



Inventory User Guide

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For additional support, the following resources are available:

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CAIR Website: www.cairweb.org

Table of Contents

Manage Inventory	3
Adding New Inventory	3
Viewing Inventory	3
Updating Inventory	4
Changing Information for Existing Vaccines.....	4
Modifying the Quantity for Existing Vaccines	5
Modifying the Quantity for Multiple Vaccines	5
Inventory Alerts	6
Viewing Inventory Alerts	6
Updating Inventory Alerts Preferences	6
Inventory Transactions	7
Viewing Inventory Transactions	7
Printing Vaccine Transactions	8
Doses Administered	9
Doses Administered Report	9
Reports for VFC/317/SGF Providers	10
State-supplied Vaccine Report	10
State-supplied Flu Report.....	10
Vaccine Eligibility Reports	11

I. Manage Inventory

The Inventory Module in CAIR2 is designed to be a complete tracking system for a provider's vaccine inventory. Users have the ability to set up the inventory module for their organization and regularly view, add, or update any vaccine in an organization's inventory.

Adding New Inventory

Use the Add Vaccine function only if you are adding a vaccine with a new lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to "Updating Inventory".

1. Click **Manage Inventory** underneath "Inventory" from the menu panel.
2. Click the **Show Inventory** button.
3. Click the **Add Inventory** button.
4. On the "Add Vaccine Inventory Information" page, click a Vaccine Group. The Trade Name and Manufacturer drop-down menu will populate based on the Vaccine Group selection.
5. Select the NDC code from the drop down menu.
6. Select appropriate packaging from the drop down menu.
7. Enter Lot number in the Lot Number field.
8. Click the dose from the Dose Size drop-down menu.
9. Enter the vaccine lot's expiration date. Complete the field using the MM/DD/YYYY format.
10. Select the appropriate Funding Source from the Funding Source drop down.
11. Click **Yes** from the Lot Active drop-down menu. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on the drop-down menu on the Add Immunizations screen.
12. Enter the number of vaccines doses received in the Quantity on Hand text field.
13. If desired, Enter the cost per dose of the vaccine in the Cost Per Dose text field.
14. Click the **Save** button.
15. The message "Inventory was inserted successfully" appears at the bottom of the screen.
16. To add additional vaccines, repeat steps 4-11.

II. Viewing Inventory

To view your organization's vaccine inventory in CAIR2:

1. Click **Manage Inventory** underneath "Inventory" from the menu panel.
2. Click the **Show Inventory** button.

The inventory table is displayed by default and includes vaccines within your organization's CAIR2 Inventory Module. This list will include non-expired, expired, active, and inactive vaccines.

The following is a description of all options available:

- Active: Click the **Active** option to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module.
- Inactive: Click the **Inactive** option to view only those vaccine lots that have been set to inactive by a user or automatically inactivated due to no doses remaining.

- Non-Expired: Click the **Non-Expired** option to view any active or inactive inventory that has not yet expired.
- Expired: Click the **Expired** option to view any inventory that has expired.

Additional Information:

The red text in the Show Inventory page indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons, including; the inventory for that vaccine’s lot number may be used up; the vaccines in that lot may be expired; or the vaccines in that lot may have been recalled and set to inactive by a user. Vaccines on the Show Inventory page that are highlighted in pink will expire within 30 days.

The following is a description of the columns in the Inventory table:

Manage Inventory					
Add Inventory for Site (IR Physicians)....					Add Inventory
Modify Quantity On Hand for Selected Sites....					Modify Quantity
Show Transactions for Sites....					Show Transactions
Return to the Previous Screen....					Cancel

Site: IR Physicians ▾ Show <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Non-Expired <input type="radio"/> Expired					
Select	Trade Name	Lot Number	Inv On Hand	Active	Exp Date
<input type="checkbox"/>	ACAM2000	963582	129	Y	12/12/2011
<input type="checkbox"/>	Pediarix	123 new	1994	Y	01/01/2013

