EVI: Procedures Day 1

**Important:** In order to print reports in EVI, you must have Crystal Reports installed on your computer. You can find the instructions on how to install this software by going to the Texas Vaccines for Children website located: Immunization Branch, Texas Vaccines For Children (TVFC) and scrolling down to the bottom of the website under: Training & Education: Electronic Vaccine Inventory (EVI) and print off the file entitled: Crystal Report Add-on August 10, 2012.

After October 1, 2012:
The first time you log into EVI, it will require you enter and save your days/hours of operation in which staff is available to receive and store vaccines.

**Instructions for entering days/hours of operation:**

1. *Hours of Operation* is not designated as AM or PM; therefore, you must use military time. For example, if your office is open on Mondays 8:00 A.M. to 5:00 P.M. you would enter 08:00 under **Open** and **Close** time would be entered as 17:00 hours. **Note:** To convert to military time use 12 noon + 5 (in this example the site closes at 4:00 P.M.) hour number past 12 noon = 17:00 hours.
2. If closed on a particular day, set all hours to “00” for the day.
3. If only open for a half day, set the times in the **Open** and **Close** fields, but please leave the **Lunch Start** and **Lunch End** fields set to “00”.
4. If closed during lunch, please complete the **Lunch Start** and **Lunch End** fields with a beginning and ending time.
5. Once all your hours of operation are updated, scroll to the bottom of the screen and click **Save**.
6. All information on the **Provider Information** tab should be reviewed and if needed must be edited each time an order is placed. To receive TVFC updates regarding vaccine orders and shipping dates, a company or provider email address must be input on the **Provider Information** page.

**Screen shot #1**

After you have installed Crystal Reports and entered your **Hours of Operation** on the **Provider Information** tab, you are ready to begin the steps to set up your inventory in EVI. **Steps #1-3 must be completed in the sequence and timeframe described.**
Step 1: To assist you in recording your inventory, EVI is pre-populated with shipments received in the past 2 months from McKesson and Merck.

A worksheet, Tally and Physical Count is available to show the pre-populated vaccines. You will compare the vaccines on this worksheet with the vaccines you have now in your refrigerator/freezer, and on October 1st use the same worksheet to write down the number of doses of each vaccine.

Important: Your worksheet does not contain vaccines:
- Received from McKesson received prior to August 2012
- Received from Merck
- Transferred between sites
- Received from DSHS Pharmacy

Instructions for Step 1: To retrieve the worksheet, Tally and Physical Count:
1. Click on Reports tab. (screen shot #1)
2. From drop down list, highlight and click on Tally and Physical Count.
3. EVI retrieves a Tally and Physical Count Sheet listing vaccines imported from previous shipments.(screen shot #2)
4. Print the report using the Printer icon right above the Main Report.
5. Go to your refrigerator/freezer and compare the vaccines on the Tally and Physical Count Sheet with the TVFC vaccines’ lot number and expiration in your inventory.
   a. If a vaccine’s lot is listed write down the quantity on hand.
   b. If a vaccine’s lot is not in your refrigerator and/or freezer, mark through the vaccine on the worksheet so you will know you do not have it in inventory.
6. If you find TVFC vaccines not listed on the worksheet, please write onto the worksheet the National Drug Code (11-digit number formatted as five-digits XXXXX; four digits-XXXX; and two digits-XX on the outer container – it is not the NDC listed on the vial or prefilled syringe), vaccine brand, vaccine family, presentation, Ped or Adult, lot, expiration and quantity so you can add them to your EVI inventory in Step 2.

Screen shot #1

[Image of a computer screen showing a menu with Reports highlighted and the Tally and Physical Count selected]

Screen shot #2

[Image of the Tally and Physical Count Sheet]

<table>
<thead>
<tr>
<th>NDC and Vaccine</th>
<th>Lot and Expiration</th>
<th>0 - 18 years</th>
<th>19 years and over</th>
<th>Physical Count from Refrigerator/Freezer</th>
</tr>
</thead>
<tbody>
<tr>
<td>49281-0515-05-P</td>
<td>07/27/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>00006-1971-02-P</td>
<td>02/28/2013</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Note:** You cannot print your Tally and Physical Count Sheet unless you have installed Crystal Reports. The first paragraph of this document outlines where you can find instructions on how to install the software.

