ALBERTA VACCINE INVENTORY (AVI) MANAGEMENT SYSTEM

Vaccine Ordering and Management

Training Guide

Updated November 2019

Contents

DEFINITION OF TERMS

- **Alberta Health Provincial Vaccine Depot**
  The Alberta Health warehouse and distribution center for all publicly funded vaccines in Alberta. Commonly referred to as the PVD, this is the first tier in the Alberta Vaccine Inventory System.

- **Organization**
  This term applies to all locations that receive vaccine from the Provincial Vaccine Depot and processes orders from facilities. Organizations are the second tier of the Alberta Vaccine Inventory System. An example of an organization would be an Alberta Health Services (AHS) Vaccine Depot.

- **Facility**
  This term applies to all locations that receive vaccine from an organization. These locations are where vaccine is administered and do not distribute vaccines to other locations. Facilities are the third tier of the Alberta Vaccine Inventory System and commonly refer to a public health center or community provider.

- **Facility Client, Organization Client, Registry Client, Super User**
  These terms refer to the different authority levels in the AVI system.
    - Facility clients have access to their facility only and have limited permissions.
    - Organization Clients have access to their organization only and have limited permissions.
    - Registry Clients have access to all organizations and facilities and access to most areas of the AVI system.
    - Super Users have access to all organizations and facilities and access to all areas of the AVI system.

- **Physical Inventory**
  This term refers to the quantity of each vaccine that is physically at a location. Physical inventory must be counted prior to reconciling inventory in AVI.

- **Reconciliation of Inventory**
  This term refers to the process of comparing the physical inventory to the AVI inventory then updating the AVI inventory to reflect the physical inventory using the appropriate category and reason.

- **Funding Source**

  This term refers to the funding program that the vaccine was purchased through. Types of funding sources include:
  - Publicly Funded (P) – All vaccines purchased by Alberta Health to be used in publicly funded programs.
  - Cost Recovery ($) – All vaccines purchased by Alberta Health Services to be used for clients that do not qualify for publicly funded vaccine (e.g. Travel vaccine), or when there is not a publicly funded program (e.g. Yellow Fever).
  - Research (R) – All vaccines purchased for research purposes.
  - Other (O) – All vaccines purchased with funds not included in the previous listings.

- **Order Set**

  Found in the *Create Order* screen, these are the fillable order sheets which list all the vaccines available to order for an organization or a facility. Organizations and facilities may have several order sets available to them.

- **Vaccine Order**

  Vaccine orders are placed by organizations or facilities to their designated depot for vaccines. Vaccine orders are processed in AVI and physically shipped out to the location.

- **Viable vaccine**

  Vaccine that can be used for clients.

- **Non-Viable**

  Vaccine that has been spoiled, expired, recalled or otherwise compromised and cannot be used for clients.

- **Packing Slip**

  The paperwork included with all vaccine orders that indicates the shipping and receiving locations as well as the vaccines, quantities, lots and expiries. The packing slip details should be compared to the actual contents in the vaccine shipment to confirm accuracy of the vaccine order.

PURPOSE

This guide demonstrates the steps needed to reconcile your vaccine inventory, place vaccine orders, receive vaccine orders, transfer vaccines and return vaccines using the Alberta Vaccine Inventory (AVI) System.

Super Users, Registry Clients, Organization Clients and Facility Clients use the processes listed in this document.

ORDER FUNCTION

The order function is a permission that is granted by your designated depot**.**

This function will allow you to:

- Place orders for your organization or facility.
- Track the status of existing vaccine orders.
- View past vaccine order history and details.
- Transfer vaccine to other facilities (at the discretion of your depot).
- Return vaccines to your designated depot (at the discretion of your depot).

AVI WORKFLOW

The AVI system utilizes a three tier ordering system to track vaccine from the Provincial Vaccine Depot to an organization to a facility. The AVI system is used to order and manage vaccine inventory throughout the province.

