



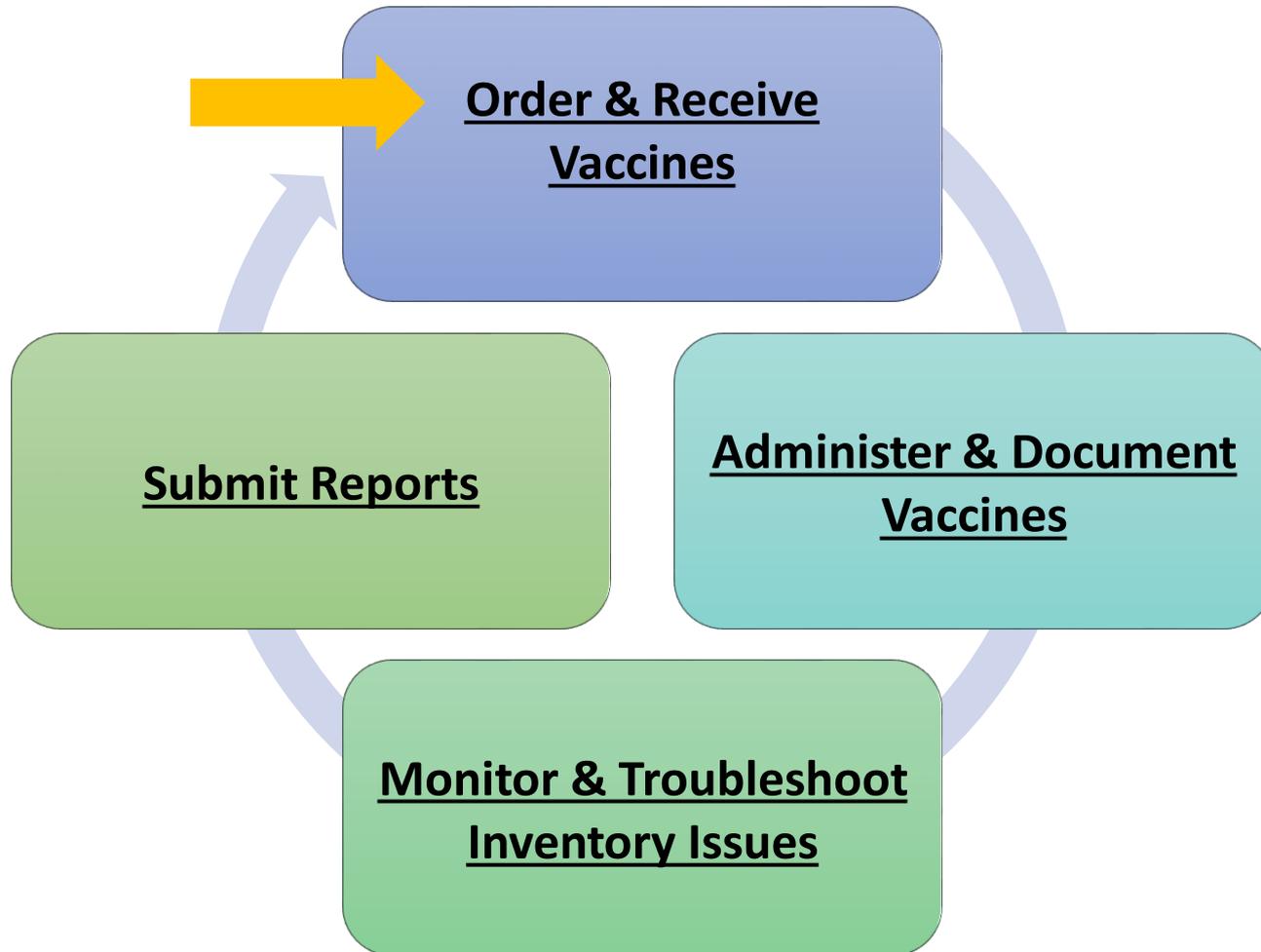
INTRO TO THE IIS FOR VACCINE COORDINATORS

Washington State Department of Health
Office of Immunization and Child Profile

Training Topics

- Review vaccine coordinator tasks & workflow
 - Ordering & receiving vaccine
 - Documenting vaccines to reduce inventory issues
 - Troubleshooting inventory issues
 - Submitting monthly vaccine reports

Vaccine Coordinator Tasks & Workflow



Ordering Guidelines

- Every clinic has an assigned ordering schedule (Economic Order Quantity or [EOQ](#)).
- Ensure you order enough vaccine, but minimize wastage (Recommended Order Quantity or [ROQ](#)).
 - ROQ helps you determine how much vaccine to order based on your clinic's ordering schedule.
- Submit **ALL** required accountability reports before submitting your vaccine order:
 - Doses Administered Report
 - Inventory Report
 - Temperature Logs

