Report**

**Patients**

- manage patient
- enter new patient
- merge patients
- upload list
- check roster status
- manage roster list

**Immunizations**

- manage immunizations

**Reports**

- reminder / recall
- check reminder status
- check reminder list
- manage custom letters
- cocasa extract
- check request status
- the afix product
- vaccine eligibility
- check vaccine elig status
- group patients
- check group status
- assessment report
- check assessment
- benchmark report
- check benchmark
- ad hoc list report
- ad hoc count report
- ad hoc report status
- billing report request
- check billing report
- provider report
- check provider status

## Create a Customized List Report

### What items would you like to display on the report?

**Most Common Items**

- Birth Date
- Patient First Name
- Patient Last Name
- Vaccination Date
- Vaccine
- Vaccine Eligibility
- Vaccine Lot
- Historical Immunization

Add &gt;

&lt; Remove

&lt; Remove All

### How would you like the report to be sorted?

Item to sort on (not sorted) ▼

Order  First-to-Last  Last-to-First

A report takes longer to run if you want it to be sorted.

### How would you like to filter the data?

Item to filter on Owned Immunization ▼

Comparison EQUALS ▼

Value to compare to Yes ▼

and ▼



Add/Save Edit

**Selected Filters**

Active Status EQUALS Yes  
 AND  
 Owned Immunization EQUALS Yes

Edit

Remove



# Finding borrowing another way... Ad Hoc List Report!

## Create a Customized List Report

What items would you like to display on the report?

### Most Common Items

#### Immunization Items

Borrowed Inventory

CVA Code

From Inventory

Immunization Submitted Date

Inventory Funding Source

NDC

Owning Organization

Add >

< Remove

< Remove All

### Most Common Items

Birth Date

Patient First Name

Patient Last Name

Vaccination Date

Vaccine

Vaccine Eligibility

Vaccine Lot

Historical Immunization

# Ad Hoc List Report & Borrowing

Birth Date	Patient First Name	Patient Last Name	Vaccination Date	Vaccine	Vaccine Eligibility	Vaccine Lot	Borrowed Inventory	From Inventory	Inventory Funding Source
03/11/2017	SHIRLEY	TEMPLE	12/07/2022	DTaP	B	T8421CA	Yes	Yes	STATE
05/21/1950	TINA	KNOWLES	12/12/2022	Influenza, high-dose, quad, PF	B	PH3533B	No	Yes	PRIVATE
02/26/1950	MORGAN	FREEMAN	12/20/2022	Influenza, high-dose, quad, PF	B	PH3833B	(null)	No	
01/07/2022	CARMEN	MIRANDA	12/05/2022	Flu quadrivalent injectable pfree		J7C77	Yes	Yes	STATE
09/10/2017	BLUEY	HEELER	12/09/2022	DTaP	M	T8421CA	No	Yes	STATE

- Only doses that deduct inventory will show “Borrowed” Yes/No
- If doses do not deduct inventory, “Borrowed” will show (null)
- Missing eligibility can lead to a borrow

# Ad Hoc List Report & Borrowing

- From Inventory:  
*Can be Yes, no, or blank*
  - Borrowed Inventory:  
*Can be Yes, no, or (null)*
- If immunization did not deduct from inventory, ALERT will not be able to show as borrowed
- No Inventory Transaction
  - Borrowing on Ad Hoc will be (null)

# Correcting “False” Borrowing

- Lots of the time, it is a coding problem.

<b>WRONG</b>	<b>RIGHT</b>
<b>State-Supplied Vaccine Coded B</b>	VFC is coded M, N, or A for kids only!
<b>Adult with Medicaid/OHP coded M</b>	Insured patients – and all adults – must be coded B

- *Correct the coding = fix the problem*
- No need to delete or resend immunization if all other information is correct

## Eligibility Codes for Clinics using State-supplied Vaccine




### PRIVATE CLINIC ELIGIBILITY CODING

Eligibility codes must be documented in patient medical records for every dose of vaccine administered.

