

# Alberta Vaccine Inventory (AVI) Quick Reference Guide Approving Vaccine Orders



### **APPROVING AN ORDER**

1. Using the Navigation Menu, click on the Orders/Transfers Menu Heading, then click Approve Orders to show the Approve Orders Screen.

#### **PROCESS TO REVIEW AND APPROVE ORDERS:**

**2.** Orders will appear in the "Reviewed for Approval" section when the ordering entity is placing an order out of the assigned frequency.

| Approv         | e Orders                         |                             |               |                           |               |  |
|----------------|----------------------------------|-----------------------------|---------------|---------------------------|---------------|--|
| Organizati     | ion (IRMS):                      | select                      | •             |                           |               | Facility:select V  |
| PIN:           |                                  | select V                    |               |                           |               | Find   |
| Order Dat      | e:                               | From:                       |               | Through:                  |               |  |
| Order L        | ist                              |                             |               |                           |               |  |
|                | Sh                               | ow: • All • Reviewe         | ed For Approv | al 📀 Conditionally A      | Approved 🔘 B  | ackordered   |
|                | ed For Approval                  |                             |               |                           |               |  |
| Order<br>Numbe | er 🔶 (IRMS)                      | Facility                    | ♦ PIN         | Order Set                 | Order<br>Date | Exception Reason   |
| <u>26</u>      | 1011-AHS-<br>EDMONTON ZONE       | AHS-DEPOT-<br>E EDMONTON    | AHSED-ED      | CHILDHOOD<br>VACCINES     | 11/11/2014    | Outside Assigned Order Frequency;<br>Outside Recommended Order Quantity                            |
| <u>27</u>      | 1011-AHS-<br>EDMONTON ZONE       | AHS-DEPOT-<br>EDMONTON      | AHSED-ED      | CHILDHOOD<br>VACCINES     | 11/11/2014    | No inventory available; Outside<br>Assigned Order Frequency; Outside<br>Recommended Order Quantity |
| <u>28</u>      | 1009-AHS-CALGA<br>ZONE           | CALGARY                     | AHSCA-CA      | CHILDHOOD<br>VACCINES     | 11/11/2014    | No inventory available; Outside<br>Assigned Order Frequency; Outside<br>Recommended Order Quantity |
| <u>29</u>      | 1008-AHS-SOUTH<br>ZONE           | AHS-DEPOT-<br>MEDICINE HAT  | AHSSO-MH      | CHILDHOOD<br>VACCINES     | 11/11/2014    | No inventory available; Outside<br>Recommended Order Quantity                                      |
| <u>32</u>      | 1012-AHS-NORTH<br>ZONE           | AHS-DEPOT-HIGH<br>LEVEL     | AHSNO-HL      | CHILDHOOD<br>VACCINES     | 11/13/2014    | No inventory available; Outside<br>Assigned Order Frequency; Outside<br>Recommended Order Quantity |
| 45             | ZONE                             | AL AHS-DEPOT-RED<br>DEER    | AHSCE-RD      | CHILDHOOD<br>VACCINES     | 11/17/2014    | Shipping Information Changed; Outside<br>Recommended Order Quantity                                |
| <u>47</u>      | 1010-AHS-CENTR<br>ZONE           | AL AHS-DEPOT-RED<br>DEER    | AHSCE-RD      | UAT                       | 11/17/2014    | Outside Recommended Order Quantity   |
| Ready I        | For Depot Approval               |                             |               |                           |               |  |
|                | Order Organizat<br>Number (IRMS) | <sup>ion</sup> ≑ Facility ≑ | PIN \$        | Order + Order<br>Type Set | Order<br>Date | <ul> <li>Approved<br/>By</li> <li>Exception Reason</li> </ul>                                      |
| 32             | 1011-AHS-                        | AHS DEPOT                   | SED-ED Deg    | CHILDHO                   | DD 11/11/2014 | Outside Assigned Order<br>ADMIN USER Frequency; Outside<br>Recommended Order<br>Quantity           |
| 355            | 1009-AHS-<br>CALGARY<br>ZONE     | AHS-DEPOT- AHS<br>CALGARY   | SCA-CA Dep    | oot CHILDHOO<br>VACCINES  |               | No inventory available;<br>NICK RC Outside Recommended<br>Order Quantity                           |
| Select All     |                                  |                             |               |                           |               | Approve and Prin   |

3. Click the Order Number to open the order details.

Note: The orders are automatically arranged by the order number

4. Verify that the *Doses Used Last Month* and *Physical Inventory* are entered for all vaccine products, and enter any missing information.

