



# How to Balance Inventory

MCiR Vaccine Inventory Module (VIM)

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Produced by the MPHI-Interactive Solutions Group  
on behalf of the  
Division of Immunization  
Michigan Department of Community Health

## MCiR VIM background

- New in April 2008
- Required for Michigan Vaccines For Children (MI-VFC) providers to manage inventory
- VFC providers go-live schedule based on Tier Ordering Frequency (monthly, bimonthly, or quarterly) assigned by their Local Health Department

## MCIR VIM trainings

- Provided by regional MCIR staff
  - [www.MCIR.org/contact\\_regions.html](http://www.MCIR.org/contact_regions.html)
- Tip sheets available at
  - [www.MCIR.org/SuperVIM.html](http://www.MCIR.org/SuperVIM.html)

## VIM = Vaccine Mgmt

The screenshot displays the Michigan Care Improvement Registry (MCIR) website. At the top, there are logos for MICHIGAN DCH and Michigan.gov. The main navigation area is divided into several sections:

- Person:** Add/Find, Roster
- Reports:** Batch, Retrieve Results, Roster, Profile, VAERS, VFC
- Vaccine Mgmt:** Manage Inventory, View Inventory History, Doses Administered, Create Reports, Access Reports
- Reminder/Recall:** Create Reminder, Create Recall, Retrieve/Confirm Results, Create Reports, Access Reports
- My Site:** Site Preferences, User Preferences, Edit My Site, View My Site List, Go to New Site
- Administration:** Add/Find User
- Other:** Get News, View Usage Agreement, MCIR Training Course, MCIR.org, VIS, IVEN, Exit Application

## Four steps

1. Print the Physical Inventory Report
2. Refrigerator count
3. Make sure all immunization data is entered into MCIR
4. Balance Inventory in the MCIR VIM

## 1. Print the Physical Inventory Report

- Login to MCIR
- Click the Create Reports link (under **Vaccine Mgmt/VIM**)
- Select:
  - Report: Physical Inventory Report
  - Inventory: VFC or Private
  - Description: type a report description (VFC or Private)
- Click the Submit button
- Click Access Reports (under **Vaccine Mgmt/VIM**)
- Click Report to view in Adobe Reader and print
- Run and print this report for each (VFC/Public, Private) inventory

## 2. Refrigerator count

- Do at end of the clinic day
- Count the number of doses for your inventories
  - Remember to count vaccines in the freezer (MMRV, Varicella, Zoster)
  - Write the number of doses on the appropriate (VFC/Public or Private) Physical Inventory Report

## 3. Make sure all immunization data is entered into MCIR

This includes:

- Entered directly (and correctly!) into MCIR
  - ***MCIR VIM Tip Sheet #3: Adding Immunizations***
- Transferred into MCIR from your office's Electronic Medical Record (EMR)
- Lost and Wasted vaccines
  - ***MCIR VIM Tip Sheet #2: Manage Inventory***
    - Adding Transactions to Lots

## 4. Balance Inventory in the new MCIR VIM

- Assign one person to complete the Balance Inventory for your office
  - Login to MCIR
  - Click Manage Inventory
  - Default inventory (VFC/Public or Private) will appear
  - Click Balance Inventory in upper-right hand corner

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### Balance Inventory - VFC/Public

Person	Reports	VIM	Rem/Rcl	My Site	Admin	Sch/CC	Other
<a href="#">Manage Inv</a>	<a href="#">Inv Hist</a>	<a href="#">Doses Admin</a>	<a href="#">VIS</a>	<a href="#">Create Reports</a>	<a href="#">Access Reports</a>		

[Manage Inventory](#)

