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Department of State Health Services

Vaccine Choice
Texas Vaccines For Children

TVFC

EVI: Electronic Vaccine Information System

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EVI: Electronic Vaccine Information System

The Texas Department of State Health Services (DSHS) is responsible for the overall management and control of vaccines purchased through the Texas Vaccines for Children (TVFC) program. As of April 2012, TVFC has expanded the accounting system, EVI, to meet the majority of the program reporting requirements.

TVFC providers without access to the Internet are required to submit paper reports. To order vaccines, the following paper reports must be submitted to your HSR or LHD (at a minimum):

- **EC-33 Monthly Biological Report** (use most current form posted on TVFC website)
- **EC-68 Biological Order Form** (use most current form posted on TVFC website)
- **C-105 Temperature Recording Form** (rev. 01/05)

Providers with access to the Internet do not have to submit a paper report; however, you **must** continue to submit a paper **Temperature Recording Form (C-105)** to your assigned local health department or health service region.

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Upon completion of this training you are able to:

- Access and sign into EVI
- Conduct Steps 1-3 to set up inventory
- Review and update your facility's shipping address
- Input day/time your staff is available to receive vaccine deliveries
- Receive vaccine orders or transfers and add vaccine to your inventory
- Record doses administered
- Conduct transfer of vaccines
- Record wasted or expired vaccines
- Record physical count and reconcile inventory
- Place an order
- Update or review vaccine choices
- Review available reports to use for reporting and/or quality assurance

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Important:

- If you cannot locate your ***User Name*** and/or ***Password***, please contact the **Vaccine Call Center** by dialing 1 888-777-5320 or emailing vaccallcenter@dshs.state.tx.us
- For security purposes, the ***User Name*** and ***Password*** is only released to the primary contact listed on the account or the provider that signed the TVFC Enrollment.

Login:

The URL for EVI is: **https://iteams.dshs.texas.gov/IRMSTexas/Security/SignIn.aspx**.

Upon clicking on the URL for EVI, the ***Sign In*** screen above appears. EVI requires users to authenticate their identity using a unique ***User Name*** and ***Password***. To sign in:

- Enter all six digits of your ***User Name*** - your TVFC **P**rovider **I**dentification **N**umber (PIN).
- Enter your ***Password*** - this is the password sent by DSHS via email to the primary contact for your facility.

If you wish to have EVI store your ***User Name*** or ***Password***, or automatically sign in on the computer you are presently using, click the appropriate checkbox(es).

- Click ***OK*** to log into your account.

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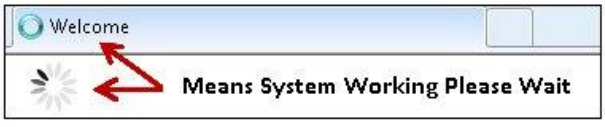

Important:

Anytime EVI is working or thinking, a spinning dial appears on the browser tool bar and/or a large 'sundial' figure appears in the top left hand corner of the screen. It is **VERY** important not to change tabs or screens while 'EVI is working.'

The ***Update Choice*** tab, circled above right, is **only** visible at times when you are allowed to change or update your vaccine choices. At all other times, it will not be visible.

Welcome:

Once signed in, you will land on the ***Welcome*** screen. This screen contains brief descriptions of each of the tabs at the top of the page. Over the next few slides we will take a closer look at the sections.

Also, this screen is used to provide important TVFC announcements. You must review this page **often** for updates and/or changes impacting you or your practice!

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Step 1-3:

Before you can begin using EVI to its fullest potential, you must establish your current inventory. EVI requires all activities be tracked by:

- Vaccine Brand (e.g., ActHib);
- Vaccine Family (e.g., Hib);
- Presentation (e.g., single dose vial or PF syringe);
- Pediatric/Adult (i.e., Ped or Adult);
- Lot number (e.g., UH410AA);
- Expiration date (e.g., 07/27/2013); and
- Quantity (in doses).

To guarantee the success of this initial set up, Steps 1-3 must be carried out in the sequence provided.

Step 1: To assist you in recording your inventory, EVI is pre-populated with shipments received in the past 2-3 months from McKesson

A work sheet, ***Tally and Physical Count***, is available to show the pre-populated vaccines and allow you to record quantities.

Important:

Your worksheet does <u>not</u> contain vaccines received from:

- Transfers
- DSHS Pharmacy
- Merck

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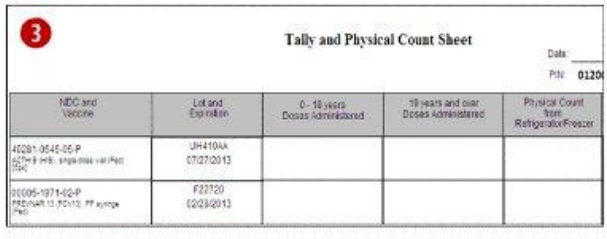
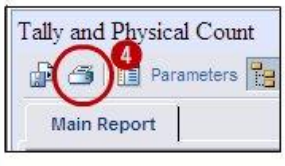
INSTRUCTIONS

To retrieve the worksheet, ***Tally and Physical Count***:

1. Click on the ***Reports*** tab.
2. From the 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 McKesson and Merck shipments.
4. Print the report using the ***Printer*** icon right above ***Main Report***.





5. Once you have printed the ***Tally and Physical Count Sheet***:
   a. Count all doses of TVFC vaccines only.
   b. ***Physical Count from Refrigerator/Freezer***: Write the quantity of each vaccine in doses next to the appropriate Brand, Lot and Expiration date.
   c. If you find TVFC vaccines <u>not</u> listed, please write onto the worksheet the NDC, Vaccine Brand, Vaccine Family, Presentation, Ped or Adult, Lot, Expiration and Quantity so you can add them to your inventory.

Important: NDC is taken from the outer container and/or box. It is <u>not</u> the NDC listed on the inner container, vial or syringe.

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:

- Qualified providers who participate in the Adult Safety Net Program are required to distinguish between their Adult and Pediatric vaccines; order and report Adult vaccines separately from TVFC Pediatric vaccines.
- If you have a vaccine in stock you cannot add, i.e. because the NDC is different than what is offered in the drop-down list, please send an email to the **vaccallcenter@dshs.state.tx.us** or fax information to the Vaccine Call Center @ 512-776-7346. The Vaccine Call Center must have the NDC, Brand, Presentation and Quantity to add the vaccine to your account. You will be notified once the vaccine is added.
- When writing down the NDC, it must contain 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 box/vial 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.

Note: NDC is taken from the outer container and/or box. It is ***not*** the NDC listed on the inner container, vial or syringe.

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INSTRUCTIONS

To add vaccines:

1. Click on the ***Receiving*** tab.
2. Click on the ***Add Line*** button located on the bottom right side of the screen.
3. A new screen appears with blank fields to complete:
   a. ***NDC*** (National Drug Code)
   b. ***Lot***
   c. ***Expiration Date***
   d. ***Quantity***
   e. ***Received By***

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INSTRUCTIONS

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.

5. ***Lot*:** Enter all capital 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.

   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.

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INSTRUCTIONS

7. ***Quantity***: Enter total doses only of the specific Lot and Expiration date.
8. ***Received By***: Enter your first initial/last name/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 vaccine you have handwritten on the form is 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 either printed or written in on the ***Tally and Physical Count Sheet*** are shown.

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Step 3 and Forward: Sequence of Events

After you have entered all your vaccines into EVI, you are ready to record the quantity for the vaccines off the **Tally and Physical Count Sheet.**

Important:
If you find vaccine with an incorrect lot you will need to add the correct vaccine using the **AddLine** function and zero out the quantity on the incorrect lot.
If you find a vaccine with the correct brand, presentation, correct lot but an incorrect expiration date, you cannot enter the vaccine through the **AddLine** function; you must submit an email to the Vaccine Call Center @ vaccallcenter@dshs.state.tx.us and provide the following information:

- Six-digit PIN
- NDC
- Vaccine Brand
- Lot
- Incorrect Expiration Date
- Correct Expiration Date

It is critical that you complete your activities in EVI in the following sequence for Step 3.

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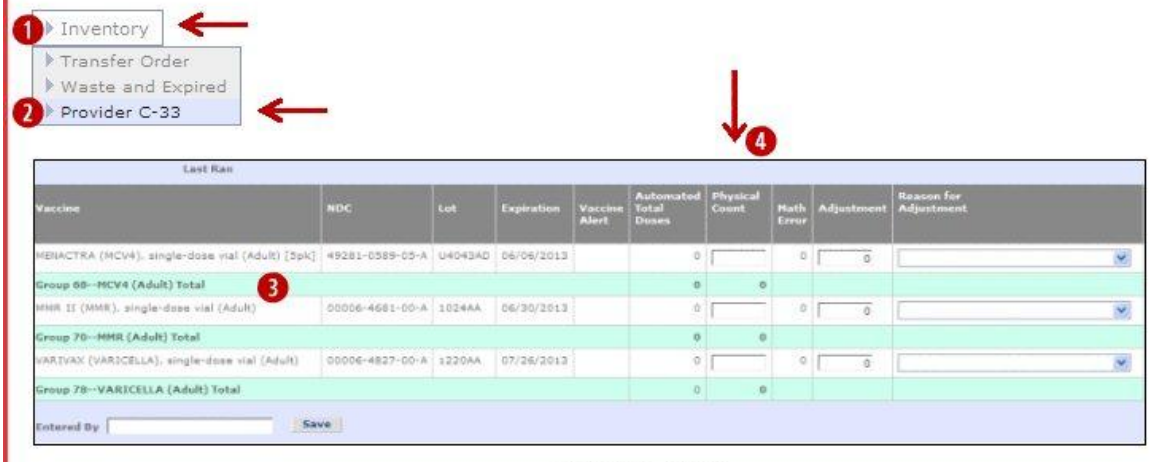

INSTRUCTIONS

To add quantities:

1. Hover over the ***Inventory*** tab.
2. Click on ***Provider C-33*** on the second drop-down menu.
3. EVI refreshes and returns a screen listing all the vaccines entered into and/or printed on the final ***Tally and Physical Count Sheet***.
4. For vaccines added earlier, verify the quantity listed in the ***Physical Count*** column is correct.

