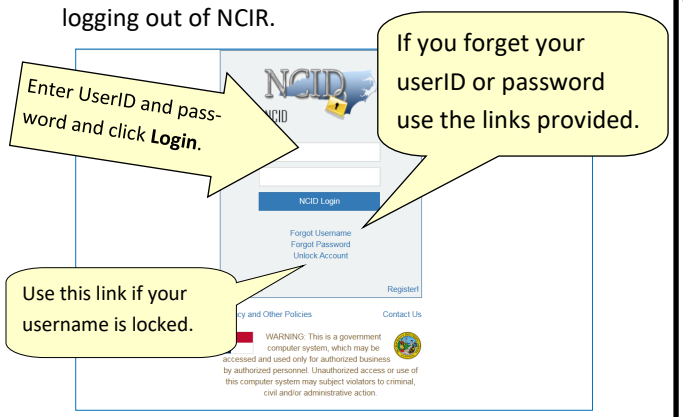
NORTH CAROLINA IMMUNIZATION REGISTRY (NCIR) QUICK REFERENCE GUIDE

BOOKMARKING THE NCIR WEBSITE

1. Open a new browser window and type in *https://ncir.ncdhhs.gov/* in the address bar and then bookmark the site (it will bookmark the NCID website).
2. Edit the bookmark by right-clicking on the bookmark itself, left-clicking on **Properties** and retyping the NCIR web address into the **URL** blank.

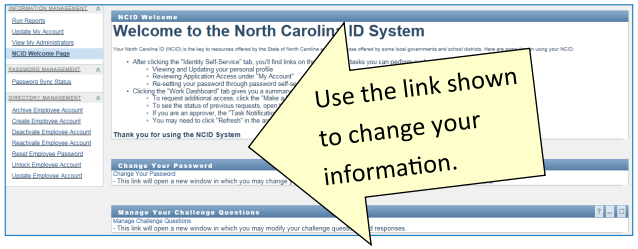
USER ID AND PASSWORD

- UserID is not case sensitive, but password is.
- Do not share userID and passwords.
- For added security, close the browser window after logging out of NCIR.



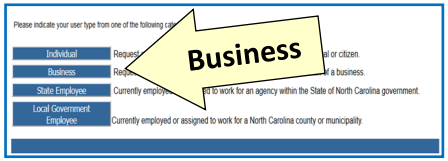
UPDATING YOUR USER PROFILE INFORMATION

Change your e-mail address or password by typing in the *https://ncid.nc.gov* web address.



HOW TO OBTAIN A NCIR USER ID

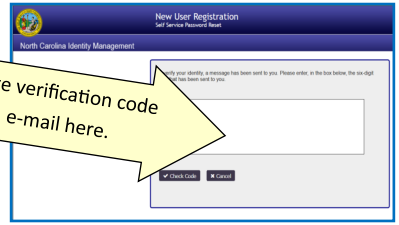
1. Open a new browser window and type *https://myncid.nc.gov* in the address bar.
2. Click the "**Register NOW**" link in bottom right corner of the blue box.
3. Click the **Business** button.



4. Complete the required personal information, including choosing your own *UserID* and *password.*

*Password requirements are listed on the page and will remain **red** until your choice of password meets all requirements. The strength of your password will be assessed, and you will be required to type it twice to ensure correctness.*

5. Click **Continue.**
6. An e-mail from *ncid.notifications@nc.gov* will be sent to the provided e-mail address. Clicking the supplied link will verify your new *UserID*. You will be re-routed back to the NCID website, or you can copy the 6-digit code and paste it into the "Code" field.

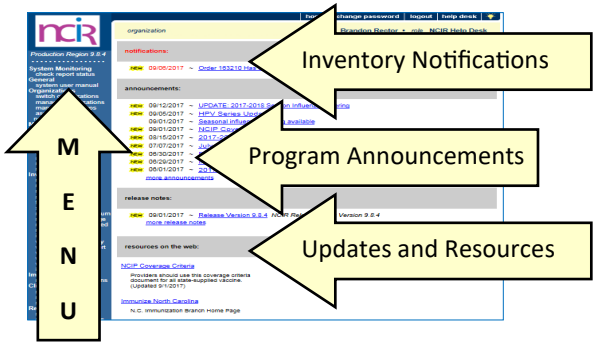


7. Click **Check Code**.
8. Click **Continue**.

At this point, an NCIR Administrator in your organization must add your userID (instructions on page 7). You must share your UserID, but NOT your password. Once you have been added, return to https://ncir.ncdhhs.gov to log in.

9. The first time you log in, you will be required to select and answer *5 challenge questions* to verify your identity if your password is ever lost.
10. Once completing your challenge questions, you will be forwarded to NCIR.

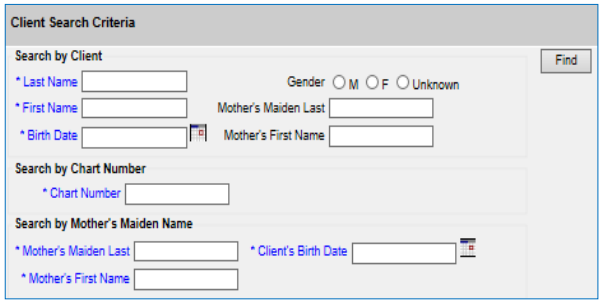
NCIR HOMEPAGE



SEARCHING FOR A CLIENT

Many clients are already in NCIR—and those who move into NC are easy to add!

1. Using the navigation menu on the left, click **Manage Client.**



NOTE: In general, Gender is unnecessary when searching for a client and could limit results unnecessarily.

2. Click **Find**.

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4 Ways to Search—only choose one:

* Search by client (Last Name, First Name, and Date of Birth)
* Search by Chart Number (This must be assigned & entered **by your organization**)
* Search by Mother's Maiden Name (Mother's Maiden Name, Mother's First Name, Client's Date of Birth)
* Search by NCIR ID (allows for secure and confidential sharing of client information by **NCIR Administrators**)

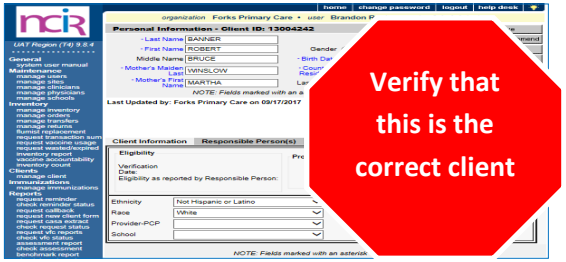
If the client has a compound last name, try entering only one portion of the last name (i.e. Johnson-Smith—enter "Johnson").

