

ALBERTA VACCINE INVENTORY MANAGEMENT SYSTEM

Super User Training Guide Organization, Facility and User Management

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INTRODUCTION

This guide demonstrates the steps needed for adding, editing and inactivating organizations, facilities and users in the Alberta Vaccine Inventory System (AVI).

ORGANIZATION (IRMS) MENU

The purpose of the **Organization (IRMS) Menu** is to provide the **Registry Client** user the ability to setup defaults for their Organizations (IRMS). You can **Search, Add, and Edit** names of Organizations (IRMS).

The **Registry Client** user is able to change their Organizations (IRMS) as many times as they want during their session.

Note: When the Organizations (IRMS) is selected, every window containing the Organizations (IRMS) field will automatically populate with a default Organizations (IRMS).

Searching for an Organization (IRMS)

To search for an Organizations (IRMS), perform the following:

1. From the **ORGANIZATION (IRMS)** menu, point and click on the **Search/Add** option. The **Organizations (IRMS) Maintenance – Search** window appears.

| Search Results | | | | | | |
|----------------|------------------------|---------|--------------------------|----------|---------|-------|
| Select | Organization (IRMS) ID | VFC PIN | Organization (IRMS) Name | Inactive | Contact | Phone |
| | | | | | | |

2. Select/type your search criteria and then click the **Search** button. The search process begins. For more information on field definitions, see the AVI Application Guide 5.14.3 Table 1-1.
 - a. **If a match is found**, it will appear in the bottom of the window in the “Search Results” section.

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Organization (IRMS) Maintenance
Search/Add Organization (IRMS) - Search Required Before Adding

Inactive Status: All IRMS
 Organization (IRMS) ID:
 Organization (IRMS) Name: test
 City:
 Postal Code:
 Phone:
 District/Region:
 VFC PIN:

Back

Search Results

| Select | Organization (IRMS) ID | VFC PIN | Organization (IRMS) Name | Inactive | Contact | Phone |
|--------|------------------------|---------|--------------------------|----------|---------|-------|
| --> | 1001 | 90001 | TEST DEPOT | Y | | |
| --> | 1007 | 90003 | TEST DEPOT 2 | Y | | |

View Report
Add

- b. **If a match is NOT found**, the search criteria will appear at the top of the window without any results.
- 3. Click one of the available buttons depending on the desired action:
 - a. **Back** – to return to the **Organization (IRMS) Maintenance – Search** window.
 - b. **Select** – to display the **Organization (IRMS) Maintenance Details** window to begin an edit. Continue to the section titled, “Editing an Organization (IRMS)” for instructions.
 - c. **Add** – to enter a new Organization (IRMS). The **Organization (IRMS) Maintenance [Add]** window appears. Continue to the section titled, **Adding an Organization (IRMS)**.
 - d. **View Report** – to view a report in a new browser window providing the option to print. The report contains the search criteria, Organization (IRMS) ID, Site Name, Contact Person, Status, Phone, Extension, City, and State for the displayed Organizations (IRMS).

Organization (IRMS) Report

Report Criteria: Report Date: December 1, 2014

Inactive Status: All IRMS
 Organization (IRMS): All
 ID: All
 Organization (IRMS) Name: All
 City: All
 Postal Code: All
 District/Region: All

| Organization (IRMS) ID | VFC PIN | SITE NAME | CONTACT PERSON | INACTIVE | PHONE EXT | CITY | STATE |
|------------------------|------------|--------------------------------|----------------|----------|-----------|--------------|-------|
| 1009 | AHSCALGARY | AHS-CALGARY ZONE | | | | CALGARY | AB |
| 1010 | AHSCENTRAL | AHS-CENTRAL ZONE | | | | CALGARY | AB |
| 1011 | AHSEDMON | AHS-EDMONTON ZONE | | | | ANCHORAGE | AK |
| 1012 | AHSNORTH | AHS-NORTH ZONE | | | | ANCHORAGE | AK |
| 1008 | AHSSOUTH | AHS-SOUTH ZONE | | | | MEDICINE HAT | AB |
| 1017 | 1017 | LOCAL HEALTH ZONE 1 | | | | GIBBONS | AB |
| 1004 | 87654 | PROVINCIAL VACCINE DEPOT | | | | MANCHESTER | NH |
| 1016 | 1016 | PVD ORG | | | | GIBBONS | AB |
| 1014 | 99501 | PVDRTN | | | | ANCHORAGE | AK |
| 1013 | | STATE APPROVER | | | | PHOENIX | AZ |
| 1015 | UAT-ORG | UAT-PROVIDER | | | | PORTLAND | ME |
| 1006 | AP1234 | ALBERTA PEDIATRICS | | Y | | MANCHESTER | NH |
| 1000 | | CLIENT_SERVER_INTERNAL_IRMS_ID | | Y | | OLYMPIA | WA |
| 1003 | 54321 | COMMUNITY PHARMACY | | Y | | MANCHESTER | NH |
| 1 | | PCIC_SOURCE | | Y | | ANCHORAGE | AK |
| 1002 | 12345 | PUBLIC HEALTH CLINIC | | Y | | MANCHESTER | NH |
| 1005 | 90002 | RETURN DEPOT | | Y | | MANCHESTER | NH |
| 1001 | 90001 | TEST DEPOT | | Y | | MANCHESTER | NH |
| 1007 | 90003 | TEST DEPOT 2 | | Y | | ANCHORAGE | AK |

Adding an Organization (IRMS)

If you attempt to add an Organization (IRMS) that is already entered in the application, a message appears indicating the organization already exists.

1. Perform a **Search** on the **Organization (IRMS)** and click on the **Add** button. The **Organization (IRMS) Maintenance Add** window appears with the Organization (IRMS) name already filled in.
2. Type in as much information as is possible in the corresponding fields. At a minimum, you must enter data into the **RED** labeled fields. For more information on field definitions, see the AVI Application Guide 5.14.3 Table 1-2.
3. At the very bottom above the Save button, the **Add Facility** check box will be displayed. This can be checked before saving to allow the user to quickly add a facility that is associated with the newly created organization.
4. Click one of the available buttons:
 - a. **Cancel** - to not save and exit to the **Organization (IRMS) Maintenance Search** window.
 - b. **Reset** - to erase your newly typed entries and remain on the same window to re-enter data.
 - c. **Save** - to save your entry and display the **Organization (IRMS) Maintenance Details** window.