Patient Age	Patient Population	Eligibility Code	Vaccine Stock
<b>0 through 18</b>	No Insurance	<b>N</b>	VFC
	OHP/Medicaid (children only)	<b>M</b>	
	American Indian/Alaskan Native	<b>A</b>	
	Underinsured (in FQHC/RHC only)	<b>F</b>	
<b>All Ages</b>	Billable (Privately insured patients and adults on OHP/Medicaid)	<b>B</b>	Private
	Special Projects (rarely used, only when funds are available)	<b>S</b>	State

# Correct in EHR and ALERT

- ALERT will not take code updates via data exchange – to fix in ALERT:

Add New Imms	Add Historical Imms	Edit Patient	Reports	Print Record	Print Confidential Record			
<b>Immunization Record</b>								
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
HepB	<a href="#">08/25/2015</a>	1 of 3	HepB-Adult [Recombivax-Adult ®]	Full				
Influenza-seasnl	<a href="#">08/28/2017</a>		Flu quadrivalent injectable pfree [Fluzone Quad PF 0.5mL ®]	Full				
PneumoPoly 23	<a href="#">08/28/2017</a>	1 of 2	Pneumococcal 23 [Pneumovax 23 ®]	Full				

- Only track on paper Borrowing Log if truly borrowed

# Documenting True Borrowing

## Oregon Vaccines for Children Borrowing Log

Vaccine	Patient Name or ID	DOB	Stock Borrowed	Lot # (Optional)	Date Borrowed	Reason Borrowed	Date Paid Back <sup>1</sup>
<i>Example: ActHib</i>	<i>Jane Doe</i>	<i>11/8/17</i>	<i>Private</i>	<i>UI181AAC</i>	<i>1/20/18</i>	<i>8</i>	<i>2/2/18</i>

# Paying Back Borrowing

- If the wrong vaccine was used, it is a truly borrowed dose
  - Ex: VFC Flu given to an adult
- Must be paid back within 90 days and tracked on Borrowing Log
- Move vaccine in fridge and in ALERT Inventory



# *Questions on Borrowing?*

*OK... switching gears...*

# Vaccine Accountability & the Oregon VFC Program

- **Accountability is...**
  - Clear line of transactions for the use of all vaccine, down to the patient immunization record level
- **EHR Data linked to ALERT**
  - Good data quality → good inventory management
  - Good inventory management → high accountability

# Accountability & the Oregon VFC Program

- **Why does it matter?**
  - It's state law
  - Provides assurance that vaccine is getting to the intended population
  - Gives us insight into a clinic's need for training & support
  - Enables continued participation in VFC

# Vaccine Accountability

- Goal: 95% or better
- Less than 5% wasted, spoiled and expired
- Doesn't include flu or COVID-19
- Check it yourself in ALERT

# The Vaccine Accountability Report

organization ERIN'S TEST CLINIC • user Erin Corrigan • role Super User (Provider and LHD)

## Vaccine Accountability Report Request

Begin Date  End Date

### Select Accountability for Organization

Select Individual Organization

Organization Name

AMJEN MEDICAL GROUP  
ERIN DE TEST PRIVATE ONE  
ERIN DE TEST PRIVATE THREE-Changed  
ERIN DE TEST PRIVATE TWO  
ERIN DE TEST PUBLIC

Add >

Add All >>

< Remove

<< Remove All

Selected Organizations

ERIN'S TEST CLINIC

### Select Type of Vaccine:

State-Supplied  Privately Purchased  Both

If Individual Organization option is chosen and only one Org is selected, in addition to the Summary Report that shows Accountability by Vaccine Group, a Detail Report will be available that shows accountability by individual lot numbers, sorted by Vaccine Group.

Report Name:

Generate

Cancel

# ALERT

AWS UAT 5.9.0

### Patients

manage patient  
enter new patient

### Immunizations

manage immunizations

### Reports

reminder / recall  
check reminder status  
check reminder list  
manage custom letters  
vaccine eligibility  
check vaccine elig status  
the afix product

group patients

check group status

assessment report

check assessment

benchmark report

check benchmark

hoc list report

hoc count report

hoc report status

hoc report request

check billing report

accountability report request

check accountability report

data exchange report

check dx report status

### Inventory

manage inventory

manage orders

# Check Accountability Report

- group patients
- check group status
- assessment report
- check assessment
- benchmark report
- check benchmark
- ad hoc list report
- ad hoc count report
- ad hoc report status
- billing report request
- check billing report
- check accountability report**
- data exchange report
- check dx report status