Tier 1	Alberta Health Provincial Vaccine Depot
Tier 2 - Organization	Alberta Health Services Vaccine Depots (14 depots in Alberta)
Tier 3 - Facility	Public Health Centers / Community Providers / First Nation Communities
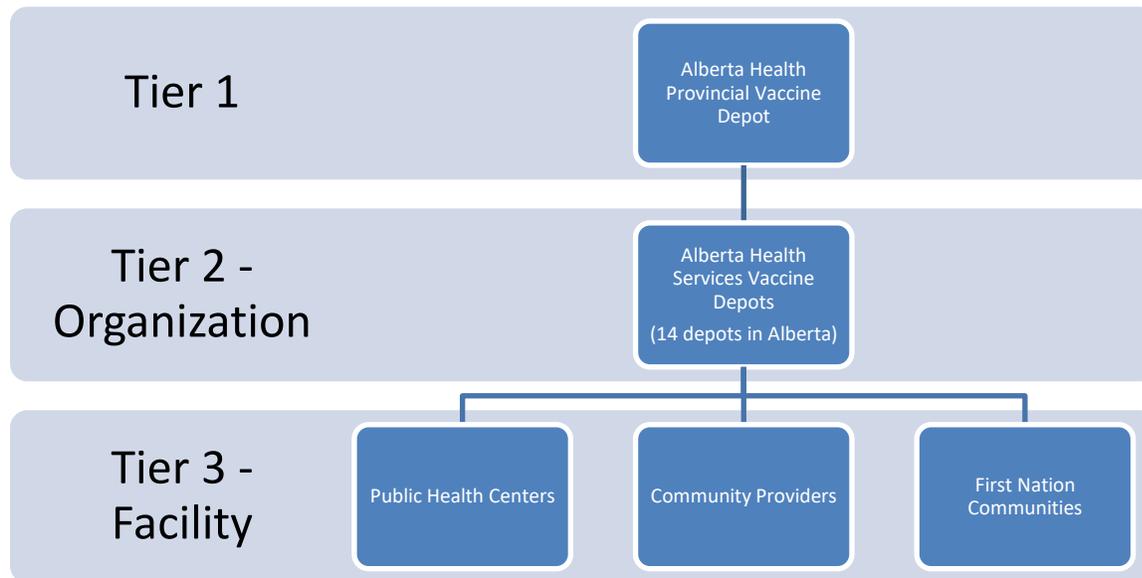
It is important to follow this workflow to manage your inventory in the AVI System. This will help to ensure that your inventory is accurate in the system.

COUNT physical inventory and RECONCILE vaccine inventory

PLACE vaccine orders in the AVI system

TRACK your order, if desired

CONFIRM delivered vaccines by lot number, expiry date and quantities

RECEIVE vaccine orders in the AVI system
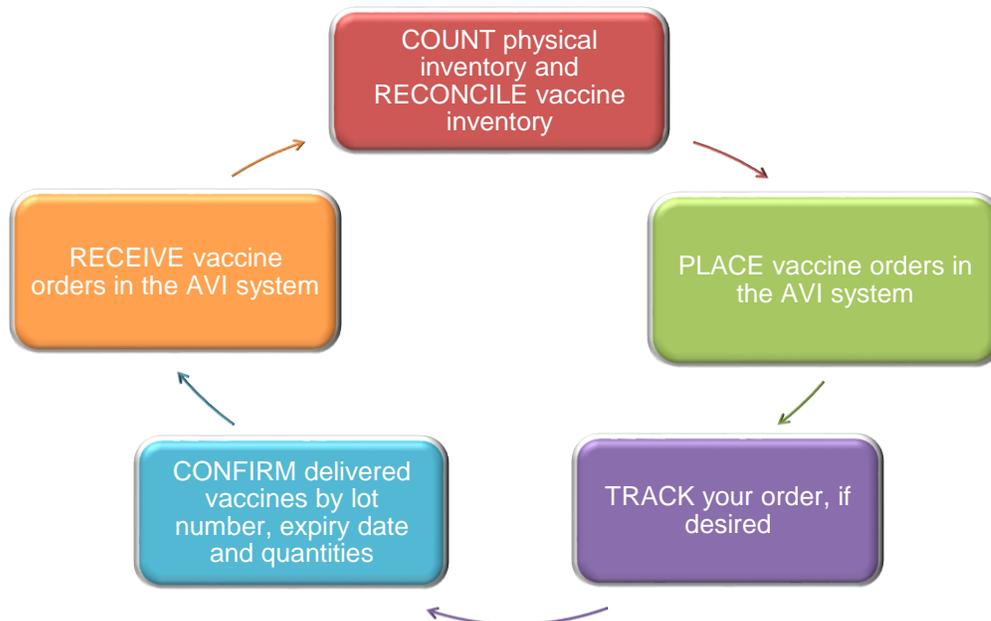
RECONCILE VACCINE INVENTORY

All organizations and facilities are required to reconcile inventory before placing a routine vaccine order in AVI. All facilities are expected to reconcile inventory on a regular basis. Check with your depot to determine the expected frequency for your facility.

