



Shared health
Soins communs
Manitoba

PHIMS Inventory

Agenda

- Intro
- Definitions
- Key concepts
- Inventory Functions

Intro

- Inventory will track vaccine orders from the warehouse, to the vaccine holding points, to the clients and back to the warehouse if they are returned
- Inventory is linked to Immunization:
 - After vaccine is received it will be visible as a choice when you immunize
 - When vaccine is recorded in PHIMS as a single immunization the vaccine is "auto-decremented" from the inventory stock (this does not occur with mass immunization)
 - Vaccines are identified by lot number and expiry date and can be searched in case of alerts or recalls (both administered vaccine and in stock vaccine)

Inventory Processes

- In many cases, there is more than one way to achieve the desired result, we are teaching you this way because it has been tested and we recommend that you start with these steps
- Just follow the steps and you will be fine!

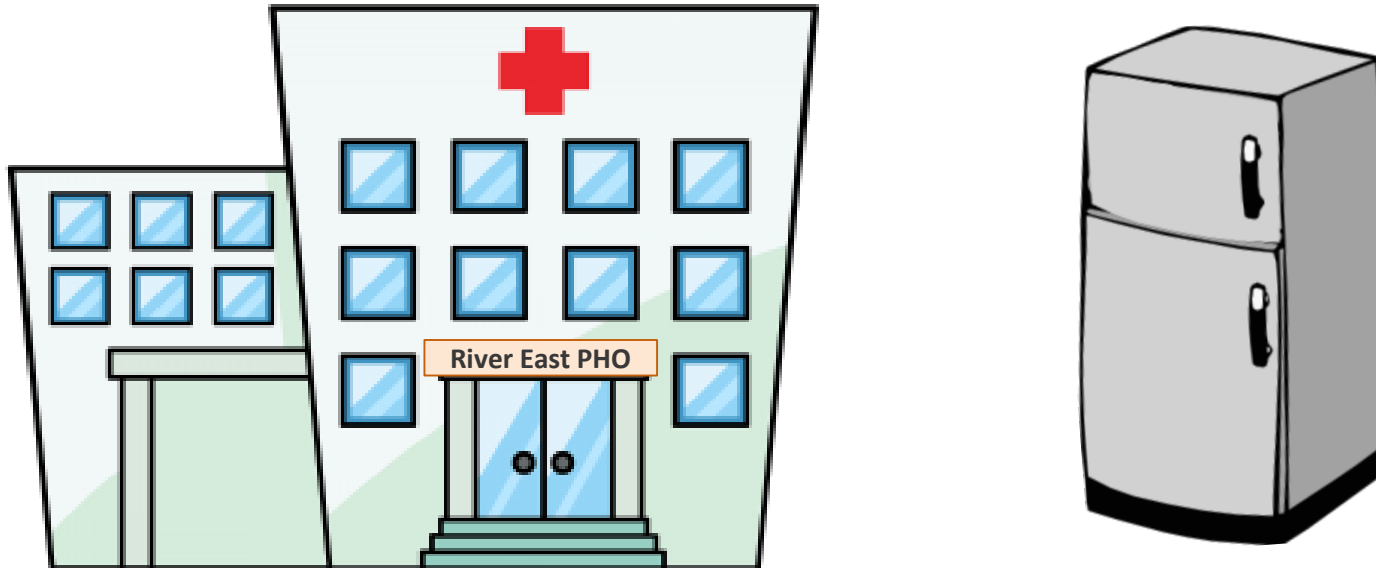
Inventory Definitions

Inventory Item	Definition
Catalogue Items/Product	Vaccine available to be ordered from Materials Distribution Agency (MDA)
Requisition	A vaccine order made by a Public Health Office to be filled by MDA
Service Delivery Location (SDL)	A physical location where public health services re delivered <i>(e.g. Public Health Office, School)</i>
Holding Point (HP)	A service delivery location that holds vaccine <i>(e.g. Public Health Office)</i>
Holding Point Location (HPL)	Specifies the location of the vaccine within the holding point <i>(electronic location e.g. Operations, Quarantine, For Return)</i>