Editing an Organization (IRMS)

To edit an **Organization (IRMS)**, perform the following steps:

1. Perform a **Search**. Refer to the section titled, **Searching for an Organization (IRMS)**.
2. Select the Organization (IRMS) you want to edit by clicking on the **SELECT ARROW**. The **Organization (IRMS) Maintenance [Details]** window appears.
3. Refer to the AVI Application Guide 5.14.3 Table 1-2 for a list of field descriptions.
4. Click one of the available buttons:
 - a. **Back** – to return to the “Organization (IRMS) Maintenance – Add” window.
 - b. **Edit** – to display the **Organization (IRMS) Maintenance – EDIT** window to edit the Organization (IRMS) information.

FACILITIES MENU

The purpose of the **Facilities Menu** is to **Search, Add, and Edit** names of Facilities (Clinics) for consistent data entry and to avoid data entry redundancy.

You may also add a new user immediately after adding a facility provided you are authorized to do so. A checkbox appears on the Facility Add window that will invoke the **Web User Maintenance – Add** portion of the application. More information is available in the section titled, “Adding a Facility.”

Searching for a Facility

- From the **Facilities** menu, point and click on the **Search/Add** option. The **Facility Maintenance – Search** window appears.

Facility Maintenance

Search/Add Facility - Search Required Before Adding

| | |
|---|---|
| <input type="checkbox"/> Organization (IRMS): | <input type="text" value="--select--"/> |
| <input type="checkbox"/> Inactive Status: | <input type="text" value="--select--"/> |
| <input type="checkbox"/> Facility Name: | <input type="text"/> |
| <input type="checkbox"/> VFC PIN: | <input type="text" value="--select--"/> |
| <input type="checkbox"/> Phone: | <input type="text"/> |

Search Results

| Select | Facility Name | Organization (IRMS) | VFC PIN | Phone | City | Province | Postal Code |
|--------|---------------|---------------------|---------|-------|------|----------|-------------|
| | | | | | | | |

- Refer to the AVI Application Guide 5.14.3 Table 2-1 for a list of field descriptions.
- Select/type data into the fields and then click the **Search** button.
 - If a match is located, the **Search** Results appear in the bottom half of the window.
 - If a match is **NOT** located, the **Search** Results will appear empty.
- Click on one of the available buttons:
 - Select Arrow** – click the **Select** arrow to select from the Search Results list. Continue to the section titled, “Editing a Facility.”
 - Back**– to return to the **Facility Maintenance** window and possibly try a different search; repeat from step 1 above.
 - Add** – to add a new Facility. The **Facility Maintenance Add** window appears. Continue to the section titled, **Adding a Facility**.

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| Facility Maintenance | |
|---|----------------|
| Search/Add Facility - Search Required Before Adding | |
| Organization (IRMS): | All |
| Inactive Status: | All Facilities |
| Facility Name: | ahs |
| VFC PIN: | |
| Phone: | |
| <input type="button" value="Back"/> | |

| Search Results | | | | | | | |
|------------------------------------|-------------------------|---------------------|------------|---------------|----------------|----------|-------------|
| Select | Facility Name | Organization (IRMS) | VFC PIN | Phone | City | Province | POSTAL CODE |
| --> | AHS-DEPOT-CALGARY | 1009 | AHSCA-CA | (403)955-6850 | CALGARY | AB | |
| --> | AHS-DEPOT-CAMROSE | 1010 | AHSCE-CAM | (780)679-2965 | CAMROSE | AB | |
| --> | AHS-DEPOT-EDMONTON | 1011 | AHSED-ED | (780)342-8460 | EDMONTON | AB | |
| --> | AHS-DEPOT-EDSON | 1012 | AHSNO-ED | (780)723-4421 | EDSON | AB | |
| --> | AHS-DEPOT-FORT MCMURRAY | 1012 | AHSNO-FM | (780)791-6247 | FORT MCMURRAY | AB | |
| --> | AHS-DEPOT-GRAND PRAIRIE | 1012 | AHSNO-GP | (780)513-7568 | GRANDE PRAIRIE | AB | |
| --> | AHS-DEPOT-HIGH LEVEL | 1012 | AHSNO-HL | (780)841-3234 | HIGH LEVEL | AB | |
| --> | AHS-DEPOT-LETHBRIDGE | 1008 | AHSSO-LETH | (403)388-6655 | LETHBRIDGE | AB | |
| --> | AHS-DEPOT-MEDICINE HAT | 1008 | AHSSO-MH | (403)502-8217 | MEDICINE HAT | AB | |
| --> | AHS-DEPOT-RED DEER | 1010 | AHSCE-RD | (403)356-6358 | RED DEER | AB | |
| --> | AHS-DEPOT-SLAVE LAKE | 1012 | AHSNO-SL | (780)805-3562 | SLAVE LAKE | AB | |
| --> | AHS-DEPOT-ST. PAUL | 1012 | AHSNO-STP | (780)645-3396 | ST PAUL | AB | |
| --> | AHS-DEPOT-WESTLOCK | 1012 | AHSNO-WES | (780)349-3316 | WESTLOCK | AB | |
| --> | AHS-DEPOT-WETASKAWIN | 1010 | AHSCE-WE | (780)361-4305 | WETASKIWIN | AB | |
| <input type="button" value="Add"/> | | | | | | | |

Adding a Facility/Clinic

If you attempt to add a facility that is already entered in the application, a message appears indicating the facility already exists.