1. Using the **Navigation Menu**, click on **Lot Numbers Menu** and then click *Reconciliation* to show the *Reconcile Inventory* screen.

In this screen you may expand or collapse lines by vaccine type by selecting the arrow on the vaccine line. You may also change the number of entries that appear on the page by choosing a number from the drop down menu at the top of the screen.

2. Click the **Print** button in the lower right-hand side of the page.

TIP: Ensure your pop up blocker is turned off for the AVI website as your browser will block the printable reconciliation page as a pop up.

3. The *Reconciliation Worksheet* will open and can be printed and taken to your storage units in order to do your physical count.

Reconciliation Worksheet

Organization (IRMS): AHS-DEPOT-FORT MCMURRAY
Facility:

Vaccine Description	Lot Number	Vaccine Name	Exp Date	Quantity on Hand	Physical Inventory	Adjustment	Reason	Funding Source	Inactive
Diluent	L029137	Diluent Sterile Water-Merck 1 dose/pkg	2018/06/02	0				P	
Diluent	M024507	Diluent Sterile Water-Merck 1 dose/pkg	2019/03/11	28				P	
Diluent	M026094	Diluent Sterile Water-Merck 1 dose/pkg	2019/03/29	32				P	

4. Count physical supply of vaccines within all fridges and freezers. If there is a lot number in your fridge or freezer that is not listed on your *Reconciliation Worksheet*, please contact your depot for assistance on correcting the issue. While counting, note the funding source indicated in the **Funding Source** column. For more information regarding funding sources please refer to the *Definition of Terms* section of this manual.

5. Enter the values from your count in the **Physical Inventory** column on the worksheet.

> **Note**: To reconcile the inventory, Facility Clients must fill out all lines before submitting inventory. Due to a larger quantity of on hand doses, Organization Clients, Registry Clients and Super Users have the ability to only fill out the affected lines before submitting inventory.

6. To reconcile the inventory in AVI, do one of the following options:

> **For Facility Clients:**
>
> **Option A:** If the physical inventory in your storage unit matches the quantity in the **Quantity on Hand** column, enter the quantity in the **Physical Inventory** column. Once the physical inventory for all products has been filled please proceed to step 8.
>
> **Option B:** If changes are required, determine if the changes are due to administered, wasted, spoiled or expired reasons (see table on page 10 for further information). If yes, make all necessary changes by:
>   1. Entering the physical inventory count in the **Physical Inventory** column.
>   2. The adjustment quantity in the **Adjustment** column is automatically calculated.
>
> > **TIP**: Facility Clients are not able to submit positive adjustments. If you have more inventory than is listed in AVI (positive adjustment), you may have an outstanding order to receive. Check the *Create/View Orders* page before updating count. If your positive adjustment is due to an error during reconciling, please contact your depot for assistance.
>
>   3. Selecting the appropriate category in the **Category** drop down menu.
>   4. Selecting the appropriate reason in the **Reason** drop down menu.
>   *See step 7 for information on entering multiple categories and reasons for one lot.*
>   5. Once the physical inventory for all products has been entered, proceed to step 8.
>
> > **TIP**: All lines will need to be filled in for a Facility Client to successfully submit inventory.

For Organization Client, Registry Client or Super User:

 Option A: If the physical inventory in your storage unit matches the quantity in the **Quantity on Hand** column for *all* the vaccines and no changes are required, select **Submit Inventory** button. Proceed to step 10.

Option B: If changes are required, determine if the changes are due to administered, wasted, spoiled or expired reasons (see table on page 10 for further information). Make all necessary changes by:

1. Entering the physical inventory count in the **Physical Inventory** column.
2. The adjustment quantity in the **Adjustment** column is automatically calculated.

> **TIP**: If you have more inventory than is listed in AVI (positive adjustment), you may have an outstanding order to receive. Check the **Create/View Orders** page before updating count.

3. Selecting the appropriate category in the **Category** drop down menu.
4. Selecting the appropriate reason in the **Reason** drop down menu.
See step 7 for information on entering multiple categories and reasons for one lot.
5. Once the physical inventory for applicable products has been recorded, proceed to step 8.