Key Concepts

- Holding Points
- Holding Point Locations
- Catalogue
- SKUs

Holding Point

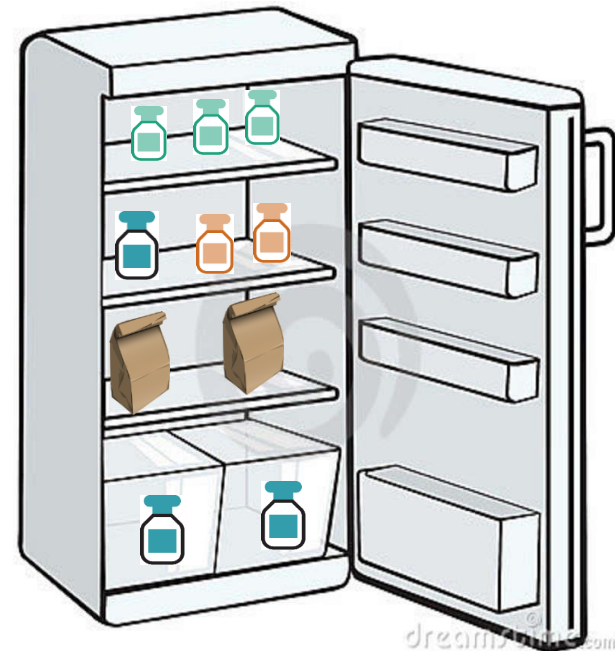


A service delivery location that holds vaccine
In PHIMS is represented by the **MDA Client ID#**
(*e.g. Selkirk Public Health – 80021*
Altona Public Health - 80077)

PHIMS Holding Point Location

The electronic location of the vaccine within the holding point

Inventory Item	Definition
Operational (OP)	all refrigerated useable vaccine goes here
Operational – None (OPN)	Non-refrigerated non-vaccine items e.g. STI meds, OCPs
Quarantine for review (QR)	any item that needs further assessment to determine whether it is usable (<i>e.g. temperature excursion, product recall</i>)
Cold Chain Quarantine (CCQ)	for items that have had a confirmed cold chain break and cannot be used
For Disposal (DIS)	For items that are to be returned to MDA (<i>does not require cold chain maintenance</i>)
Reserved Stock (RS)	place items here if they are to be used for a specific clinic and you do not want anyone else to use them



Stock Keeping Units (SKUs)

- Stock Keeping Unit (SKU) is the package presentation
e.g. 1 vial/box, 5vials/box, 10 vials/box
- In PHIMS we order in SKUs – same method as MB Health Biologics order form
e.g. Gardasil vaccine is packaged 10 vials/box
1 box = 1 SKU = 10 doses
- Partial SKUs are represented by a decimal point
e.g. 8 vials of HPV = 0.8 SKU

Boxes of 10 (e.g. Gardasil,9 Pevnar)



10 vials = 1 sku



9 vials = 0.9 sku



8 vials = 0.8 sku



7 vials = 0.7 sku



6 vials = 0.6 sku

Boxes of 5 (e.g. *Pediacel*, *TdaP*)



5 vials = 1 sku



4 vials = 0.8 sku



3 vials = 0.6 sku



2 vials = 0.4 sku



1 vials = 0.2 sku

Catalogue

- The catalogue contains
 - Products that are available to order
 - Same items as are on the MB Health Biologics order form
- Organized in 6 levels

Example of levels

Level		Hep B Pediatric	Gardasil
1	Category: Vaccines	Vaccines	Vaccines
2	Product Group: Vaccine type	Hepatitis B	HPV-9
3	Generic Product Strength: Volume	HB Pediatric 0.5ml	HPV-9 0.5ml
4	Product Presentation	HB Pediatric 0.5ml vial	HPV-9 0.5ml vial
5	Generic Product Package Size	HB Pediatric 0.5ml vial - 1/box	HPV-9 0.5ml vial - 10/box
6	Trade Product	Engerix B Junior HB 5 mcg - 1/box	Gardasil 9 - 10/box

Catalogue Item Codes

Biologics Order form



Product Code

PHIMS



Product Alternate ID
(Catalogue Item Code)

<u>Pediacel</u>	Single dose vial – 5 per box		1715001
<u>Boostrix – Polio</u>	Single dose syringe – 10 per box		1715055
<u>Engerix B Junior 0.5 mL</u>	Single dose vial – 1 per box		1715112
<u>Gardasil 9</u>	Single dose vial – 10 per box		1715085
<u>Flulaval Tetra</u>	Single dose vial – 10 per box		1715079
<u>Neisvac-C</u>	Single dose syringe – 10 per box		1715009
<u>Priorix – Tetra</u>	Single dose vial – 10 per box		1715040
<u>Prevar 13</u>	Single dose syringe – 10 per box		1715011

Inventory Functions

- Search Catalogue
- Search Requisition
- Create Requisition (Ordering)
- Receive Requisition
- View Inventory
- Adjust Products
- Move Inventory

