VII. North Carolina Immunization Registry (NCIR)
NC DPH. WCH: Immunization: Providers

http://www.immunize.nc.gov/providers/ncireducation.htm

North Carolina Immunization Branch

NCIR Education

NCIR Trainings

The following trainings are related to NCIR users and their specific roles in the registry. User roles include reports-only, typical user, inventory control, and administrators.

The user roles are defined as follows:

- **Reports-only**: The reports only user is able to search for clients and print client specific immunization records. This user may not edit or update information in the registry.
- **Typical User**: This user role is the most common in the NCIR. The typical user finds, adds, and edits clients records, manages immunization information, and prints immunization report for clients. The typical user is able to do everything that can be done by the reports-only user.
- **Inventory Control**: The inventory control user is responsible for the managing of the organization's inventory of vaccines. This role is able to use the NCIR to view the organization's inventory, add vaccines, update vaccines, view inventory transactions, submit inventory counts, and view inventory reports - including Vaccine Accountability Statements. The inventory control user is able to do everything that can be done by the typical user and reports-only user.
- **Administrator**: This user role serves as the main contact for the NCIR within the health care organization. Administrators are responsible for adding new users and inactivating users who should no longer have access. Administrators are also responsible for maintaining organization specific information, including user, site, and clinician information. This user role is able to run reports, including reminder/recall reports and reports to access immunization coverage. The administrator is able to do everything that can be done by report-only, typical, and inventory control users. It is required that you have at least two administrators within your organization - one primary and at least one backup.

https://immunize.nc.gov/providers/ncireducation.htm
North Carolina Immunization Registry
User Confidentiality Agreement
(Complete for each NCIR user)

As a user of the North Carolina Immunization Registry under

(Name of Organization)

I agree to abide by the following policies:
1. Use information contained in the registry only for purposes for which it is intended.
2. Release registry information only to those parties allowed access by North Carolina law and North Carolina administrative code.
3. Keep all information contained in the registry confidential.
4. Keep my assigned user ID and password confidential.
5. Report any violations of confidentiality that I witness.

________________________________________
Employee Name (Please Print)

________________________________________
Employee Signature/Date

________________________________________
On-site NCIR Administrator Signature/Date
## North Carolina Immunization Registry (NCIR) Overview

### What is NCIR?
- A secure, web-based clinical tool which is the official source for North Carolina immunization information;
- Healthcare providers may access all recorded vaccines administered in North Carolina, regardless of where the immunizations were given.

### NCIR Benefits
- Houses all immunization data including COVID-19 records
- User friendly and simple to navigate
- Increased efficiency to search all NC immunization data
- Reduced training needs by utilizing one system, rather than two

### Purpose
- To create an accurate and complete immunization data to enhance services for patients, parents, health care providers, schools and childcare facilities;
- To assist in the evaluation of a child's immunization status and identify children who need (or are past due for) vaccines;
- To assist communities in assessing their immunization coverage and identifying areas of under-immunization.
BOOKMARKING THE NCIR WEBSITE

1. Open a new browser window and type in https://ncir.dhhs.state.nc.us in the address bar and then bookmark the site (it will bookmark the NCID website).

2. Edit the bookmark by right-clicking on the bookmark itself, left-clicking on Properties and retyping the NCIR web address into the URL blank.

USER ID AND PASSWORD

• UserID is not case sensitive, but password is.
• Do not share userID and passwords.
• For added security, close the browser window after logging out of NCIR.

If you forget your userID or password use the links provided.

Enter UserID and password and click Login.

Use this link if your username is locked.

UPDATING YOUR USER PROFILE INFORMATION

Change your e-mail address or password by typing in the https://ncid.nc.gov web address.

Use the link shown to change your information.

HOW TO OBTAIN A NCIR USER ID

1. Open a new browser window and type https://ncir.dhhs.state.nc.us in the address bar.
2. Click the “Register!” link in bottom right corner of the blue box.

3. Click the Business button.

4. Complete the required personal information, including choosing your own UserID and password. Password requirements are listed on the page and will remain red until your choice of password meets all requirements. The strength of your password will be assessed, and you will be required to type it twice to ensure correctness.
6. Click Continue.
7. An e-mail from ncid.notifications@nc.gov will be sent to the provided e-mail address. Clicking the supplied link will verify your new UserID. You will be re-routed back to the NCID website, or you can copy the 6-digit code and paste it into the “Code” field.