**Balance Inventory Details** Last balanced on 04/20/2008

Inventory: **VFC/Public**      VFC Pin: 080005      Total Lots: 8

Balance inventory as of:             Balanced Lots: 7

Lots to Balance: 1

Vaccine	Mfr	Lot #	On Hand	Count	Diff	LWB	
DT (pediatric)	sanofi (DT)	U2105AA	10	<input type="text" value="10"/>	0	0	<a href="#">View</a>
DTaP	Glaxo (INFANRIX)	1234567	0	<input type="text" value="0"/>	0	-2	<a href="#">View</a>
DTaP-Hep B-IPV	Glaxo (PEDIARIX)	765432	39	<input type="text" value="39"/>	0	0	<a href="#">View</a>
Hep B (ped/adol)	Merck (RECOMBIVAX)	215412	23	<input type="text" value="23"/>	0	1	<a href="#">View</a>
HPV, quadrivalent	Merck (GARDASIL)	8795544	94	<input type="text" value="94"/>	0	5	<a href="#">View</a>
Influenza - split	Glaxo (FLUARIX)	21541	15	<input type="text" value="14"/>	1	5	<input type="button" value="Balance"/>
IPV	sanofi (IPOL)	AC33325	14	<input type="text" value="14"/>	0	1	<a href="#">View</a>
MMRV	Merck (PROQUAD)	123456	50	<input type="text" value="50"/>	0	0	<a href="#">View</a>

## Balance Inventory screen

- Enter date of refrigerator count in “Balance as of” box, click Get Records button
- Enter refrigerator counts into Count column
- **Double-check entries**
- Click Save/Update Counts button
  - Balanced lots = View link
  - Unbalanced lots = Balance button
- Repeat the previous steps for your other (VFC/Public or Private) inventory

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**Lot Reconciliation - VFC/Public**

<b>Person</b>	<b>Reports</b>	<b>VIM</b>	<b>Rem/Rcl</b>	<b>My Site</b>	<b>Admin</b>	<b>Sch/CC</b>	<b>Other</b>
Manage Inv	Inv Hist	Doses Admin	VIS	Create Reports	Access Reports		

Balance Worksheet
Inventory Detail

Lot Information		Expires	Volume/Dose:
Vaccine	Influenza - split	06/30/2008	0.5
Mfr (Product)	Glaxo (FLUARIX)	Lot # 21541	On Hand: 15
NDC	00007-0874-46	Presentation SYR (5)	
		Lot Status Active	

Lot details for inventory	Totals	LWB	Returned
Balance forward from 04/20/2008	20	0	
<b>Additions to inventory</b>	<b>0</b>		
<i>No additions to inventory found</i>			
<b>Subtractions from inventory</b>	<b>5</b>		
Breakage	4	4	
Lost	1	1	
<b>Totals Ending 05/30/2008</b>	<b>15</b>	<b>5</b>	<b>0</b>

Balance Summary			
MCIR Total		15	5
Refrigerator count		-14	
Adjustment needed		-1	1
<b>Ending Balance</b>		<b>0</b>	<b>6</b>

Inventory Detail

## Reconciling unbalanced lots

- Add transactions to unbalanced lots
  - Refer to **MCIR VIM Tip Sheet #2: Manage Inventory**
    - Adding Transactions to Lots
- **Important: Make sure any transactions added for balancing are dated *on or before the refrigerator count date***

## Lot Transactions screen

**Lot Transactions - VFC/Public** [Print Help](#)  
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<b>Person</b>	<b>Reports</b>	<b>VIM</b>	<b>Rem/Rcl</b>	<b>My Site</b>	<b>Admin</b>	<b>Sch/CC</b>	<b>Other</b>
Manage Inv	Inv Hist	Doses Admin	VIS	Create Reports	Access Reports		

[Balance Worksheet](#) [Lot Reconciliation](#)

Lot Information					
<b>Vaccine</b>	Influenza - split	<b>Expires</b>	06/30/2008	<b>Volume/Dose:</b>	0.5
<b>Mfr (Product)</b>	Glaxo (FLUARIX)	<b>Lot #</b>	21541	<b>On Hand:</b>	15
<b>NDC</b>	00007-0874-46	<b>Presentation</b>	SYR (5)	<b>Lot Status</b>	Active

Date	Transaction Log	Qty	LWB	Comments
<a href="#">Add New Transaction</a>				
05/30/2008	<b>Current Balance</b>	15	5	
04/23/2008	Lost	-1	1	Lost
04/23/2008	Breakage	-1	1	breakage
04/21/2008	Breakage	-3	3	oops!
04/20/2008	<b>Balance Forward</b>	20	0	