Search Catalogue

- Option 1 – Broad Search
 - Click Catalogue Item – and Click Search
 - Will display the entire catalogue
 - Useful for ordering and other times when you want to see the entire catalogue
 - Demo -
- Option 2 - Defined Search
 - Select each level or use Catalogue Item Code
 - Used for finding a specific vaccine
 - Demo –

Search Tips

- When doing a broad search of the catalogue, alphabetize the items by clicking on the triangle in the top column
- Search Catalogue - QRC shows vaccine up to level 6 – Trade name
- Create Requisition - QRC shows vaccine up to level 5 – Generic name

Search Catalogue

- Demo
- Practice

You are a nurse or clerk at a Public Health Unit. You are planning your upcoming clinics and you want to know what vaccine is available to order from MDA.

- How many items are in the inventory search results?
- What is the Catalogue Item Code for Pediacel?
- What is the Catalogue Item Code for Gardasil 9?

Create Requisition (Ordering vaccine)

- Similar process to using the Biologics Order Form
- Orders will be in SKUs or packages
- There will be preset quotas that will give limits to orders – “pre-approvals”
- Approvals – will be required from MB Health if ordering above the set quotas
- Emergency orders – can be done by phone after hours or by MOH
- Requisitions can be **Saved** if you want to recheck, revise or have a second person check it before it is submitted
- **Ship To Instructions** – are specific to the order and will be included on the Manifest
- Shipping instructions that apply to all shipments are recorded in the Holding point profile

Ordering Tips

- Take note of the requisition ID number for future reference
- Save requisition if you are not finished, or you want to recheck or you want someone else to recheck the order before submitting
- Submit requisition can be done without saving if you wish
- Remember to select check boxes before submitting
- Initially you will receive “yellow banner” notifications about PH work groups, monthly demands etc – ignore them for now, just look for the message about “successfully submitted”

Create Requisition Practice

- Demo
- Practice

Create an order for Selkirk Public Health

- Holding Point (HP) <Main HP> (<HP number>)
- Choose “Next scheduled”
- Order 5 SKUs of:

User 1 – DTaP-IPV-Hib

User 2 – Pneumo23

User 3 – Rota-5

User 4 - Tdap

User 5 - PCV 13

User 6 – Men C

User 7 – Hep B pediatric

User 8 – MMRV

User 9 – HPV9

User 10 – Tdap - IPV

User 11 – Inf-Intramuscular

User 12 – MMR

Search Requisition

Can search by:

- Requisition ID number
- Status (pending pick, shipped etc)
- Date
- Ship to Holding Point

Search Requisition - QRC

- Demo
- Practice
- Search by Ship to Holding Point: <HP number>
 - How many results?
- Search by status: Shipped
 - How many results?
- Search by ID number: _____
 - What is the status?
- Search for Requisition ID _____
 - What is the status?
 - What is the product on order? How much?

Receive Requisition - QRC

- This is a new activity for PH users
- When vaccine is received, it must be documented into PHIMS to complete the shipping cycle
- When receiving your order, the destination holding point location (HPL) is required.
- Unless the vaccine is damaged or had a known temperature excursion, choose Operational (OP) HPL e.g. 80077-OP

Receive Requisition - QRC

- Demo
- Practice
- Search for the requisition # _____

View Inventory - QRC

- Viewing allows you to see what products are in your holding point (HP) including:
 - HPL details (what is in operational, quarantine etc.)
 - Product details (lot number, expiry date etc.)
 - SKU or dose
- In View Inventory, if the lot # is not visible, there is more than one lot # present. Individual lot numbers will display in the Adjust page.
- The quantities displayed on the Product Inventory: Search results page are for all HPLs, including unusable vaccine in disposal and quarantine.
- Best practice is to view the HPL locations by clicking on the quantity hyperlink or selecting HPL details.

View Inventory - QRC

- Demo
- Practice
- You are a PHN or clerk from <secondary HP> Office (<HP number>)
- View your inventory in stock
- How much of each vaccine is in stock?
 - SKUs
 - Doses

Physical Count - QRC

Physical Count Steps:

1. Create Count & Print Count Sheet

- **Create** a new count
- **Print** a count sheet

Activity outside of PHIMS - Perform the count and record it on the count sheet

2. Entering & Submit Physical Count Data

- **Enter** physical count data
- **Save** count
- **Recount**
- **Count Complete**

- Vaccines documented with the mass clinic functionality – the 'auto-decrement' feature must be selected, or the vaccines will need to be adjusted manually after the clinic
- In View Inventory, if the lot# is not displayed, there is more than one lot#. Individual lot #s will display in the Adjust page.