1. Perform a **Search** on the **Facility**.
2. Click on the **Add** button. The **Facility Maintenance Update –Add Mode** window appears with the Facility name already filled in.
3. It is recommended to type in as much information as possible. At a minimum, you must enter data into the **RED** labeled fields. Refer to the AVI Application Guide 5.14.3 Table 2-2 for a list of field descriptions.
4. See screenshots below for AVI specific facility options.

| Facility Maintenance [Detail] | |
|--|--------------------------------|
| Facility Name: | AHS-DEPOT-CALGARY |
| Facility Display Name: | AHS-DEPOT-CALGARY |
| Organization (IRMS): | 1009-AHS-CALGARY_ZONE |
| External Facility Inventory ID: | |
| Facility Id: | SIISCLIENT42 |
| Street Address: | 1213 - 4TH STREET SW 5TH FLOOR |
| Street Address 2: | |
| City: | CALGARY |
| Province: | AB |
| Postal Code: | T1X 0L3 |
| County/Parish: | |
| Phone Number: | (403)955-6850 |
| Fax Number: | (403)955-6755 |
| Email: | |
| Primary Contact: | CALGARY DEPOT |
| Inactive: | No |
| District/Region: | |
| Automatic Ownership Blocked: | Yes |
| Comments: | |
| Enable Waiting Room: | |
| VFC Status: | VFC |
| VFC PIN: | AHSCA-CA ← |
| Administration of public vaccine to VFC ineligible patients: | |
| Facility Designation: | Facility |
| Reporting Method: | |
| DTT Profile Name: | |
| Allow imports to decrement Organization (IRMS) inventory: | |
| Facility Type (FRITS): | AHS-Depot ← |
| Facility Type Description (if Other): | |
| Provider Agreement Facility Type: | |
| Referring Organization Category (FRITS): | |
| Facility Group: | |
| Local Approval Organization (IRMS): | |
| Is Depot: | Y ← |
| Depot Selection: | PROVINCIAL DEPOT (SITE) ← |

1. A VFC PIN is required for the facility to order vaccine
2. Select the "Facility Type (FRITS)"
3. Select if this facility is a depot or not
4. Select the depot this facility orders from in the "Depot Selection" field

5. Click one of the available buttons:
 - a. **Save** – to save your entry and return to the **Facility Maintenance Search** window or depending on your options, exit to the **Web User Maintenance-Add** window.
 - b. **Reset** – to erase your newly typed window and remain on the window; or
 - c. **Cancel** – to not save and return to the **Facility Maintenance Search** window.

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Certifying Provider:

Certifying Provider Phone:

Certifying Provider Fax:

Certifying Provider Email:

Agreement Signatory Name:

Agreement Signatory Title:

Original VFC Cert Date:

Current Certification Date:

Freezer average temperature of 5°F or colder:

Separate, insulated freezer door:

Freezer Measuring Device:

Allow Online Orders:

Default physical inventory on order:

Default doses used last month on order:

Allow Vaccine Transfers:

Allow Vaccine Returns:

Order Frequency:

Order Timing:

Order Frequency Start Month:

Order Threshold Percent:

Recommended Quantity Calculation:

Enable Auto-Receive:

Order Set / Order Type:

Bypass Dose-Level Accountability:

Upload Temperature Data:

Cold Storage Physical Location:

Allow only one brand selection per vaccine:

Facility Last Updated Date: 11/25/2014 02:23:35 PM

Facility Last Updated By: PROV_JACY

Facility Created Date: 09/15/2014 07:01:26 PM

Facility Created By: ADMIN

Buttons: Cancel, Reset, Save

Instruction Box: Ensure all the boxes are checked for online ordering, transfer, returns, and upload data temperatures. Select the Order Frequency.

Editing a Facility

1. To edit a facility, perform the following steps:
 - a. Perform a **Search**. Refer to the section titled, “Searching for a Facility” for instructions.
 - b. Select the facility you want to edit by clicking on the **Select Arrow**. The **Facility Maintenance [Detail]** window appears.
2. Refer to the AVI Application Guide 5.14.3 Table 2-2 for a list of field descriptions.
3. Click one of the available buttons:
 - a. **Back** – to return to the **Facility Maintenance Search** window.
 - b. **Edit** – to display the **Facility Maintenance Update – Edit Mode** window.

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4. If you selected **Edit**, type your new information into the appropriate field(s).

Facility Maintenance Update

Facility Name: AHS-DEPOT-CALGARY

Facility Display Name: AHS-DEPOT-CALGARY

Organization (IRMS): 1009 - AHS-CALGARY ZONE

External Facility Inventory ID:

Facility Id: SIISCLIENT42

Street Address: P.O. Box:

Physical Address:

Street: 1213 - 4TH STREET SW 5TH FLOOR

Street Address 2:

City: CALGARY

Province: AB

Postal Code: T1X 0L3

County/Parish: --select--

Phone Number: (403)955-8850


Phone Number Extension:

Fax Number: (403)955-8755

Email:

Primary Contact First Name: CALGARY

Primary Contact Last Name: DEPOT

Inactive: 

District/Region:

Automatic Ownership Blocked:

Comments:

Enable Waiting Room:

VFC Status: VFC

VFC PIN: AHSCA-CA

Administration of public vaccine to VFC ineligible patients: --select--

Facility Designation:

Facility Type: AHS-Depot

Facility Type Description (if Other):

Provider Agreement Facility Type: --select--

Provider Agreement Facility Type Other:

Referring Organization Category (FRITS): --select--

Reporting Method: --select--

DTT Profile Name:

Allow imports to decrement Organization (IRMS) inventory:

Facility Group: None Facility Group Owner Facility Group: --select--

Local Approval Organization (IRMS): --select--

Is Depot:

Depot Selection: Org/Facility - PROVINCIAL DEPOT (SITE)