7. If the adjustment to your inventory was due to multiple reasons, you can use the **Add Row** button to create a new line to enter multiple adjustment reasons.

This button will add a line directly under your selected line with the same lot and the physical inventory quantity that was entered in the previous line.

Lot Number	Exp Date	Quantity on Hand	Physical Inventory	Adjustment (+/-)	Category	Reason	Funding Source	Inactive	Add Row
R022605	2021/02/20	170	100	-70.0	Administered ▼	Administered ▼	P		
R022605	2021/02/20	100	90	-10.0	Spoiled ▼	Failure to Store Properly ▼	P	☐	+

Showing 1 to 2 of 2 entries
Showing 1 to 2 of 2 entries (filtered from 39 total entries)

The **Add Row** button can be used as many times as necessary, but once a line has been added, users are no longer able to modify the lines above.

8. If the physical inventory equals '0' on any lot number, the **Inactive** box can be checked to inactivate the lot when the page is saved or submitted. Inactive lots will not appear on the *Reconcile Inventory* screen.

> **TIP**: If physical inventory is not zero, you will not be able to inactivate the lot.

9. When all the quantities in your storage units have been entered, click the **Submit Inventory** button.

10. Once submitted, the *Inventory Last Submitted* date on the left side of the page will be updated.

> **Quality Assurance Check**: The AVI System automatically does a quality assurance check on your order before it is submitted. If any information was entered incorrectly, an error message will show on the top of the page in red or in pop up boxes. Correct the noted mistakes and re-submit.

> **A helpful training video for this process is available on the AVI home page.**

CATEGORIES AND REASONS EXPLANATION

The adjustment reasons are separated into categories to simplify the process. Always use the category and reason which best describes what happened to the doses in your inventory.

Negative Adjustments

Category	Rationalization
Administered	This reason accounts for doses that were used for clients.
Expired	Vaccines were not used before the manufacturer's expiration date and have expired on shelf. Doses marked as expired are eligible for return to your depot using the vaccine return process in AVI.
Recall	Vaccines that are nationally recalled, or Alberta Health sends notice to stop using the vaccine and return it to your depot. Doses marked as recalled are eligible for return to your depot using the vaccine return process in AVI.
Spoiled	Vaccines have spoiled due to improper storage practices, man-made or natural disasters, or spoiled during transport. Doses marked as spoiled are eligible for return to your depot using the vaccine return process in AVI.
Wasted	Vaccines are not viable because they were either dropped, or lost/unaccounted for. Doses marked as wasted are not eligible for return to your depot as they are expected to have been discarded on site.
Wasted/Influenza Season End	This reason accounts for doses that remain after the end of the influenza season. Doses marked as "end of season" are not eligible for return to the Provincial Vaccine Depot and will remove the product from your inventory. <u>Use this reason code for influenza vaccine only.</u> **Only specific facilities should use this reason to remove vaccine from their inventory. If you are unsure, please contact your depot to confirm before removing inventory.**

Key Tips to Remember:

- Select the best category and reason that describes what happened to those doses.

- Tracking doses periodically makes it easier to reconcile before placing an order.

- It may be helpful to develop a system at your organization or facility to immediately log doses that are wasted or spoiled.

CREATING A VACCINE ORDER

1. Using the **Navigation Menu**, click on **Orders/Transfers Menu** and then click *Create/View Orders* to show the *Current Order/Transfer List*.

2. Click the **Create Order** button at the bottom of the page to open the *Create Order* screen.

3. The *Create Order* screen will open.

> **Note:** On hand inventory must be reconciled and submitted before an order is placed.
> If you are redirected to the *Reconcile Inventory* screen, you must submit your
> inventory before you will be able to place an order.

4. At the top of the page is the delivery contact information, address and delivery times. Review your vaccine delivery contact and address information. If your contact or shipping information needs updating, please have this updated before placing an order by contacting your Depot.

5. Select your shipping times by checking the box and selecting the appropriate times that you can receive vaccine shipments. **Please check with your depot that this information is used as several organizations do not use this as a method of communication.**

6. General comments can be added to the blank field labelled **Comments**. Comments can also be added to each line of the order. Delivery Instructions can be included in the blank field labelled **Instructions**.