- Select: A checkmark in this box allows you to modify the quantity of the selected vaccine.
- Trade Name: Displays the vaccine’s trade name.
- Funding Source: Displays the Funding Source of the corresponding vaccine.
- Lot Number: Displays the lot number of the corresponding vaccine.
- Packaging: Displays the packaging of the corresponding vaccine.
- NDC: Displays the NDC code of the corresponding vaccine.
- Inv On Hand: Displays the number of doses remaining in the organization’s inventory.
- Active: A “Y” indicates the inventory is active. An “N” indicates the vaccine is inactive. Remember, inactive vaccines are displayed in red text.
- Exp Date: Displays the vaccine’s expiration date. Remember, vaccines that will expire in 30 days or less are highlighted in pink.

III. Updating Inventory

Changing Information for Existing Vaccines

1. Click **Manage Inventory** underneath “Inventory” from the menu panel.
2. Click the **Show Inventory** button.
3. Click the **Trade Name** of the vaccine you wish to update.

4. Make the desired changes to any field(s). Any changes made to a vaccine after a dose has been administered will update in the patient's record.
5. Click the **Save** button.

Modifying the Quantity of an Existing Vaccines

1. Click **Manage Inventory** underneath “Inventory” from the menu panel.
2. Click the **Show Inventory** button.
3. Click the **Trade Name** of the vaccine you wish to update.
4. In the “Action” drop-down menu, click whether you are adding or subtracting inventory on hand.
5. In the “Amount” field, enter the quantity of inventory to be added or subtracted.
6. In the “Reason” drop-down menu, click a reason for changing the quantity of the vaccine lot. See Table 1 below for a description of the various options for the Reason drop-down menu.
7. You can also enter specific details in the Reason Notes: section under the Reason drop down menu.
8. Click the **Save** button. A message displays “Inventory was updated successfully” at the bottom of the page.

Table 1—Reasons For Adding Or Subtracting Inventory

Drawn but not used	When subtracting vaccine is extracted but not administered to patient
Error correction	When adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial
Transfer In	When adding inventory to a particular lot because vaccines were transferred In from another site associated with your organization
Transfer Out	When subtracting inventory that has been transferred Out to another site associated with your organization
Doses Recalled by Manufacturer	When subtracting inventory that has been recalled
Doses Administered	When subtracting inventory due to giving dose(s) to a patient
Spoiled/Storage Issue by provider	When subtracting inventory due to vaccines spoiling prior to expiration
Lost or damaged in transit to Provider	When subtracting inventory due to broken vials or faulty injections that occurred when being delivered
Spilled/Broken	When subtracting inventory due to broken or spilled vaccine
Refrigeration failure reported by Provider	When subtracting inventory due to improper refrigeration
Lost or unaccounted for in Provider inventory	When subtracting inventory due to lost inventory
Other	When subtracting inventory due to other reasons not specified above

Modifying the Quantity of Multiple Vaccines

1. Click **Manage Inventory** underneath “Inventory” from the menu panel.
2. Click the **Show Inventory** button.
3. In the “Select” column, click the checkboxes next to all vaccine quantities you wish to update.
4. Click the **Modify Quantity** button.
5. In the “Action” drop-down menu, click whether you are adding or subtracting inventory on hand.
6. In the “Amount” field, enter the quantity of inventory to be added or subtracted.

7. In the “Reason” drop-down menu, click a reason for changing the quantity of the vaccine lot. See Table 1.1 above for a description of the various options for the Reason drop-down menu.
8. Do this for each vaccine lot you wish to modify.
9. Click the **Save** button. A message displays “Inventory was updated successfully” at the bottom of the page.

IV. Inventory Alerts

Inventory Alerts inform users of the status of their organization’s vaccine inventory. These lists are displayed on the Alerts home page and the Manage Inventory page. Alerts for vaccines that are going to expire and vaccines that are running low are initially generated by a default system setting; however these Alerts can be customized.