To inactivate a facility, check the Inactive check box

5. Click one of the available buttons:

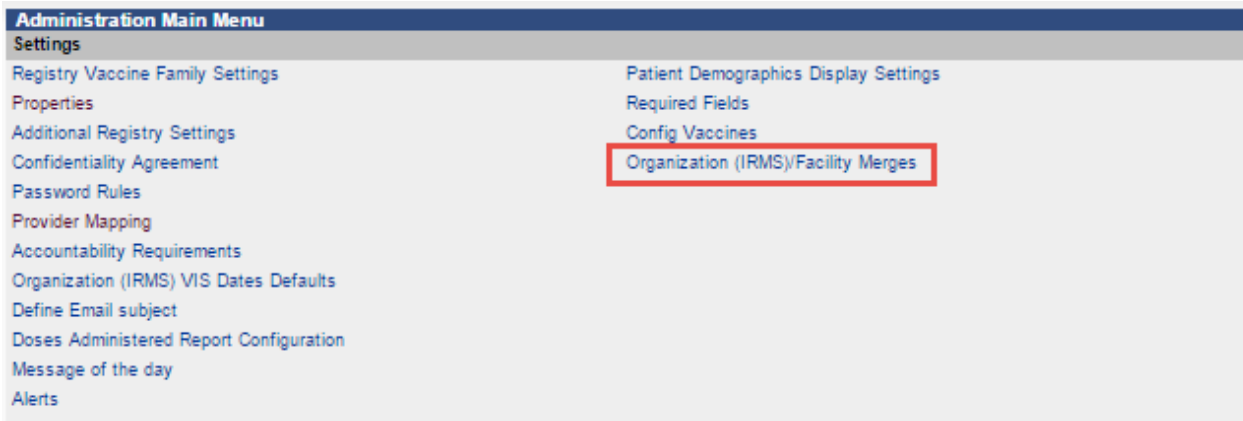
- a. **Save** – to save and exit to the **Facility Maintenance [Detail]** window.
- b. **Reset** – to erase your newly typed entries, redisplay what was previously entered, and remain on the same window.
- c. **Cancel** – to NOT save and exit to the **Facility Maintenance Search** window.

MERGING ORGANIZATIONS AND FACILITIES

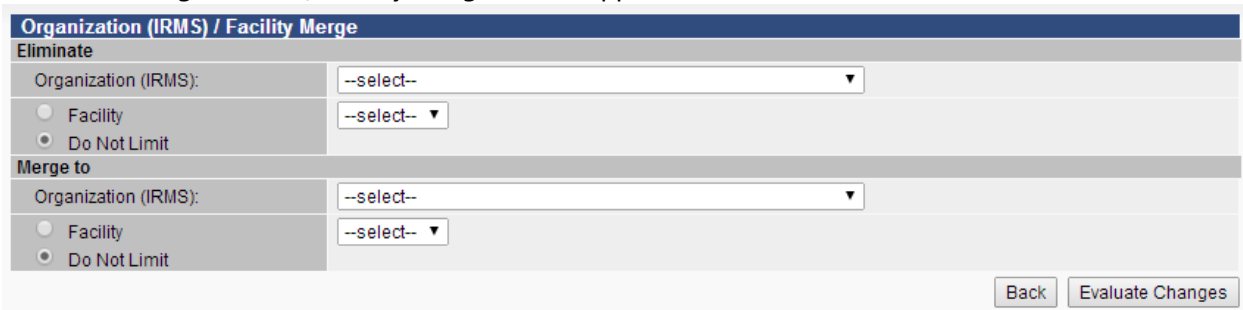
Merging organizations and facilities would most likely be used when providers are ordering for more than one facility and you would like them to be able to order for all the facilities associated with one organization. This could also happen if one organization buys another organization.

To perform a merge, do the following:

1. A new facility must be created to merge an existing facility to. Add a facility under the organization you would like to move an existing facility to by adding the minimum data elements required. See “Add a Facility” on page 8 of this guide.
2. VFC PINS cannot be duplicated in the system. If this field contain the information that needs to be on the new facility, it must be deleted from the old facility before adding it to the newly merged facility. The address and phone number information will not merge. These fields will need to be manually added to the newly merged facility. Make sure to take note of these items.
3. From the Administration Main Menu, click on the **Organization/Facility Merges** option.



4. The **Organization/Facility Merge** screen appears.



5. Select the **Eliminate Organization / Facility** and select the new facility you created in the **Merge To Organization / Facility** field.

Note: If the Organization (IRMS) has facilities, both the Organization (IRMS) level and each facility must be merged.

6. Accept or deny the continuation by clicking the **Ok** or **Cancel** button. These instructions assume you clicked the **Ok** button.

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7. The “Patient/Vaccination – Lot Conflict” screen appears.

| There are conflicts for active lots. Please resolve them before doing the merge | | | | | | | |
|---|---------------------------------|---------------------|------------|-------------------|-------------|--------------|-----------------|
| Eliminate: IRMS:FAMILY HEALTH CARE CLINIC- FLOWOOD Facility: NO FACILITY SPECIFIED | | | | | | | |
| Merge to:IRMS:FAMILY HEALTH CARE CLINIC INC Facility: FAMILY HEALTH CARE CLINIC FLOWOOD | | | | | | | |
| Patients | | Vaccinations | | Lots | | Users | |
| 840 | | 3332 | | 36 | | 10 | |
| Lot Conflicts For Active Lots | | | | | | | |
| Lot Number | Vaccine Name | Manufacturer | Expires | Publicly Supplied | Doses Total | Doses Used | Doses Available |
| AC140B091AA | DTaP | SKB | 06/30/2011 | Y | 92.0 | 8.0 | 84.0 |
| AC21B248BA | DTaP/Hep B/IPV | SKB | 03/18/2012 | Y | 5.0 | 5.0 | 0.0 |
| AC21B254AA | DTaP/Hep B/IPV | SKB | 04/24/2012 | Y | 2.0 | 3.0 | -1.0 |
| C3747AA | DTaP/Hib/IPV | PMC | 04/29/2012 | Y | 42.0 | 3.0 | 39.0 |
| AC20B136AA | DTaP/IPV | SKB | 10/27/2011 | Y | 2.0 | 2.0 | 0.0 |
| AC20B168AA | DTaP/IPV | SKB | 12/02/2012 | Y | 4.0 | 2.0 | 2.0 |
| 0096Z | HPV, quadrivalent | MSD | 10/14/2012 | Y | 11.0 | 3.0 | 8.0 |
| 0850Z | Hep A 2 dose - Ped/Adol | MSD | 05/13/2013 | Y | 6.0 | 6.0 | 0.0 |
| 1088Z | Hep A 2 dose - Ped/Adol | MSD | 07/25/2013 | Y | 1.0 | 1.0 | 0.0 |
| 0320Z | Hepatitis B--adol. or pediatric | MSD | 04/02/2012 | Y | 17.0 | 4.0 | 13.0 |
| 1483Y | Hepatitis B--adol. or pediatric | MSD | 09/10/2012 | Y | 50.0 | 0.0 | 50.0 |
| UH125AA | Hib--PRP-T | PMC | 09/08/2012 | Y | 12.0 | 12.0 | 0.0 |
| UH157AA | Hib--PRP-T | PMC | 09/24/2012 | Y | 26.0 | 12.0 | 14.0 |