- 5. Verify that the *Order Quantity* is appropriate.
- 6. Change the *Order Quantity* if needed, as described on the next page.
- 7. Review exception reason(s) if present.
- 8. <u>To approve</u>: Click the **Approve** button to save changes and exit the order details.
- **9.** The order will move to the next section labeled "Ready For Depot Approval"
- **10.** Click the check box next to each order number that is ready to ship, and click **Approve and Print**. This will create an inventory pick list that will open in another window, and can be printed.

| rganizati    | on (IRMS):      |                               | select               |        |           | •      |               |               |              |      |               | Facility:                           | select V   |       |
|--------------|-----------------|-------------------------------|----------------------|--------|-----------|--------|---------------|---------------|--------------|------|---------------|-------------------------------------|--|-------|
| IN:          |                 |                               | select               | •      |           |        |               |               |              |      |               |                                     | Find   |       |
| rder Dat     |                 |                               | From:                |        |           |        | Through       | h:            |              |      |               |                                     |  |       |
| Order Li     | ist             |                               |                      |        |           |        |               |               |              |      |               |                                     |  |       |
| Jouiour      | ed For Ap       |                               | ow: • All            | Revie  | wed For / | Approv | /al ○ C       | onditi        | onally A     | ppro | ved OB        | ackordered                          |  |       |
| Order        |                 | rganization                   | _                    |        |           |        |               |               |              |      | Order         | _                                   |  |       |
| Numbe        | er 🕈 👘 🗍        | (IRMS)                        |                      | cility | ¢         | PIN    | ¢             | Order         |              | \$   | Date          |                                     | ption Reason   |       |
| <u>6</u>     | 1011-<br>EDM0   | AHS-<br>DNTON ZONE            | AHS-DEF<br>EDMONT    |        | AHSE      | ED-ED  |               | DHOO<br>CINES |              | 11   | /11/2014      | Outside Recon                       | ed Order Frequency;<br>nmended Order Quan                                | ntity |
| 7            | 1011-<br>EDM0   | AHS-<br>ONTON ZONE            | AHS-DEF<br>EDMONT    |        | AHSE      | ED-ED  |               | DHOO<br>CINES |              | 11   | /11/2014      | Assigned Orde                       | vailable; Outside<br>r Frequency; Outside<br>d Order Quantity            |       |
| 8            | 1009-<br>ZONE   | AHS-CALGAR                    | Y AHS-DEF<br>CALGAR  |        | AHS       | CA-CA  |               | DHOO          |              | 11   | /11/2014      | Assigned Orde                       | vailable; Outside<br>r Frequency; Outside<br>d Order Quantity            |       |
| 9            | 1008-<br>ZONE   | AHS-SOUTH                     | AHS-DEF<br>MEDICIN   |        | AHS       | SO-MH  |               | DHOO          |              | 11   | /11/2014      | No inventory a<br>Recommended       | vailable; Outside<br>d Order Quantity                                    |       |
| 2            | ZONE            |                               | AHS-DEF<br>LEVEL     |        | AHSI      | NO-HL  |               | DHOO          |              | 11   | /13/2014      | Assigned Orde                       | vailable; Outside<br>r Frequency; Outside<br>d Order Quantity            |       |
| 5            | ZONE            |                               | DEER                 |        | AHS       | CE-RD  |               | DHOO<br>CINES |              | 11   | /17/2014      |                                     | nation Changed; Outs<br>d Order Quantity                                 | sid   |
| 7            | 1010-<br>ZONE   | AHS-CENTRA                    | L AHS-DEF<br>DEER    | OT-RED | D AHSO    | CE-RD  | UAT           |               |              | 11   | /17/2014      | Outside Recon                       | nmended Order Quan   | ntity |
| Ready F      | For Depot       | Approval                      |                      |        |           |        |               |               |              |      |               |                                     |  |       |
|              | Order<br>Number | Organizati<br>(IRMS)          | <sup>on</sup> ¢ Faci | lity 🜩 | PIN       | ÷      | Order<br>Type | ÷             | Order<br>Set | ÷    | Order<br>Date | <ul> <li>Approved<br/>By</li> </ul> | Exception Reaso  | on    |
| ) <u>325</u> | 2               | 1011-AHS-<br>EDMONTON<br>ZONE | AHS-DE               |        | HSED-ED   | ) De   | pot           |               |              |      | 1/11/2014     | ADMIN USER                          | Outside Assigned Or<br>Frequency; Outside<br>Recommended Ord<br>Quantity |       |
| ) <u>355</u> | i               | 1009-AHS-<br>CALGARY<br>ZONE  | AHS-DE<br>CALGAI     |        | AHSCA-CA  | De     | pot           |               |              |      | 1/18/2014     | NICK RC                             | No inventory availab<br>Outside Recommen<br>Order Quantity               |       |