North Carolina Public Health

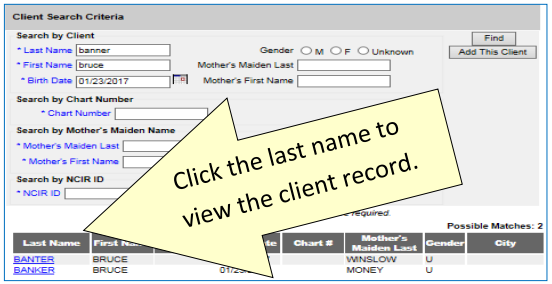
IMMUNIZE North Carolina

North Carolina Immunization Registry

3. If the client appears in the search results, check the name and DOB to ensure that this is the correct date.



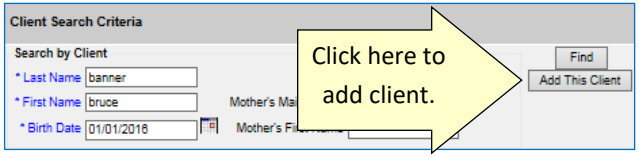
4. If there are multiple clients that met your search criteria, you will see all possible matches listed:



5. If the client was not found, you will see the message below.

Last Name	First Name	Middle Name	Birth Date	Chart #	Mother's Maiden Last	Gender	City
No clients were found for the requested search criteria.							

6. Click the **Add This Client** button to create a new client in NCIR.

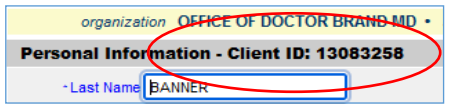


7. The information that you entered on the search screen will all be retained on the "enter new client" screen.

DUPLICATE CLIENT RECORDS

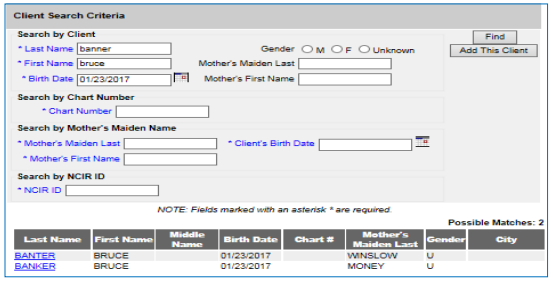
- If you locate a duplicate client record, contact the NC Vaccines Help Desk, at *ncirhelp@dhhs.nc.gov*.
- Please note the **NCIR ID** number for **both** client records, and if possible, indicate which record is most accurate.

DO NOT e-mail client names or dates of birth! **DO USE** the Client ID (or NCIR ID) which appears in the gray bar at the top of each client screen.



ADDING A NEW CLIENT

1. Enter all of the required information (noted by a blue asterisk): Last Name, First Name, DOB, and County of Residence.
2. Mother's Maiden Name, Mother's First Name, and gender assist with deduplication of clients.
3. Chart number is optional (organization specific). Please enter the correct Ethnicity/Race. Status defaults to "Active."
4. Click **SAVE**.
5. If a client already exists in NCIR with exact or similar information to the client that you are creating, you may see the screen shown below.



If you are sure this is not the same client, click the "Create New Client" button.

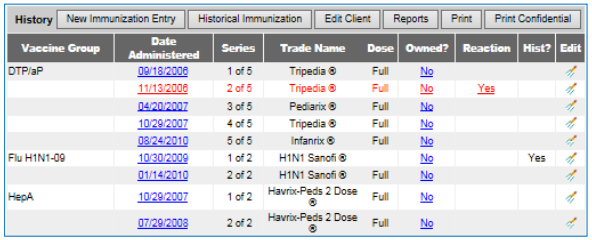
6. If you think this may be the same client, click the last name of the existing client in blue.
7. If no match is found, click "Create New Client" button.
8. Click on **Responsible Persons**
   - Complete as much information as possible for each individual (minimum requirements: name, relationship, address and phone number)
   - **Notices** should be checked unless it is specified that that the responsible person does not want to receive immunization reminders.
   - Default for language is always "English" unless you select otherwise.
   - Be sure that a "**Primary**" person is designated.
   - To add more than one person, click on **Next.**
   - Scroll to the top of the screen and click **Save**.

VIEWING HISTORY / RECOMMEND

From the edit client screen, click **History / Recommend** to view the client record and recommendations.

The screen has 4 sections: Client Information, History, Current Age, and Vaccines Recommend by Tracking Schedule.

The history section lists vaccines the client has already received.



Vaccine Group	Date Administered	Series	Trade Name	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	09/18/2006	1 of 5	Tripedia ®	Full	No			
	11/13/2006	2 of 5	Tripedia ®	Full	No	Yes		
	04/20/2007	3 of 5	Pediarix ®	Full	No			
	10/29/2007	4 of 5	Tripedia ®	Full	No			
	08/24/2010	5 of 5	Infanrix ®	Full	No			
Flu H1N1-09	10/30/2009	1 of 2	H1N1 Sanofi ®		No		Yes	
	01/14/2010	2 of 2	H1N1 Sanofi ®	Full	No			
HepA	10/29/2007	1 of 2	Havrix-Peds 2 Dose ®	Full	No			
	07/29/2008	2 of 2	Havrix-Peds 2 Dose ®	Full	No			

Vaccine Group: vaccine group for each immunization entered

Date Administered: day the client was given the vaccine

Series: sequence number within the immunization series

Trade Name: trade name of the vaccine received

Dose: magnitude (amount administered—e.g. full, half, etc.)

Owned?: whether or not this shot was administered or entered by your organization (*blank* indicates "yes")

Reaction: any reactions the client had after receiving the vaccine

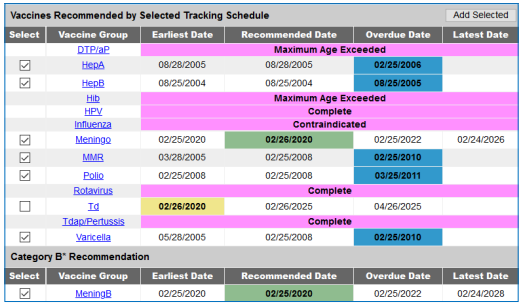
Hist?: whether the recorded immunization was historical or not

Edit: will allow you to edit the recorded immunization (see **EDITING A DOSE OF VACCINE** for specifics)

The **client's age** displays in a solid blue field between the immunization history and before the recommendations. **Note:** Age is calculated by DOB and today's date.

Current Age: 11 years, 2 months, 2 days

Vaccines Recommended by Selected Tracking Schedule are based on: Current ACIP Recommendations, Age of the client, History *entered* into NCIR, and Any client comments and/or contraindications.



Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date
	DTP/aP	Maximum Age Exceeded			
☑	HepA	08/28/2005	08/28/2005	02/25/2006	
☑	HepB	08/25/2004	08/25/2004	08/25/2005	
	Hib	Maximum Age Exceeded			
	HPV	Complete			
	Influenza	Contraindicated			
☑	Meningo	02/25/2020	02/26/2020	02/25/2022	02/24/2026
☑	MMR	03/28/2005	02/25/2008	02/25/2010	
☑	Polio	02/25/2008	02/25/2008	03/25/2011	
	Rotavirus	Complete			
☐	Td	02/26/2020	02/26/2025	04/26/2025	
	Tdap/Pertussis	Complete			
☑	Varicella	05/28/2005	02/25/2008	02/25/2010	

Category B* Recommendation

Select	Vaccine Group	Earliest Date	Recommended Date	Overdue Date	Latest Date
☑	MeningB	02/25/2020	02/25/2020	02/25/2022	02/24/2028

Select: check boxes which can be used to pre-select any of the tracking schedule's immunizations (for entering doses given from inventory)

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Vaccine Group: recommended vaccine group name

Earliest Date: dates which note the earliest date the selected client could receive the corresponding immunization

Recommended Date: the date that the selected client is recommended to have the corresponding immunization

Overdue Date: notes the date that the client is past due for corresponding immunization

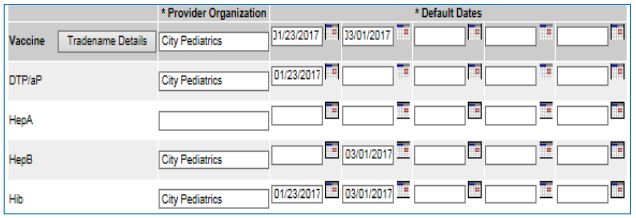
Latest Date: the date after which the client should not receive the corresponding immunization

Category B Recommendations require individual clinical decision-making based on a clinician-patient discussion of risks and benefits.