8. Click Check Code.
9. Click Continue.
10. Once completing your challenge questions, you will be forwarded to NCIR.

NCIR HOMEPAGE

4 Ways to Search—only choose one:
* Search by client (Last Name, First Name, and Date of Birth)
* Search by Chart Number (This must be assigned & entered by your organization)
* Search by Mother’s Maiden Name (Mother’s Maiden Name, Mother’s First Name, Client’s Date of Birth)
* Search by NCIR ID (allows for secure and confidential sharing of client information by NCIR Administrators)

If the client has a compound last name, try entering only one portion of the last name (i.e. Johnson-Smith—enter “Johnson”).

SEARCHING FOR A CLIENT

Many clients are already in NCIR—and those who move into NC are easy to add!
1. Using the navigation menu on the left, click Manage Client.

NOTE: In general, Gender is unnecessary when searching for a client and could limit results unnecessarily.
2. Click Find.

(continue to next page)
3. If the client appears in the search results, check the name and DOB to ensure that this is the correct date.

4. If there are multiple clients that met your search criteria, you will see all possible matches listed:

5. If the client was not found, you will see the message below.

6. Click the **Add This Client** button to create a new client in NCIR.

7. The information that you entered on the search screen will all be retained on the “enter new client” screen.

**DUPLICATE CLIENT RECORDS**

- If you locate a duplicate client record, contact the NC Vaccines Help Desk at [https://ncgov.servicenowservices.com/csm_vaccine](https://ncgov.servicenowservices.com/csm_vaccine).
- Please note the NCIR ID number for both client records, and if possible, indicate which record is most accurate.

**DO NOT** e-mail client names or dates of birth! **DO USE** the Client ID (or NCIR ID) which appears in the gray bar at the top of each client screen.

**DUPLICATE CLIENT RECORDS**

If you are sure this is not the same client, click the “Create New Client” button.

6. If you think this may be the same client, click the last name of the existing client in blue.

7. If no match is found, click “Create New Client” button.

8. Click on **Responsible Persons**
   - Complete as much information as possible for each individual (minimum requirements: name, relationship, address and phone number)
   - **Notices** should be checked unless it is specified that the responsible person does not want to receive immunization reminders.
   - Default for language is always “English” unless you select otherwise.
   - Be sure that a “Primary” person is designated.
   - To add more than one person, click on Next.
   - Scroll to the top of the screen and click Save.

**VIEWING HISTORY / RECOMMEND**

From the edit client screen, click History / Recommend to view the client record and recommendations.

The screen has 4 sections: Client Information, History, Current Age, and Vaccines Recommend by Tracking Schedule.
ENTERING HISTORICAL IMMUNIZATIONS

Historical immunizations are immunizations that are not given from inventory (i.e. records from another office).

1. Search for the client using manage client or manage immunizations.
2. Click on History / Recommend button if using the manage client option.
3. Compare the client’s current immunization record with the doses listed in the NCIR and update as necessary. If doses are missing from the NCIR, click on Historical Immunization (located in the gray History bar below “Client Information”).
4. Key in the provider organization next to the vaccine trade name details section. If all shots that you are entering were given at the same place, click in the blank box for provider organization it will automatically fill-in as needed. There is a drop-down menu at the bottom of the list for vaccines that you do not see.
5. Click on the calendar icon to the right for the Date Administered and select date or key in the date MM/DD/YYYY.
6. To enter the Trade Name and Lot Number click on the Trade Name Details button (make sure provider organization and date are filled in first), then verify date, select trade name and key in lot number, click SAVE.

ENTERING NEW IMMUNIZATIONS

New immunizations are immunizations given from your inventory.

1. Search for the client using manage client.
2. Click on the History / Recommend button. Review comments under “Client Information” at the top of the page and the “Current Age” in the blue bar about 2/3 of the way down the page.
3. Review the Vaccine Recommended by Selected Tracking Schedule below the age. The recommendations are based on the ACIP schedule, the child’s age, client comments and contraindications, and vaccination history.
4. The select column contains check boxes which can be used to pre-select any of the tracking schedule’s immunizations when adding immunizations to the client.
   - The check box will be disabled if the tracking schedule’s recommended vaccination is contraindicated or if all required immunizations for that vaccine group have been received.
   - The box is automatically selected for any vaccines that are recommended or overdue.
   - To deselect any of the recommended vaccines, click the checkmark to remove it.
   - Any vaccines that are not recommended or overdue, but still may be applied to the series (as noted by earliest date) may be added by clicking in the box next to the vaccine name to add a checkmark.
   - If you administer a vaccine that does not appear in the schedule, you will be able to add it on the next screen.