**Step 2: Adding Vaccines** For all TVFC vaccines not printed on the Tally and Physical Count Sheet, you must add those vaccines into your inventory before proceeding.

**Important:**
- When writing down the NDC, it must be the number listed on the outer most container. It is not the NDC listed on the vial and/or syringe.
- The NDC contains 11-digits with a sequence of five digits-four digits-two digits (xxxxx-xxxx-xx). If one of the digits is missing in a sequence, add a 0 in front of the sequence. For example, if the outermost container shows 58160-825-52, it is missing a digit in the 2nd sequence of numbers. To correct, you would add a 0 in front of the 2nd sequence of numbers or in this example ‘825’. This corrects the NDC to read as: 58160-0825-52.
- If you have a NDC of pediatric or adult vaccine not shown on the pull down list, you cannot add it. You must send the Vaccine Call Center the NDC, brand, presentation and quantity either by email: vaccallcenter@dshs.state.tx.us or by fax: 512-776-7346. You will be notified once the vaccine is added.

**Instructions for Step 2:** To add vaccines not listed on the Tally and Physical Count Sheet:
1. Click on the Receiving tab. (screen shot #1)
2. Click on the Add Line button located on the bottom right side of the screen. (screen shot #2)
3. A new screen appears with blank fields to complete: (screen shot #3)
   a. **NDC** (National Drug Code)
   b. **Lot**
   c. **Expiration Date**
   d. **Quantity**
   e. **Received By**
4. **NDC:** Open the drop down box and choose the correct NDC, vaccine brand, vaccine family, presentation and whether vaccine is for pediatric or adult populations. Note: If NDC is not found, contact the Vaccine Call Center (see above). (screen shot #4)
5. **Lot:** Enter all capitals letters. This avoids confusing letters and numbers.
6. **Expiration Date:** Date can be entered as xx/xx/xxxx or be chosen from the drop down calendar. (screen shot #5)
   a. To change calendar to a different month, click on the current month and year header. EVI brings up an entire calendar for the current year.
   b. To change years, click on current month and year header. Once EVI brings up an entire calendar for the current year, click on right arrow until you reach the correct year. After selecting the correct year, click on the appropriate month.
7. **Quantity:** Enter total doses only of the specific lot and expiration date.
8. **Received By:** Enter your first initial, last name, and date the vaccine was added.
9. Click **Save**.
10. EVI returns an empty screen to add another vaccine.
11. Continue until all of the TVFC vaccines you have handwritten on the form are added.
12. Run a new **Tally and Physical Count Sheet** to verify all the TVFC vaccines are listed.
13. If missing vaccines, repeat until all TVFC vaccines are on the Tally and Physical Count Sheet.

**Screen shot of #1**

**Screen shot #2**
### Screen shot #3

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NDC</td>
<td><strong>Please Select</strong></td>
</tr>
<tr>
<td>Lot</td>
<td></td>
</tr>
<tr>
<td>Expiration Date</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td></td>
</tr>
<tr>
<td>Received By</td>
<td></td>
</tr>
</tbody>
</table>

