MCIR VIM Tip Sheet: Balance Inventory for Hospital Pharmacy Universal Hepatitis B

The inventory must be balanced prior to placing an order.

- Use the following five steps as a guide:

1. Creating and Printing the MCIR Physical Inventory Report
2. Performing Refrigerator Counts
3. Recording Dose Counts
4. Reconciling Lots
5. Creating and Printing the MCIR Ending Inventory Report

Step 1. Creating and Printing the MCIR Physical Inventory Report

Go to the Reports menu/tab:

MCIR Home Page screen with Reports: Inventory and Retrieve Results links

- Click the Inventory/Inv link (see above)

Inventory Reporting screen

- Select Physical Inventory Report
• Choose the Inventory (VFC/Public)
• Fill in the Description by overwriting the description for the report to allow for easier identification later.

Inventory Reporting screen: Physical Inventory Report

• Click the Reports tab, next click the Retrieve Results link. You will be taken to the Scheduled Results menu.

Scheduled Results screen: Retrieve Report

• Click the Report link to view and print the report(s). The Physical Inventory Report is used to perform a refrigerator count of all vaccines on hand.
**Step 2. Performing Refrigerator Counts**

Write down the “Date of dose count” on your Physical Inventory Report. Use the “Count” column of your printed Physical Inventory Report (see Step 1) to write down the number of doses on hand for each Inventory, Lot, and Presentation.

**Physical Inventory Report**

**Step 3. Recording Dose Counts**

Log into MCIR. Click the Manage Inventory link. Choose the VFC Manage Inventory screen. Click the Balance Inventory link in the upper-right-hand corner. This takes you to the Balance Inventory screen for that Inventory.
Note: only one designated person per Provider Site should be working in the MCIR Balance Inventory screen at any given time. This ensures that the correct version of the balance inventory is recorded.

On the Balance Inventory screen:

1. Enter the “Dose Count Date” date as the date you recorded on the Physical Inventory Report as the “Date of refrigerator count.”
2. Click the Get Records button to refresh the On Hand column of this screen with what has been entered into MCIR as of that date.
3. Refer to your Physical Inventory Report. Enter the dose counts for each lot into the boxes under the Count column. Double-check your entries for accuracy.
4. When finished entering Counts, click the Save/Update Counts button at the bottom of the screen.
5. The “Diff” column will show the difference between what is recorded in MCIR as On Hand and your entered Count.
   - Lots that do not balance will have the Balance button available. Refer to “Step 4: Reconciling unbalanced lots” for instructions on how to balance these lots.
   - Lots that balance will have the View link available.
6. Once all lots are balanced, and it is the day after the “Balance as of” date, the Completed button will be available at the bottom of the Balance Inventory screen. Click on it to complete the balance for this VFC inventory.
Step 4. Reconciling Unbalanced lots

After entering your refrigerator counts and clicking the **Save/Update Counts** button, a **Balance** button will be to the right of a lot on the Balance Inventory screen. The lot must be balanced. Click the **Balance** button to view the Lot Reconciliation screen.

The number of doses in your refrigerator and the MCIR Totals are not matched/the same they are off by 25 doses. An Adjustment must be made. Click Inventory Detail.

All transaction types since the last Ending Inventory are summarized on this screen. To view all activity from this lot that is not balanced, click on the **Inventory Detail** link (upper-right) or button (bottom) of this screen.
How to make adjustments to the inventory.

This brings you to the Lot Transactions-VFC/Public screen. How to do adjustments describes and shows the effects of the different inventory transactions that are available. For Hospital Universal HepB Pharmacies, please ONLY choose the following:

1. **Lot Transaction screen: Add New Transaction**
   - Click on Add New Transactions.