**11.** The order will move into the "Awaiting Shipment" section after the pick list is generated.



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- 12. Select the check boxes next to the orders you wish to ship.
- **13.** Click **Ship.** This will change the order status to "Shipped or Ready for Pickup."

| Awa   | iting Shipmer   |                               |                               |           |                                    |                       |               |                   |  |
|-------|-----------------|-------------------------------|-------------------------------|-----------|------------------------------------|-----------------------|---------------|-------------------|--|
|       | Order<br>Number | Organization<br>(IRMS)        | Facility                      | ¢ PIN     | <ul> <li>Order<br/>Type</li> </ul> | Order     Set         | Order<br>Date | Approved<br>By    | Exception Reason   |
|       | <u>293</u>      | 1012-AHS-<br>NORTH ZONE       | AHS-DEPOT-<br>WESTLOCK        | AHSNO-WES | Depot                              | ADULT<br>VACCINES     | 11/06/2014    | ADMIN USER        | No inventory available;<br>Outside Assigned Order<br>Frequency; Outside<br>Recommended Order<br>Quantity |
|       | <u>306</u>      | 1011-AHS-<br>EDMONTON<br>ZONE | AHS-DEPOT-<br>EDMONTON        | AHSED-ED  | Depot                              | CHILDHOOD<br>VACCINES | 11/07/2014    | ELAINA<br>BOLTON  | Outside Recommended<br>Order Quantity  |
|       | <u>307</u>      | 1009-AHS-<br>CALGARY<br>ZONE  | AHS-DEPOT-<br>CALGARY         | AHSCA-CA  | Depot                              | INFLUENZA             | 11/07/2014    | ADMIN USER        | Outside Assigned Order<br>Frequency; Outside<br>Recommended Order<br>Quantity; Urgent                    |
|       | <u>330</u>      | 1008-AHS-<br>SOUTH ZONE       | AHS-DEPOT-<br>MEDICINE<br>HAT | AHSSO-MH  | Depot                              | CHILDHOOD<br>VACCINES | 11/11/2014    | ADMIN USER        | No inventory available;<br>Outside Assigned Order<br>Frequency; Outside<br>Recommended Order<br>Quantity |
|       | <u>346</u>      | 1010-AHS-<br>CENTRAL<br>ZONE  | AHS-DEPOT-<br>RED DEER        | AHSCE-RD  | Depot                              | UAT                   | 11/17/2014    | KRISTI<br>SIAHAYA | Outside Recommended<br>Order Quantity  |
|       | <u>347</u>      | 1010-AHS-<br>CENTRAL<br>ZONE  | AHS-DEPOT-<br>RED DEER        | AHSCE-RD  | Depot                              | UAT                   | 11/17/2014    | KRISTI<br>SIAHAYA | Outside Recommended<br>Order Quantity  |
| Selec | t All           |                               |                               |           |                                    |                       |               |                   | Ship   |

#### TO MAKE CHANGES TO THE ORDER:

Open the orders under either the "Ready for Approval" or the "Ready for Depot Approval" sections.