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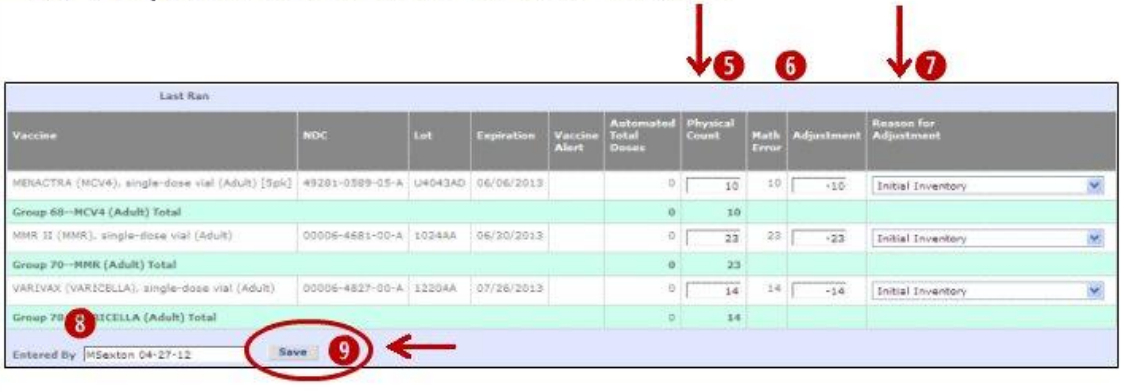

INSTRUCTIONS

5. For remaining vaccines not added, enter the quantities next to the appropriate Brand, Presentation, Lot and Expiration date in the ***Physical Count*** column.

6. EVI defaults ***Math Error*** and ***Adjustment*** to be the same as the ***Physical Count***.

7. For all vaccines with a red * by ***Reason for Adjustment:*** choose ***"Initial Inventory"*** from the drop down list.

8. ***Entered By***: Enter the first initial/last name/date.

9. Click ***Save***.

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INSTRUCTIONS

10. A popup message box is displayed, stating: ***"Provider C-33 Saved Successfully."***

11. Click ***OK***.

12. EVI refreshes and shows a ***Last Ran*** date at the top to be the current date/time of update.

13. The ***Automated Total Doses*** column shows the current ***Physical Count*** recorded in Step 5.

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After you have completed Steps 1-3, you are ready to place your first order in EVI.

After these initial steps, each month you will record all activities previously captured on the paper **Monthly Biological Report** You will continue to submit a paper **Temperature Recording Log!**

EVI allows updating your account information more than once a month. You must record your receiving, transfers, and wasted or expired vaccines as they occur. Please restrict your data entry of doses administered and recording your physical count to only one time a month.

For ease of navigation, the reporting requirements are listed in sequential order with the tabs running from left to right.

- Welcome
- Provider Information
- Receiving
- Doses Administered
- Inventory
  - Transfer (as applicable)
  - Wasted or Expired (as applicable)
  - Provider C-33
- Place Order
- Update Choice (as applicable)
- Reports
  - Monthly Biological
  - Tally and Physical Count
  - Wasted Vaccine
  - Doses About to Expire
  - C-33 History Report

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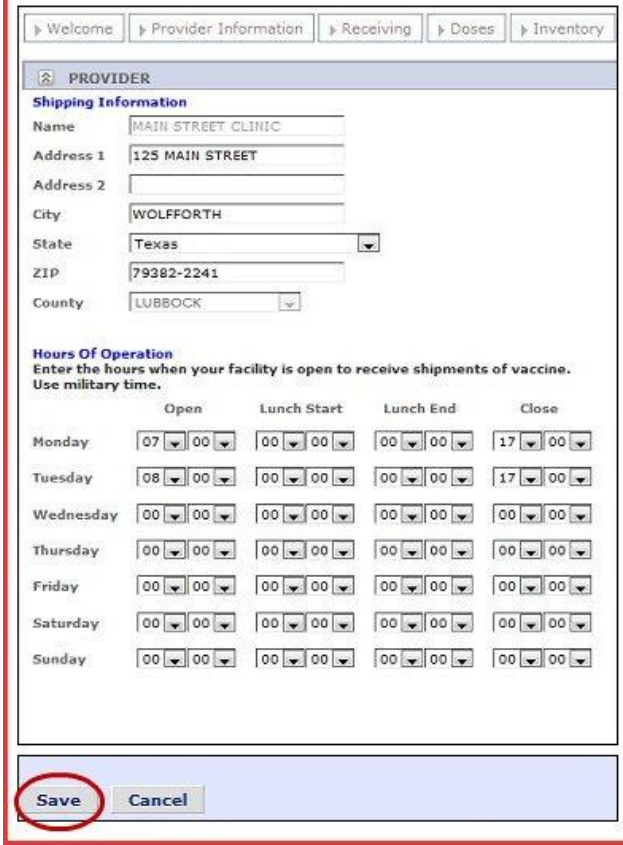

Provider Information:

The information on the ***Provider Information*** screen is critical to ensuring that vaccine will arrive at the correct place and during a time when someone is available to accept and properly store it.

This screen is divided into three sections:

- Shipping Information
- Hours of Operation
- Contact

Over the next several slides we will take a closer look at each section. Please continue to the next slide for an explanation of the ***Shipping Information*** section.

Important:

- The first time a provider logs into EVI, it requires the facility to complete and **save** their ***Hours of Operation***.
- For each subsequent order, you should review the contents of the ***Provider Information*** screen to:

  a. ensure the vaccine is delivered to the correct site,
  b. when staff is available to receive/store the vaccine, and
  c. verify the primary contact's information is correct.
- If changes are made to your address and/or ***Hours of Operation***, you must click ***Save*** at the bottom of the screen.

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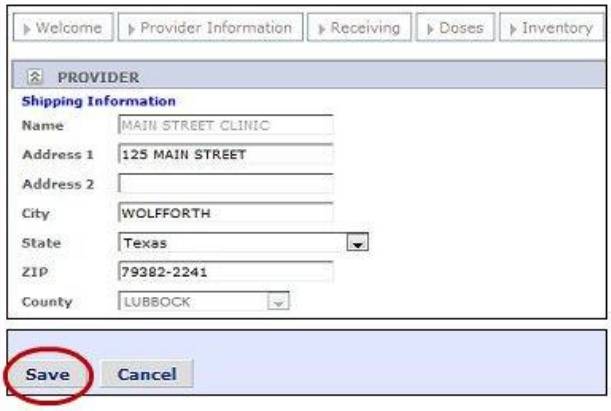

This is a close up of the ***Shipping Information*** section of the ***Provider Information*** tab. This section contains the shipping address where the vaccine will be delivered.

Please check for accuracy and make necessary changes when needed.

To keep any changes, you must click the ***Save*** button in the lower left hand corner.

Important:

- Vaccine will not be shipped to a P.O. Box.
- The ***Address 2*** field can be used for special instructions to assist with deliveries, e.g., "Building behind the school."
- Only fields not 'grayed' out can be changed.

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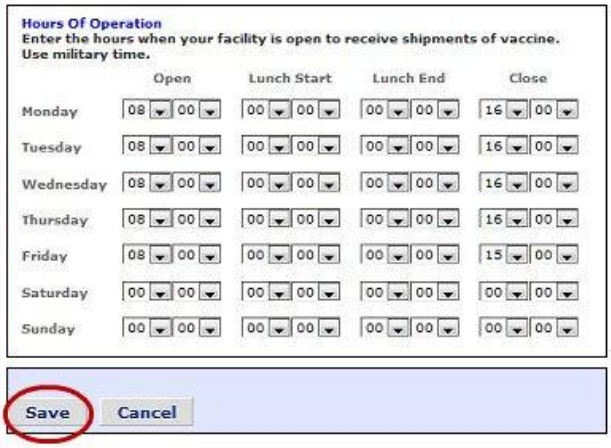

Important:

- Before placing your first order, you must complete the ***Hours of Operation***.
- ***Hours of Operation*** **should always be reviewed before any order is placed.**

Special Scenarios:

- ***Hours of Operation*** is not designated as AM or PM; therefore, you must use military time. For example shown, if facility is open on Tuesdays 8:00 AM to 4:00 PM you would change your closing time to military time by using 12 noon + 4 (hour number past 12 noon) = 16:00 hours.
- If closed on a particular day, set all hours to "00" for the day.
- 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 at "00."
- If closed during lunch, please complete the ***Lunch Start*** and ***Lunch End*** fields with a beginning and ending time.

To keep any changes, you must click the ***Save*** button in the lower left hand corner.

This is a close up of the ***Contacts*** tab. This tab lists the primary contact for your facility.

The primary contact should be staff that can:

- Respond if called with questions about the vaccine inventory or vaccine orders;
- Receive emails related to program guidelines, and/or changes to orders; and,
- Communicate program information to the appropriate staff.

Clicking on the underlined ***First Name*** or ***Last Name*** opens the ***Edit Customer Contacts*** details.

Please go to the next slide to see a close up of the ***Edit Customer Contacts*** details.

Important:

- Do not uncheck ***Primary Contact*** under the **Contact** tab.
- Because the information contained in emails may contain important or time-sensitive information, we recommend that a generic email account be created where multiple staff can access the account.
- If you do not have the capability to set up a generic email address, we recommend using an email account for an individual who checks their email each day.

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This is a close up of the ***Primary Contact*** information. The fields shown can be changed or updated at any time.

Note that the ***Phone, Phone #2*** and ***Fax*** fields accept up to 10 numbers only, as shown. Please do NOT enter parentheses or dashes.

To keep any changes, you must click ***Save*** in the lower left hand corner of the ***Edit Customer Contacts*** box.

Important:

Upon clicking ***Save***, the ***Edit Customer Contacts*** box closes and returns you to the ***Provider Information*** screen. Your changes to the contact information are made!

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Receiving:

Upon logging into EVI, if you have orders to receive, EVI gives you a popup message box stating: "***(X) Unreceived Orders***." The number in the parentheses is the number of orders in EVI to receive. Click ***OK*** to remove the popup box.

Once the vaccine arrives, it is critical you store the vaccines immediately to ensure vaccine viability and record the receipt of the vaccine. Recording the information immediately allows you to maintain correct quantities on hand when recording doses and/or your physical count at the end of the month.