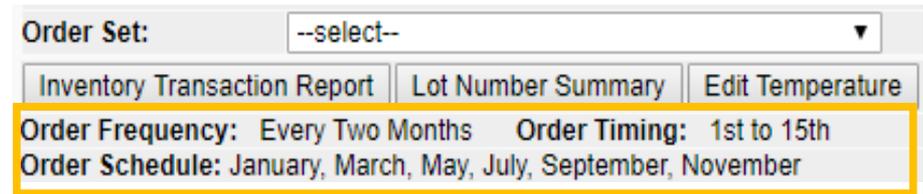
For more information about EOQ/ROQ, visit the [Vaccine Ordering, Returns & Choice webpage](#)

Ordering Vaccine

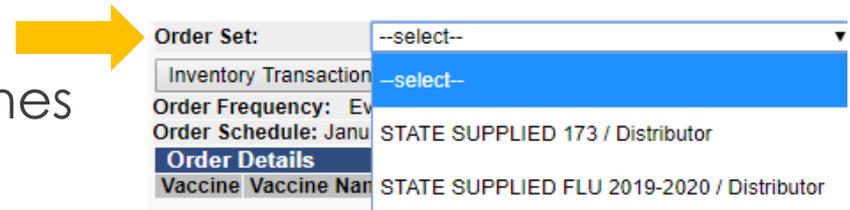
- Click **Orders/Transfers**, then **Create/View Orders** in left menu of the IIS. Then click the **Create Order** button at bottom of screen.



- Notice your clinic's **Order Schedule**



- Select an **Order Set**
 - Routine childhood vaccines
 - Flu vaccines*



* Flu vaccines can be ordered outside of your clinic's assigned order schedule.

Ordering Vaccine

Enter the following information:

- **Doses Used Last Month** → Doses Administered Report
- **Physical Inventory** → Inventory Report
- **Order Quantity** → Calculate how much vaccine to order

Order Details								
Vaccine	Vaccine Name	Funding Source	Dose Used Last Month	Physical Inventory	Order Quantity	Urgent	Priority Reason	Comments
DT (pediatric)	DIPHTHERIA AND TETANUS TOXOIDS ADSORBED - can be ordered as single doses	SPLIT	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	--select-- ▼	<input type="text"/>
DTaP	DAPTACEL	SPLIT	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	--select-- ▼	<input type="text"/>
DTaP-Hep B-IPV	PEDIARIX	SPLIT	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	--select-- ▼	<input type="text"/>

Tip: You can leave these fields blank for any vaccines you don't need to order.

Calculating Order Quantity (ROQ)

Use this calculation to determine the amount of vaccine you need to enter in the **Order Quantity** field.

<p>Start with</p>	<p>Order frequency + 1 month safety stock = Order frequency and safety stock total</p>		
<p>Finish with</p>	<p>Order frequency and safety stock total × Doses used last month - Current physical inventory = ROQ (rounded up to next package size)</p>		
<p>If you order every month, multiply doses used last month by 2</p>	<p>If you order every 2 months, multiply doses used last month by 3</p>	<p>If you order every 3 months, multiply doses used last month by 4</p>	<p>If you order every 6 months, multiply doses used last month by 7</p>

Vaccine Ordering Resources

- [Childhood Vaccine Program – Vaccine Ordering](#)
- [Vaccine Ordering Short Video](#)
- [Vaccine Ordering & Receiving Guide](#)

Receiving Guidelines

- Check vaccine when shipments arrive at your clinic:
 - Never reject a delivery
 - Inspect/check for damage and viability
 - Put vaccine in the proper storage unit (fridge/freezer)
 - Receive the order in the IIS*

*Do not proceed with receiving the vaccine in the IIS if the vaccine was damaged or spoiled unless the distributor verified that the vaccine is viable.

Follow the [Vaccine Management Plan](#) guidelines for receiving vaccine.

Receiving Vaccine Orders

Receiving: Adding the vaccines you ordered into your clinic's IIS inventory.

Timing is Very Important to Avoid Inventory Issues

T	W	Th
Vaccine Arrives & Received in IIS	Vaccines Documented	Vaccines Documented

Doses Subtract

T	W	Th
Vaccine Arrives	Vaccines Documented	Vaccine Received in IIS

Doses Won't Subtract

Receiving Orders

Refrigerated and frozen vaccines are ordered together, but shipped separately.

When part of an order arrives at your clinic, you can:

- Navigate to the **Create Order** screen.
- Under Inbound Orders, look for any orders with the status **shipped** or **approved**.