2. **Add Vaccine Lot Transaction - VFC/Public**
   - **Date**: Enter Date of Transaction (be sure the date is within your last balance date and your new balance date)
   - **Doses**: Enter number of doses you are correcting (in this case 25)
   - **Action**: Adjustment
   - **Reason**: Data Entry Correction
   - **Inventory Effect**: Subtract
   - **LWB Effect**: N/A
   - **Comment**: You must add comments for this transaction, i.e., Fridge count is 325

Add Vaccine Lot Transaction: Add Adjustment

- **Date**: Enter Date of Transaction (be sure the date is within your last balance date and your new balance date)
- **Doses**: Enter number of doses you are correcting (in this case 25)
- **Action**: Adjustment
- **Reason**: Data Entry Correction
- **Inventory Effect**: Subtract
- **LWB Effect**: N/A
- **Comment**: You must add comments for this transaction, i.e., Fridge count is 325
Step 5. Creating and Printing the MCIR Ending Inventory Report

To create the Ending Inventory report for VFC Inventory:

- Go to the Reports link.
- Click the Inv/Inventory link.
- Select from the dropdown box “Ending Inventory Report”.
- Choose the Inventory (VFC).
- Choose the Ending Inventory Date from the dropdown box.
- Type a descriptive name for your report (See above Ending Inventory with date).
- Click the Submit button. You will be taken back to the MCIR Home screen.

(Repeat the above steps if you need to create this report for your other Inventory.)

- Click Reports/Retrieve Results link.
- Click the Report link to view and print the report(s). See below for an example of the report.

Send a copy of your VFC/Public Ending Inventory Report to your local health department and keep a copy for your office’s internal records.
Ending Inventory Report

Pams Testing Universal HepB (123456)

Inventory: VFC/Public

Report Period Ending Date 03/15/2011

<table>
<thead>
<tr>
<th>Lot Number</th>
<th>Expiration Date</th>
<th>Begin Balance</th>
<th>Doses In</th>
<th>Doses Out</th>
<th>Admins</th>
<th>Brwd/Rplcd</th>
<th>Unsuitable</th>
<th>Balance</th>
<th>Dose Count</th>
<th>Diff</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567</td>
<td>01/12/2012</td>
<td>0</td>
<td>325</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>325</td>
<td>325</td>
<td>0</td>
</tr>
<tr>
<td>ABCV1234</td>
<td>12/13/2012</td>
<td>0</td>
<td>300</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>300</td>
<td>300</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td>0</td>
<td>625</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>625</td>
<td>625</td>
<td>0</td>
</tr>
</tbody>
</table>

Ending Inventory Report Example

Contact your Regional MCIR helpdesk for assistance with VIM

Please contact your local health department if you have concerns about public vaccines.

REGION 1 City of Detroit; Livingston, Macomb, Monroe, Oakland, St. Clair, Washtenaw, and Wayne Counties
  • 1-888-217-3900

REGION 2 Allegan, Berrien, Branch, Calhoun, Cass, Hillsdale, Ionia, Jackson, Kalamazoo, Kent, Lenawee, Muskegon, Ottawa, St. Joseph, and Van Buren Counties
  • 1-888-217-3901

REGION 3 Barry, Clinton, Eaton, Gratiot, Ingham, and Montcalm Counties
  • 1-888-217-3902

REGION 4 Bay, Genesee, Huron, Lapeer, Midland, Saginaw, Sanilac, Shiawassee, and Tuscola Counties
  • 1-888-217-3903

REGION 5 Alcona, Alpena, Antrim, Arenac, Benzie, Charlevoix, Cheboygan, Clare, Crawford, Emmet, Gladwin, Grand Traverse, Iosco, Isabella, Kalkaska, Lake, Leelanau, Manistee, Mason, Mecosta, Missaukee, Montmorency, Newaygo, Oceana, Ogemaw, Oscoda, Osceola, Otsego, Presque Isle, Roscommon, and Wexford Counties
  • 1-888-217-3904

REGION 6 Alger, Baraga, Chippewa, Delta, Dickinson, Gogebic, Houghton, Iron, Keweenaw, Luce, Mackinac, Marquette, Menominee, Ontonagon, and Schoolcraft Counties
  • 1-888-217-3905