## Tips for reconciliation

- Is all immunization administration data reported to MCIR for your provider site?
  - Double-check that data entry was not missed
  - Double-check that data was entered accurately
    - Use [Doses Administered](#) link to query
- Are all lost and wasted immunizations accounted for in MCIR?
- Was the refrigerator count accurate?
  - Check the “other” inventory (VFC/Public or Private) for misplacement of VFC/Public vs. Private vaccine stock
  - Do a recount if necessary

## Completing the balance

- **The day following the refrigerator count date** -- once all lots are balanced -- the Completed button will be available on the Balance Inventory screen
  - Click on it to finish the balance for this (VFC/Public or Private) inventory
  - Repeat for the other (VFC/Public or Private) inventory
- To view a summary of your completed counts, click the [Inventory History/Inv Hist](#) link (found under the **Vaccine Mgmt/VIM** menu)

# Ending Inventory Report

- Click the [Create Reports](#) link (under **Vaccine Mgmt/VIM**)
- Select:
  - Most recent Ending Inventory Date
  - Report: Ending Inventory Report
  - Inventory: VFC or Private
  - Description: type a report description
- Click the Submit button
- Click [Access Reports](#)
- Click [Report](#) to view in Adobe Reader and print
- Run and print this report for each (VFC/Public, Private) inventory

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## Ending Inventory Report

Page 1

Your Provider Site (Your VFC PIN)

Report Period Ending Date **05/30/2008**

DTaP											
Doses											
Lot Number	Expiration Date	Begin Balance	Doses In	Doses Out	Unusable	Ending Balance	Total Admins	Recon	Total Admins and Dist	Computed Balance	Diff
1234567	06/10/2008	49	1	50	0	0	0	0	50	0	0
<b>TOTAL</b>		49	1	50	0	0	0	0	50	0	0

Hep B (ped/adol)											
Doses											
Lot Number	Expiration Date	Begin Balance	Doses In	Doses Out	Unusable	Ending Balance	Total Admins	Recon	Total Admins and Dist	Computed Balance	Diff
215412	11/10/2010	0	50	25	0	24	1	0	26	24	0
<b>TOTAL</b>		0	50	25	0	24	1	0	26	24	0

HPV, quadrivalent											
Doses											
Lot Number	Expiration Date	Begin Balance	Doses In	Doses Out	Unusable	Ending Balance	Total Admins	Recon	Total Admins and Dist	Computed Balance	Diff
8795544	04/01/2010	0	100	0	5	94	1	0	1	99	-5
<b>TOTAL</b>		0	100	0	5	94	1	0	1	99	-5

## VFC Doses Administered Report

- Click the VFC link (under **Reports**)
- Select:
  - VFC Doses Admin Report
  - The Start and End dates should match the ending inventory dates.
  - The Vaccine Purchase Type should be MI-VFC Funds.
  - Name the report and click the Submit button.
- Click Retrieve Results
- Click Report to view in Adobe Reader and print
- Run and print this report for each (VFC/Public, Private) inventory

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### VFC Doses Admin Report

Page 1

Your Provider Site (Your VFC PIN)

**Report Period: 05/01/2008 - 05/30/2008**

Provider Type: Public

VFC Pin: 123456

Funding Type: MI-VFC Funds

Hep B (ped/adol)												
<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Total
0	0	0	1	0	0	1	0	0	0	0	0	2

HPV, quadrivalent												
<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Total
0	0	0	0	0	0	0	1	0	0	0	0	1

Influenza - split												
<1	1	2	3-5	6	7-10	11-12	13-18	19-24	25-44	45-64	65+	Total
0	0	0	0	0	0	1	0	0	0	0	0	1

## Questions

- MI-VFC enrollment, ordering, storage and handling
  - Contact your Local Health Department (LHD) Immunization Action Plan Coordinator. LHD contact information is online at:
    - [www.malph.org/page.cfm/108](http://www.malph.org/page.cfm/108)
  
- MCIR VIM training & support
  - Training materials online at [www.mcir.org/SuperVIM.html](http://www.mcir.org/SuperVIM.html)
  - Regional MCIR office contact information is online at:
    - [www.mcir.org/contact\\_regions.html](http://www.mcir.org/contact_regions.html)
  
- Centralized Vaccine Ordering and Distribution (COD) updates from MDCH
  - Online at [www.michigan.gov/vfc](http://www.michigan.gov/vfc)