**Inventory**

- ALERT will save your report under the Check Accountability Report menu item

organization ERIN'S TEST CLINIC • user Erin Corrigan • role Super User (Provider and LHD)

Accountability Report Status							Refresh	Cancel
Report Name	VFC PIN	Vaccine Type	Begin Date	End Date	Status	Summary Report	Detail Report	
ERIN'S TEST CLINIC	321	Both	Week 16, 2023	Week 16, 2023	100%	<a href="#">ERIN'S TEST CLINIC.xls</a>	<a href="#">ERIN'S TEST CLINIC_Detail.xls</a>	

# The Vaccine Accountability Report

Oregon  
Immunization  
Program

Oregon  
Vaccines for  
Children

## Vaccine Accountability Report - ERIN'S TEST CLINIC

Org Code: AL1234

VFC PIN: 000005

Report timeframe: Quarter 1, 2023

Report date: 05/09/2023

Funding Source: Both

*This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza or COVID-19 vaccine.*

### Detailed Accountability Data by Vaccine Group and Lot

Vaccine Group	Lot Number	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
DTP/aP	3M9Y7	77	0	-38	0	0	0	0	38	76	98.7 %
<b>DTP/aP</b>	<b>ALL</b>	<b>77</b>	<b>0</b>	<b>-38</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>38</b>	<b>76</b>	<b>98.7 %</b>
DTP/aP-HepB-Polio	9552X	0	100	-10	0	0	0	0	90	100	100.0 %
DTP/aP-HepB-Polio	N7HL3	100	5	-83	0	0	0	0	19	102	97.1 %
DTP/aP-HepB-Polio	X9HS4	29	0	-23	0	0	0	0	0	23	79.3 %
<b>DTP/aP-HepB-Polio</b>	<b>ALL</b>	<b>129</b>	<b>105</b>	<b>-116</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>109</b>	<b>225</b>	<b>96.1 %</b>
Varicella	W018837	90	0	-49	0	0	0	0	40	89	98.8 %
<b>Varicella</b>	<b>ALL</b>	<b>90</b>	<b>0</b>	<b>-49</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>40</b>	<b>89</b>	<b>98.8 %</b>
<b>ALL</b>	<b>ALL</b>	<b>1,278</b>	<b>1,928</b>	<b>-1,456</b>	<b>-11</b>	<b>0</b>	<b>-4</b>	<b>-20</b>	<b>1,667</b>	<b>3,158</b>	<b>98.5 %</b>



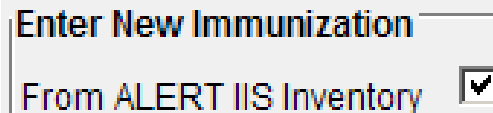
# What Lowers Accountability...

- **Doses not deducting from Inventory**

- Use Ad Hoc List report to troubleshoot common problems:

- Typos in lot number from EHR
- Use the lot number on the outer packaging
- Entering a lot number with the letter "O" instead of the number "0"

- If entering directly in ALERT, don't forget to check the box:



Enter New Immunization  
From ALERT IIS Inventory



**REMEMBER:**

The goal is to have a transparent audit trail. Manually modifying inventory does not allow that.

# What Lowers Accountability...

- **Manually adjusting inventory**
  - Frequent use of “Doses Administered” lowers accountability
- **Eligibility code issues**
  - No eligibility code sent to ALERT
  - Coding adults as “M”
    - ALERT IIS will reject the eligibility code for adults coded as “M”
    - Should be coded as “B” for Billable or “S” if enrolled in a Special Project

*Quiz Time!*

## True or False

- All vaccine should be manually entered in ALERT inventory.

## True or False

- All vaccine should be manually entered in ALERT inventory.
- *False, and a Trick Question!*
- All vaccine must be put into ALERT Inventory. State-supplied vaccine comes as a transfer that you accept to add to inventory. Only private stock is entered manually.

## True or False

- Vaccine Accountability relies on good data entry.

## True or False

- Vaccine Accountability relies on good data entry.
- *True*
- One of the most common Stewardship findings is low inventory deduction, which happens when incorrect lot numbers are entered and sent from the EHR.

## True or False

- Borrowing is a way to stretch out the time between vaccine orders.