8. Review the Patient and Vaccination counts to make sure the results are logical.

- a. If any “Lot Conflicts” are listed in the “Lot Conflicts for Active Lots” section of the screen (as shown above), copy the list to another file or print the page so that the lots (for the eliminating Organization/Facility) can be inactivated via the Lot Numbers – Reconciliation option.

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b. Click on the **Reconciliation** option. The **Reconcile Inventory** screen appears.

Public lots display with dark gray shading. Private lots display with light gray shading.

| Vaccine | Lot Number | Exp Date | Quantity on Hand | Physical Inventory | Adjustment (+/-) | Reason | Public | Inactive | Add Row |
|--|-------------|------------|------------------|--------------------|------------------|------------------------|-------------------------------------|-------------------------------------|---------|
| DTP | AC140B091AA | 06/30/2011 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + |
| DTP | AC14B086AB | 02/21/2011 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + |
| DTaP (Infanrix/Tripedia/Daptacel) | AC140B091AA | 06/30/2011 | 84 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + |
| DTaP (Infanrix/Tripedia/Daptacel) | AC14B086AB | 02/21/2011 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + |
| DTaP/Hep B/IPV (Pediarix) | AC21B248BA | 03/18/2012 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| DTaP/Hep B/IPV (Pediarix) | AC21B254AA | 04/24/2012 | -1 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| DTaP/Hib/IPV (Pentacel) | C3664AA | 03/17/2012 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + |
| DTaP/Hib/IPV (Pentacel) | C3747AA | 04/29/2012 | 39 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| DTaP/IPV (Kinrix) | AC20B136AA | 10/27/2011 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| DTaP/IPV (Kinrix) | AC20B168AA | 12/02/2012 | 2 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| HPV, quadrivalent (Gardasil) | 0096Z | 10/14/2012 | 8 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| Hep A 2 dose - Ped/Adol (Vaqta/Havrix) | 0850Z | 05/13/2013 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| Hep A 2 dose - Ped/Adol (Vaqta/Havrix) | 1088Z | 07/25/2013 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |
| Hepatitis B--adol. or pediatric (Recombivax/Engerix-B) | 0320Z | 04/02/2012 | 13 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | + |

c. Click the **Inactive** checkbox for all lots on the “Lot Conflict” list and then click the **Save** button.

9. Again, access the **Organization / Facility Merges** option. The “Eliminate/Merge To” screen appears.

10. Select the “Eliminate” and “Merge To” Organization/Facility.

Organization (IRMS) / Facility Merge

Eliminate

Organization (IRMS):

Facility

Do Not Limit

Merge to

Organization (IRMS):

Facility

Do Not Limit

11. Click the **Evaluate Changes** button.

The following number of records will be merged

Eliminate: IRMS:FAMILY HEALTH CARE CLINIC- FLOWOOD Facility: NO FACILITY SPECIFIED

Merge to:IRMS:FAMILY HEALTH CARE CLINIC INC Facility: FAMILY HEALTH CARE CLINIC FLOWOOD

| Patients | Vaccinations | Lots | Users |
|----------|--------------|------|-------|
| 840 | 3332 | 36 | 10 |

Lot Conflicts For Active Lots

| Lot Number | Vaccine Name | Manufacturer | Expires | Publicly Supplied | Doses Total | Doses Used | Doses Available |
|------------|--------------|--------------|---------|-------------------|-------------|------------|-----------------|
| | | | | | | | |

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- Review the Patient and Vaccination counts to make sure the results are logical and click the **Merge** button.

IRMS/Facility: FAMILY HEALTH CARE CLINIC- FLOWOOD (2542) / FAMILY HEALTH CARE CLINIC, INC. FLOWOOD

An IRMS Facility Merge Job has been scheduled.

Eliminate

IRMS: --select--

Facility --select--
 Do Not Limit

Merge to

IRMS: --select--

Facility --select--
 Do Not Limit

- Monitor the job on the **Job Queue** menu.

IRMS/Facility: FAMILY HEALTH CARE CLINIC- FLOWOOD (2542) / FAMILY HEALTH CARE CLINIC, INC. FLOWOOD

Current Jobs

Jobs Running

| Description | Status | Username | Date/Time Entered |
|---------------------------|-------------------------|-------------------|------------------------------|
| Merging Irms/Facility Job | Merging patient records | BRANDY.ALTSTADTER | Thu Mar 17 23:23:53 CDT 2011 |

Jobs Waiting

| Description | Status | Username | Date/Time Entered |
|-------------|--------|----------|-------------------|
|-------------|--------|----------|-------------------|

- When the job has completed, contact the Provider and have them reconcile the inventory in the Organization/Facility that was kept.

IRMS/Facility: FAMILY HEALTH CARE CLINIC INC (2080) / FAMILY HEALTH CARE CLINIC FLOWOOD

Public lots display with dark gray shading. Private lots display with light gray shading.