NOTE: Only vaccine that you have available in inventory can be selected.
6. Under Defaults for New Immunizations verify or complete the following:
   - Organization Site: for those organizations with multiple sites.
   - Ordering Authority: the doctor who issues the order for vaccines to be administered
   - Administered By: the clinician who administered the vaccine
   - Date Administered: will default to today’s date on the next screen if left blank

7. Click OK.
8. Choose an Eligibility.
9. Choose the Trade Name/Lot Number, the Body Site, and enter/verify the Route for each vaccine selected.

NOTE: As you select the trade name and lot number the most current date for each VIS will display on the bottom of the page.

EDITING A DOSE OF VACCINE

To edit a dose of vaccine (including adding a vaccine reaction), click the Edit button next to the appropriate vaccine date on the History / Recommend screen.

Any person, at any organization, may delete or update a historical immunization. You may update any of the following fields for historical immunizations: trade name, lot number, date provided, provider organization, or any reactions associated with vaccine administration.
You may only delete or update a dose of vaccine from inventory, if it was administered by your organization. You may update any of the following fields for doses from your inventory: dosage from inventory, whether the dose was adequate, date provided, eligibility, ordering authority, administered by, body site, route of administration, VIS date (on the date of administration only), or any reactions associated with vaccine administration.

**NOTE:** If an incorrect lot number was entered for a new immunization the dose must first be deleted and then re-entered with the correct lot number.

If the vaccine was given from another organization’s inventory (as noted by No in the Owned? Column) click on the link to view which organization administered the shot as well as the contact information.

**HOW TO PRINT IMMUNIZATION RECORDS**

After you have searched for and found the appropriate client, click Reports.

- **Chart Copy** includes full lot and dose information.
- The Immunization Record—Patient Copy fulfills the requirements for an official immunization record. Immunization Records in other formats are available on this page.

For a Patient Copy only, choose the Site (if not defaulted) and then click on the link—Immunization Record—Patient Copy. It will open an Adobe .pdf file in a separate window.

**HOW TO ADD A CLIENT COMMENT**

Client comments allow you to add HIPAA-safe information to an immunization record including contraindications, health conditions, refusals, and exemptions.

1. On the Edit Client screen, select the Client Comment tab.
2. Select the appropriate Client Comment from the drop-down menu.
3. Enter an Applies To Date and, if appropriate, an End Date.
4. Click Next to add the Client Comment to the client’s list of comments.
5. The Client Comment will appear at the top of the immunization record and the recommendation page will reflect contraindicated or completed vaccine series.

**HOW TO ADD PRIVATE INVENTORY TO THE NCIR**

You should use this procedure to add your private supply of vaccine. For state inventory see: ACCEPTING YOUR STATE SUPPLIED VACCINE ORDER.

If the vaccine lot number is NOT already in your inventory:

1. Click Manage Inventory.
2. Click Show Inventory.
3. Click Add Inventory.
4. Choose the Trade Name, the Manufacturer will automatically populate.
5. **HIGHLY RECOMMENDED!** Enter the NDC (noted on the outside of the vaccine box).
6. Enter the Lot Number (use the number on the vaccine box, NOT the vial).
7. Verify the Dose size from the drop-down menu.

In the event that the NCIR is unavailable and you do not have any forms on hand, they are also available on the NC Immunization Branch website in both English and Spanish at [http://immunize.nc.gov/providers/ncir.htm](http://immunize.nc.gov/providers/ncir.htm).

**HOW TO PRINT A NEW CLIENT FORM**

The New Client Form should be used as a contingency plan in case of an NCIR outage or a loss of Internet access. The New Client Form contains all information necessary to enter the client and/or doses administered in to the NCIR at a later time.

1. From the left hand menu bar, click on Request New Client Form, under Reports.
2. Choose a site from the site drop-down menu (this is the site information that is printed at the top of the report) and click Generate.

It is a good idea to keep several copies of these blank forms on hand in case of an outage.

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8. Verify the Units (will always be mL unless you are administering a vaccine in capsule form). **Note:** Tubes are not considered capsules.