TVFC uses three vaccine distribution centers: McKesson Specialty, a third-party distributor which ships the majority of TVFC vaccines; the DSHS Pharmacy Branch; and Merck, the manufacturer of Varicella. At this time EVI only supports the auto population of the following orders in the ***Receiving*** tab:

- Orders generated and shipped from McKesson.
- Varicella orders.
- Transfers being sent to your office from another TVFC site.

Any vaccine received from DSHS Pharmacy must be added using the function of ***Add Line*** (described on slides 9-12).

Providers can expect their orders approximately one - three weeks after placing their online order. Once the order is in transit, you will receive a faxed confirmation listing all the vaccines in your order and the order appears in the drop-down box of the ***Receiving: Provider Order Detail Receiving*** screen.

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Important:

- Providers should always accept vaccine shipments. Never refuse or return vaccine without specific instructions from the TVFC program or your Health Service Region or Local Health Department.
- Vaccine should always be stored properly, even if viability is questionable.
- ***Tracking Number*** or hyperlink to the carrier's website is only for vaccines received from McKesson.
- ***Tracking Number*** for Varicella is blank.
- ***Tracking Number*** for transfers starts with a **C** and is not a valid hyperlink to a carrier's website.

INSTRUCTIONS

To receive vaccines:

You must record the receipt of vaccine at the time of the occurrence to maintain correct quantities on hand when recording doses and/or physical counts. The following steps should be taken when a vaccine arrives:

1. Check actual vaccine information of Vaccine Brand, Presentation, Lot, Expiration date and Quantity received against packing list to verify all vaccines have been received and all information is correct.
2. Diluent may or may not be listed on the packing slip but is not recorded in EVI.
3. Once the vaccine is stored properly, use the packing list for remainder of the steps.

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Program Name : Immunizations

Warehouse Packing List

Report Run On:
03/28/2012 @ 12:28:30 pm

Order # : 122496 **Host Batch # :**

Ship Via : Lone Star Overnight Ground Service

Number of Cartons : 1

From : McKesson Distribution Center
1100 West 53rd
Anytown, TX 78651-1232
USA

Ship To : ABC Pediatrics
2345 Main Street
Anytown, TX 79854-2315
USA

Order Type : Regular

Hours of Operation :

Monday-Friday 08:30 a.m. - 5:00 p.m.

Customer Hours of Operation :

Monday 0830 to 1200, 1300 to 1700
Tuesday 0830 to 1200, 1300 to 1700

Example: Packing List

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INSTRUCTIONS

5. Click on the ***Receiving*** tab.
6. EVI refreshes and opens the ***Provider Order Detail Receiving*** screen.
7. Click on the drop-down box next to ***Order***.
8. Highlight and click on the appropriate order number.

9. The screen displays all vaccines by:

   a. ***Vaccine***: List of each Vaccine by Brand, (e.g., Daptacel); Vaccine Family (e.g., DTAP); Presentation (e.g., single-dose vial or PF syringe); (Pedi) or (Adult).
   b. ***Requested Quantity***: Original amount approved by LHD and/or HSR.
   c. ***Ship Date***: Date the shipment left the distributor.
   d. ***Lot***: Self-explanatory. If incorrect, edit with correct Lot number using capital letters for all alpha characters.
   e. ***Expiration Date***: Self-explanatory. If incorrect, edit with correct Expiration date xx/xx/xxxx.
   f. ***Received Quantity***: The amount you received. If incorrect, edit the correct quantity.
   g. ***Tracking Number***: Valid for McKesson orders ONLY - hyperlink to carrier's website to track order.

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INSTRUCTIONS

There are three possible receiving scenarios: receive ALL, receive PART, or receive order with Varicella.

To receive ALL vaccines (if only part, skip to Step 11; if Varicella, skip to Step 12):

10. If ALL the vaccines on the order or transfer are received:
    a. Click the ***Accept*** box at the top of the order and EVI automatically places a check mark beside all the vaccines listed.
    b. Verify all information is correct; if not, correct as indicated in Step 9.
    c. Complete the text box, ***Received By:*** with your first initial/last name/date.
    d. Click ***Save***.
    e. EVI refreshes and removes the order number from the drop-down box.

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INSTRUCTIONS

To receive PART of the vaccines:

11. If only PART of the order or transfer is received (if an order containing Varicella, skip to Step 12):
    a. Click the ***Accept*** box beside each line item received.
    b. Verify all information is correct; if not, correct as indicated in Step 9.
    c. Complete the text box, ***Received By:*** with your first initial/last name/date.
    d. Click ***Save***.
    e. EVI refreshes the screen removing all received vaccines and leaving the order number with remaining vaccines for future receipt.

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INSTRUCTIONS

To receive an order containing VARICELLA:

12. For an order containing Varicella or a Varicella ONLY order:
    a. **Note:** Varicella only or Varicella line items do not have a valid ***Tracking Number***.
    b. Click the ***Accept*** box next to the line item with Varicella.
    c. Enter the ***Lot***, ***Expiration Date***, and ***Received Quantity***.
    d. Complete the text box, ***Received By:*** with your first initial/last name/date.
    e. Click ***Save***.

13. ***Add Line:*** For vaccines listed on the packing slip but not in EVI, you must add using the ***Add Line*** functionality used in Step 2. Notify your local health department or health service region immediately to report any vaccine received but not on your original order.

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Doses Administered:

You must record doses administered in EVI under the ***Doses: Doses Administered*** tab.

If you do not use an electronic medical record system where you can extract your doses administered by Brand, Lot, Expiration date and appropriate age groups (***0-18*** and ***19 and over***), you may want to use the ***Tally and Physical Count Sheet*** to record your doses administered throughout the month.

Important:

- EVI does not allow you to skip a calendar month or combine ***Doses Administered*** for multiple months.
- To correctly capture your does administered make sure you have:
  - a system in place to record all doses administered by Brand, Pedi versus Adult (if applicable), Lot, Expiration date and appropriate age groups of ***0-18*** and ***19 and over.***
  - the correct date range appearing at the top of your screen.
- TVFC requires you record doses administered and physical count on hand even if you do not wish to order, or if it is not your month to order.
- EVI requires you to record your doses administered no more than two days before you place an order.
- EVI allows updating your doses administered more than once a month; however, you may want to limit your data entry for doses administered and physical count to once a month to avoid duplication of reporting.

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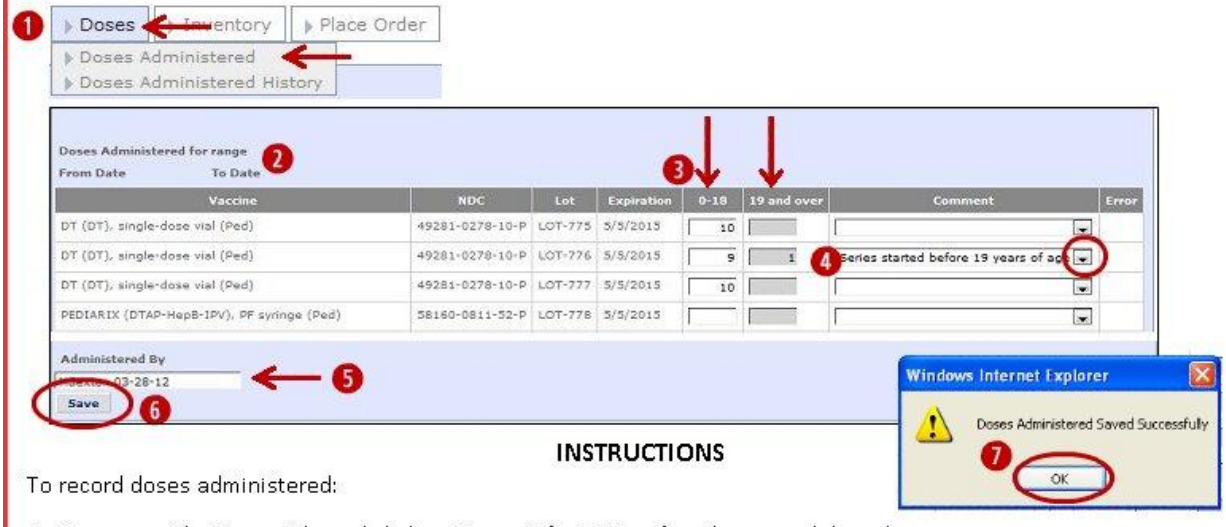

INSTRUCTIONS

To record doses administered:

1. Hover over the ***Doses*** tab, and click on ***Doses Administered*** on the second drop-down menu.
2. ***From Date-To Date*** displays the ***From Date*** as the last time doses administered was saved in EVI and ***To Date*** defaults to current date.
3. ***0-18*** and ***19 and over*** age groups: Record your doses in the appropriate age column by the Vaccine Brand, Presentation, NDC, Lot, and Expiration.
4. If the age group you administered is 'grayed out,' you must select a ***Comment*** from the drop-down box.
5. After you record all doses, complete your first initial/last name/date in the ***Administered By*** text box.
6. Click ***Save***.
7. EVI refreshes the screen and you get a popup message box stating: ***"Doses Administered Saved Successfully."***

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Doses Administered History:

You can only edit the doses you have administered since May 1, 2012 in EVI. All other corrections for prior months must be corrected on the appropriate **Monthly Biological Report (EC-33)** and submitted to your local health department or health service region. If you attempt to edit any months prior to May 2012, you get a popup message box stating: ***"There is no dosage history for the selected range."***

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Inventory: Transfer:

EVI supports the ability to transfer vaccine from your office to another TVFC provider.

Important:

- You must record the transfer of vaccine at the time of the occurrence to maintain correct quantities on hand for recording doses and/or physical counts of vaccines.
- Transferred vaccine must be unopened, usable, TVFC supplied vaccines. Vaccine may only be transferred to active TVFC providers including local health departments and/or health service regions.

INSTRUCTIONS

To transfer vaccine:

1. Before submitting a transfer, it is critical you have received all orders.
2. Obtain the receiving site's PIN - this information is required to conduct a transfer.
3. Hover over the ***Inventory*** tab.
4. Click on ***Transfer Order*** on the second drop-down menu.