ENTERING HISTORICAL IMMUNIZATIONS

Historical immunizations are immunizations that are not given from inventory (i.e. records from another office).

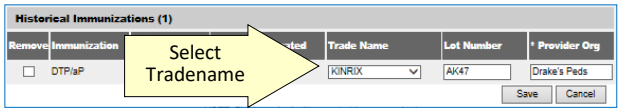
1. Search for the client using **manage client** or **manage immunizations**.
2. Click on **History / Recommend** button if using the manage client option.
3. Compare the client's current immunization record with the doses listed in the NCIR and update as necessary. If doses are missing from the NCIR, click on **Historical Immunization** (*located in the gray History bar below "Client Information"*).
4. Key in the provider organization next to the vaccine trade name details section. If all shots that you are entering were given at the same place, click in the blank box for provider organization it will automatically fill-in as needed. There is a drop-down menu at the bottom of the list for vaccines that you do not see.



5. Click on the calendar icon to the right for the **Date Administered** and select date or key in the date MM/DD/YYYY.

6. To enter the **Trade Name** and **Lot Number** click on the **Trade Name Details** button (make sure provider organization and date are filled in first), then verify date, select trade name and key in lot number, click **SAVE**.

NOTE: for certain vaccines (e.g. combination vaccines, Hib, etc.) trade name is necessary to apply the correct vaccine schedule information .

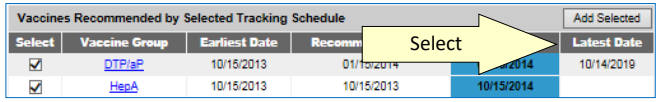


ENTERING NEW IMMUNIZATIONS

New immunizations are immunizations given from your inventory.

1. Search for the client using **manage client**.
2. Click on the **History / Recommend** button. Review comments under **"Client Information"** at the top of the page and the **"Current Age"** in the blue bar about 2/3 of the way down the page.
3. Review the **Vaccine Recommended by Selected Tracking Schedule** below the age. The recommendations are based on the ACIP schedule, the child's age, client comments and contraindications, and vaccination history.
4. The **select** column contains check boxes which can be used to pre-select any of the tracking schedule's immunizations when adding immunizations to the client.

- The check box will be disabled if the tracking schedule's recommended vaccination is contraindicated or if all required immunizations for that vaccine group have been received.
- The box is automatically selected for any vaccines that are recommended or overdue.
- To deselect any of the recommended vaccines, click the checkmark to remove it.
- Any vaccines that are not recommended or overdue, but still may be applied to the series (as noted by earliest date) may be added by clicking in the box next to the vaccine name to add a checkmark.
- If you administer a vaccine that does not appear in the schedule, you will be able to add it on the next screen.

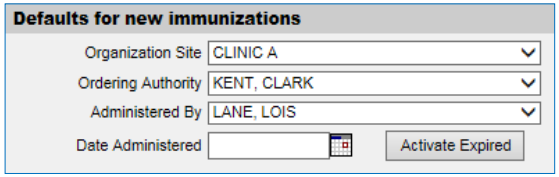


5. After making your vaccine choices, click **Add Selected**. Another entry screen will be displayed. The vaccines that you selected will have a checkmark in the **New** column.

NOTE: If you administered any vaccine that does not have a check next to it in the **New** box, click on that box to add a checkmark.

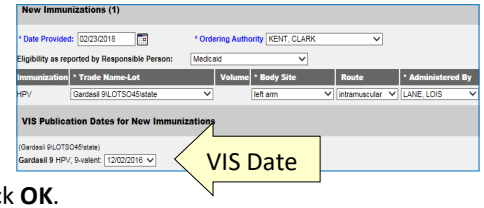
NOTE: Only vaccine that you have available in inventory can be selected.

6. Under **Defaults for New Immunizations** verify or complete the following:
   - **Organization Site:** for those organizations with multiple sites.
   - **Ordering Authority:** the doctor who issues the order for vaccines to be administered
   - **Administered By:** the clinician who administered the vaccine
   - **Date Administered:** will default to today's date on the next screen if left blank



7. Click **OK**.
8. Choose an **Eligibility**.
9. Choose the **Trade Name/Lot Number**, the **Body Site**, and enter/verify the **Route** for each vaccine selected.

NOTE: As you select the trade name and lot number the most current date for each VIS will display on the bottom of the page.

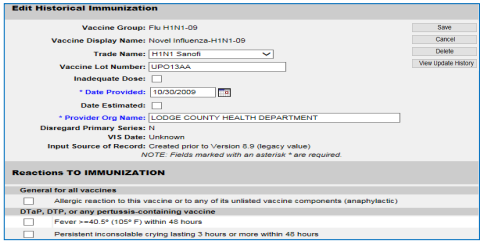


10. Click **OK**.

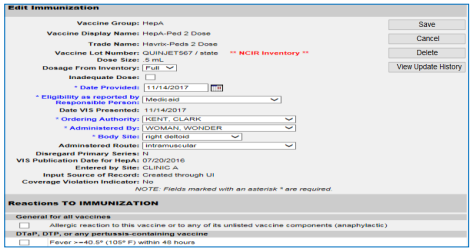
EDITING A DOSE OF VACCINE

To edit a dose of vaccine (including adding a vaccine reaction), click the **Edit** button next to the appropriate vaccine date on the History / Recommend screen.

Any person, at any organization, may delete or update a historical immunization. You may update any of the following fields for historical immunizations: trade name, lot number, date provided, provider organization, or any reactions associated with vaccine administration

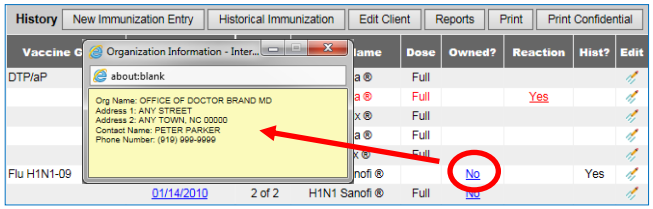


You may only delete or update a dose of vaccine from inventory, if it was administered by your organization. You may update any of the following fields for doses from your inventory: *dosage from inventory, whether the dose was adequate, date provided, eligibility, ordering authority, administered by, body site, route of administration, VIS date (on the date of administration only),* or *any reactions associated with vaccine administration*.