7. Select an order set. Most facilities and organizations will have multiple order sets to choose from. Only one order set can be used per order. If products from multiple orders sets are required, multiple orders will need to be placed.

8. To place an order, review the following information that is prepopulated on the order screen under the shipping information:

    a. **Physical Inventory** (auto-populated reconciled inventory numbers).
    b. Enter the **Order Quantity** (required for products you want to order. Quantities must be entered by **dose** not unit).
    c. Enter **Comments** (if desired).

9. Double check your entries and click one of the following buttons at the bottom to continue:

a. Click the **Submit Order** button to send the order to your depot. You cannot make changes to an order after it has been submitted. Contact your depot immediately if you need to make changes.

Quality Assurance Check: AVI automatically does a quality assurance check on your order before it is submitted.

If any field is entered incorrectly, an error message will show on the top of the page in red or in pop up boxes. Correct the noted mistakes and re-submit.

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b. Click the **Save Order** button to save the order, but not submit it. Saved orders are listed in your **Inbound Orders** section of the **Create/View Orders** screen. Saved orders can be re-opened, updated and submitted at any time. You may also delete saved orders if they will not be used by clicking the **Delete Order** button.

c. Click the **Cancel** button to cancel the order and exit the **Create Order** screen. Nothing will be submitted or saved.

Order Details								
Vaccine	**Vaccine Name**	**Funding**	**Dose Used Last Month**	**Physical Inventory**	**Order Quantity**	**Urgent**	**Priority Reason**	**Comments**
dTap	Boostrix® 10 dose/pkg	P		40	10	☐	--select-- ▼	
Hepatitis B Pediatric	Engerix-B® Pediatric 1 dose/pkg	P		6	25	☐	--select-- ▼	Clinic Use
HPV, nonavalent	Gardasil 9 ® 10 dose/pkg	P		10		☐	--select-- ▼	
Meningococcal polysaccharide groups A, C, W-135 and Y conjugate	Nimenrix™ 10 dose/pkg	P		20		☐	--select-- ▼	
Varicella	Varivax® III 1 dose/pkg	P		4	10	☐	--select-- ▼	
Diluent	Diluent Sterile Water-Merck 1 dose/pkg	P		4	10	☐	--select-- ▼	

Cancel | Save Order | Submit Order
Submit and Enter Next | Skip and Enter Next

A helpful training video for this process is available on the AVI home page.

TRACKING YOUR VACCINE ORDER

Orders can be tracked through each stage of the order process after an order has been submitted. The AVI System will automatically update the order status as orders are approved by your depot and when the order is finally shipped. The order status can be tracked at the top section of the *Create/View Orders* screen.

View the status of a specific order

1. Using the **Navigation Menu**, click on the **Orders/Transfers Menu**.

2. Click on *Create/View Orders* to direct you to the *Create/View Orders* screen.

3. The order status of each order is visible on the right under the **Status** column.

Inbound Orders

Select	Order Number	PIN	Submit Date	Approval Date	Status
-->	41938	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	41940	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	41941	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	41958	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	41966	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	41969	AHSED-ED	2017/05/09	2017/05/09	Approved
-->	42067	AHSED-ED	2017/05/24	2017/05/30	Approved
-->	42065	AHSED-ED	2017/05/24		In Manual Review
-->	42189	AHSED-ED	2017/06/22		In Manual Review
-->	42032	AHSED-ED	2017/05/15	2017/05/15	Partially Received

Status Type	What it Means
Saved	The order has been started and saved, however it has NOT been submitted. Note: Saved orders are not submitted to your designated depot.
In Manual Review	The order has been created and submitted to your designated depot and is waiting for their approval.
Pending Approval	The order is awaiting approval from your designated depot.
Approved	The order has been approved by your designated depot.
Shipped or Ready for Pickup	The order has been shipped from the depot, or is ready for pick up depending on the agreement between your facility and your depot.

> **Note:** Do not receive orders in AVI until physical count, lots and expiry dates are verified by comparing received product to AVI packing slip.

RECEIVING AN ORDER

Once a vaccine order has been physically received by your office, the shipment and the packing slip have been compared, and the product is stored appropriately, you should electronically receive the vaccine order in AVI. This will move the order out of the *Inbound Orders* section and into your inventory.