9. Enter the Expiration Date. **Note:** Vaccines with only a month and year should be entered as the last day of the month of expiration.

10. Verify the Funding Program (should always be Private).

11. Lot Active drop-down must be set to Yes to be saved. ("Yes" will make the Lot number appear in the drop-down menu when documenting administration of a dose of vaccine. If you do not want the lot number to appear in the drop-down menu, change the active indicator to "No" after saving the initial information.)

12. Enter the Quantity on Hand (the number of doses, not boxes or vials).

13. Cost Per Dose is optional.

14. Click Save.

**If the lot number ALREADY EXISTS in your inventory:**

1. Click Manage Inventory.

2. Click Show Inventory.

3. To get to the modify quantity on hand screen, place a checkmark in the select box and click Modify Quantity.

4. Under the modify quantity on hand section, make sure the action is Add, enter the number of doses that you are adding, choose Receipt from Inventory.

5. Click Save.

**HOW TO COMPLETE AN INVENTORY COUNT**

All providers should complete a manual inventory count weekly to identify errors, identify shortages, and review expiration dates.

1. Click Inventory Report, under Inventory.

2. Select Funding Source from the drop-down menu.


4. Print the document and use this to do your inventory count.

5. Document your physical count in the right-hand column and store for your convenience.

**HOW TO SUBMIT AN INVENTORY COUNT**

Prior to placing an order, providers must submit a physical inventory count of state vaccine.

1. Prior to submitting an inventory count, providers MUST REMOVE EXPIRED VACCINE from inventory. See page 6 for instructions.

2. Click Inventory Count, under Inventory.

3. Click Enter New Count.

4. Enter the amount of vaccine physically on hand in the "Physical Count" column.

5. Click Save & Submit. You will be able to review the current Discrepancy Percentage in the lower right corner.

6. An order may be placed in the next 24 hours.

**HOW TO PLACE A VACCINE ORDER**

**COVID-19 VACCINE, SEE SUPPLEMENT!**

Before placing an order, make sure that all doses administered have been keyed into NCIR, complete and submit and inventory count (see previous sections).

1. Click Manage Order.

**NOTE: You will be unable to create an order if:**

- Your organization has any unaccepted inbound transfers (including orders).
- An order has been placed within the past 14 days.
- An existing order is in “Pending” status.
- Your organization has expired vaccine (older than 31 days) in inventory.
- A required Inventory Count has not been submitted within the past 24 hours.
- Site-visit follow-up has not been completed by the required deadline.

3. The Suggested order quantity is calculated from your doses administered (Tier Usage) and your inventory on hand. Review the Suggested Order Quantity to assist with placing your order.

4. Enter the amount, IN DOSES, of each vaccine you’re requesting in the corresponding boxes. You may order vials, syringes, or a combination of the two based on availability. Make sure that you place the order for ALL...
6. Click Submit Order.
7. You will be redirected to the Manage Order page where your order shows up as “Pending” (An order in Pending status may be edited or update).

**ACCEPTING YOUR STATE-SUPPLIED VACCINE ORDER**  
*(OR AN INCOMING TRANSFER FROM ANOTHER ORGANIZATION)*

1. When you receive your vaccine, verify that the vaccine type, lot number, expiration date and quantity of the vaccines in the shipping container match what is listed on the packing list.
2. Log in to the NCIR and click Manage Transfers.
3. Under Inbound Transfer you should see your order from the Vaccine Distribution organization as shown below.

   ![Image](image-url)

4. Click on the date under Create Date.
5. Verify that the order in the NCIR (amount, lot number, and trade name) matches your packing list. If the packing list does not match the NCIR, please call the Help Desk at 877-873-6247 before moving on to Step #6.
6. If everything matches, click Accept Transfer.
7. Click OK. The vaccine should now be active in your inventory.

**NOTE:** An incoming transfer from another organization will display that organization’s name in the “Sending Org: Site” box.

**TRANSFERRING VACCINE TO ANOTHER NCIR PROVIDER**  
*Covid-19 Vaccine, See Supplement!*

1. Click Manage Transfers.
2. Click New Transfer.
3. Choose the Sending Site and the Receiving Site or Organization. *Internal Receiving Sites* are other sites within your organization. *Receiving Organizations* are other NCIR Providers.