NOTE: If an incorrect lot number was entered for a new immunization the dose must first be deleted and then re-entered with the correct lot number.

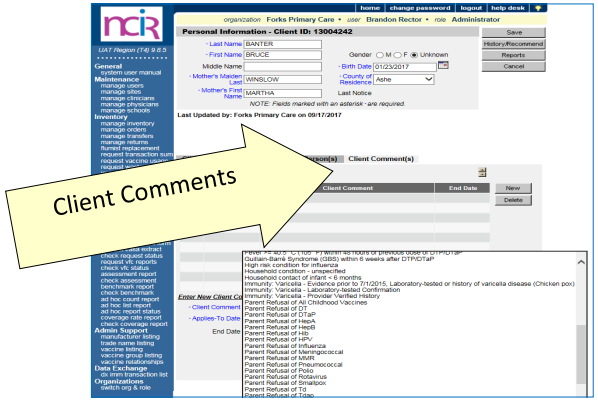
If the vaccine was given from another organization's inventory (as noted by **No** in the **Owned?** Column) click on the link to view which organization administered the shot as well as the contact information.



HOW TO ADD A CLIENT COMMENT

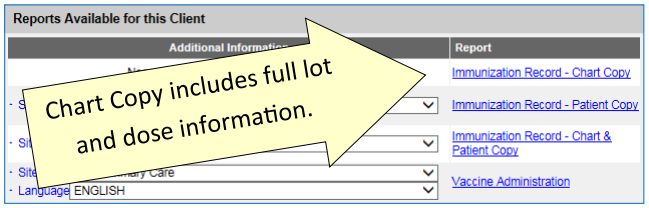
Client comments allow you to add HIPAA-safe information to an immunization record including contraindications, health conditions, refusals, and exemptions.

1. On the **Edit Client** screen, select the **Client Comment** tab.
2. Select the appropriate **Client Comment** from the drop-down menu.
3. Enter an **Applies To Date** and, if appropriate, an **End Date**.
4. Click **Next** to add the Client Comment to the client's list of comments.
5. The Client Comment will appear at the top of the immunization record and the recommendation page will reflect contraindicated or completed vaccine series.



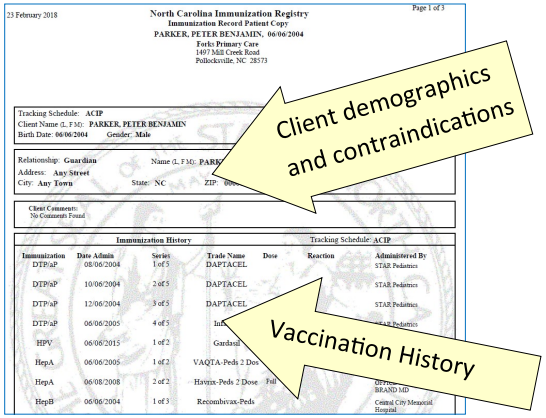
HOW TO PRINT IMMUNIZATION RECORDS

After you have searched for and found the appropriate client, click **Reports**.



The Immunization Record—Patient Copy fulfills the requirements for an official immunization record. Immunization Records in other formats are available on this page.

For a **Patient Copy** only, choose the **Site** (if not defaulted) and then click on the link—**Immunization Record—Patient Copy**. It will open an Adobe .pdf file in a separate window.

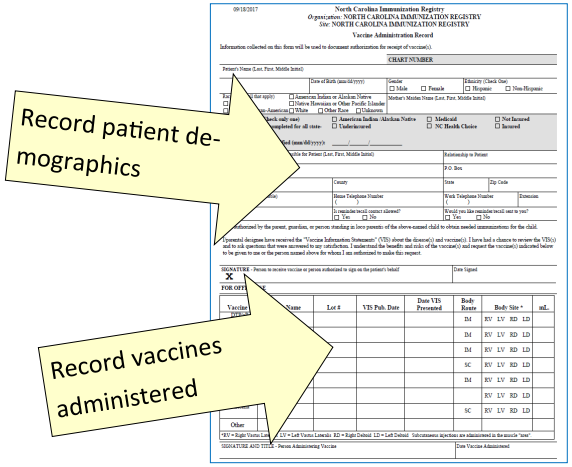


HOW TO PRINT A NEW CLIENT FORM

The New Client Form should be used as a contingency plan in case of an NCIR outage or a loss of Internet access. The New Client Form contains all information necessary to enter the client and/or doses administered in to the NCIR at a later time.

1. From the left hand menu bar, click on **Request New Client Form**, under **Reports**.
2. Choose a site from the site drop-down menu (this is the site information that is printed at the top of the report) and click **Generate**.
3. The report should open in a new window as an Adobe .pdf file.

It is a good idea to keep several copies of these blank forms on hand in case of an outage.



In the event that the NCIR is unavailable and you do not have any forms on hand, they are also available on the NC Immunization Branch website in both English and Spanish at *http://immunization.dph.ncddhhs.gov/providers/ncir.htm*.

HOW TO ADD PRIVATE INVENTORY TO THE NCIR

You should use this procedure to add your private supply of vaccine. For state inventory see: **ACCEPTING YOUR STATE SUPPLIED VACCINE ORDER**.

*If the vaccine lot number is **NOT already in your inventory:***

1. Click **Manage Inventory**.
2. Click **Show Inventory**.
3. Click **Add Inventory**.
4. Choose the **Trade Name**, the *Manufacturer* will automatically populate.
5. **HIGHLY RECOMMENDED!** Enter the **NDC** (noted on the outside of the vaccine box).
6. Enter the **Lot Number** (use the number on the vaccine box, NOT the vial).
7. Verify the **Dose** size from the drop-down menu.

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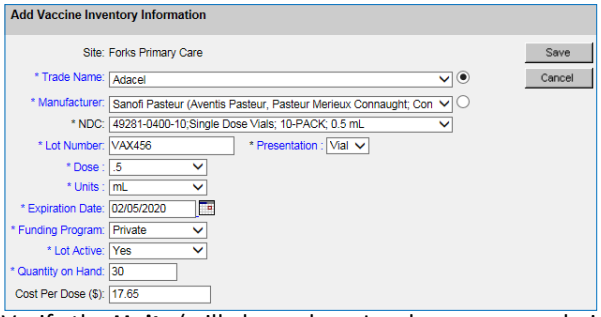
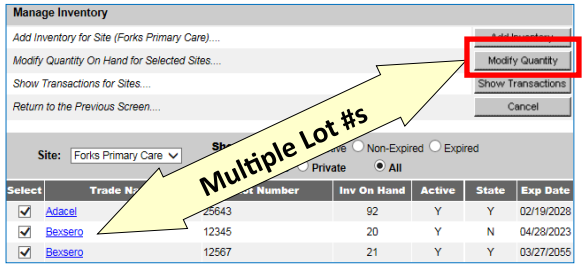


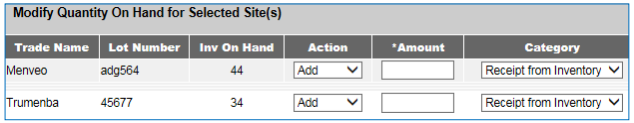
8. Verify the **Units** (will always be mL unless you are administering a vaccine in capsule form). **NOTE:** Tubes are not considered capsules.
9. Enter the **Expiration Date**. **NOTE:** Vaccines with only a month and year should be entered as the last day of the month of expiration.
10. Verify the **Funding Program** (should always be *Private*).
11. **Lot Active** drop-down must be set to Yes to be saved. (*"Yes" will make the Lot number appear in the drop-down menu under the Lot Number/Trade Name when documenting administration of a dose of vaccine. If you do not want the lot number to appear in the drop-down menu, change the active indicator to "No" after saving the initial information.)*
12. Enter the **Quantity on Hand** (the number of **doses**, not boxes or vials).
13. **Cost Per Dose** is optional.
14. Click **Save**.