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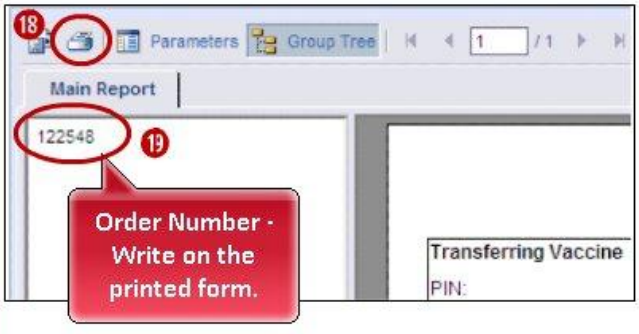
INSTRUCTIONS

5. EVI brings up a blank ***Transferring Vaccine To*** screen.
6. ***Provider PIN***: Enter the receiving site's TVFC six-digit PIN.
7. Click ***Go***.
8. Review the demographic information to make sure this is the correct receiving site.
9. EVI displays a list of all TVFC inventory and quantities available to transfer.
10. ***Quantity***: Amount of vaccine available to transfer.
11. ***Doses***: Amount in doses of vaccine being transferred.
12. If the ***Doses*** column is 'grayed out', EVI is stating there is no inventory available to transfer.
13. For each vaccine transferred, a ***Reason for Transfer*** must be selected from the drop-down box.
14. ***Transferred By***: Complete text box with first initial/last name/date.
15. Click ***Save***.



INSTRUCTIONS

16. EVI automatically decreases your on hand inventory by the amount indicated.

17. EVI refreshes and presents a form to be printed, signed and used as a packing slip.

18. Print the form using the ***Printer*** icon located above the ***Main Report*** tab.

19. An order number for the transfer is located in the left hand side of the screen. It is not on the form, so you must write the number on the printed form. This assists the receiving site in finding/receiving the correct order listed under the ***Receiving*** tab.

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Transferring Vaccine	FROM:		TO:	
PIN:	080911	*Order # 122548*	082099	
Facility Name:	KHAN MEDICAL CLINIC		MAIN STREET CLINIC	
Address:	304 N MAIN ST		125 MAIN STREET	
	COTULLA TX	78014-2153	WOLFFORTH TX	79382-2241
Phone	(830) 879-2309		(555)599-1236	
Contact:				

Vaccine	NDC	Lot Number	Expiration	Doses	Reason
DAPTACEL (DTAP), single-dose vial (Ped)	49281-0286-10-P	MBB 2345	5/15/2012	29	Short expiration date

Instructions:
Transferred vaccine must be unopened, usable, state-supplied vaccine.
Vaccine may only be transferred to active TVFC providers, including state or local health departments.

Mary Jane Smithers — Approved By

03-28-2012 — Date:

Example: Transfer Form

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Inventory: Transfer - Historical Transactions:

EVI supports retrieving transfer history. Upon opening the ***Inventory - Transfer Order*** tab, it shows a hyperlink: ***Historical Transactions***. If you click on the hyperlink, it will retrieve a list of all transfers conducted in EVI.

INSTRUCTIONS

To view historical transactions:

1. Click on the ***Historical Transactions*** hyperlink.
2. EVI refreshes and produces a ***Transfer History*** with a list of all transfers, ***Order*** and ***Order Date*** placed for your site.
3. EVI supports sorting by the column headers to re-arrange the order on the screen.

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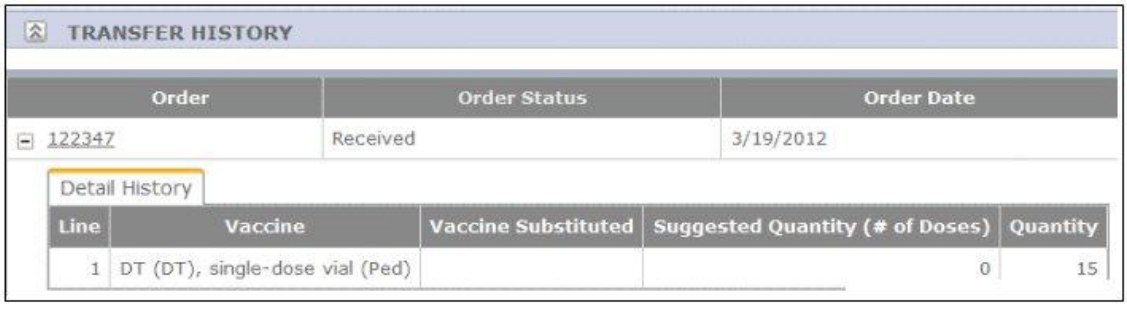
INSTRUCTIONS

Transfer History List

4. ***Order*** = Order number generated in EVI when the order is placed.
5. ***Order Status*** = **Shipped** or **Received**.
   a. ***Shipped***: This transfer is enroute to your site.
   b. ***Received***: This transfer is received in EVI.

6. Click on the **+** next to the transfer you wish to open. This action opens the details of the transfer showing:
   a. ***Line***: The line sequence of the vaccine on the transfer.
   b. ***Vaccine***: What Brand, Vaccine Family, Presentation and Pedi or Adult is in the transfer.
   c. ***Vaccine Substituted***: For a transfer, should always be blank.
   d. ***Suggested Quantity***: For a transfer, should always be zero.
   e. ***Quantity***: Amount of vaccine you transferred.



Transfer History Detail

Inventory: Wasted and Expired:

EVI supports the capability to record wasted or expired vaccine. You must record wasted and expired vaccine at the time of the occurrence to maintain correct quantities on hand for recording doses and/or physical counts of vaccines.

Wasted vaccine is defined as any vaccine that cannot be used; this includes ruined, dropped, broken, or drawn-up but not administered. **Expired vaccine** is any vaccine that cannot be used because it is past the manufacturer's Expiration date.

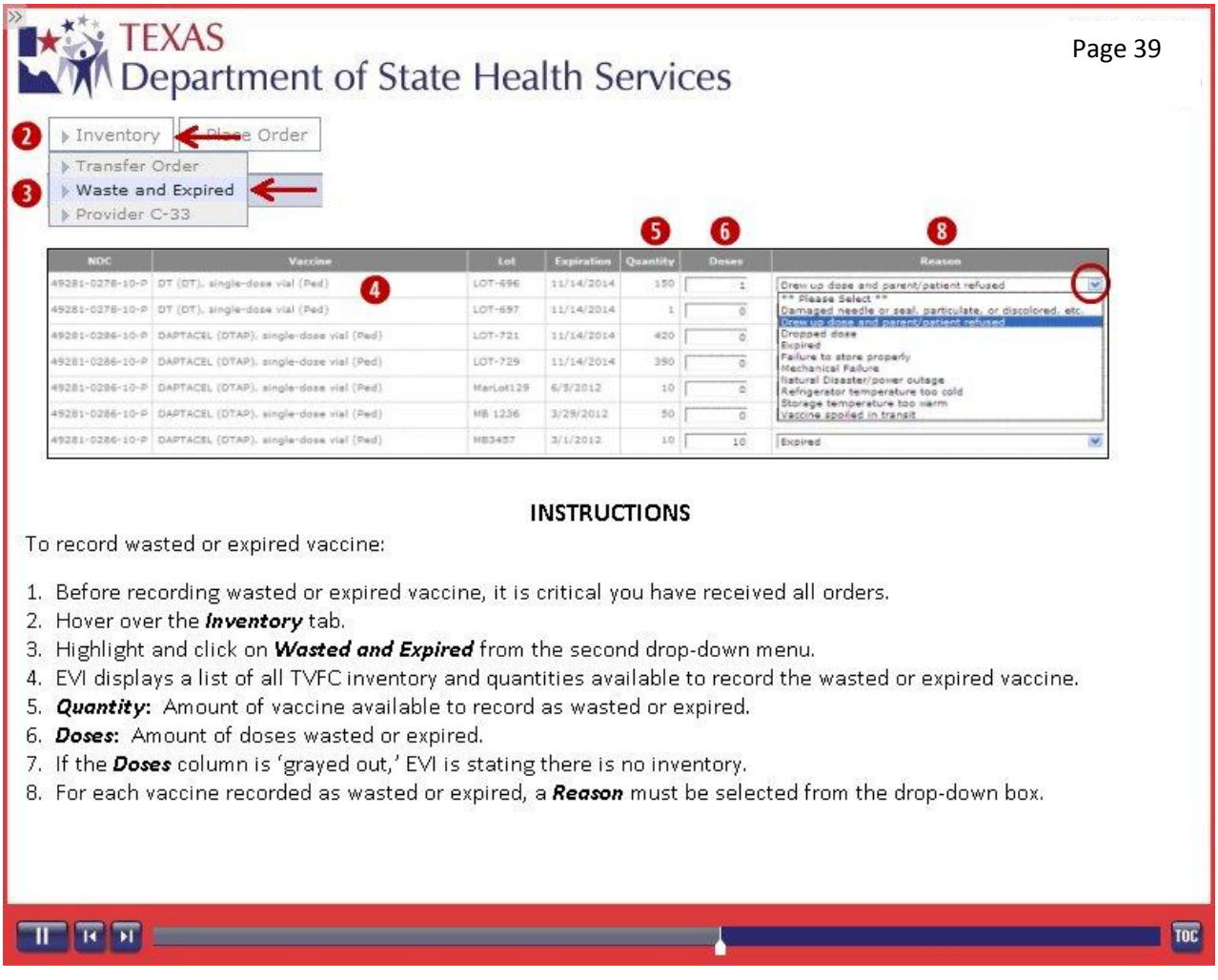
Important:
A wastage is defined as a loss someone sees or is reported, it is not a 'mysterious appearance' or a 'mysterious disappearance' of vaccine. A 'mysterious appearance' or 'mysterious disappearance' of vaccine is recorded on the ***Inventory: Provider C-33*** screen.
As a wastage occurs it must be documented in EVI for each occurrence and reported to your local TVFC representative. Each time there is an occurrence:

- Site must enter the information into EVI
- Site must print the automated **Vaccine Loss Report (C-69).**
- **Vaccine Loss Report** must be signed by the medical provider who signed the TVFC Provider Enrollment.
- **Vaccine Loss Report** must be faxed to your assigned TVFC representative within the defined program timeframe.