#### To ADD a vaccine to an order:

- 1. Locate the vaccine under the *optionally add vaccines to order by changing order quantity* section.
- 2. Enter values in the *Dose Used Last Month* and *Physical Inventory* fields.
- **3.** Enter the desired quantity in both the *Order Quantity* and *Approved Quantity* fields. The values must be equal.
- 4. Explain why the vaccines were added in the *Comment* field.
- 5. Repeat for each vaccine being added to the order.
- 6. Click the Approve button when finished.

| Order D<br>Vaccine          |   | Physical<br>Inventory | Recom-<br>mendec<br>Quantit | Order<br>Quanti | Approv<br>yQuantit | ed Back-<br>order<br>Quant | Denied<br>ity <sup>Quantit</sup> | y Description               | Denial Rea | son Urge | ent F  | riority Reason | Comment | Reason                                  | Exception<br>Resolved |
|-----------------------------|---|-----------------------|-----------------------------|-----------------|--------------------|----------------------------|----------------------------------|-----------------------------|------------|----------|--------|----------------|---------|---|-----------------------|
| Tdap                        | 0 | 0                     | 0                           | 50              | 50                 |                            |                                  |                             | select     | •        | sele   | ti 🔻           |         | Outside<br>Recommende<br>Order Quantity |                       |
| Optionall<br>DTaP/IPV       |   | accines to            | order b                     | y chang         | ing order          | quantity                   |                                  | Advecte Parts & description | a start    | • In     | - ante | tta 🔻          |         |   |                       |
| отанлеч<br>Нер В            | 0 | 0                     | <u>v</u>                    | <u> </u>        | 0                  |                            |                                  | Adacel8-Polio 1 dose/pkg    | select     | • •      | sele   | ci •           |         |   |                       |
| Ped/Adol<br>Preserv<br>Free | 0 | 0                     | 0                           | 0               | 0                  |                            |                                  | Engerix-B® 1 dose/pkg       | select     | •        | sele   | ct 🔻           |         |   |                       |
| Hepatitis<br>Badult         | 0 | 0                     | 0                           | 0               | 0                  |                            |                                  | Engerix-B® 1 dose/pkg       | select     | •        | sele   | ct 🔻           |         |   |                       |
|                             | 0 | 0                     | 0                           | 0               | 0                  |                            |                                  | Adacel® 1 dose/pkg          | select     | •        | sele   | ct 🔻           |         |   |                       |
|                             |   | 0                     | -                           | 0               | 0                  |                            |                                  | Boostrik® 10 dose/pkg       | select     | <b>T</b> | sele   | rt             |         |   |                       |

Important: The values in the **Approved Quantity + Backordered Quantity + Denied Quantity** fields must equal the value in the **Order Quantity** field for each vaccine.

To **INCREASE** the order quantity of a vaccine in the order:

- Enter the new (higher) quantity in both the *Order Quantity* and *Approved Quantity* fields. The order and approved quantities must be equal.
- 2. Explain why the vaccines were increased in the *Comment* field.
- 3. Repeat for each vaccine to increase the order quantity.
- 4. Click the Approve button when finished.

#### To DECREASE (Deny) the order quantity of a vaccine in the order:

- 1. Enter the new (lower) quantity in the Approved Quantity field.
- 2. Do not change the original Order Quantity.
- **3.** Enter the amount of vaccine being denied in the *Denied Quantity* field. The *Approved Quantities* + the *Denied Quantity* must equal the original *Order Quantity*.
- 4. Select a *Denial Reason* from the drop down menu.
- 5. Explain the vaccine denial/decrease in the *Comment* field.
- 6. Repeat for each vaccine to decrease (deny) the order quantity.
- 7. Click the Approve button.



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#### To **DENY** an **entire order** so none of the requested vaccines are ordered:

- 1. Select an *Entire Order Denial Reason* from the drop down menu at the bottom of the page.
- 2. Click the *Deny Order* button.