*If the lot number **ALREADY EXISTS** in your inventory.*

1. *Click **Manage Inventory**.*
2. *Click **Show Inventory**.*
3. *To get to the modify quantity on hand screen, place a checkmark in the select box and click **Modify Quantity**.*



4. Under the modify quantity on hand section, make sure the action is **Add**, enter the number of doses that you are adding, choose **Receipt from Inventory**.

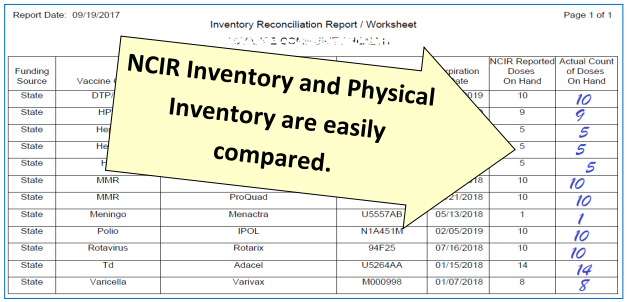


5. Click **Save**.

HOW TO COMPLETE AN INVENTORY COUNT

All providers should complete a manual inventory count weekly to identify errors, identify shortages, and review expiration dates.

1. Click **Inventory Report**, under *Inventory.*
2. Select **Funding Source** from the drop-down menu.
3. Click **Generate Report**. A report will open as an Adobe .pdf file.
4. Print the document and use this to do your inventory count.

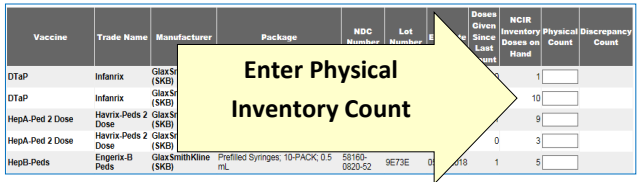


5. Document your physical count in the right-hand column and store for your convenience.

HOW TO SUBMIT AN INVENTORY COUNT

Prior to placing an order, providers must submit a physical inventory count of state vaccine.

1. Prior to submitting an inventory count, providers **MUST REMOVE EXPIRED VACCINE** from inventory. See *page 6* for instructions.
2. Click **Inventory Count**, under Inventory.
3. Click **Enter New Count**.
4. Enter the amount of vaccine physically on hand in the "*Physical Count*" column.



5. Click **Save & Submit**. You will be able to review the current Discrepancy Percentage in the lower right corner.
6. An order may be placed in the next 24 hours.

HOW TO PLACE A VACCINE ORDER

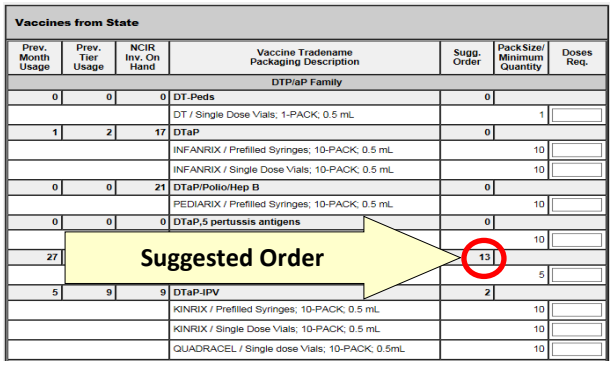
Before placing an order, make sure that all doses administered have been keyed into NCIR, complete and submit and inventory count (see previous sections).

1. Click **Manage Order**.
2. Click **Create Order**.

NOTE: You will be unable to create an order if:

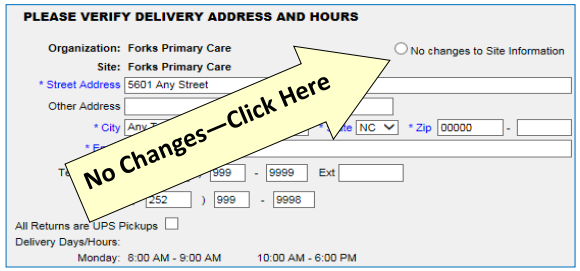
- Your organization has any unaccepted inbound transfers (including orders).
- An order has been placed within the past 14 days.
- An existing order is in "*Pending*" status.
- Your organization has expired vaccine (older than 31 days) in inventory.
- A required Inventory Count has not been submitted within the past 24 hours.
- Site-visit follow-up has not been completed by the required deadline.

3. The Suggested order quantity is calculated from your doses administered (Tier Usage) and your inventory on hand. Review the **Suggested Order Quantity** to assist with placing your order.
4. Enter the amount, **IN DOSES**, of each vaccine you're requesting in the corresponding boxes. You may order vials, syringes, or a combination of the two based on availability. Make sure that you place the order for **ALL** vaccines you need at one time.



5. Scroll to the bottom of the page to verify your shipping information.
   - If all the shipping information is correct, click the button next to **No Changes to Site Information**.
   - If any information, including name, address, and delivery hours, need to be changed.

(continue to next page)

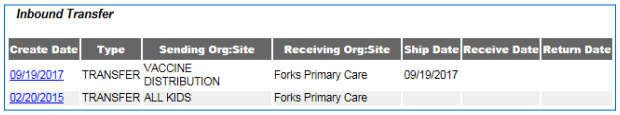


6. Click **Submit Order**.
7. You will be redirected to the **Manage Order** page where your order shows up as "***Pending***" (An order in *Pending* status may be edited or update).

ACCEPTING YOUR STATE-SUPPLIED VACCINE ORDER

(OR AN INCOMING TRANSFER FROM ANOTHER ORGANZATION)

1. When you receive your vaccine, verify that the vaccine type, lot number, expiration date and quantity of the vaccines in the shipping container match what is listed on the packing list.
2. Log in to the NCIR and click **Manage Transfers**.
3. Under **Inbound Transfer** you should see your order from the *Vaccine Distribution* organization as shown below.