Reconcile inventory

| Vaccine | Lot Number | Exp Date | Quantity on Hand | Physical Inventory | Adjustment (+/-) | Reason | Public | Inactive | Add Row |
|--|-------------|------------|------------------|--------------------|------------------|------------------------|-------------------------------------|--------------------------|----------------------------------|
| DTaP (Infanrix/Tripedia /Daptacel) | AC140B091AA | 06/30/2011 | 100 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP (Infanrix/Tripedia /Daptacel) | AC14B086AB | 02/21/2011 | 2 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/Hep B/IPV (Pediarix) | AC21B248BA | 03/18/2012 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/Hep B/IPV (Pediarix) | AC21B254AA | 04/24/2012 | 33 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/Hib/IPV (Pentacel) | 3664AA | 03/17/2012 | 10 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/Hib/IPV (Pentacel) | C3747AA | 04/29/2012 | 50 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/IPV (Kinrix) | AC20B136AA | 10/27/2011 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| DTaP/IPV (Kinrix) | AC20B168AA | 12/02/2012 | 15 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| HPV, quadrivalent (Gardasil) | 0096Z | 10/14/2012 | 28 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| Hep A 2 dose - Ped/Adol (Vaqta/Havrix) | 0850Z | 05/13/2013 | 0 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| Hep A 2 dose - Ped/Adol (Vaqta/Havrix) | 1088Z | 07/25/2013 | 16 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |
| Hepatitis B--adol. or pediatric (Recombivax/Engerix-B) | 0320Z | 04/02/2012 | 32 | | 0.0 | --No Reason Required-- | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="button" value="+"/> |

USER ADMINISTRATION AND MANAGEMENT

This section will show how to set up and user accounts.

Administration Menu

The Administration Function is a user account permission.

The Administration Function will allow you to:

- Create and update System usernames and passwords.
- Change the System access level and permissions.
- Inactivate user accounts of staff that are no longer using the system.

Keep the Registry Secure

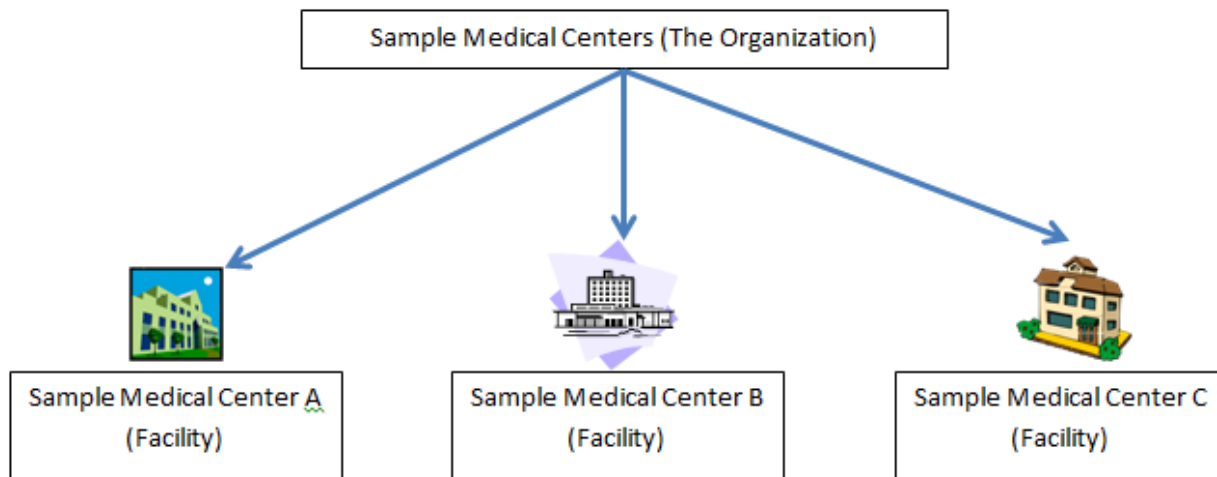
Help keep AVI system secure by maintaining and inactivating user accounts. If an employee is no longer a part of an organization, or if you suspect inappropriate use of the system, please inactivate the user account in order to prevent future access to the system. Steps for inactivating a user can be found on page 22.

USER ACCESS LEVELS

There are two types of users that may be created in a multi-facility medical organization: Organization (IRMS) user accounts and Facility user accounts. Think of the Organization/IRMS as the parent organization and the facilities as the actual locations where care is given (see the diagram below for a visual illustration).

- Organization user accounts allow the user to place orders for all facilities within the organization and are able to run reports for individual clinics or the entire organization as a whole.
- Facility user accounts allow the user to access and run reports only for the facility for which he or she is assigned.

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In addition to the two different user types (Organization and Facility) there are also two different types of user levels: Client and View.

- Client user accounts allow the user to view, add, edit, vaccine information and place orders.
- View user accounts allow the user to view (read only). This type of user level is not recommended for the AVI system.

The different user account types and levels combine to give four possible User Access Levels.

Note: Organization client will only be used for people ordering for multiple facilities where the facilities are associated with one organization. The majority of the AVI users will User Access Level of Registry Client or Facility Client.

- ❖ Organization Client
- ❖ Facility Client
- ❖ Organization View
- ❖ Facility View

Depending on the employee’s role and work location, you will need to select the appropriate User Access Level.

For example:

- If a vaccine coordinator works solely at the Sample Medical Center A and s/he will enter data into the system, you would assign them as a Facility Client assigned to the appropriate facility name (in this case Sample Medical Center A).
- If a vaccine coordinator floats between facility locations that are under one organization and enters data into the system, this user would need to be assigned as an Organization Client.

USER PERMISSIONS

Once the user level is determined, the user permissions need to be assigned. The permissions allow a user to perform additional functions within the system based on specific tasks. See the AVI Applications Administrative Guide v5.14.3: Appendix E for an explanation of all permissions.

Follow the steps on page 21 for “Adding and Updating User Accounts” for more information.

Recommended Permissions for Non-Depot Ordering entity Staff

Block Patient Data Access

- This permission takes away the patient parts of the application so only the vaccine ordering functions are shown.

Block User Management

- This permission takes away the user management part of the application so users cannot be created or edited.

