

Move or Share Vaccine Inventory

Last Modified on 12/14/2021 10:04 am EST

Version 20.15

About

There may be instances where vaccine inventory may be moved between office locations due to a location no longer having the vaccine in inventory. In addition, an entire vaccine lot may need to be moved due to an error in the entry of the inventory location.

Move a Vaccine Lot

1. Navigate to Manage Vaccine Inventory: **Practice Management tab > Manage vaccine inventory.**
2. Click the **Location** drop-down and select the location where the vaccine lot is currently entered.
3. In the grid, locate the vaccine lot and click the **edit** button.
4. In the **Practice location** field, click the drop-down and select the correct location of the vaccine lot.
5. Click the **Save** button.
6. Confirm that the vaccine lot has been moved by clicking the **Location** drop-down and selecting the location where the vaccine lot should be found.

Share Vaccine Inventory


1. Navigate to Manage Vaccine Inventory: **Practice Management tab > Manage vaccine inventory.**
2. Click the **Location** drop-down and select the location where the vaccine lot is currently entered.
3. In the grid, locate the vaccine lot and click the **Edit** button.
4. Deduct the amount from the **Total doses in lot** field. For example, if the original number of doses was 60 and you are transferring 10 to another office location, the total doses would be changed to 50.
5. In the **Notes** field, enter the explanation for the change.
6. Click **Save**.
7. Add the inventory to the office location where the inventory is transferred. Click [here](#) for information on how to add vaccine inventory.

Version 20.14

Overview

There may be instances where it is necessary to take vaccine inventory from one office location and move it to another office location. You may wish to move an entire vaccine lot due to an error in entry or move a vaccine lot due to an office location no longer having the vaccine in stock.

Move a vaccine lot to a different location, no vaccines administered

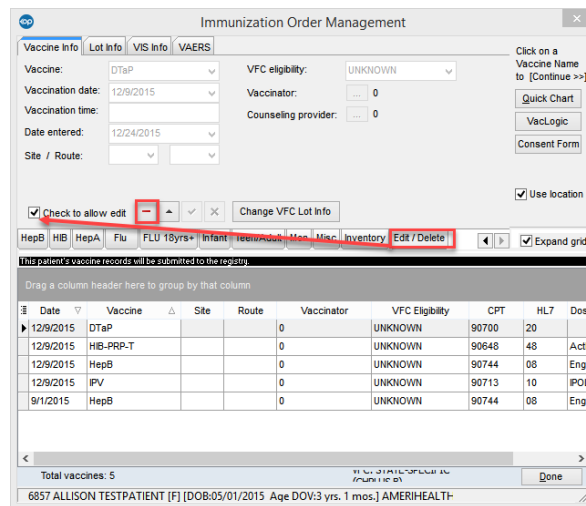
1. Click **Activities** on the main menu.
2. Click **Maintain Vaccine Inventory.**
3. Click **Location** dropdown arrow and select the location where the vaccine lot is currently entered.
4. In the grid, locate the vaccine lot. Click the **ellipse** button  to edit.
5. In the **Practice location** field, click the dropdown arrow and select the correct location of the vaccine lot.
6. Click the **Save** button.
7. Confirm that the vaccine lot has been moved by clicking the **Location** dropdown arrow.
8. Select the location where the vaccine lot should be found.

Move a vaccine lot to a different location, vaccines administered



Note: If vaccines were administered at the incorrect office location, you are required to correct the error. This can occur if the vaccine was originally entered in inventory at the incorrect office location or the incorrect location was chosen during the login.

1. Click **Activities** on the main menu.
2. Click **Maintain Vaccine Inventory**.
3. Click the **Location** dropdown arrow and select the location where the vaccine lot is currently entered.
4. Click the **Lot #** button to generate and print a report of the patients receiving the vaccine associated to the incorrect location.
5. For each patient on the list, do the following:
 - a. Click the **Chart** button on the Smart Toolbar and search for the patient.
 - b. Click the **Immunizations** tab.
 - c. Click the **Enter Immunization** button.
 - d. Highlight the vaccine to delete from the grid.
 - e. Click the **Edit/Delete** tab.
 - f. Select the **Check to allow edit** checkbox . Write down all detail in the top panel. This will be used to reenter the vaccine.
 - g. Click the **Delete** button.
 - h. Click **OK** to confirm the deletion.



- i. In the Audit Trail window, enter the reason for deleting the record or click the dropdown arrow and select a reason from the list.
- j. Repeat the above steps for all patients on the Lot # report.



Note: All deleted vaccines will be added back into the inventory. This will allow for reentry at the correct location.

6. From the **Maintain Vaccine Inventory**, click the **ellipse** button to edit.
7. Click the Practice location dropdown arrow button and select the correct location.
8. Click **Save**.
9. From the patient chart, reenter the vaccines administered by following the steps below:



Note: Before proceeding, confirm you have the correct location selected by viewing the location field on the Main Menu bar. If not correct, click the drop down arrow and select the location.

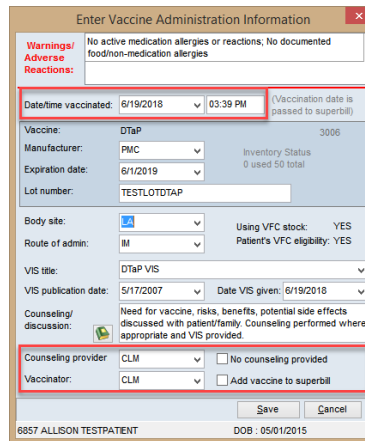
- a. Click the **Chart** button on the Smart Toolbar.
- b. Search for and select the patient.
- c. Click the **Immunizations** tab
- d. Click the **Enter Immunization** button.

- e. Click the **Inventory** tab.
- f. Double click on the vaccine in the top panel
- g. Complete the **Enter Vaccine Administration Information** window.



Note: Use the information from the details you recorded in the delete process, this includes: Date/time vaccinated, body site, Counseling provider and Vaccinator.

- h. Deselect the **Add vaccine to superbill** checkbox if the vaccine has been billed.
- i. Click **Save**.



- j. Complete the above process for all patient vaccines that were previously deleted.



Note: It is recommended you count the inventory once all vaccines have been reentered to ensure you completed the process correctly.

Inventory sharing between locations

1. Click the **Activities** button in the Smart Toolbar.
2. Select **Maintain Vaccine Inventory**.
3. In the grid, locate the vaccine lot to deduct in the vaccine inventory and click the **ellipses** button.
4. Deduct the amount from the Total doses in lot field. For example, if the original number of doses was 60 and you are transferring 10 to another office location, the total doses would be changed to 50.
5. In the **Notes** field enter the explanation for the change.
6. Click **Save**.
7. Add the inventory to the office location where the inventory is transferred. Click [here](#) for information on how to add vaccine inventory.