Inbound Transfer

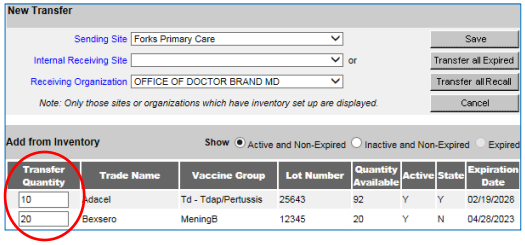
Create Date	Type	Sending Org:Site	Receiving Org:Site	Ship Date	Receive Date	Return Date
09/19/2017	TRANSFER	VACCINE DISTRIBUTION	Forks Primary Care	09/19/2017		
02/20/2015	TRANSFER	ALL KIDS	Forks Primary Care			

4. Click on the date under **Create Date**.
5. Verify that the order in the NCIR (amount, lot number, and trade name) matches your packing list. If the packing list does not match the NCIR, please call the Help Desk at *877-873-6247* before moving on to Step #6.
6. If everything matches, click **Accept Transfer**.
7. Click **OK**. The vaccine should now be active in your inventory.

NOTE: An incoming transfer from another organization will display that organization's name in the "Sending Org: Site" box.

TRANSFERRING VACCINE TO ANOTHER NCIR PROVIDER

1. Click **Manage Transfers**.
2. Click **New Transfer**.
3. Choose the **Sending Site** and the **Receiving Site** or **Organization** . *Internal Receiving Sites* are other sites within your organization. *Receiving Organizations* are other NCIR Providers.
4. Enter the number of doses that you are transferring in the **Transfer Quantity** box next to the Trade Name.



New Transfer

Sending Site: Forks Primary Care
Internal Receiving Site: or
Receiving Organization: OFFICE OF DOCTOR BRAND MD
Note: Only those sites or organizations which have inventory set up are displayed.
Save | Transfer all Expired | Transfer all Recall | Cancel

Add from Inventory — Show: Active and Non-Expired / Inactive and Non-Expired / Expired

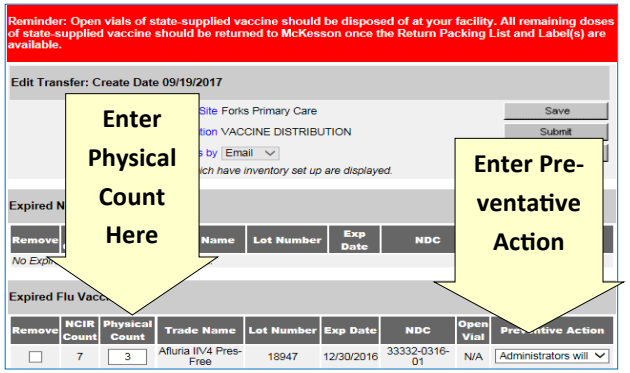
Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	State	Expiration Date
10	Adacel	Td - Tdap/Pertussis	25643	92	Y	Y	02/19/2028
20	Bexsero	MeningB	12345	20	Y	N	04/28/2023

5. Click **Save**. You should see a message saying "Saved Successfully."
6. You must generate and view either a **Packing List** or **Label** in order to complete the transfer.
7. Click **Ship**.
8. Enter a **Ship Date**.
9. Click **Ship** again to complete the transfer.
10. You will see a message saying "Transfer Successfully Shipped," and it should show up in your outbound transfer list with a *Ship Date*.
11. The transfer is ready for the receiving organization to accept into their inventory.

HOW TO REPORT AND RETURN EXPIRED STATE-SUPPLIED VACCINE

1. Click **Manage Transfers**.
2. Click **New Transfer.**
3. Click **Transfer All Expired**.
4. Verify the **Physical Count.** If the number of doses being returned is incorrect, enter the number of doses being returned even if it does not match NCIR's estimate.

NOTE: The difference in physical and digital inventory is recorded as unaccounted vaccine.



5. Select the appropriate **Preventative Action** from the drop-down menu.

NOTE: If the physical count for a lot of vaccine is zero, enter a "*0*" in the physical count box and "*None of These Apply To Me*" and type "*No vaccine on hand*" in the text box.

6. Click **Submit.**
7. Verify that expired vaccine has been removed from your refrigeration unit.
8. Verify the correct *e-mail address* for mailing labels. If the e-mail address is incorrect, change the address **immediately** under "Manage Sites"

A pre-paid UPS shipping label will be sent to the e-mail address verified above and a "**Return Packing List for VTrckS Return ID**" will be generated for your return. Once the Packing List is complete, it will be visible under *Notifications* on the *NCIR Home Page*. This document **MUST** be printed and placed in the package with your expired vaccine.

HOW TO REMOVE PRIVATE EXPIRED VACCINE

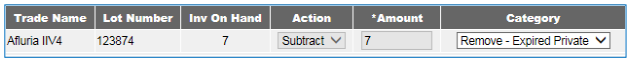
1. Click **Manage Inventory**.
2. Click **Show Inventory**.
3. Select the **Expired** and **Private** (as below).

Site: Forks Primary Care — Show: Active / Inactive / Non-Expired / Expired / State / Private / All

4. Put a check in the select column beside each vaccine lot to be removed and click **Modify Quantity**.

Select	Trade Name	Lot Number	Inv On Hand	Active	State	Exp Date
☑	Afluria IIV4	123874	7	N	N	12/30/2016
☐	Fluzone Intradermal IIV4 Pres-Free	12548	0	N	N	08/12/2015

5. On the Modify Quantity screen choose "Remove—Expired Private" from the Category drop-down menu.



Trade Name	Lot Number	Inv On Hand	Action	*Amount	Category
Afluria IIV4	123874	7	Subtract	7	Remove - Expired Private

6. All other fields will populate automatically.
7. Click **Save**.
8. Expired Inventory will be removed.

HOW TO REPORT WASTED VACCINE

Before wasting any vaccine due to out-of-range or inappropriate temperatures, providers ***MUST contact the NC Immunization Branch Storage & Handling line at*** *877-873-6247, option 5. Branch Staff will determine the viability of vaccine. Damaged vials may be removed using the following instructions. In all other cases, viability* ***MUST*** *be determined by the NC Immunization Branch.*

1. Click **Manage Inventory**.

(continue to next page)

2. Click **Show Inventory**.
3. Put a check in the select column beside each vaccine lot that you are removing.
4. Click **Modify Quantity**.
5. On the Modify Quantity screen, choose **Subtract** from the *ACTION* drop-down menu.
6. Enter the number of doses that were wasted.
7. Choose **Wasted Doses** from the *Category* drop-down menu.
8. Type in the **Reason Wasted** (what caused the vaccine to become non-viable) and **Preventative Action** for future vaccine handling.

9. Click **Save**.

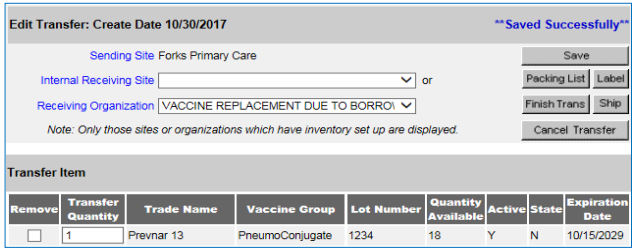
NOTE: Any open vials or syringes of vaccine should be discarded on site in your sharps container.

DOCUMENTING THE REPLACEMENT OF A BORROWED VACCINE DOSE

The VFC program allows for some borrowing between state and private vaccine inventories (see *http://immunization.dph.ncdhhs.gov/providers/ncip/pdf/borrowing_form.pdf*). After transferring a physical dose in your refrigerator, follow these steps to transfer the dose in NCIR.