- The “Vaccine Order/Transfer Notification” table under Inventory Alerts displays the type of transfer, when it shipped, or whether awaiting return on a shipment. This would only pertain to transfers.
- The “Active Inventory that is Going to Expire or Expired Lots with a Quantity” table displays a list of vaccines in the Alerts Inventory Module that will expire within a set amount of days (30 is the default), as well as vaccines that have expired but still have quantity in inventory.
- The last two tables at the bottom of the page display inventory that is running low by either vaccine group or trade name (the default low level Alerts is 5 doses).

Viewing Inventory Alerts

Click **Manage Inventory** underneath “Inventory” from the menu panel.

Updating Inventory Alerts Preferences

1. Click **Manage Inventory** underneath “Inventory” from the menu panel.
2. Click the **Update Alerts Prefs** button.
3. Enter the number of days prior to the expiration of any vaccine lot that you would like to be notified.
4. Enter the number of doses that are preferred for low-level Alerts for all vaccine groups and/or trade names.
5. Click the appropriate radio button for Vaccine Group or Trade Name.
6. If you desire, enter the number of doses for each vaccine listed underneath “Update Low-Level Alert Defaults” to specify the low-level Alert settings by vaccine group.
7. Click the **Save** button. The message “Updated Alert Preferences” appears at the top of the page.

Inventory Expiration Alerts

The current system expiration default is **30 days**.

Notify me when a lot will expire within days.

Update Low-Level Alert Defaults

Selection grouping Vaccine Group Trade Name

The current system low level default is **5 doses**.

The custom organization low level default is doses.

Update Low-Level Alerts by Vaccine Group

(Click link to display all trade names for vaccine group.)

	Doses
DTP/aP	<input type="text"/>
HepB	<input type="text"/>
Polio	<input type="text"/>
Smallpox	<input type="text"/>
Td/Tdap	<input type="text"/>

V. Inventory Transactions

Viewing Inventory Transactions

The Show Transactions page is used to display vaccine lot track records for all quantity-changing events that occur within a provider organization's inventory. Read below to learn about running an inventory transaction report.

1. Click **Manage Inventory** underneath "Inventory" from the menu panel.
2. Click the **Show Transactions** button.
3. On the Vaccine Transactions page, do the following:
 - a. Enter the **From** and **To** dates for when the immunizations were entered into CAIR or enter the **From** and **To** dates for when the immunizations were given to the patient(s).
 - b. Click a specific user name or all user names from the User Name drop-down menu.
 - c. Click a specific transaction type or "All Transaction Types". See Table 2 below for a description of transaction types.
 - d. Click the inventory site whose transaction you wish to view or "All Sites with Inventory".
 - e. Click the trade name, lot number, and site from the "Trade Name/Lot Number" drop-down menu or click "All Lot Numbers".
 - f. Enter the quantity of records you wish to view in the "Display Last" field.
 - g. Click the **View** button. The Vaccine Transaction screen displays.

Table 2—Transaction Types

Drawn But Not Used	Indicates vaccine was drawn but not administered to patient
Error Correction	Indicates vaccines were added or subtracted to correct a previous error or after getting extra or fewer doses from a vial
Spilled/Broken	Indicated vaccines were deleted due to being spilled or broken
Immunization deleted	Indicates vaccines were added to inventory because they were deleted from a patient's record
Immunization given	Indicates vaccines were subtracted from inventory because of immunizations given
Doses Recalled by Manufacturer	Indicates vaccines were subtracted due to recall
Doses Administered	Indicates vaccines were subtracted due to giving dose(s) to a patient
Spoiled/Storage issue by Provider	Indicates vaccines were subtracted due to vaccines spoiling prior to expiration
Expiration reported by Provider	Indicates vaccines were subtracted due to vaccines expiring
Lost or damaged in transit to Provider	Indicates vaccines were subtracted due to broken vials or faulty injections that occurred when being delivered
Failure to store properly upon receipt by Provider	Indicates vaccines were subtracted due to improper storage
Lost or unaccounted for in Provider inventory	Indicates vaccines were subtracted due to lost inventory
Other	Indicates vaccines were subtracted due to other reasons not specified above
Transfer In	Indicates vaccines were added to inventory after being returned from another site associated with your organization
Transfer Out	This type indicates vaccines were subtracted due to transfer to another site associated with your organization
Borrowed Imm Given	Indic
Expired Doses Transferred	
Lot Deleted	Indicates lot has been deleted but no vaccines administered
Refrigeration failure reported by Provider	Indicates vaccines were subtracted due to improper refrigeration
Reconstitute	Indicates that a number of doses were subtracted from an un-reconstituted lot to form a new reconstituted lot
Doses Received	Indicates vaccines were added as new inventory