> **TIP:** It is suggested that the vaccine shipment packing slip is used to complete the *Receive Order* function after the shipment lots, expiries and quantities have been verified and stored properly. See below for an example of an AVI packing slip.
>
> ## AVI Immunization Program
>
> (Immunization Program Copy)
>
> | Shipment Date: | | PIN: | 6024 | Order #: 57379 |
> | --- | --- | --- | --- | --- |
>
> | SHIPPED FROM: | AHS-DEPOT-CAMROSE
5510 - 46 AVENUE
CAMROSE, AB T4V 4P8 | TO: | VERMILLION COMMUNITY HEALTH CENTRE
4701-52 STREET
VERMILION, AB T9X 1J9 |
> | --- | --- | --- | --- |
> | Phone: | (780)679-2965 | Phone: | |
> | Fax: | | Fax: | |
>
> **Delivery Instructions:**
>
> **IMPORTANT NOTES ON RECEIVING VACCINE:**
>
> | Vaccine | Funding | Manufacturer | Lot Number | Expires | QTY Ordered | Doses | Units | Cost |
> | --- | --- | --- | --- | --- | --- | --- | --- | --- |
> | Haemophilus Influenzae b | P | GSK | A72CA954A | 2019/04/30 | 1 | 1 | | $0.00 |
>
> Total Value of this Shipment (this is not a bill): $0.00

1. Using the **Navigation Menu**, click on **Orders/Transfers Menu** and then click *Create/View Orders* to show the *Current Order/Transfer List*.

2. Click the **Selection Arrow** to select the desired vaccine order to open the *Receive Order* screen. The order **Status** column should say "Shipped or Ready for Pickup."

3. On the *Receive Order* screen, you will see the vaccine and the number of doses ordered.

4. There are several shipment possibilities. Please see the directions for the scenario that best describes your current shipment for complete instructions on how to receive the vaccines into the system.

Shipment possibilities/scenarios: Follow the directions for the appropriate scenario below.
- The order is complete and viable.
- The order is a partial order with missing/incorrect vaccine products.
- The whole order is damaged or nonviable.

If the order is complete and viable:
    a. Verify the products listed in the order match the verified packing slip. Enter the **Receipt Quantity** for each vaccine product shipped.
    b. Missing Information: If there is any missing information, such as Manufacturer, Lot Number, or Expiration Date for any product; contact your depot before receiving the vaccine.

    c. <u>Incorrect Information</u>: If there is any incorrect product Manufacturer, Lot Number, or Expiration Date information, contact your depot before receiving the vaccine.

    d. Click the **Receive** button. The system updates your inventory with the received doses by lot number.

If the order is partial with missing/incorrect vaccine products:

    a. Receive any lines where all doses were received using the steps as described above.

    b. For the missing vaccine products:

      1) Enter the quantity of doses actually received in the **Receipt Quantity** column (this may be 0) and enter a **Rejected Quantity** that shows the number of doses missing for that product.

      2) Select **Shipment is Incomplete** or **Incorrect Lot Number** from the **Reason for Rejecting** dropdown.

    c. Click the **Receive** button. You will receive a warning advising that a child order will not be created for the rejected quantities. Proceed with receiving the order by selecting **Yes, I would like to receive my order**.

    d. The system updates your inventory with only the received doses.

    e. A transfer is created in the AVI system for the products that have been rejected. The transfer is visible in the *Outbound Transfer* section of your *Create/View Orders* screen. This transfer will alert your depot to the discrepancy in your order and allow your depot to add the rejected product back into their inventory.

    f. A new order will have to be submitted if you would like to receive the missing/incorrect products.

Note: The quantity received and quantity rejected must add up to the shipped quantity.

If the whole order is damaged or nonviable (for example, a cold chain failure):

Contact your depot immediately for further instructions for vaccines that arrive damaged or spoiled.

A helpful training video for this process is available on the AVI home page.

BACKORDERS

Backordered orders will appear on the *Create/View Orders* page under the heading *Backordered Orders*. Entire or partial vaccine orders can be placed into backorder by your depot. Vaccine orders that have been backordered will be assigned new order number. Backorders are created when there is not enough stock to fill the order or a depot may move orders into backorder to purposely hold the order for further review.

Backordered Orders				
Select	**Order Number**	**PIN**	**Submit Date**	**Backorder Date**
-->	90491	PH8279AHS	2019/07/05	2019/07/05
-->	90751	PH8279AHS	2019/08/12	2019/08/12

You can view the quantities that were backordered by pressing the **Selection Arrow**.