Current Order/Transfer List					
Inbound Orders					
Select	Order Number	PIN	Submit Date	Approval Date	Status
-->			10/15/2019	10/16/2019	Approved

Receiving Orders

- Click the arrow button to open the **Receive Order** screen.

Current Order/Transfer List						
Inbound Orders						
Select	Order Number	PIN	Submit Date	Approval Date	Status	
-->			10/15/2019	10/16/2019	Approved	

- Enter the **Receipt Quantity, Manufacturer, Lot Number** (from box) and **Expiration Date** of each vaccine that arrived at your clinic.

Order Details							
Shipped Quantity	Receipt Quantity	Rejected Quantity	Vaccine	Funding Source	Manufacturer	Lot Number	Expiration Date
100	100		rotavirus, pentavalent	PUB	MERCK-MSD ▼	718987	02/19/2022

- Leave these fields blank for any vaccines that haven't arrived yet.
- Click the **Receive** button.

Receiving Orders

- The order status will change to **Partially Received**.
- When the remaining vaccines arrive, return to the **Create/View Order** screen and click the arrow to open the order.



- Enter **Receipt Quantity** and other required fields for the rest of the vaccines in the order and click **Receive**.

A screenshot of a vaccine order form. The form has a light gray background and contains several fields. On the left, there is a '10' in a small box, followed by two empty input boxes. The main text of the form reads 'Td (adult), 5 Lf tetanus toxoid, preservative free, adsorbed'. To the right of this text is a 'PUB' label followed by a dropdown menu showing '--select--'. Further right are two more empty input boxes and another dropdown menu showing '--select--'. Below these fields is a 'Comments' label followed by a long empty text area. To the right of the text area is a 'Tracking #' label. At the bottom right of the form, there is a 'Receive' button, which is highlighted by a large yellow arrow pointing to it from the left.

Vaccine Receiving Resources

- [Vaccine Receiving Short Video](#) - Includes more detailed instructions on how to inspect and check vaccine shipments, including what to do if vaccine is damaged or there are concerns about viability.
- [Vaccine Ordering & Receiving Guide](#)
- [Vaccine Management Plan](#)

Review Question One

True or False:

You should start administering and documenting vaccines before receiving them into your inventory.

- A. True
- B. False

Review Question One

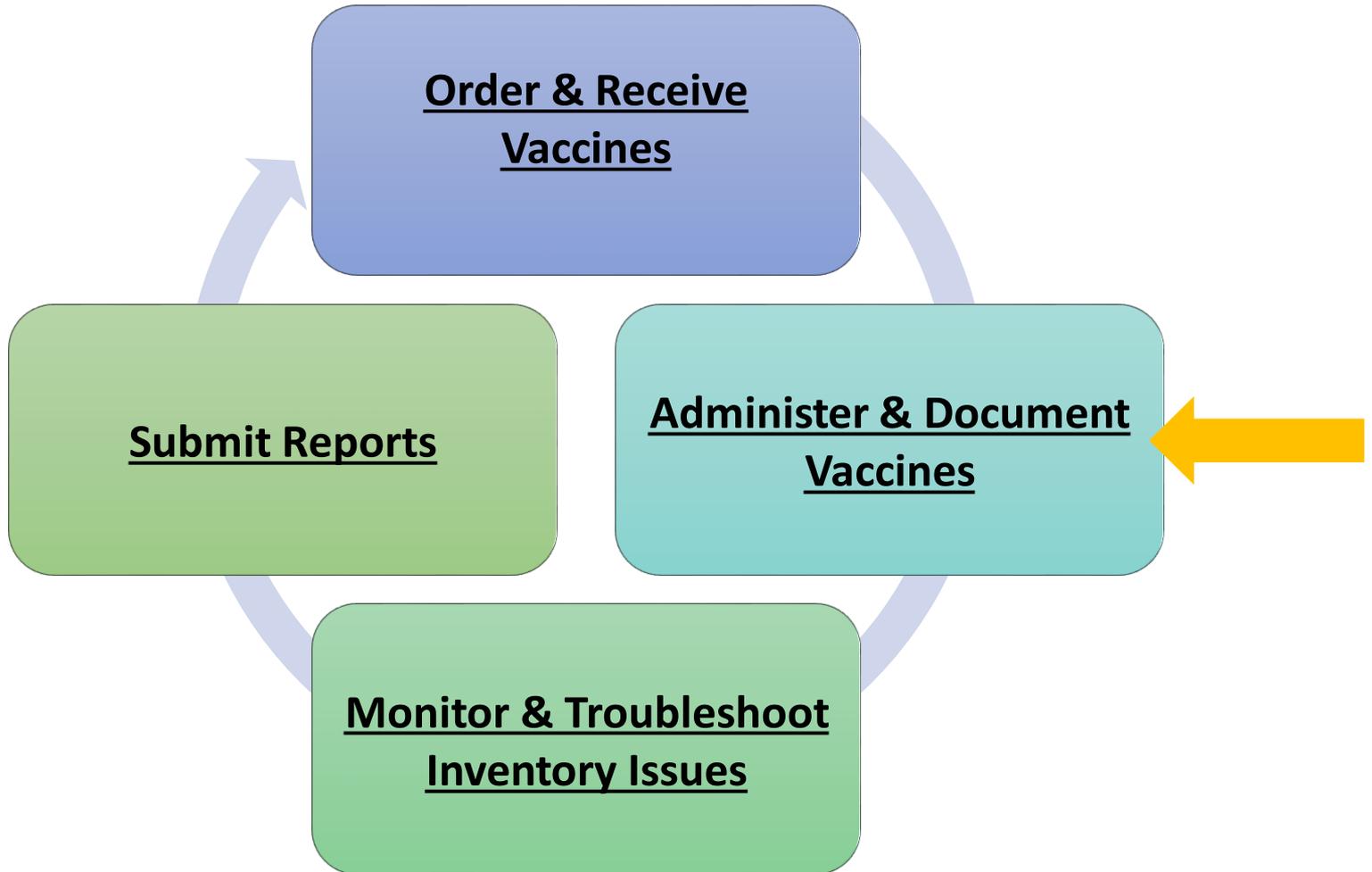
True or False:

You should start administering and documenting vaccines before receiving them into your inventory.

A. True

B. False

Vaccine Coordinator Tasks & Workflow



Documenting Vaccines with an Interface

The following must be documented correctly in your Electronic Health Record for doses to subtract from your IIS inventory

Data Element	Example
Vaccine Type (CVX)	Influenza, injectable, quadrivalent (CVX 158)
Lot Number (from box)	UI992AB
Manufacturer	Sanofi Pasteur (PMC)
Facility ID	ABC Family Medicine (SIISCLIENT56123)
Patient Eligibility	VFC Eligible – Uninsured (V03)
Funding Source	Publicly Funded – VFC (VXC51)

Documenting Vaccines in the IIS

- Search for a patient, then click on **Vaccinations** and **View/Add** in the left navigation menu.
- Locate the name of the vaccine you want to document from the list on the **View/Add** screen.
- Enter the administered date into the text box next to the correct **vaccine name** and click **Add Administered**.

Vaccination View/Add Screen

influenza, injectable, quadrivalent (Fluzone 5.0mL MDV)	<input type="text"/>
influenza, injectable, quadrivalent, preservative free (FluLaval 0.5mL, Fluzone 0.5mL)	<input type="text" value="09/10/2019"/>
influenza, live, intranasal, quadrivalent (Flumist)	<input type="text"/>
Influenza, injectable, MDCK, preservative free (Flucelvax PF - .5mL syringe)	<input type="text"/>

Documenting Vaccines in the IIS

On the **Vaccination Detail Add** screen, use **Click to select** to pull up your IIS inventory.

Vaccination Detail Add	
Vaccine 1:	influenza, injectable, quadrivalent, preservative free
Date Administered:	<input type="text" value="09/20/2019"/>
Historical:	<input type="radio"/> YES <input checked="" type="radio"/> NO
Confidential:	<input type="radio"/> YES <input checked="" type="radio"/> NO
Provider Noted on Record:	<input type="text"/>
Lot Noted on Record:	<input type="text"/>
Manufacturer Noted on Record:	<input type="text"/>
Manufacturer:	<input type="text"/>  Click to select

Use the **arrow** button to select the correct lot number.

Select Lot Number						
Select	Manufacturer	Lot Number	Facility	Funding Source	Expiration Date	Doses Available
<input type="text" value="-->"/>	SANOFI PASTEUR	UI56789	NICOLE'S VFC CLINIC 2	PUB	06/30/2020	19.0

Tip: If nothing appears in the pop-up box, you have selected the incorrect vaccine name or have not received/added inventory into the IIS.

Documenting Vaccines in the IIS

After selecting the vaccine from your inventory, the items shown below will autofill. All required fields should be filled in before you click **Save** to add the vaccine to the patient's IIS record.