If the loss form is used as a packing list:

- The form must be signed by the provider who signed the TVFC Enrollment form.
- Any vaccine that is broken or otherwise deemed a hazardous waste cannot be returned for excise tax credit. These items should be destroyed onsite according to your clinic's hazardous waste policy.
- You must mark out all vaccines not being returned (due to damage, etc.) before placing the form into the box and sending it back to the distributor for excise tax credit.

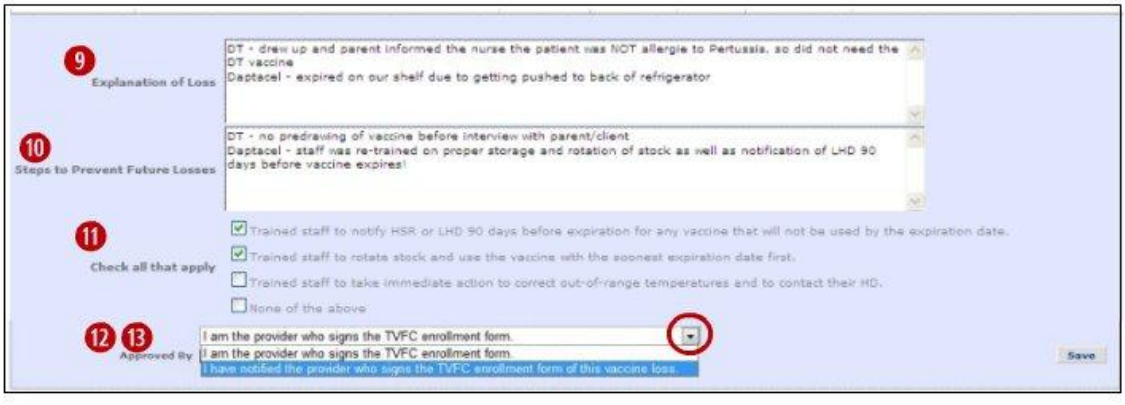
Provider must wait on receipt of a postage paid label and the next UPS delivery to return the vaccine.



INSTRUCTIONS

To record wasted or expired vaccine:

1. Before recording wasted or expired vaccine, it is critical you have received all orders.
2. Hover over the ***Inventory*** tab.
3. Highlight and click on ***Wasted and Expired*** from the second drop-down menu.
4. EVI displays a list of all TVFC inventory and quantities available to record the wasted or expired vaccine.
5. ***Quantity***: Amount of vaccine available to record as wasted or expired.
6. ***Doses***: Amount of doses wasted or expired.
7. If the ***Doses*** column is 'grayed out,' EVI is stating there is no inventory.
8. For each vaccine recorded as wasted or expired, a ***Reason*** must be selected from the drop-down box.



INSTRUCTIONS

9. ***Explanation of Loss*:** Thorough explanation of why the vaccine was wasted or allowed to expire.
10. ***Steps to Prevent Future Losses*:** Thorough explanation of what you did to avoid any more wastage or expiration of vaccine.
11. ***Check all that apply*:** List of expectations when a loss occurs. EVI requires you choose at least one item shown. Not all of these apply to each situation and if none apply, you must choose: "***None of the above***."
12. If the person completing the action in EVI is the provider who signs the TVFC Enrollment, select "***I am the provider who signs the TVFC enrollment form***."
13. If the person completing the action in EVI is NOT the provider who signs the TVFC Enrollment, the expectation is the signing provider is informed and you acknowledge this by selecting, "***I have notified the provider who signs the TVFC enrollment form of this vaccine loss***."

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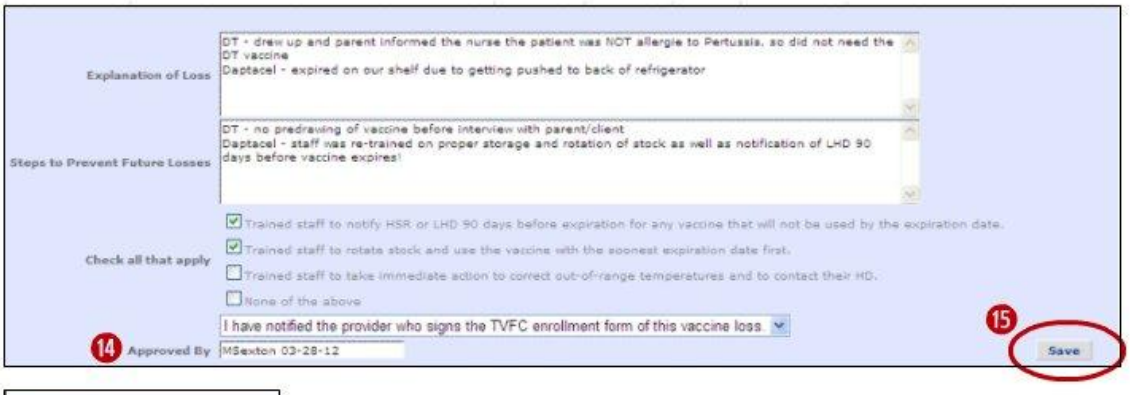

INSTRUCTIONS

14. ***Approved By:*** Text box to enter first initial/last name/date.
15. Click ***Save***.
16. Print the form using the ***Printer*** icon located above the ***Main Report*** tab.
17. EVI automatically decreases your on hand inventory by the amount indicated.
18. EVI refreshes and presents a form to be printed, signed, faxed to your assigned LHD or HSR.
19. A signed copy should be used as a packing slip and placed with the return.

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Wasted or Expired Vaccines

PIN: **080299**
Facility Name: MAIN STREET CLINIC
Address: 125 MAIN STREET
WOLFFORTH, TX 79382-2241

Phone: (555)599-1236
Contact: MARY ROBIN

Explanation of Loss

DT - drew up and parent informed the nurse the patient was NOT allergic to Pertussis, so did not need the DT vaccine
Daptacel - expired on our shelf due to getting pushed to back of refrigerator

Step To Prevent Future Losses

DT - no predrawing of vaccine before interview with parent/client
Daptacel - staff was re-trained on proper storage and rotation of stock as well as notification of LHD 90 days before vaccine expires!

☑ Trained staff to notify HSR or LHD 90 days before expiration for any vaccine that will not be used by the expiration date.

☑ Trained staff to rotate stock and use the vaccine with the soonest expiration date first.

Vaccine	NDC	Lot Number	Expiration	Doses	Reason	Cost
DT (DT), single-dose vial (Ped)	49281-0278-10-P	LOT-696	11/14/2014	1.00	Drew up dose and parent/patient refused	$29.06
DAPTACEL (DTAP), single-dose vial (Ped)	49281-0286-10-P	MB3457	03/01/2012	10.00	Expired	$145.10
					TOTAL COST	$174.16

Example: Form for Wasted or Expired Vaccines

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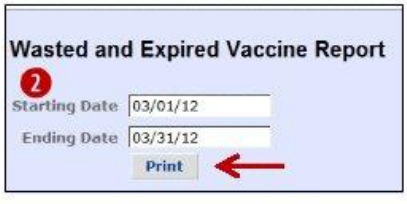
Inventory: Wasted and Expired - Historical Transactions:

EVI supports retrieving wasted or expired ***Historical Transactions.*** Upon opening the ***Inventory - Wasted and Expired*** tab, it shows a hyperlink: ***Historical Transactions***.

INSTRUCTIONS

To view historical transactions:

1. Click on the ***Historical Transactions*** hyperlink.
2. EVI refreshes and produces a date parameter selection.
   a. ***Starting Date:*** Enter a date (xx/xx/xxxx) or select from calendar.
   b. ***Ending Date:*** Enter a date (xx/xx/xxxx) or select from calendar.
   c. Click ***Print*** for a preview.
3. Please be patient! EVI may take several minutes to retrieve the date range.



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INSTRUCTIONS

4. EVI refreshes and brings up the first ***Wasted or Expired Report*** conducted in EVI during the date range specified.
5. If there is only one report, EVI retrieves only one; however, if there are multiple reports, they are listed individually under the ***Main Report*** menu.
   a. Reports are not numbered sequentially.
   b. If looking for a specific report, open and view before printing.

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Inventory: Provider C-33:

This screen is used to enter your physical count each month and validate all the activities recorded since the last time you saved this screen. It must be completed within two days of placing an order. EVI allows updating your inventory more than once a month; but it is recommended you limit this activity to once a month to avoid the risk of duplicating your data.

Important:

- After completing Steps 1-3, it is recommended you complete this screen only one time at the end of the month and **AFTER** the following sequence of events:
  - Receipt of all orders and/or transfers.
  - Conduct any transfers (if applicable).
  - Record any wasted or expired vaccine (if applicable).
  - Record ***Doses Administered***.
- After completing the above sequence of events, it is recommended you print a copy of the ***Monthly Biological Report*** (2nd report on the drop-down list) to manually complete before entering your data into EVI.

INSTRUCTIONS

If data is entered from each of the above screens, it is shown on the ***Provider C-33*** screen as described below:

1. Hover over the ***Reports*** tab.
2. Highlight and click on ***Monthly Biological*** from the drop-down menu.
3. Print the report using the ***Printer*** icon located above the ***Main Report*** tab.

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Monthly Biological report

Agency: ABC Pediatrics PIN: 080999 Month/Year: May 2012
Street Address: 1113 Main Street Name of person completing report:
City: Dilley Zip: Phone number: 555-555-2342

Vaccine	Lot	Expiration	A. Doses on Hand at begining of month	B Doses received during month	C. Doses Transferred into Inventory from	D. Total Inventory A+B+C=	E. Doses Administered During Month Subtract from Inventory			F. Expiruned Doses Returned to Distributor	G. Doses Transfered out to Other Providers	H. Doses on Hand at End of Month	I. Net Doses Lost or Gained Enter + or -
			Beginning Inventory	Add to Inventory	Add to Inventory	subtotal	a. birth - 18 years	b. 19 years +	a + b = Total	Subtract from Inventory	Subtract from Inventory	Physical Count	
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)	MBB 2345	05/15/2015	0	50	0	50	3	0	3	0	5	41	1
KINRIX (DTAP-IPV), PF syringe (Ped)	MBB 55765	07/02/2016	0	40	0	40	3	0	3	0	5	31	0
VAQTA (HEP A), single-dose vial (Ped)	1268AA	06/17/2014	13	0	0	0	3	0	3	2	0	8	0
PREVNAR 13 (PCV13), PF syringe (Ped)	P22720	02/28/2013	13	0	0	0	3	0	3	0	0	10	0

Example: Monthly Biological Report

INSTRUCTIONS

4. Complete the worksheet based on information from packing slips, doses administered data, transfer forms and/or vaccine loss forms.
5. **Receive** any/all outstanding orders or transfers.
6. If not done as it occurred throughout the month, record any **Transfer** conducted.
7. If not done as it occurred throughout the month, record any **Wasted or Expired** vaccines.
8. Record all ***Doses Administered*** activities for the past calendar month.