Order Number: 90751

Submit Date: 2019/08/12 01:32:59

Submitter: AHSDEPOT USER (AHSDEPOT_USER)

Receiver:

Comments:

Original Order# 90749

Order Set / Order Type: PUBLIC HEALTH ROUTINE / Depot

Exception Reason:

Inventory Last Submitted: 2019/08/12

Last Order Submitted: 2019/08/12 01:32:59 PM

Order Frequency: Twice Weekly

Order Schedule:

Instructions: [   ] Save Changes

Order Status: Backordered

Approver: ()

Approval Date:

Exception Description:

Exception Comment:

Order Timing:

Order Items								
Vaccine	**Vaccine Name**	**Funding**	**Dose Used Last Month**	**Physical Inventory**	**Ordered Quantity**	**Approved Quantity**	**Received Quantity**	**Priority Reason**	**Receipt Date**
dTap	Boostrix® 10 dose/pkg	P			40	0			
Comments		Tracking #:							
dTap-IPV	Boostrix®-Polio 10 dose/pkg	P			30	0			
Comments		Tracking #:							
Pneumococcal, Polysaccharide	Pneumovax® 23 10 dose/pkg	P			20	0			
Comments		Tracking #:							

Cancel

Note: Backordered quantities may be a partial quantity of the full quantity originally ordered.

DENIED ORDERS

Vaccine orders may be entirely or partially denied by your depot and will be listed in the *Create/View Orders* screen in the *Denied Orders* section.

Navigate to the **Selection Arrow** to open the denied order and view the details.

Current Order/Transfer List

Inbound Orders

Select	Order Number	PIN	Submit Date	Approval Date	Status
-->	68463	PH8279AHS	2018/07/31	2018/07/31	Partially Received
-->	90485	PH8279AHS	2019/07/05	2019/07/05	Shipped or Ready for Pick Up
-->	90487	PH8279AHS	2019/07/05	2019/07/05	Shipped or Ready for Pick Up

Backordered Orders

Select	Order Number	PIN	Submit Date	Backorder Date
-->	90491	PH8279AHS	2019/07/05	2019/07/05

Denied Orders

Select	Order Number	PIN	Submit Date	Denial Date
-->	85987	PH8279AHS	2019/04/05	2019/04/05
-->	87169	PH8279AHS	2019/05/02	2019/05/02
-->	87653	PH8279AHS	2019/05/10	2019/05/12
-->	89442	PH8279AHS	2019/06/17	2019/06/17
-->	89798	PH8279AHS	2019/06/21	2019/06/24

Only the denied doses will be listed on the denied order. If partial doses have been approved or back-ordered, they will be listed in their respective sections above. There are three reasons vaccine may be entirely or partially denied.

Denial Reasons	Rationalization
Order is outside of recommended quantity	The order quantity is much higher than the expected use prior to the vaccine's expiration date. This is based on the regional history.
Facility is not authorized	The vaccine on order is not approved for use by the region.
Supply is not available	The vaccine is currently out of stock or on allocation and the order cannot be filled as requested.

TRANSFERRING VACCINE

Transfers can be used to move vaccines between organizations and facilities. Organizations have the ability to transfer vaccines. Depending on your depot's policy, facilities may also have the ability to transfer vaccines. **Facilities and organizations should report all transfers to their depot before they are shipped**. Transfers should be used for viable vaccines only. For non-viable vaccines, the vaccine return process should be used (see return section in this manual for more information).

Creating a Transfer:

1. Using the **Navigation Menu**, click on **Orders/Transfers Menu** and then click *Create/View Orders* to show the *Current Order/Transfer List*.

2. Click the **Create Transfer** button at the bottom of the screen to open the *Create Transfer* screen.

Note: If the **Create Transfer** button is not available on the *Create/View Orders* screen your organization has removed this permission from your facility.

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3. Your inventory will show under the *Transfer Details* section.

4. Indicate the organization and facility you are transferring to by selecting them from the drop down menus. Enter the number of doses for each lot number in the **Transfer Quantity** field. Enter the transfer reason in the **Transfer Reason** field. The transfer reason is a text field that allows you to type the reason for the transfer.