Vaccination Detail Add	
Vaccine 1:	influenza, injectable, quadrivalent, preservative free (F
Date Administered:	09/20/2019
Historical:	<input type="radio"/> YES <input checked="" type="radio"/> NO
Confidential:	<input type="radio"/> YES <input checked="" type="radio"/> NO
Provider Noted on Record:	
Lot Noted on Record:	
Manufacturer Noted on Record:	
Manufacturer:	SANOFI PASTEUR Click to select
Lot Number:	UI56789
Lot Facility:	NICOLE'S VFC CLINIC 2
Funding Source:	PUB
Facility:	NICOLE'S VFC CLINIC 2
Vaccinator:	NURSE, NANCY LPN x ▾

Vaccine Documentation Resources

- [IIS Common Codes Guide](#) - Provides IIS vaccine names and codes for pediatric, adult, flu and travel vaccines.
- [Adding Vaccines in the IIS Short Video](#)
- [Adding, Editing, and Deleting Vaccines Guide](#)

Review Question Two

Which of the following information is critical to document correctly for vaccine inventory decrementing?

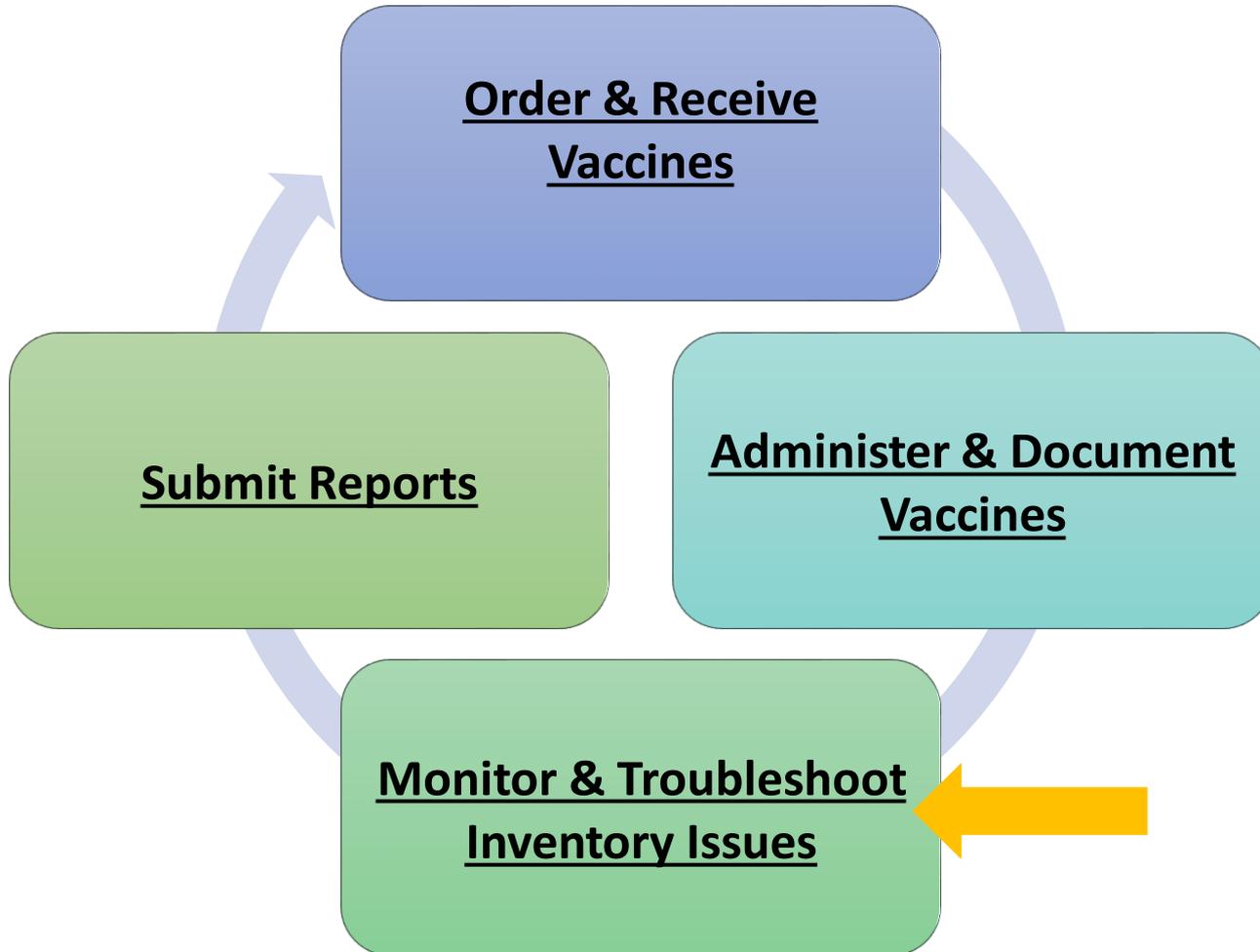
- A. Vaccine type
- B. Lot number
- C. NDC
- D. A & B
- E. All of the above

Review Question Two

Which of the following information is critical to document correctly for vaccine inventory decrementing?

- A. Vaccine type
- B. Lot number
- C. NDC
- D. A & B
- E. All of the above

Vaccine Coordinator Tasks & Workflow



Inventory Guidelines

You must count, reconcile and submit your inventory report every month.