NOTE: *Before beginning this process, be sure that all inventory contains an NDC number. See **HOW TO ADD PRIVATE INVENTORY TO THE NCIR** on page 4.*

1. Click **Manage Transfers**.
2. Click **New Transfer**.
3. In the **Receiving Organzation** drop-down menu, select "VACCINE REPLACEMENT DUE TO BORROWING."
4. In the **Transfer Quantity** column, enter the number of doses of each lot being replaced.



5. Click **Save**. You should see a message saying "Saved Successfully."
6. You must generate either a **Packing List** or **Label** in order to complete the transfer.
7. Click **Ship**.
8. Enter a **Ship Date**.
9. Click **Ship** again to complete the transfer.
10. You will see a message saying "Transfer Successfully Shipped," and it should show up in your outbound transfer list with a *Date*.
11. The doses shipped to "VACCINE REPLACEMENT DUE TO BORROWING" are shipped back to the provider with the funding source reversed.

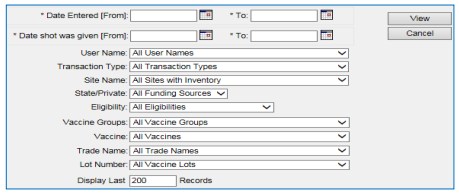
At that point, refer to the directions for **ACCEPTING YOUR STATE-SUPPLIED INVENTORY** (page 4) to accept the vaccine into your inventory.

All vaccine borrowing and replacement must be documented using a Borrowing and Replacement Form which must be kept on site for review by Branch Staff upon request. *See link at the top of this section*.

HOW TO VIEW NCIR TRANSACTIONS

Viewing a list of your organization's transactions may help you review use of NCIR by staff and identify doses that were not properly recorded.

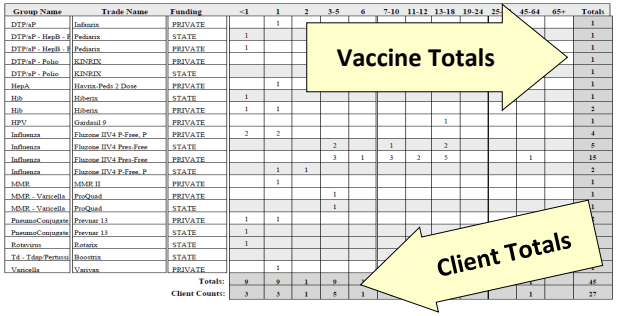
1. Click **Manage Inventory**.
2. Click the **Show Transactions** button.
3. Select the dates within which you would like to review transactions.
4. You may narrow your search using a number of factors, including *funding source, vaccine types, trade names, lot numbers*, etc.



5. Click **View**. Transactions will be displayed with a summary at the bottom of the page.

HOW TO VIEW VACCINE USAGE

1. Under the Inventory section, click **Request Vaccine Usage**.
2. Enter a date in the **From** and **To** text boxes.
3. Click Generate Report.
4. A report will be generated, allowing you to review your offices use of each private and public vaccine and the number of clients that you have vaccinated.



HOW TO ADD NEW USERS TO THE NCIR

Before a user may be added to the NCIR, they must have completed NCID registration (instructions on Page 1).

1. Click **Manage Users**.
2. Click **Add User**.
3. Type the *userID* into the box provided.
4. Click **Verify.**
5. Confirm that the personal information retrieved is correct for the user that you are adding.
6. Choose the **Role** for the user by clicking on the drop-down menu.
7. Click Save. You should see the message "User has been successfully saved."

NOTE: HIPAA-compliance requires that you ***ALWAYS*** *inactivate users when they are no longer at your practice.*

HOW TO ADD A CLINICIAN TO THE NCIR

1. *Click **Manage Clinicians**.*
2. *Click **Add Clinician**.*

3. *Choose the **Role** first:*

Clinician: anyone who administers vaccines.

Ordering Authority: MD, DO, PA, or NP that signs orders for vaccines to be administered

(continue to next page)

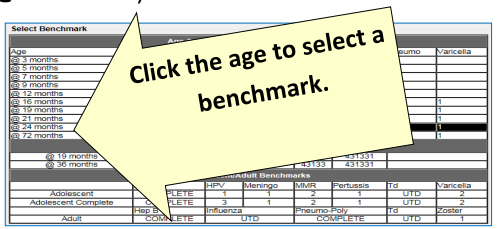
4. Enter the **Last** and **First Name**.
5. Choose **Credentials** from the drop-down menu.
6. Under the **Complete Site Listing** box click the name of the appropriate site and click **Add** to move it to the **Selected Site** box.
7. Address, phone, and e-mail are optional.
8. Click **Save**. You should see the message "Inserted clinician: Name."

NOTE: *Please remember to inactivate clinicians when they are no longer at your practice.*

HOW TO USE THE BENCHMARK REPORT

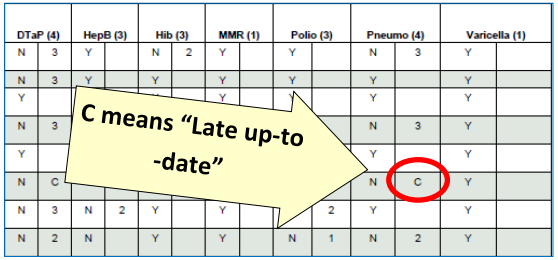
NCIR's Benchmark Report allows you to identify and contact patients who are not not up-to-date and completely protected from disease.

1. Under Reports, click **Benchmark Report**.
2. "**Clients Associated with**" and "**Clients who did NOT meet the benchmark**" are pre-selected.
3. Select the **Age or Birth Date Range** that you would like to review (e.g. 24-35 months or 13 to 18 years).
4. **Standard Assessment** is pre-selected.
5. Enter the current date as the **Evaluation Date**.
6. **Select Benchmark** by clicking on the age range that matches your selected age range (i.e. for 13-18 years, pick **Adolescent Complete** or for 24-36 months, pick **@24 months**).



7. Click **Generate**. You will be forwarded to the "*Benchmark Report Status*" page.
8. Click **Refresh**.
9. *Benchmark Report* will be displayed showing any pa-

REVIEWING BENCHMARK RESULTS

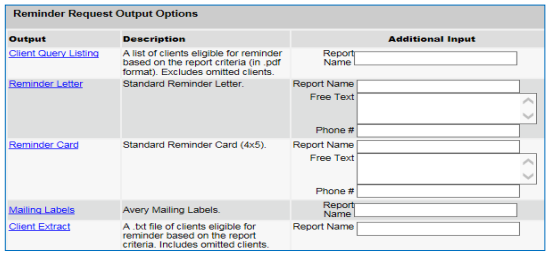


Any client who did not meet all of the Benchmarks, will appear on the report. Each vaccine column is split into two. The **first column** shows whether the client met the benchmark with a Y or a N. The **second column** shows how many doses the client has completed within the series. Zero doses show as blank. "C" means that the client received all doses after the benchmark age.

HOW TO USE THE REMINDER / RECALL REPORT

NCIR's Reminder/Recall Report allows you to generate letters for patients who are due or over due for vaccines. It can also be used to find eligible patients when your office has short-dated vaccine.