5. Click the **Create Transfer** button on the lower right side of the page.

6. The transfer will appear under *Outbound Transfers* section on the *Create/View Orders* screen.

7. Click the **Selection Arrow** next to the outbound transfer to open the *Transfer* screen, and then select **Print** to print the transfer paperwork.

Receiving a Transfer:

1. To receive a transfer, click on the **Orders/Transfers Menu** and then click *Create/View Orders* to show the *Current Order/Transfer List*.

2. Click the **Selection Arrow** next to the transfer you want to receive under the *Inbound Transfers* section.

3. This will take you to the *Receive Transfers* screen. There are several shipment possibilities. Please see the directions for the scenario that best describes your current transfer for complete instructions on how to receive the vaccines.

Shipment possibilities/scenarios: Follow the directions for the appropriate scenario below.

- The transfer is complete and viable.
- The transfer is a partial order with missing/incorrect vaccine products.
- The whole shipment is damaged or nonviable.

If the transfer is complete and viable:

a. Verify the products listed in the transfer match the product physically received. Enter the **Receipt Quantity** for each vaccine product shipped.

b. Click the **Receive** button. The system updates your inventory with the received doses by lot number.

If the transfer is partial with missing/incorrect vaccine products:

a. Receive any lines where all doses were received using the steps as described above.

b. For the missing vaccine products:

   3) Enter the quantity of doses actually received in the **Receipt Quantity** column (this may be 0) and enter a **Rejected Quantity** that shows the number of doses missing for that product.

   4) Select **Shipment is Incomplete** or **Incorrect Lot Number** from the **Reason for Rejecting** dropdown.

c. Click the **Receive** button.

d. The system updates your inventory with only the received doses.

e. The system will not alert the shipper to the discrepancy. Alert the shipper to the discrepancy via phone or email.

Note: The quantity received and quantity rejected must add up to the shipped quantity.

If the whole order is damaged or nonviable (for example, a cold chain failure):

Contact your depot immediately for further instructions for vaccines that arrive damaged or spoiled.

VACCINE RETURNS

Depending on your depot's policy, facilities may have the ability to return non-viable vaccines to the depot. Vaccines removed from inventory for the categories below will appear on the *Vaccine Return* screen.

Expired	Vaccines were not used before the manufacturer's expiration date and have expired on shelf. Doses marked as expired will be eligible for return to your depot using the vaccine return process in AVI.
Recall	Vaccines that are nationally recalled, or Alberta Health sends notice to stop using the vaccine and to return to your depot. Doses marked as recalled will be eligible for return to your depot using the vaccine return process in AVI.
Spoiled	Vaccines have spoiled due to improper storage practices, man-made or natural disasters, or spoiled during transport. Doses marked as spoiled will be eligible for return to your depot using the vaccine return process in AVI.

1. Using the **Navigation Menu**, click on **Orders/Transfers Menu** and then click *Create/View Orders* to show the *Current Order/Transfer List*.

2. Click the **Vaccine Return** button at the bottom of screen to open the *Vaccine Return* screen.

> **Note:** If the **Vaccine Return** button is not available on the *Create/View Orders* screen your organization has removed this permission from your facility.

3. Your vaccine doses that qualify for being returned will show under the *Vaccine Return* section.

4. Enter the quantity you will be returning in the **Transfer Quantity** field.

5. Click the **Submit and Print Vaccine Return** button on the lower right of the screen.

> **TIP**: Ensure your pop up blocker is turned off for the AVI website as your browser will block the packing slip as a pop up.

6. The *Vaccine Return* packing slip will open in a new browser window. Print the document and include with the vaccine to be returned to your depot.
7. Physically return the vaccines as per your depot's routine procedures or instructions.

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Vaccine Return

Transfer Number: 9157

Sending Organization (IRMS): AHS-DEPOT-FORT MCMURRAY

Sending Facility:

Receiving Organization (IRMS): PROVINCIAL VACCINE - RTN

Receiving Facility:

Transfer Quantity	Vaccine	Funding	Lot Number	Usable Quantity Available	Wasted Quantity	Wastage Cost	Expiration Date	Return Reason
118	Diluent	P	L018496	0	118		2018/03/12	Natural Disaster / Power Outage
245	HPV, quadrivalent	P	K026398	0	245		2017/05/14	Natural Disaster / Power Outage
16	Haemophilus Influenzae b	P	A72CA892A	0	16		2017/02/28	Natural Disaster / Power Outage

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