| Vaccine                                | Dose     | Physical<br>Inventory | Recom-<br>mended Order<br>Quantity | Approve<br>ityQuantity | d <mark>Back-</mark><br>order<br>Quantit | Denied<br>yQuantity | Description              | Denial Rease | on Urgen | t Priority Reason |   | Comment | Reason                                  | Exception<br>Resolved |
|--|----------|-----------------------|------------------------------------|------------------------|--|---------------------|--------------------------|--------------|----------|-------------------|---|---------|---|-----------------------|
| Tdap (                                 | 0        | 0                     | 0 50                               | 50                     |  |                     |                          | select       | •        | select            | ¥ |         | Outside<br>Recommende<br>Order Quantity |                       |
| Optionall                              | v add va | accines to            | order by chan                      | aina order             | uantity:                                 |                     |                          |              |          |                   |   |         |   |                       |
| DTaP/IPV/                              |          | 0                     | 0 0                                | 0                      |  |                     | Adacel®-Polio 1 dose/pkg | select       | <b>T</b> | select            | • |         |   |                       |
| Hep B<br>Ped/Adol<br>- Preserv<br>Free | 0        | 0                     | 0 0                                | 0                      |  |                     | Engerix-B® 1 dose/pkg    | select       | •        | select            | ¥ |         |   |                       |
| Hepatitis ,                            |          | 0                     | 0 0                                | 0                      |  |                     | Engerix-B® 1 dose/pkg    | select       | •        | select            |   |         |   |                       |
| Badult                                 |          |                       |                                    |                        |  |                     |                          |              |          |                   | - |         |   |                       |
| Tdap (                                 |          | 0                     | 0 0                                | 0                      |  |                     | Adacel® 1 dose/pkg       | select       | ▼ 目      | select            | • |         |   |                       |
| Tdap (                                 | 0        | 0                     | 0 0                                | 0                      |  |                     | Boostrix® 10 dose/pkg    | select       | <b>T</b> | select            | • |         |   |                       |
| Deny Ent                               | ire Orde | r 🗏 Enti              | re Order Denial                    | Reason                 | select                                   |                     | T                        |              |          |                   |   | Cancel  | Approve                                 |                       |

#### To **BACKORDER** a vaccine or entire order:

- 1. Enter the backorder quantity in the *Back-order Quantity* field.
- 2. Adjust the *Approved Quantity* in order to ensure the *Back-order Quantity* and the *Approved Quantity* equal the *Order Quantity*.
- **3.** Explain the vaccine back-order in the *Comment* field.
- 4. Repeat for each vaccine that needs back ordered.
- 5. Click the Approve button.

| Order De Vaccine              |          | Physical<br>Inventory | Recom-<br>mended<br>Quantity | Order<br>Quantit | Approve<br>yQuantity | d <mark>Back-</mark><br>order<br>Quantity | Denied<br>Quantity | Description             | Denial Reas | on Urge | nt Priority Reason |     | Comment | Exception<br>Reason                    | Exception<br>Resolved |
|-------------------------------|----------|-----------------------|------------------------------|------------------|----------------------|---|--------------------|-------------------------|-------------|---------|--------------------|-----|---------|--|-----------------------|
| Tdap                          |          |                       |                              | 50               | 50                   |   |                    |                         | select      | •       | select             | ¥   |         | Outside<br>Recommende<br>Order Quantit |                       |
| Optional                      | v add v  | accines to            | order by                     | v changi         | ng order i           | quantity:                                 |                    |                         |             |         |                    |     |         |  |                       |
| DTaP/IPV<br>Hep B             | Ó        | 0                     | 0                            | 0                | õ                    |   | A                  | dacel®-Polio 1 dose/pkg | select      | •       | select             | •   |         |  |                       |
| Ped/Adol<br>- Preserv<br>Free | 0        | 0                     | 0                            | 0                | 0                    |   | E                  | ingerix-B® 1 dose/pkg   | select      | •       | select             | ¥ [ |         |  |                       |
| Hepatitis<br>Badult           | 0        | 0                     | 0                            | 0                | 0                    |   | E                  | ingerix-B® 1 dose/pkg   | select      | •       | select             | •   |         |  |                       |
|                               | D        | 0                     | 0                            | 0                | 0                    |   | A                  | dacel® 1 dose/pkg       | select      | •       | select             | •   |         |  |                       |
|                               | 0        | 0                     | 0                            | 0                | 0                    |   |                    | loostrix® 10 dose/pkg   | select      | •       | select             | •   |         |  |                       |
| Deny Ent                      | ire Orde | r 🗆 Entii             | re Order I                   | Denial R         | eason                | select                                    |                    | •                       |             |         |                    |     | Cancel  | Approve                                |                       |

URGENT order requests:

Urgent orders will be approved at your discretion.

Review the **Priority Reason** when deciding to approve or deny an urgent order request.

a. To **approve** an urgent request, leave the Urgent checkbox checked.b. To **deny** an urgent request, uncheck the Urgent checkbox. Explain why the request was denied in the *Comment* field.

c. To **mark an order** urgent, select a *Priority Reason* from the dropdown menu.