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INSTRUCTIONS

9. Hover over the ***Inventory*** tab.
10. Highlight and click on ***Provider C-33*** from the second drop-down menu.
11. EVI refreshes the screen and provides a ***Last Ran*** as the date and time you last saved this screen.
12. AFTER steps 1-9 are completed, this screen shows the various columns populated with transactions since the last time you saved the information on the ***Inventory: Provider C-33*** screen:
    a. ***Beginning Doses*** = ***Physical Count***.
    b. ***Doses Received*** = Received vaccines.
    c. ***Doses Transferred*** = Vaccines transferred.
    d. ***Doses Wasted or Expired*** = Vaccines recorded as wasted.
    e. ***0-18 and 19 and over*** = Doses administered.
    f. ***Automated Total Doses*** = ***Beginning Doses + Doses Received - Doses Transferred - Doses Wasted - Doses Administered.***
    g. ***Math Error*** = Difference between ***Automated Total Doses*** - ***Physical Count***.
    h. **Adjustment** = Difference between ***Automated Total Doses*** - ***Physical Count***.

Note: The ***Math Error*** and ***Adjustment*** columns are automated by EVI. If the sum of these columns is more than zero, you should verify you have recorded all receipts, transfers, wasted or doses administered and your hand count is correct. After research, if none of the above is incorrect, it is considered an unexplained math error and you must choose a ***Reason for Adjustment*** for each vaccine with the discrepancy.

13. ***Entered By:*** In the text box enter, first initial/last name/date of reconciliation. Click ***Save***.
14. EVI displays a popup message box stating: "***Provider C-33 Successfully Saved***." Click ***OK***.
15. EVI refreshes and displays the current date and time next to ***Last Ran***.

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Vaccines in Inventory — **Starting Balance + Received - Transfer - Wasted - Administered = *Automated Total Doses***

Vaccine	Beginning Doses	Doses Received	Doses Transferred Out	Expired or Wasted Doses	0-18	19 and over	Automated Total Doses
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)	0	50	5	0	3	0	42
Group 14--DTaP-HepB-IPV Pediarix Total	**0**	**50**	**5**	**0**	**3**	**0**	**42**
KINRIX (DTAP-IPV), PF syringe (Ped)	0	40	6	0	3	0	31
Group 16--DTaP-IPV Kinrix Total	**0**	**40**	**6**	**0**	**3**	**0**	**31**
VAQTA (HEP A), single-dose vial (Ped)	13	0	0	2	3	0	8
Group 20--HEP A (Ped) Total	**13**	**0**	**0**	**2**	**3**	**0**	**8**
PREVNAR 13 (PCV13), PF syringe (Ped)	13	0	0	0	3	0	10
Group 42--PCV13 (Ped) Total	**13**	**0**	**0**	**0**	**3**	**0**	**10**

List of Vaccines in Inventory

Automated Total - Physical Count = Math & Adjustment

Vaccine	NDC	Automated Total Doses	Physical Count	Math Error	Adjustment
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)	58160-0811-52-P	42	41	1	1
Group 14--DTaP-HepB-IPV Pediarix Total		**42**	**41**	**1**	
KINRIX (DTAP-IPV), PF syringe (Ped)	58160-0812-52-P	31	31	0	0
Group 16--DTaP-IPV Kinrix Total		**31**	**31**	**0**	
VAQTA (HEP A), single-dose vial (Ped)	00006-4831-41-P	8	8	0	0
Group 20--HEP A (Ped) Total		**8**	**8**	**0**	
PREVNAR 13 (PCV13), PF syringe (Ped)	00005-1971-02-P	10	10	0	0
Group 42--PCV13 (Ped) Total		**10**	**10**	**0**	

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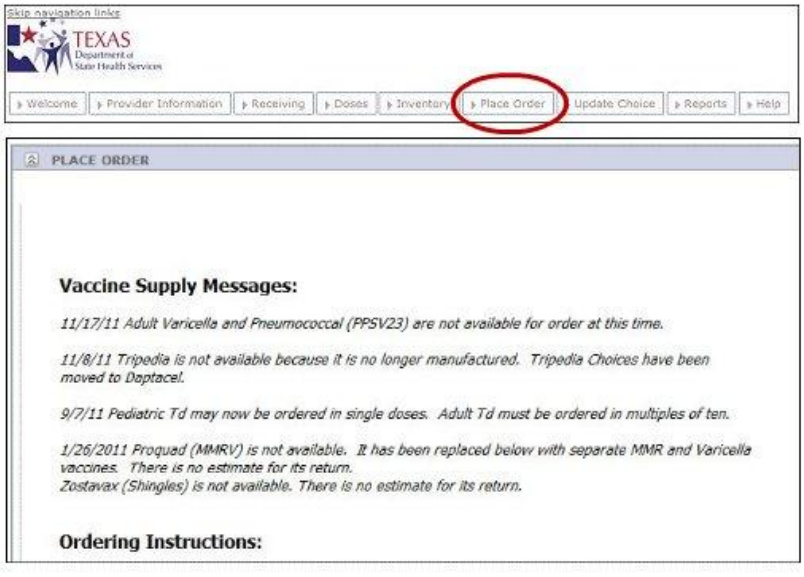
Place Order:

On the ***Place Order*** screen is where you place orders for your current vaccine choices. The top half of the screen contains important information about unavailability of vaccines and basic instructions to assist you in completing your order.



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Place Order:

Important:

- EVI requires you record ***Doses Administered*** and enter your physical on hand count on the ***Inventory: Provider C-33*** screen no more than 2 days BEFORE placing an order.
- Even if you do not wish to or it is not your assigned month to order, you must record your ***Doses Administered*** and complete your physical on hand count.
- All vaccines come in quantities of 5 or 10 EXCEPT for DT, Pedi which can be ordered as a single dose.
- If a combination vaccine is not available, a single antigen for each component of the combination will be substituted. It is **critical** you review the ***Suggested Quantity*** carefully! This will reduce the risk of you overstocking OR receiving more vaccine than you can store!
- Review and click on all checkboxes validating shipping address, correct temperatures, and ***Hours of Operation***.
- In case your responsible entity has a question about your order, **always** add a name in the ***Name of Person Approving Order*** text box.

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Your TOF: M MONTHLY

Vaccine To Be Shipped	Unavailable Vaccine	Suggested Quantity (# of Doses)	Quantity	Comments	Error Messages
DT (DT), single-dose vial (Ped)		0.00	0		
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)		0.00	0		
PENTACEL (DTAP-IPV-HIB), single-dose vial (Ped) [5pk]		0.00	0		
ENGERIX-B (Hep B), PF syringe (Ped)		0.00	0		
VARIVAX (VARICELLA), single-dose vial (Ped)		0.00	0		
HAVRIX (HEP A), PF syringe (Adult)		0.00	0		
HAVRIX (HEP A), single-dose vial (Adult)		0.00	0		

INSTRUCTIONS

1. ***Your TOF*** - Assigned Tiered Ordering Frequency (TOF). The TOF is based upon actual or projected annual vaccines usage and provider storage capacity. Providers are asked to place their orders during their assigned calendar months.

   Current TOF Schedules are:

   - **M - Monthly** - Allowed to order every month.
   - **B1 - JAN, MAR,MAY,JULY,SEPT,NOV.**
   - **B2 - FEB,APR,JUNE,AUG,OCT,DEC.**
   - **Q1 - MAR,JUNE,SEPT,DEC.**
   - **Q2 - JAN,APR,JULY,OCT.**
   - **Q3 - FEB,MAY,AUG,NOV.**

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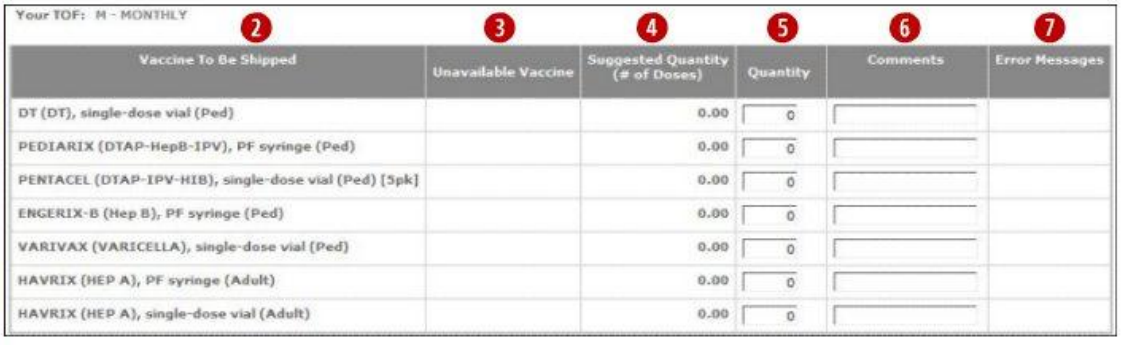

Your TOF: M - MONTHLY

2 Vaccine To Be Shipped	3 Unavailable Vaccine	4 Suggested Quantity (# of Doses)	5 Quantity	6 Comments	7 Error Messages
DT (DT), single-dose vial (Ped)		0.00	0		
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)		0.00	0		
PENTACEL (DTAP-IPV-HIB), single-dose vial (Ped) [5pk]		0.00	0		
ENGERIX-B (Hep B), PF syringe (Ped)		0.00	0		
VARIVAX (VARICELLA), single-dose vial (Ped)		0.00	0		
HAVRIX (HEP A), PF syringe (Adult)		0.00	0		
HAVRIX (HEP A), single-dose vial (Adult)		0.00	0		

INSTRUCTIONS

2. ***Vaccine To Be Shipped*:** Vaccine you are ordering and will be shipped. **Important:** This column should contain your original vaccine choice **unless** your choice is not available. If your choice is not available, this column shows the vaccine that is available to be ordered and shipped.