Reconciling: Making sure your inventory in the IIS matches the number of doses your clinic has in your physical inventory.

IIS Quantity on Hand

How much vaccine the IIS thinks you have

Reconcile Inventory				
Vaccine ▲	Lot Number	Exp Date ←	Quantity on Hand	Physical Inventory
DTaP	C4754AA	06/23/2017	94	
DTaP/Hep B/IPV	PEDIARIX	10/28/2017	20	

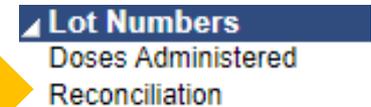
Physical Inventory

How much vaccine you have in your storage units.



Counting Your Physical Inventory

- First, make sure all orders that have arrived at your clinic are received in the IIS.
- Select **Lot Numbers** and then **Reconciliation** in the left menu to view your IIS inventory. 
- Click the **Print** button at the bottom of the screen to print a reconciliation worksheet
- Count your **Physical Inventory** of publicly-supplied vaccine and note on the worksheet



Vaccine	Lot Number	Exp Date	Quantity on Hand	Physical Inventory	Adjustment	Reason	Funding Source	Inactive
DT (pediatric)	C5511AA	08/30/2020	2				PUB	
DTaP (Daptacel, Infanrix, Tripedia)	C5523AA	09/20/2020	14				PUB	
DTaP (Daptacel, Infanrix, Tripedia)	C5611BA	04/03/2021	50				PUB	

Inventory Troubleshooting

If your physical counts do not match your IIS inventory counts, troubleshoot for any doses that did not subtract (decrement) from your inventory.

- The **Patient Detail Report** can help identify which patients received doses that did not subtract from your inventory.
- The **Lot Usage and Recall Report** provides a list of patients who received a certain lot number.

Both reports can be found in the **Report Module**



Reports	
Vaccinations	Patients
Vaccination Totals	Daily Patient Immunization List
Vaccinations Breakdown	Patient Detail <input type="button" value="Schedule"/>
Lot Number Summary	Patient Totals
Lot Usage and Recall Report	Recall for Inactivation

Common Reasons for Inventory Issues

Most inventory decrementing issues are caused by:

- **Documentation issues** – wrong vaccine type, lot number typos, incorrect manufacturer, invalid or missing VFC eligibility status.
- **Delayed receipt of orders in the IIS** – Vaccines will not decrement if they are documented before the orders are received & added to your inventory.
- **Timing** – If your clinic sends data to the IIS from your EHR, there may be a delay in how quickly vaccines subtract from your inventory.

Editing Vaccination Records

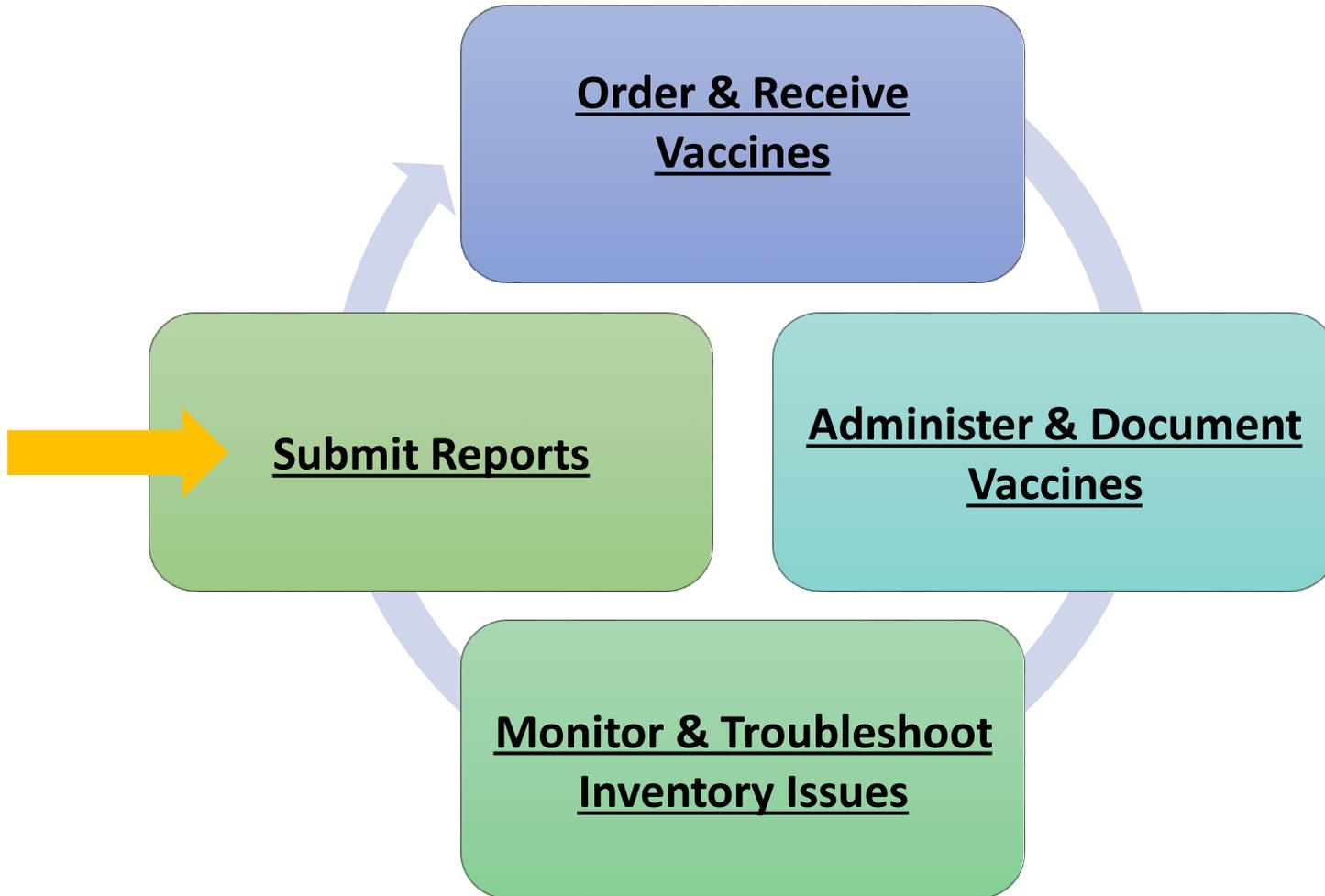
If a dose does not decrement from your inventory, you can make edits to the vaccine details or you may need to delete the record from the IIS and re-enter.