## True or False

- Borrowing is a way to stretch out the time between vaccine orders.
- *False*
- You should carry enough vaccine to cover all your patients. If there is an unexpected delay, you can borrow to prevent a missed opportunity.

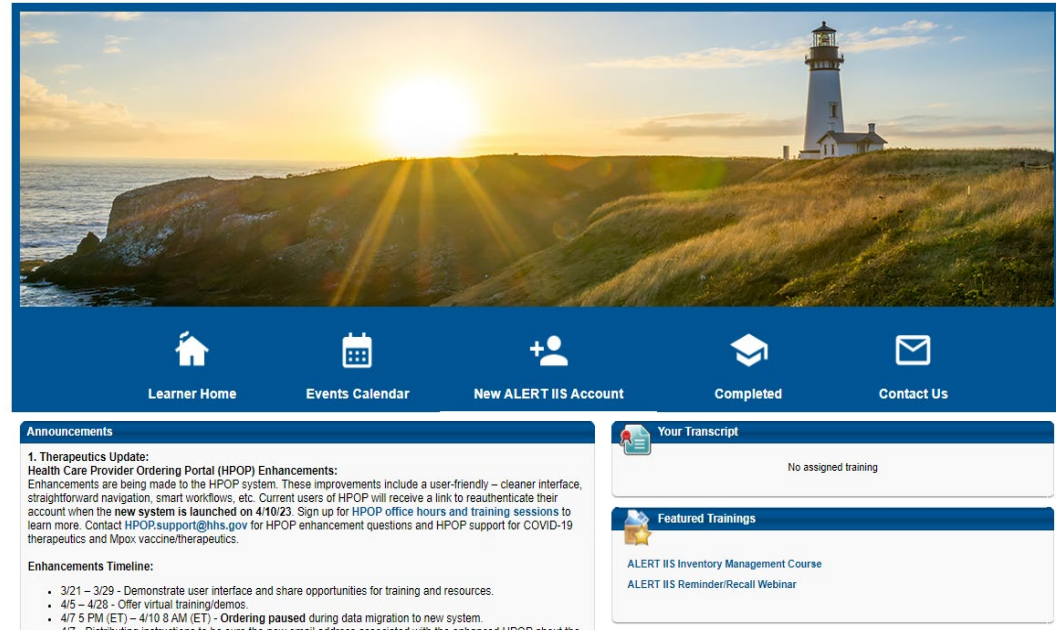


# Training Opportunities

Visit the OIP Training Portal at [oip.csod.com](http://oip.csod.com) to create an account.

- Webinars
  - Super User
  - Inventory Management
  - Reminder/Recall
- On Demand
  - Query Only
  - Standard User
  - Reports

Welcome, OIP Training



**Announcements**

1. Therapeutics Update:  
Health Care Provider Ordering Portal (HPOP) Enhancements:  
Enhancements are being made to the HPOP system. These improvements include a user-friendly – cleaner interface, straightforward navigation, smart workflows, etc. Current users of HPOP will receive a link to reauthenticate their account when the new system is launched on 4/10/23. Sign up for HPOP office hours and training sessions to learn more. Contact [HPOP.support@hhs.gov](mailto:HPOP.support@hhs.gov) for HPOP enhancement questions and HPOP support for COVID-19 therapeutics and Mpx vaccine/therapeutics.

**Enhancements Timeline:**

- 3/21 – 3/29 - Demonstrate user interface and share opportunities for training and resources.
- 4/5 – 4/28 - Offer virtual training/demos.
- 4/7 5 PM (ET) – 4/10 8 AM (ET) - Ordering paused during data migration to new system.
- 4/7 - Distribute instructions to log into the new email address associated with the enhanced HPOP about the

**Your Transcript**

No assigned training

**Featured Trainings**

- ALERT IIS Inventory Management Course
- ALERT IIS Reminder/Recall Webinar



# Oregon Immunization Program Help Desk

800-980-9431

HOURS of OPERATION:  
Mon-Fri, 9-4



[alertiis@odhsoha.oregon.gov](mailto:alertiis@odhsoha.oregon.gov)



[vfc.help@odhsoha.oregon.gov](mailto:vfc.help@odhsoha.oregon.gov)

- Reset locked accounts
- Set up School User accounts
- Report duplicate patient records
- Vaccine ordering
- Temperature excursions
- Site Visits
- New clinic enrollment