Printing Vaccine Transactions

1. Click **Manage Inventory** underneath “Inventory” from the menu panel.
2. Click the **Show Inventory** button.
3. Click anywhere on the page.
4. Print the page according to your system’s print settings.

VI. Doses Administered

Doses Administered Report

The Doses Administered Report will provide information to doses administered during a selected time period for a specified funding source. To generate the report, follow these steps:

1. Click the Doses Administered link under the Inventory section of the menu panel.

Doses Administered Report Criteria

Funding Source: Generate Report

Report Date Range:

* From * To

2. Select the appropriate funding source from the drop down menu.
 - a. VFC – Vaccine for Children
 - b. 317 - 317 Eligible: LHD or HDAS Only
 - c. SGF – State General Fund Eligibility
 - d. PVT – Private
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Click the **Generate Report** button.
6. The report will generate and provide a summary broken down by age group plus a detailed listing of the doses administered and to whom.

Date Report Generated: 08/22/2016
 Report Title: Doses Administered
 Filters: IR Physicians
 Detail of Summary: Detail
 Date Range: 08/01/2016 to 08/22/2016
 Funding Source: All

Vaccine	Age Group (months)				Unique Clients
	<1	1 to 6	7 to 18	19+	
DTP/aP	0	6	2	0	8
HPV	0	2	31	0	33
HepA	4	0	21	5	30

Included in the detailed listing is the following information. Data Administered, Vaccine Group, CAIR ID, Patient Name, DOB, Lot #, Expiration, Trade Name, Funding Source and Patient Eligibility.

7. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

VII. Reports for VFC/317/SGF Providers

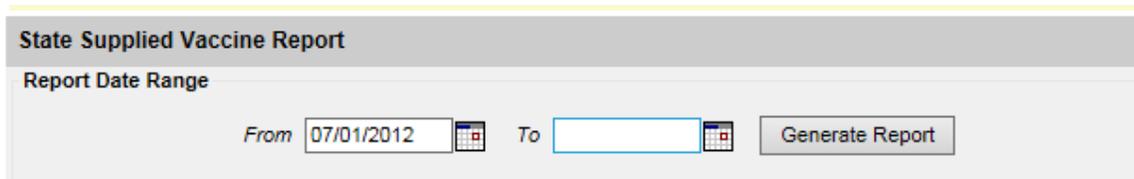
State Supplied Vaccine Report

The State- supplied Vaccine report helps streamline vaccine ordering by providing both the doses administered (during the date range you enter) and doses available (as of the time you run the report) for State-supplied vaccines in CAIR2 (VFC, 317, State General Fund).

If your clinic provides VFC vaccine, the doses of VFC vaccine administered will display in the column titled 'VFC'. If your clinic provides 317 vaccine, the doses of 317 vaccine administered will display in the column titled '317' and will show the breakdown in two age groups: 18 and under and 19+. If your clinic provides State General Funded vaccine, the doses of 317 vaccine administered will display in the column titled 'State General Funding'.