**Save**  **Cancel**

### Screen shot #4

<table>
<thead>
<tr>
<th>NDC</th>
<th>Lot</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>49281-0278-10-P</td>
<td>DT (DT), single-dose vial (Ped)</td>
<td></td>
</tr>
<tr>
<td>49281-0286-10-P</td>
<td>DAPTACEL (DTAP), single-dose vial (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0810-46-P</td>
<td>INFANRIX (DTAP), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0810-51-P</td>
<td>INFANRIX (DTAP), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0810-52-P</td>
<td>INFANRIX (DTAP), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0810-11-P</td>
<td>INFANRIX (DTAP), single-dose vial (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0811-52-P</td>
<td>PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0812-52-P</td>
<td>KINRIX (DTAP-IPV), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0812-11-P</td>
<td>KINRIX (DTAP-IPV), single-dose vial (Ped)</td>
<td></td>
</tr>
<tr>
<td>49281-0510-05-P</td>
<td>PENTACEL (DTAP-IPV-HIB), single-dose vial (Ped) [5pk]</td>
<td></td>
</tr>
<tr>
<td>58160-0825-52-P</td>
<td>HAVRIX (HEP A), PF syringe (Ped)</td>
<td></td>
</tr>
<tr>
<td>58160-0825-11-P</td>
<td>HAVRIX (HEP A), single-dose vial (Ped)</td>
<td></td>
</tr>
</tbody>
</table>
Please note: EVI defaults to this calendar but can enter date by entering XX-XX-XXXX.

Step 3: After you added all vaccines not on the list, you are ready to record the quantity for the vaccines off the Tally and Physical Count Sheet.

Important:
- Even though you may no longer be eligible to receive adult vaccines, if you have any in stock, you must record quantities on hand.
- All TVFC vaccines must appear on the screen with the correct brand, family, presentation, NDC, lot, and expiration. If not, return to Receiving tab and add vaccines not listed.
- If you have made a mistake and entered an incorrect vaccine:
  - On the vaccine with the incorrect information change the Physical Count quantity to zero.
  - Return to the Receiving tab and enter the correct information.

Instructions for Step 3: To record your inventory:
1. Hover over Inventory tab.
2. Click on Provider C-33 on second drop down menu. (screen shot #1)
3. EVI refreshes and returns a screen listing of all the vaccines entered into and/or printed on the final Tally and Physical Count Sheet from Step 2.
4. Enter the on-hand quantities next to the appropriate brand, presentation, lot and expiration date in the Physical Count column. Note: For vaccines added in Step 2, the quantities should be shown and correct. (screen shot #2)
5. EVI defaults Math Error and Adjustment to be the same as the Physical Count.
6. For all vaccines with quantities entered, under the Reconciliation Reason: choose “Initial Inventory” from the drop down list. (screen shot #3)
7. Entered By: Enter your first initial, last name, and date. (screen shot #4)
8. Click Save.
9. Popup message box stating: “Provider C-33 Saved Successfully.” (screen shot #5)
10. Click Ok.
11. EVI refreshes and shows a Last Ran date at the top to be the current date/time of update.
12. Automated Total column shows the Physical Count you recorded/saved. (screen shot #6)
13. Beginning Doses column shows the Physical Count you recorded/saved. (screen shot #6)
14. Physical Count column becomes blank. (screen shot #6)
15. Within two days of completing the above, if it is your assigned month to order you must place your order.
After you have completed Steps 1-3, you are prepared to start recording October 2012 activities previously captured on the **Monthly Biological Report (EC-33)** in the following sequence:

1. Receipt of vaccine as it occurs.
2. Transfer of vaccine as it occurs.
3. Loss of vaccine as it occurs.
4. End of October 2012:
   a. Enter doses administered using **Doses: Doses Administered** screen. If you are recording your doses after October 31, 2012, the date range must state October 1 – 31, 2012.
   b. Record your physical count using **Inventory: ProviderC-33** screen
   c. If it is your assigned month to order, review your **Provider Information** screen to verify shipping address and hours of operation.
   d. Place your November 2012 order.

**Remember:** You must turn in **Monthly Reports (Inventory, Waste, and Temperature Log)** to Metro Health for September 2012 by Monday, October 1, 2012. Forms must be faxed to (210) 207-2050. October Monthly Biological Reports will be submitted electronically in EVI with the exception of the **Temperature Recording Log**! Paper Temperature Recording Logs will continue to be submitted by fax to Metro Health at (210) 207-2050 on a monthly basis.