4. Enter the number of doses that you are transferring in the Transfer Quantity box next to the Trade Name.

5. Click Save. You should see a message saying “Saved Successfully.”
6. You must generate and view either a Packing List or Label in order to complete the transfer.
7. Click Ship.
8. Enter a Ship Date.
9. Click Ship again to complete the transfer.
10. You will see a message saying “Transfer Successfully Shipped,” and it should show up in your outbound transfer list with a Ship Date.
11. The transfer is ready for the receiving organization to accept into their inventory.

**HOW TO REPORT AND RETURN EXPIRED STATE-SUPPLIED VACCINE**

1. Click Manage Transfers.
2. Click New Transfer.
3. Click Transfer All Expired.
4. Verify the Physical Count. If the number of doses being returned is incorrect, enter the number of doses being returned even if it does not match NCIR’s estimate.

**NOTE:** The difference in physical and digital inventory is recorded as unaccounted vaccine.

5. On the Modify Quantity screen choose “Remove” from the Category drop-down menu.
6. All other fields will populate automatically.
7. Click Save.
8. Expired Inventory will be removed.

**HOW TO REPORT WASTED VACCINE**  
*Covid-19 Vaccine, See Supplement!*

Before wasting any vaccine due to out-of-range or inappropriate temperatures, providers MUST contact the NC Immunization Branch Storage & Handling line at 877-873-6247, option 5. Branch Staff will determine the viability of vaccine. Damaged vials may be removed using the following instructions. In all other cases, viability MUST be determined by the NC Immunization Branch.

1. Click Manage Inventory. 

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2. Click Show Inventory.
3. Put a check in the select column beside each vaccine lot that you are removing.
4. Click Modify Quantity.
5. On the Modify Quantity screen, choose Subtract from the ACTION drop-down menu.
6. Enter the number of doses that were wasted.
7. Choose Wasted Doses from the Category drop-down menu.
8. Type in the Reason Wasted (what caused the vaccine to become non-viable) and Preventative Action for future vaccine handling.

9. Click Save.

NOTE: Any open vials or syringes of vaccine should be discarded on site in your sharps container.

DOCUMENTING THE REPLACEMENT OF A BORROWED VACCINE DOSE

The VFC program allows for some borrowing between state and private vaccine inventories (see http://immunize.nc.gov/providers/ncip/pdf/borrowing_form.pdf). After transferring a physical dose in your refrigerator, follow these steps to transfer the dose in NCIR.

NOTE: Before beginning this process, be sure that all inventory contains an NDC number. See HOW TO ADD PRIVATE INVENTORY TO THE NCIR on page 4.

1. Click Manage Transfers.
2. Click New Transfer.
3. In the Receiving Organization drop-down menu, select “VACCINE REPLACEMENT DUE TO BORROWING.”
4. In the Transfer Quantity column, enter the number of doses of each lot being replaced.

5. Click Save. You should see a message saying “Saved Successfully.”
6. You must generate either a Packing List or Label in order to complete the transfer.
7. Click Ship.
8. Enter a Ship Date.
9. Click Ship again to complete the transfer.
10. You will see a message saying “Transfer Successfully Shipped,” and it should show up in your outbound transfer list with a Date.
11. The doses shipped to “VACCINE REPLACEMENT DUE TO BORROWING” are shipped back to the provider with the funding source reversed.

At that point, refer to the directions for ACCEPTING YOUR STATE-SUPPLIED INVENTORY (page 4) to accept the vaccine into your inventory.

All vaccine borrowing and replacement must be documented using a Borrowing and Replacement Form which must be faxed to the Immunization Branch (1-800-544-3058) and kept on site for review by Branch Staff upon request. See link at the top of this section.

HOW TO VIEW NCIR TRANSACTIONS

Viewing a list of your organization’s transactions may help you review use of NCIR by staff and identify doses that were not properly recorded.

1. Click Manage Inventory.
2. Click the Show Transactions button.
3. Select the dates within which you would like to review transactions.
4. You may narrow your search using a number of factors, including funding source, vaccine types, trade names, lot numbers, etc.
5. Click View. Transactions will be displayed with a summary at the bottom of the page.

HOW TO ADD NEW USERS TO THE NCIR

Before a user may be added to the NCIR, they must have completed NCID registration (instructions on Page 1).

1. Click Manage Users.
2. Click Add User.
3. Type the userID into the box provided.
4. Click Verify.
5. Confirm that the personal information retrieved is correct for the user that you are adding.
6. Choose the Role for the user by clicking on the drop-down menu.
7. Click Save. You should see the message “User has been successfully saved.”