To generate the State Supplied Vaccine Report:

1. Click **state supplied vaccine report** under the Reports section of the menu panel.

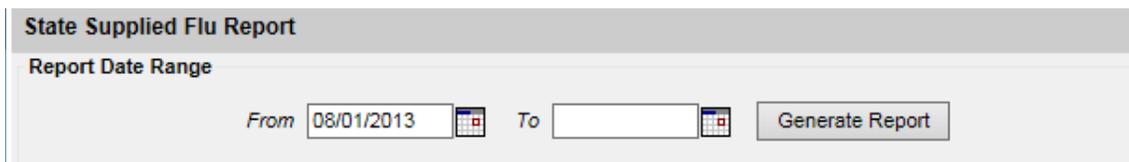


2. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
3. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
4. Click the **Generate Report** button.
5. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
6. Click the **OK** button in the Print dialog box. To return to the Vaccines for Children Report Criteria screen, click the Back button on your browser.

State Supplied Flu Report

The State-supplied Flu report will provide a summary of flu doses administered by age range, by vaccine type and lot number of all active vaccine in inventory during the time period selected. XXXXX. To generate the state supplied Flu Report:

1. Click **state supplied flu report** under the Reports section of the menu panel.

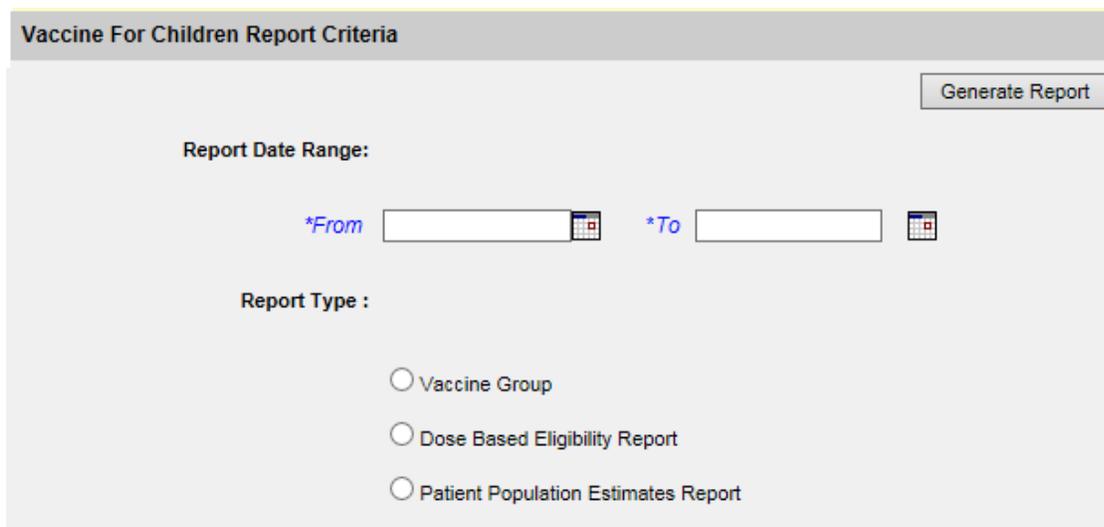


2. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
3. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
4. Click the **Generate Report** button.
5. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
6. Click the **OK** button in the Print dialog box. To return to the Vaccines for Children Report Criteria screen, click the Back button on your browser.

Vaccine Eligibility Report

The Vaccine Eligibility Reports detail the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. There are three different types to choose from. To generate a Vaccine Eligibility Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.



The screenshot shows a web form titled "Vaccine For Children Report Criteria". At the top right is a "Generate Report" button. Below it is the "Report Date Range:" section, which includes two text input fields labeled "*From" and "*To", each with a calendar icon to its right. Underneath is the "Report Type :" section, which contains three radio button options: "Vaccine Group", "Dose Based Eligibility Report", and "Patient Population Estimates Report".

2. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
3. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
4. Choose a type of VFC Report to run. You have three choices:
 - a. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups
 - b. The Dosed Based Eligibility Report displays the number of doses given by your site.
 - c. The Patient Population Estimates Report displays the total number of unique patients immunized by your site.
5. Click the **Generate Report** button.
6. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
7. Click the **OK** button in the Print dialog box. To return to the Vaccines for Children Report Criteria screen, click the Back button on your browser.