Incorrect Element	How to Correct
<ul style="list-style-type: none"><li data-bbox="305 668 917 725">• Vaccine Name/Type<li data-bbox="305 732 852 789">• Date Administered	Delete & Re-Enter
<ul style="list-style-type: none"><li data-bbox="305 818 678 875">• Lot Number<li data-bbox="305 882 730 939">• Manufacturer	Edit *Use Click to Select to choose the correct lot number from your IIS inventory

Inventory Resources

- [Inventory Reporting Short Video](#)
- [How to Search, Add, Reconcile & Report Inventory Guide](#)
- [Managing Inventory with an Interface Guide](#)
- [Patient Detail Report Guide](#)
- [Lot Usage & Recall Report Guide](#)

Vaccine Coordinator Tasks & Workflow



Reporting Guidelines

The following items must be submitted every month:

- 1. Doses Administered:** Reports the number of doses used during the previous month by vaccine, lot number and age group.
- 2. Inventory:** Reports your clinic's current inventory totals by vaccine and lot number.
- 3. Temperature Logs:** Must submit logs for all storage units containing publicly-supplied vaccine to WAChildhoodVaccines@doh.wa.gov.

Tip: Submit the doses administered report before submitting your Inventory report.

Types of Reporters

Clinics are set up as **Non-Aggregate** or **Aggregate** reporters for the Doses Administered Report.

Reporting Type	Description
Non-Aggregate	<ul style="list-style-type: none">• Most common reporting type• EHR/IIS interface or Direct Data Entry• No edit function on Doses Administered Report
Aggregate	<ul style="list-style-type: none">• Don't share patient level data with the IIS• Batch upload data file or don't share any data• Have edit button on Doses Administered Report

Running the Doses Administered Report

- Select **Lot Numbers**, then **Doses Administered** in the left menu of the IIS.
- Enter contact information.
- Select **Reporting Month** and **Vaccination Date Range** autofills.
- Click **Create Report** button.



Vaccine Administered Report
This report must be submitted on a monthly basis

Reporter Information

Person Completing Report	NICOLE PENDER
Phone Number	(360)233-5511
Email	nicole.test@doh.wa.gov

Instructions:

1. Reporting Month: Select the report month from the drop down box. Select the month in which your date range starts.
2. Vaccination Date Range: The "From" date will autofill with the day following your last report submission.
3. Lot Eligibility: Select the correct funding type.
 1. Vaccines supplied by the state are considered publicly-supplied vaccines. To run a report for publicly-supplied vaccine: select PUB.
 2. To run a report for vaccines your clinic privately purchased, select PRVT.
4. Create report and review carefully before submission.