1. Under Reports, click **Request Reminder**.
2. Under "Indicate the Tracking Schedule …" select **Use Tracking Schedule Associated with Each Client.**
3. Under "Select the Vaccine Group(s) …" select the vaccine groups you wish to review by adding vaccines from the left column to the right or removing unneeded vaccines.
4. Selecting a School & Primary Care Provider or Additional Demographic Criteria are generally not needed.
5. Under "Enter the Date Criteria" enter your chosen **Birth Date Range**. Other options are available here to adjust report results.
6. Click **Generate**.
7. At the Reminder Request Status page, click **Refresh** to check the status of the report.
8. Once the report is complete, click the blue link in the **Started** column. A summary of the report results will be displayed.
9. Proceed to the **Reminder Report Output Options**.



10. Selecting **Reminder Letter** will generate a pdf file of letters addressed to parents encouraging them to return for needed vaccinations. Additional messages can be added in the **Free Text** box.
11. For more detailed client information, including a summarized immunization record and responsible person information, click the **Client Query Listing**.

ADDITIONAL RESOURCES

The NC Immunization Branch maintains a webpage with NCIR training resources for new and experienced staff at: *http://immunization.dph.ncdhhs.gov/providers/ncireducation.htm*

NCIR Help Desk: 1-877-USE-NCIR (873-6247) or *ncir-help@dhhs.nc.gov*

Each county has a **Regional Immunization Consultant** ready to assist with questions both simple and complex via phone, e-mail, and on-site training. You can find your Regional Immunization Consultant at the following website: *http://immunization.dph.ncdhhs.gov/contacts.htm*

A full NCIR User Manual is available at any time by clicking **System User Manual** in the upper left-hand column.

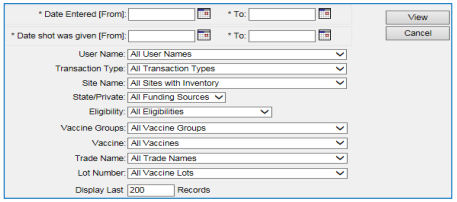
NCIR QUICK REFERENCE GUIDE: DATA EXCHANGE SUPPLEMENT

NOTE: Electronic health record (EHR) products vary. The North Carolina Immunization Branch is able to provide instructions for the use of the North Carolina Immunization Registry (NCIR), however in some cases, corrections must be made through your EHR. For such assistance, providers may need to contact their vendors directly.

REVIEWING IMMUNIZATION TRANSACTIONS

Providers utilizing a data exchange between their EHR and NCIR should regularly review their NCIR transactions to ensure that immunizations are being transmitted correctly.

1. Click **Manage Inventory**.
2. Click the **Show Transactions** button.
3. Select the date range within which you would like to review transactions.
4. You may narrow



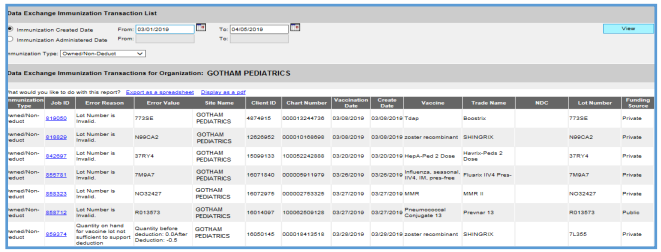
5. Click **View**. Transactions will be displayed with a summary at the bottom of the page.

The transaction report will look very similar to those generated prior to use of a data exchange system, except that the "User Name" column will say "**DATA EXCHANGE**" because no NCIR user is logged in when the vaccine is recorded. Seeing "DATA EXCHANGE" is a sign that data is coming over correctly, but providers should closely review the information to ensure that it is correct and that no vaccines are missing.

REVIEWING OWNED-NOT DEDUCTED (OND) DOSES

Owned Non-Deducted Doses—When NCIR receives vaccine details that do not match those in NCIR inventory the vaccine is noted on the patient record as having been given by your office (owned), but it does not deduct from inventory. These doses are designated as "Owned Non-Deducted" or OND. Such doses will cause inventory counts to be incorrect. NCIR allows providers to review OND doses at any time.

1. Click **dx imm transaction list**.
2. Select the **Immunization Created Dates** or **Immunization Administered Dates** to determine the timeframe for review.
3. Select whether to review **Owned Non-Deduct** doses or **Historical** doses.



ERROR REASON EXPLANATIONS

Lot Number Is Invalid: The most common reason for EHR details not matching NCIR Inventory are incorrect lot number, incorrect manufacturer, or incorrect funding source being selected. For most EHR systems, this can be corrected in the EHR, but some cases may require the user to log into NCIR, delete the error and log the correct dose directly into NCIR.

Quantity on hand for vaccine lot not sufficient to support deduction: Inventory in NCIR was at zero before submission of the dose, most likely due to a vaccine lot incorrectly recorded on a patient record or wasted in error. Once the error is corrected and the dose is returned to inventory resubmit the dose for correct deduction.

RXA Errors: Most RXA errors are the result of some required information being left out of the transaction. Most must be evaluated and corrected by the provider's EHR vendor.

REVIEWING PATIENT RECORDS IN NCIR

Data sent to a patient record can be reviewed in NCIR as needed.

1. Look up client history using Manage Immunizations.
2. Click on the "Edit" button for the shot you wish to review (the icon looks like a pencil and paper).

NOTE: If the shot did not deduct from inventory "**Owned Non-Deduct Immunization**" will appear in red on the Edit Immunization Screen.

3. Ensure that all information has populated correctly.
4. Click the "View Update History" button.

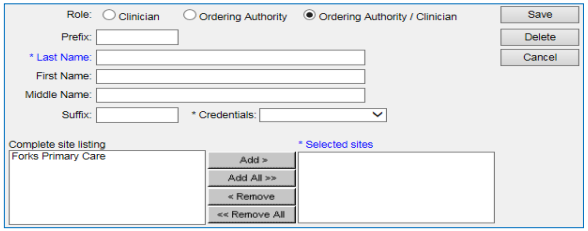
5. Clicking on the "Job ID" number will allow you to review the data sent to NCIR via data exchange.

HOW TO ADD A CLINICIAN TO THE NCIR

It is critical that the names of your clinical staff in the NCIR Clinician List match the names of the same individuals in your EHR. If names are missing or are not a correct match, this field will remain blank in the NCIR vaccination record, in violation of North Carolina's immunization rules. **This information must be checked every three months by providers utilizing the Data Exchange.**

NOTE: Clinicians are not the same as users. A clinician may be entered without being a user.

1. *Click **Manage Clinicians**.*



3. *Choose the **Role** first:*

Clinician: anyone who administers vaccines.

Ordering Authority: MD, DO, PA, or NP that signs orders for vaccines to be administered

4. Enter the **Last** and **First Name**.
5. Choose **Credentials** from the drop-down menu.
6. Under the **Complete Site Listing** box click the name of the appropriate site and click **Add** to move it to the **Selected Site** box.
7. Address, phone, and e-mail are optional.
8. Click **Save**. You should see the message "Inserted clinician: Name."

NOTE: *Please remember to inactivate clinicians when they are no longer at your practice.*