3. ***Unavailable Vaccine*:** If your original choice is not available, this column is populated showing your original choice. Otherwise this column is always blank.

4. ***Suggested Quantity (# of doses)*:** A recommended order amount in doses based on current inventory and MSL. This information cannot be changed.

5. ***Quantity*:** Same quantity as shown under ***Suggested Quantity*** based on current inventory and MSL. The amount can be changed to meet your client population and storage capacity. All vaccines come in quantities of 5 or 10 EXCEPT for DT, Pedi which can be ordered as a single dose.

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Important:

- ***Comments*** field is required to be completed for **any** vaccine where the ***Quantity*** is changed to more than the ***Suggested Quantity***.
- If the justification for the increase is a special clinic, you must note **"Special Clinic on (insert specific date)."**
- If the justification for the increase is back to school clinic, you can simply state: **"Back to School Clinic."** No date is required.
- If the justification is same for all vaccines with an increase, copy and paste the justification next to each item.

INSTRUCTIONS

6. ***Comments***: Each line item with an increase to the ***Quantity*** is required to enter a justification for the increase using the ***Comments*** field.
7. ***Error Messages***: EVI will display an error message for the following reasons: Increase in ***Quantity*** without a justification, or requesting a quantity other than the available shipping increment.

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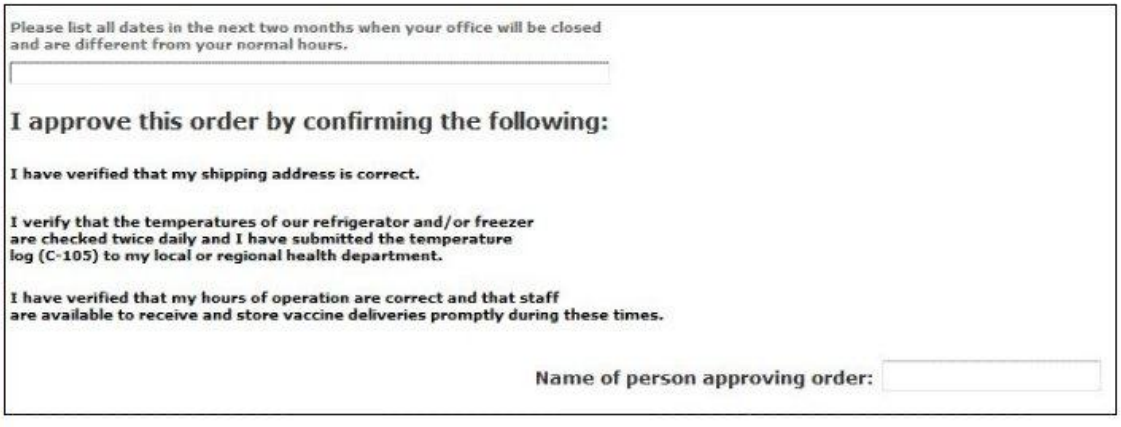

INSTRUCTIONS

8. **Special Instructions/Closures:** This section allows you to record specific date(s) your facility is closed; however, there is a restriction of 50 characters so it is important to limit the text. **Ex:** If you are placing an order in June and your office is closed the week of July 4th, you only need to enter '**07-02 to 07-06-12.**'.

9. **Confirmation Statements:** By placing a check mark beside each confirmation statement you are verifying:
   - Provision of a valid ***Shipping Address***,
   - Maintenance of appropriate recording and range of temperatures, and
   - ***Hours of Operation*** have been noted as to when staff is available to accept delivery of vaccines.

10. ***Name of Person Approving Order*** - Should contain the name of the person completing and available to answer questions related to the order.

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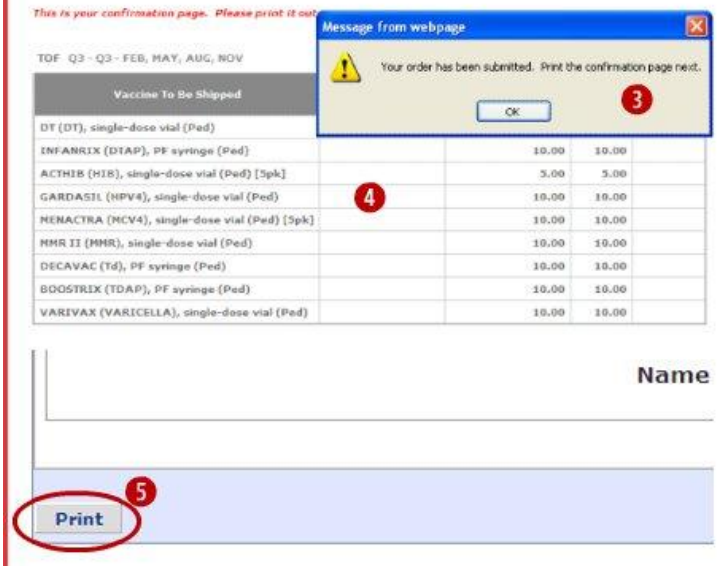
PIN 080099 (1)

Thank you for placing your vaccine order. Order # 122560 (2) has been submitted for approval.
Please use the print button on the bottom of this page to print a copy for your records.



Important:

- When you are ready to submit the order, click the ***Submit*** button in the lower left hand corner.
- Once the order has been submitted, a popup will appear, reading: ***"Your order has been submitted. Print the confirmation page next."***
- Print a copy of the order for your files/reference.

1. ***PIN***: Identifies the PIN submitting the order.
2. ***Order #*** assigned to your submitted order.
3. Message from web page - confirmation your order was submitted.
4. Order contents - list of only vaccines with quantities requested.
5. ***Print*** button to print the screen contents.

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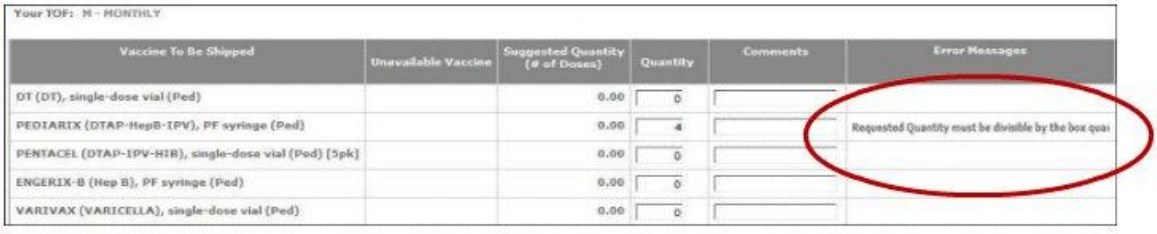

Your TOF: M - MONTHLY

Vaccine To Be Shipped	Unavailable Vaccine	Suggested Quantity (# of Doses)	Quantity	Comments	Error Messages
DT (DT), single-dose vial (Ped)		0.00	0		
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)		0.00	4		Requested Quantity must be divisible by the box quar
PENTACEL (DTAP-IPV-HIB), single-dose vial (Ped) [5pk]		0.00	0		
ENGERIX-B (Hep B), PF syringe (Ped)		0.00	0		
VARIVAX (VARICELLA), single-dose vial (Ped)		0.00	0		

Place Order: Possible Error Message "Quantity":

If there is a problem with your order contents, upon clicking ***Submit***, EVI will remove the entry in the three checkboxes and the text in the ***Name of Person Approving Order*** box is also removed. You must scroll up through your order to view the error message.

One error message relates to ordering a vaccine in an amount different than the shipping increment. TVFC vaccines come packaged in increments of 5 and 10 doses except for DT Pedi which can be ordered as a single dose. If you change the ***Quantity*** to an increment not available EVI returns: "***Requested Quantity must be divisible by the box quantity of 10***" in the line next to the vaccine with the error.

INSTRUCTIONS

1. View what EVI states as the ***Quantity*** increment.
2. Round up or down the ***Quantity*** amount in the increment displayed.
3. Recheck the three checkboxes.
4. Enter your first initial, last name and the date in the ***Name of Person Approving Order*** text box.
5. Click the ***Submit*** button.
6. EVI refreshes and you receive the confirmation box.
7. Print a copy of your new order with the corrections.

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Your TOF: M - MONTHLY

Vaccine To Be Shipped	Unavailable Vaccine	Suggested Quantity (# of Doses)	Quantity	Comments	Error Messages
DT (DT), single-dose vial (Ped)		0.00	0		
PEDIARIX (DTAP-HepB-IPV), PF syringe (Ped)		0.00	10		Allowable Overage Percent Exceeded reason must be given
PENTACEL (DTAP-IPV-HIB), single-dose vial (Ped) [5pk]		0.00	0		
ENGERIX-B (Hep B), PF syringe (Ped)		0.00	0		
VARIVAX (VARICELLA), single-dose vial (Ped)		0.00	0		

Place Order: Possible Error Message "Reason":

Another possible error relates to increasing the ***Quantity*** and not providing a justification in the ***Comments*** field. Upon clicking ***Submit***, EVI will remove the entry in the three checkboxes and the text in the ***Name of Person Approving Order*** box. You must scroll up through your order to view which vaccine entry contains the error message: "***Allowable Overage Percent Exceeded Reason Must Be Given.***"

INSTRUCTIONS

1. If extra vaccine is needed, enter a justification in the ***Comments*** column.
2. If the reason is **Special Clinic** enter the statement and include the date of the clinic.
3. If the reason is **Back to School** enter the statement (no date is required).
4. Recheck the three checkboxes.
5. Enter your first initial, last name and the date in the ***Name of Person Approving Order*** text box.
6. Click the ***Submit*** button.
7. EVI refreshes and you receive the confirmation box.
8. Print a copy of your new order with the corrections.

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Order Placement Requirements:

TVFC has several requirements before an order is approved by your local health department or health service region. For an order to be approved:

- You must record ***Doses Administered*** data and update your physical count on the ***Inventory: Provider C-33*** screen before placing an order.
- No orders will be approved by your local health department or health service region without receipt of a **Temperature Recording Form** showing all days/temperatures within range.

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Order History:

EVI stores a record of historical order contents.