- Counts are always entered in SKUs or packages.
- Part boxes are represented by a decimal point.

Box of 5 vials	
5 vials	1 sku
4 vials	0.8 sku
3 vials	0.6 sku
2 vials	0.4 sku
1 vial	0.2 sku

Box of 10 vials	
10 vials	1 sku
9 vials	0.9 sku
8 vials	0.8 sku
7 vials	0.7 sku
6 vials	0.6 sku

Physical Count - QRC

- Demo
- Practice
- You are a PHN or clerk from <secondary HP> Public Health Office (Holding Point <HP number>)
- Create and complete a count with these amounts:

Vaccine	Alternate Product ID	Amount
Pediacel	1715001	8 full boxes
Engerix B junior	1715112	35 full boxes
Flulaval	1715079	53.5 full boxes
NeisVacC (10 syringes /box)	1715009	9 boxes
Pneumovax 23	1715012	55 boxes
Priorix-Tetra (10 vials/box)	1715040	13 boxes and 6 vials

Physical Count

Vaccine	Alternate Product ID	Amount: Boxes & Vials	Amount: SKUs
Pediacel	1715001	8 full boxes	8
Engerix B junior HB	1715112	35 full boxes	35
Flulaval	1715079	53.5 full boxes	53.5
NeisVacC (10 syringes /box)	1715009	9 boxes	9
Pneumovax 23	1715012	55 boxes	55
Priorix-Tetra (10 vials/box)	1715040	13 boxes and 6 vials	13.6

Adjust Products

- Adjusting is used to manage the count of existing inventory:
 - Corrects errors
 - Adjusts quantities after physical count shows a discrepancy
 - Accounts for vaccine delivered at a mass clinic
- Reflects quantity changes when vaccine has been received from or sent to another holding point
- Adjustment Reason – important for tracking and reporting
- Deviation Value Comment – please include if relevant – this is important for tracking and reporting

Adjustment Reasons

Menu item	When to Use
Ad hoc Stock Issued	use when moving vaccine from quarantine into operational
Ad hoc Stock Received	received from MDA e.g. emergency stock
Administered Vaccine	vaccine used at a mass clinic
Count Discrepancy	based on physical count
Disposal due to lot expiry	
Previous data entry error	
Shrinkage/breakage	
Spoiled by Adverse Storage Conditions	not likely to be used, we should be moving to returns HPL
Transfer from HP	if you have received vaccine from another HP
Transfer to HP	if you have sent vaccine to another HP

Adjust Inventory Tips

- “Adjusted Quantity on Hand” = actual amount of vaccine in your fridge
- After you enter the Adjusted QOH, the page refreshes with the Deviation Quantity when you click on any other part of the page
- When adding a new lot number, click on **Add Product** and select new lot number from drop down. If you try to select a lot number that already exists in your HP, the OP HPL will not display.
- **Cancel** button takes you back to the previous page

Adjust Inventory

- Demo
- Practice

Working in pairs in <secondary HP>, Adjust your product up 5 and then down 5

- User 1 and 2 –Pediacef
- User 3 and 4 – Engerix B
- User 5 and 6 – Flulaval
- User 7 and 8 – Neis VacC
- User 9 and 10 –Pneumo 23
- User 11 and 12 –Priorix-Tetra

Move Inventory

- This function is used to move inventory within your holding point
- From one HPL to another HPL
- Example – move vaccine from operational to quarantine for review if there has been a hold put on a vaccine lot until you are advised that it is safe to use or needs to be returned

Move Inventory Practice

- Demo
- Practice
- Working in the same pairs – move your product (5 skus) from Operational to Cold Chain Quarantine and back
 - User 1 and 2 –Pediacef
 - User 3 and 4 –Engerix B junior
 - User 5 and 6 –Flulaval
 - User 7 and 8 –NeisVacC
 - User 9 and 10 –Pneumo 23
 - User 11 and 12 –Priorix-Tetra

Returns Practice - QRC

- Demo
- Practice
- Working alone: Create a return for <Main HP>
 - User 1 and 2 –Pediacef – 5 SKUS
 - User 3 and 4 – Engerix - 5 SKUs
 - User 5 and 6 –Flulaval - 5 SKUs
 - User 7 and 8 –NeisVacC - 5 SKUs
 - User 9 and 10 –Pneumo 23 - 5 SKUs
 - User 11 and 12 –Priorix-Tetra - 5 SKUs
- Adjust step is optional in training but is required in Production

Follow-up Items

- Adverse Storage Conditions - QRC

Questions?