Lot Number Manager Access

- A user with this permission has the ability to maintain your vaccine inventory in the system, including the ability to add, update and inactivate the lot numbers that appear on the vaccine lot number selection box when adding an administered shot to a patient’s record.
- This permission also allows the user to run the state vaccine accountability reports.
- Typically, it is the current vaccine manager(s) for your organization that perform this function.

Lot Number Manager Edit

- The “Lot Number Manager Edit” permission can only be given if the user has the “Lot Number Manager Access” permission.
- The “Lot Number Manager Edit permission allows the Lot Number and Manufacturer to be modified on the “Lot Number Maintenance-Update” screen even if the lot has already been used.

Provider Ordering

- This option enables the displaying of the Orders/Transfers Menu offering: Alerts, Current List, and Search History options.

Recommended Permissions for Depot Ordering Entities and Order Approvers

Note: This type of user must be a Registry Client in order to manage vaccine settings. If this user is just approving orders and managing order sets, the access level can be set at either an Organizational Client or a Registry Client.

Allow Public Lot Addition

- When this option is granted, the use is able to add a publicly supplied lot to their inventory manually when transferred from another provider.

Block Patient Data Access

- This permission takes away the patient parts of the application so only the vaccine ordering functions are shown.

Block User Management

- This permission takes away the user management part of the application so users cannot be created or edited.

Lot Number Manager Access

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Provider Ordering

- This option enables the displaying of the Orders/Transfers Menu offering: Alerts, Current List, and Search History options.

State / Local Approver

- This option enables the user to approve orders that have been sent by providers.

Vaccine Ordering Management

This option allows a Registry Client to access the following Administration functions without having Registry Settings Permissions:

- VacMan Vaccine Settings
- Properties/Vaccine Management
- Define Order Sets

Recommended Permissions for Depot Staff who need to manage Organizations, Facilities, and Users

***Note:** This type of user must be a Registry Client. These permissions can also be combined with vaccine order approval permissions if needed.*

Facility Administration

- This option enables the facilities menu to appear.

System Administration

This option allows the “Search/Add” link to appear on the Administration Main Menu. The following options are enabled on the Administration menu page when System Administration is enabled:

- Doses Administered Report Configuration
- Search/Add User
- Users Logged In
- User Reports

Recommended Permissions for PVD Staff who need to approve orders, manage organizations, facilities, and users

***Note:** This type of user must be a Registry Client*

Allow Public Lot Addition

- When this option is granted, the use is able to add a publicly supplied lot to their inventory manually when transferred from another provider.

Facility Administration

- This option enables the facilities menu to appear.

Inactive Lot Numbers

- Allows Registry Client users to inactivate lot numbers on Reconciliation, Lot Number Maintenance Search, Lot Number Maintenance Update and vaccination view/add screens.

Inventory Correction

- This can be given to any user who has the Lot Number Manager access permission.
- When the Inventory Correction permission is there, the following will happen
 - a. User will be able to inactivate the lot without having to adjust the quantity to 0 both on the reconciliation screen and lot number update screen.
 - b. User does not have to add the entire physical inventory on the reconciliation screen when accessing from the left menu.
 - c. A "Bypass" button is added to the reconciliation page when it is prompted as part of the order workflow, so that user can bypass the reconciliation screen without having to fill in all the physical inventory values.
 - d. Add reason to the Reason drop-down options on the reconciliation screen and lot number update screen.

Lot Number Manager Access

- A user with this permission has the ability to maintain your vaccine inventory in the system, including the ability to add, update and inactivate the lot numbers that appear on the vaccine lot number selection box when adding an administered shot to a patient's record.
- This permission also allows the user to run the state vaccine accountability reports.
- Typically, it is the current vaccine manager(s) for your organization that perform this function.

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- The "Lot Number Manager Edit" permission allows the Lot Number and Manufacturer to be modified on the "Lot Number Maintenance-Update" screen even if the lot has already been used.

Provider Ordering

- This option enables the displaying of the Orders/Transfers Menu offering: Alerts, Current List, and Search History options.

Registry Settings

This option allows the Settings and Define Values sections (includes Define Email Subject) to appear on the Registry Client's Administration Main Menu. The links that Registry Settings enables are:

- Properties
- Password Rules
- Required Fields
- Config Vaccines
- IRMS/Facility Merges
- Limit Manufacturer by Vaccine

State / Local Approver

- This option enables the user to approve orders that have been sent by providers.

System Administration

Vaccine Ordering Training Guide

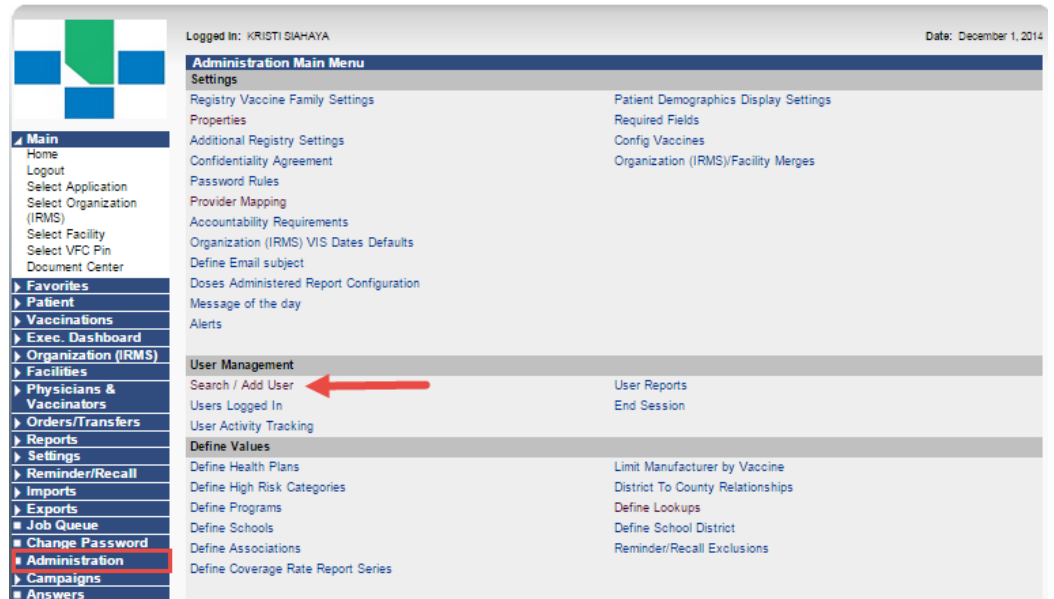
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Provider Ordering