INSTRUCTIONS

1. To access, click on the ***Order History*** hyperlink located in the upper right hand corner of the screen.
2. EVI refreshes and produces ***Order History*** with a list of all the orders, ***Order*** and ***Order Date*** placed for your site.
3. EVI supports sorting by the column headers to re-arrange the order on the screen.
4. ***Order*** = Order number generated in EVI when the order is placed.
5. The 2nd column, untitled at this time, is the **Status** of your order. There are six different statuses of orders:
   a. ***Open*** - This order is approved by your LHD or HSR to go to the distributor.
   b. ***Hold*** - This order is awaiting approval by your LHD or HSR.
   c. ***Discrepancy*** - This order has a change to your address and/or ***Hours of Operation***.
   d. ***Packed*** - This order has been submitted to the distributor.
   e. ***Shipped*** - This order is enroute to your site.
   f. ***Received*** - You have received this order in EVI.

Important:

If your local health department or health service region changes the ***Quantity*** you ordered, the history shows the edited/ revised total.

Click the + for Order Detail

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Order History:

122291	Shipped	3/13/2012

Detail History

Line	Vaccine	Vaccine Substituted	Suggested Quantity (# of Doses)	Quantity
4	KINRIX (DTAP-IPV), PF syringe (Ped)		10.00	10.00
5	HAVRIX (HEP A), PF syringe (Ped)		20.00	20.00
13	MMR II (MMR), single-dose vial (Ped)		20.00	20.00
14	PREVNAR 13 (PCV13), PF syringe (Ped)		20.00	20.00
17	DECAVAC (Td), PF syringe (Ped)		30.00	30.00
20	VARIVAX (VARICELLA), single-dose vial (Ped)		20.00	20.00

INSTRUCTIONS

6. Click on the **+** next to the order you wish to open. This action opens the details of the order showing:
   a. ***Line***: The line sequence of the vaccine on the order as it appeared on your ***Place Order*** screen BEFORE you submitted the order.
   b. ***Vaccine***: What Brand, Vaccine Family, Presentation and Pedi or Adult is in the order.
   c. ***Vaccine Substituted***: If applicable contains your original choice when your vaccine choice is not available.
   d. ***Suggested Quantity***: Amount EVI recommended you receive.
   e. ***Quantity***: Amount you ordered or amount your LHD or HSR approved to be sent.

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Update Choice:

Several times during the year you will be notified to review/update your vaccine choices. Only during the timeframe to review and/or update will the ***Update Choice*** tab be visible or active!

Upon clicking on the ***Update Choice*** tab, a screen appears with several sections. At the top of the screen, general instructions for completion will appear, e.g., deadline for completion.

In the next couple of slides, we will explain in more detail the purpose of the ***Update Choice*** functionality to:

- Make changes or additions to your vaccine choices.
- Review current choices - no changes needed.
- Confirm changes on the ***Place Order*** screen.

Important:

- The ***Update Choice*** tab is **only** visible during the timeframe designated to update your choices.
- Once notified, your office has **only two weeks** to update your choices.
- If you are satisfied with your current choices, you are not required to take any action!
- If it is your month to order, you must order **before** making any changes to your vaccine choices.
- Placing an order before making any changes reduces the risk of delaying or the possibility of your order being placed on backorder!

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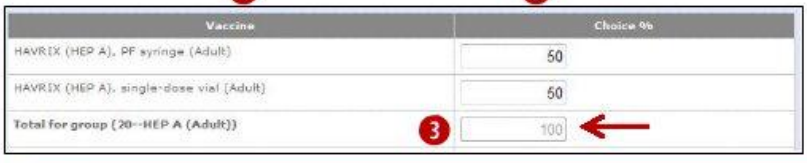

Important:

Choice **%** -

- If the maximum stock level for a vaccine is 30 or less, you must choose **one** Brand/Presentation.
- Choose all appropriate vaccines for your patient population.
- Always verify you have adequate storage for **all** vaccine choices.
- For any 'Vaccine Family' with only one Brand/Presentation you **must** indicate 100% if you wish to receive this vaccine. Example: DT has one Brand/Presentation available. If you wish to receive DT Pedi must indicate **100**% under ***Choice*** %.

Update Choice: Changes or Additions:

INSTRUCTIONS

To update your vaccine choices, click on the ***Update Choice*** tab.

1. ***Vaccine*****:** Review the vaccines available based on your TVFC enrollment as a Pediatric/Adolescent only provider, Adult only provider, or both.
2. ***Choice %*****:** For each vaccine, enter a percentage from 0% - 100%.
3. ***Total for Group*****:** Be sure the total percentage per group is 0% or 100%.

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Important:

If the corrections/additions you made are not on your printed copy, please click on the ***Update Choice*** tab and repeat the necessary steps to make your corrections.

INSTRUCTIONS

4. ***Name of Person Approving Changes***: Enter your first initial, last name as well as the date to identify when the choices were completed.
5. Click ***Submit*** to save your changes.
6. At this point EVI refreshes to a new screen with the availability to print. Click ***Print*** to get a copy for your files.

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Vaccine	Choice %
HAVRIX (HEP A), PF syringe (Adult)	25
HAVRIX (HEP A), single-dose vial (Adult)	50
Total for group (20--HEP A (Adult))	75*

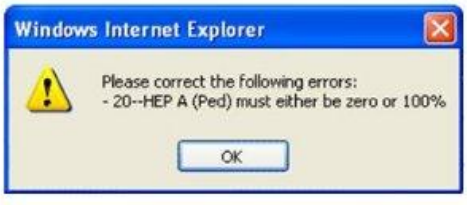
Important:

For any Vaccine Family with only one Brand/Presentation you **must** indicate 100% if you wish to receive the vaccine.

Update Choice: Possible Error Message "Total":

INSTRUCTIONS

If ***Total for Group*** is anything other than 0% or 100%, an error message appears identifying the Vaccine Group with the error:



Scrolling back up the page reveals an asterisk by the wrong ***Total for Group***. Please correct the error and click ***Submit***.

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Important:

Enter your first initial, last name **and** date your choices were updated!

Update Choice: Possible Error Message "Approver":

INSTRUCTIONS

If you do not complete ***Name of Person Approving Changes:*** you receive the following error message.

Scrolling back up the page reveals an asterisk by the wrong field. Please correct the error and click ***Submit***.

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Reports:

EVI provides the ability to generate reports within the system. Already covered are the retrieval and use for the ***Monthly Biological*** worksheet and ***Tally and Physical Count Sheet***. Other reports are:

- ***Wasted Vaccine*** - Requires a date parameter and displays all reports/events recorded of wasted or expired vaccines.
- ***Doses About to Expire*** - Does not require a date parameter and reports all vaccine with or without a balance that has expired and/or is expiring within the next 90 days.
- ***C-33 History Report*** - Electronically completed ***Monthly Biological Report*** for the time period specified based on the completion of the ***Inventory: Provider C-33*** screen. Requires a date parameter and displays all reports/ events of when you reconciled your inventory.

INSTRUCTIONS

To retrieve any report:

1. Hover over ***Reports***.
2. Highlight and click on the specific report you wish to extract.
3. Based on the specific report you chose, specific parameters may be required to extract the data.
4. If applicable, enter date parameters and click ***Print***.

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INSTRUCTIONS

5. Once you click on ***Print***, please be patient! It may take several minutes to run any one report.

6. Do not click out of the tab or into another tab while EVI is running; this could duplicate the data and/or lock up EVI.

7. If there are multiple reports listed, EVI will print all reports visible. To narrow the number of reports to print, change the date parameters.

   a. ***Wasted Vaccine*** - Reports are not numbered sequentially. If looking for a specific report, open and view before printing.
   b. ***Doses About to Expire*** - Does not display multiple reports. Compiles information as of the day it is run.

8. ***C-33 History Report*** - Reports are generated each time the ***Inventory: Provider C-33*** screen is saved. The title of the report contains a specific date. For example, if report title is: **20120312071754**, this is defined as **2012**=year; **03**=month of March; **12**=12th day of March; **071754**=time the ***Provider C-33*** was saved in EVI.

Example: Wasted and Expired Vaccine Report

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Doses About to Expire

PIN: **080922**

Date of Report: 4/2/2012

Item Number	Vaccine	Lot	Expiration	Day to Expiration	Dose in Inventory	Total Cost
00005-1971-02-P	PREVNAR 13 (PCV13), PF syringe (Ped)	MarLot138	06/05/2012	64	20	$1944.20
00006-4045-41-P	GARDASIL (HPV4), single-dose vial (Ped)	MarLot135	06/05/2012	64	10	$957.50
00006-4681-00-P	MMR II (MMR), single-dose vial (Ped)	MarLot137	06/05/2012	64	20	$379.78
49281-0286-10-P	DAPTACEL (DTAP), single-dose vial (Ped)	MBB234556	05/15/2012	43	100	$1451.00
49281-0286-10-P	DAPTACEL (DTAP), single-dose vial (Ped)	MB 1236	03/29/2012	-4	50	$725.50

Example: Doses About to Expire Report

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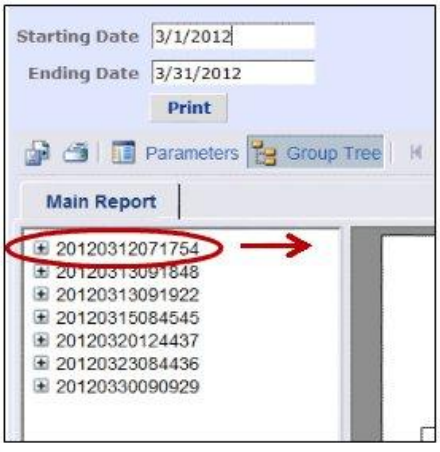

Example: C-33 History Report (Multiple reports available based on date range chosen).

Report Title Definition:

2012=year.
03=month of March.
12=12th day of March.
071754=time the ***Provider C-33*** was saved in EVI.

⊞ 20120312071754

Once you click on a specific report number, EVI displays this message box to let you know it is retrieving your chosen report. Please be patient! Depending on the amount of data, EVI may take several minutes to retrieve your report!

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Help:

This is the ***Help*** screen. The ***Help*** screen is where staff can access technical support information related to the EVI application, including the Vaccine Call Center Help Desk.

If you have questions regarding your order, please contact your assigned LHD or HSR.

If you have questions or are experiencing problems accessing EVI, please contact the Vaccine Call Center @ **1 888-777-5320**.

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