Limit Report By

<input checked="" type="checkbox"/> Reporting Month	September 2019 ▼
<input checked="" type="checkbox"/> Vaccination Date Range	From: 09/01/2019 Through: 09/30/2019

Reviewing & Submitting

- Review reports – if inaccurate, may need to do additional troubleshooting.
- Click **Submit** when you're ready to submit the report.
- Aggregate reporters will see an **Edit** button at the bottom of their report. They type in the number of doses used, then **Submit**.

Vaccine	Lot Number	Years												Total
		< 1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	
DTaP	T79X3	0	0	0	0	0								0
DTaP	YK9ET	2	1	0	1	0								4
DTaP	K92A4	0	0	0	0	0								0
	Total	2	1		1									4
<hr/>														
DTaP-Hep B-IPV	2F977	0	0	0	0	0								0
DTaP-Hep B-IPV	9A2KC	0	0	0	0	0								0
DTaP-Hep B-IPV	H994T	0	0	0	0	0								0
DTaP-Hep B-IPV	2HC47	4	0	0	0	0								4
DTaP-Hep B-IPV	53HA4	0	0	0	0	0								0
DTaP-Hep B-IPV	MG92G	0	0	0	0	0								0
	Total	4												4

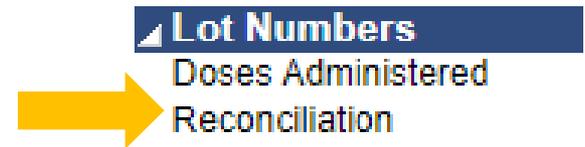
Doses Administered Report Resources

- Doses Administered Report Short Videos
 - [Non-Aggregate Reporters](#)
 - [Aggregate Reporters](#)
- [Doses Administered Report Guide](#)

Submitting the Inventory Report

Before Submitting this Report: Complete all inventory troubleshooting and make any corrections to patient records that are needed.

- Select **Lot Numbers**, then **Reconciliation** in the left menu of the IIS.
- Make minor adjustments to inventory, if necessary.



Inventory Adjustments

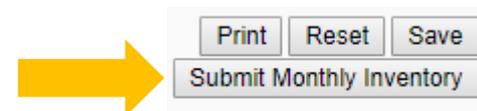
Keep inventory adjustments to a minimum – adjustments are intended for reporting wasted, spoiled, and expired vaccines.

If necessary, make adjustments by:

- Entering the actual number of doses on hand in the **Physical Inventory** field.
- Select the most appropriate **Category** & **Reason** for each lot number that needs to be adjusted.

Reconcile Inventory							
Vaccine	Lot Number	Exp Date	Quantity on Hand	Physical Inventory	Adjustment (+/-)	Category	Reason
DTaP (Daptacel, Infanrix, Tripedia)	C5611BA	04/03/2021	17	16	-1.0	Wasted	Drawn up, not used

- Click **Submit Monthly Inventory** button.



Reporting Tips

- Timing is Important!
 - Sometimes vaccines don't appear in the IIS until the next day.
 - Count inventory first thing in the morning or after closing.
- Track vaccine wastage with the [Vaccine Loss Log](#).
- Correct documentation is critical to help avoid inventory decrementing issues.
 - When you have multiple lot numbers of the same vaccine in your fridge/freezer - use one box at a time to help simplify vaccine documentation.

Review Question Three

Which documents/reports are you required to submit every month?

- A. Doses administered report
- B. Inventory report
- C. Temperature logs
- D. All of the above

Review Question Three

Which documents/reports are you required to submit every month?

- A. Doses administered report
- B. Inventory report
- C. Temperature logs
- D. All of the above

IIS Login Changes Coming

All users will need to have a SecureAccess Washington (SAW) account and an IIS account to login to the system later this year or early next year.

What can you do right now?

[Set up a SAW account](#) if you don't have one.

What will happen next?

- DOH will provide instructions to connect your SAW account to the IIS.
- All users will transition to logging in to the IIS through a SAW account.



IIS Training and Support

IIS Questions & Assistance

Contact the Help Desk

- 1-800-325-5599
- WAIISSHelpDesk@doh.wa.gov

Request IIS Training

Email the IIS Outreach & Training Team

IIS.Training@doh.wa.gov

IIS Training Resources

Visit the IIS Training Materials Portal

www.doh.wa.gov/trainingIIS

Recorded IIS Webinars on YouTube

Visit the IIS YouTube Channel [here](#)

IIS News
January 2017

WASHINGTON STATE
IMMUNIZATION
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www.doh.wa.gov/trainingIIS

December 2016 Upgrade

On December 8, 2016 the IIS was upgraded. Please review the materials below to see the changes and updates included in the upgrade.

[IIS Upgrade Summary](#)
[IIS Forecast Update](#)



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IIS School Module

The Department of Health is excited to share that we are rolling out a new tool to make



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