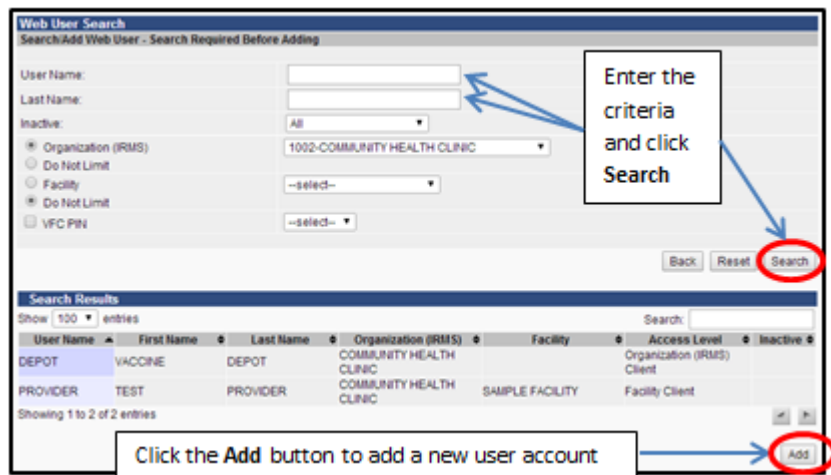
- This option enables the displaying of the Orders/Transfers Menu offering: Alerts, Current List, and Search History options.

ADDING AND UPDATING USER ACCOUNTS

1. Log into the system with your user account.
2. Using the Navigation Menu click on the **Administration Menu** Heading.
3. From the **Administration Main Menu** Page, click **Search/Add User** to navigate to the **Web User Search** Page.

4. Enter either the username or the user’s last name to search for a specific user (You may also use the **Facility** dropdown list to search for users in a specific facility).

5. Once you have entered your criteria, click the **Search** button.

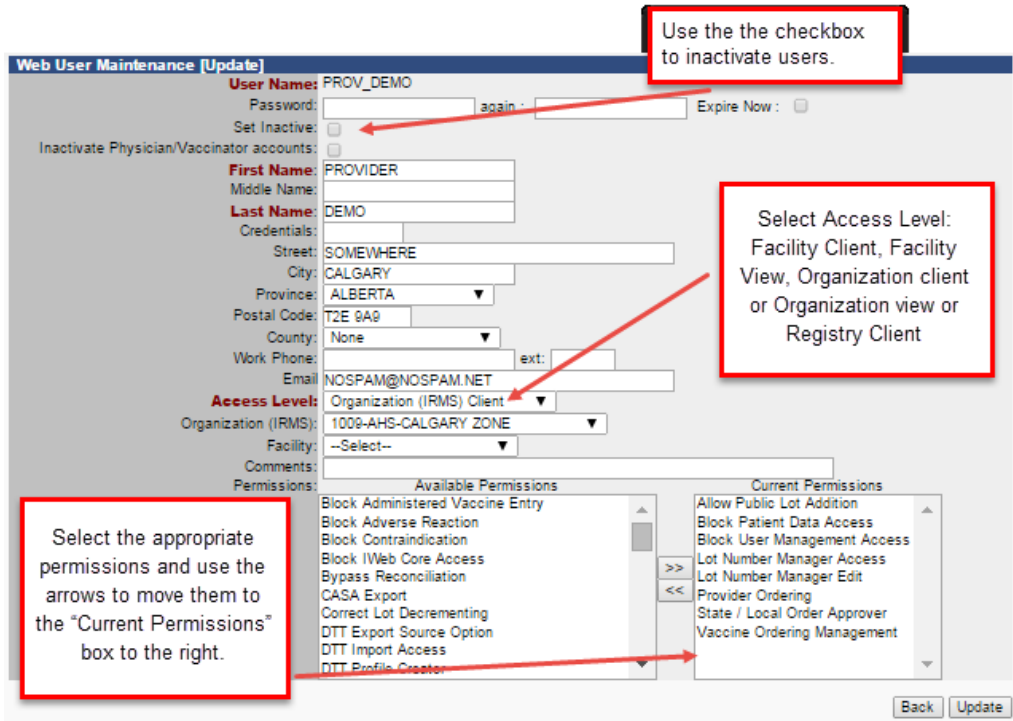


Vaccine Ordering Training Guide

6. Or, you may click the **Search** button without entering the username or user’s last name to get a list of all user accounts (or simply select a facility name from the **Facility** dropdown list and click **Search** button to get a list of all user accounts for a specific facility).

7. *If the user does not appear in the search results,* click the **Add** button to create the new user account.

8. *If the user appears in the search results,* select the appropriate user account by clicking on the **User Name** on the left.



9. You are now at the **Web User Maintenance** Page.

10. From here you will be able to add or update the person’s information.

Note: When creating or resetting passwords, it is recommended creating a temporary password (such as “Welcome1”) and then click the “Expire Now” check box next to the password fields. When the user logs onto the system with the temporary password, they will be automatically promoted to change their password.

11. The User Name, Password, First Name, Last Name and Access Level are all required fields and must be completed for each user account.

12. Choose the “Access Level” and, if applicable, any “Permission” (see pages 16-20 of this guide for details on each).

13. If you chose Facility Client as an “Access Level”, make sure you select the appropriate **Facility Name** from the dropdown list.

14. Once you have entered all appropriate information, click the **Update** button if you were editing an existing user or **Save** if you created a new user.

15. Your changes were saved and you have returned to the **Web User Maintenance** Page.

-
- 16.** If you wish to inactivate a user, click on the checkbox labeled “Set Inactive”.
- a. If the employee returns to your organization, you can reactivate the account by un-checking the checkbox.