NOTE: HIPAA-compliance requires that you ALWAYS inactivate users when they are no longer at your practice.

HOW TO ADD A CLINICIAN TO THE NCIR

1. Click Manage Clinicians.
2. Click Add Clinician.
3. Choose the Role first:
   Clinician: anyone who administers vaccines.
   Ordering Authority: MD, DO, PA, or NP that signs orders for vaccines to be administered

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Vaccine Totals

Client Totals

(continue to next page)
4. Enter the Last and First Name.
5. Choose Credentials from the drop-down menu.
6. Under the Complete Site Listing box click the name of the appropriate site and click Add to move it to the Selected Site box.
7. Address, phone, and e-mail are optional.
8. Click Save. You should see the message “Inserted clinician: Name.”

NOTE: Please remember to inactivate clinicians when they are no longer at your practice.

**HOW TO USE THE BENCHMARK REPORT**

NCIR’s Benchmark Report allows you to identify and contact patients who are not up-to-date and completely protected from disease.

1. Under Reports, click Benchmark Report.
2. “Clients Associated with” and “Clients who did NOT meet the benchmark” are pre-selected.
3. Select the Age or Birth Date Range that you would like to review (e.g. 24-35 months or 13 to 18 years).
4. Standard Assessment is pre-selected.
5. Enter the current date as the Evaluation Date.
6. Select Benchmark by clicking on the age range that matches your selected age range (i.e. for 13-18 years, pick Adolescent Complete or for 24-36 months, pick @24 months).
7. Click Generate. You will be forwarded to the Benchmark Report Status page.
8. Click Refresh.

**REVIEWING BENCHMARK RESULTS**

Any client who did not meet all of the Benchmarks, will appear on the report. Each vaccine column is split into two. The first column shows whether the client met the benchmark with a Y or a N. The second column shows how many doses the client has completed within the series. Zero doses show as blank. “C” means that the client received all doses after the benchmark age.

**HOW TO USE THE REMINDER / RECALL REPORT**

NCIR’s Reminder/Recall Report allows you to generate letters for patients who are due or over due for vaccines. It can also be used to find eligible patients when your office has short-dated vaccine.

1. Under Reports, click Request Reminder.
2. Under “Indicate the Tracking Schedule…” select Use Tracking Schedule Associated with Each Client.
3. Under “Select the Vaccine Group(s)…” select the vaccine groups you wish to review by adding vaccines from the left column to the right or removing unneeded vaccines.
4. Selecting a School & Primary Care Provider or Additional Demographic Criteria are generally not needed.
5. Under “Enter the Date Criteria” enter your chosen Birth Date Range. Other options are available here to adjust report results.
6. Click Generate.
7. At the Reminder Request Status page, click Refresh to check the status of the report.
8. Once the report is complete, click the blue link in the Started column. A summary of the report results will be displayed.
10. Selecting Reminder Letter will generate a pdf file of letters addressed to parents encouraging them to return for needed vaccinations. Additional messages can be added in the Free Text box.
11. For more detailed client information, including a summarized immunization record and responsible person information, click the Client Query Listing.

**ADDITIONAL RESOURCES**

The NC Immunization Branch maintains a webpage with NCIR training resources for new and experienced staff at: http://immunize.nc.gov/providers/ncireducation.htm

NCIR Help Desk: 1-877-USE-NCIR (873-6247)

Each county has a Regional Immunization Consultant ready to assist with questions both simple and complex via phone, e-mail, and on-site training. You can find your Regional Immunization Consultant at the following website: http://immunize.nc.gov/contacts.htm

A full NCIR User Manual is available at any time by clicking System User Manual in the upper left-hand column.
NCIR QUICK REFERENCE GUIDE: DATA EXCHANGE SUPPLEMENT

NOTE: Electronic health record (EHR) products vary. The North Carolina Immunization Branch is able to provide instructions for the use of the North Carolina Immunization Registry (NCIR), however in some cases, corrections must be made through your EHR. For such assistance, providers may need to contact their vendors directly.

REVIEWING IMMUNIZATION TRANSACTIONS

Providers utilizing a data exchange between their EHR and NCIR should regularly review their NCIR transactions to ensure that immunizations are being transmitted correctly.

1. Click Manage Inventory.
2. Click the Show Transactions button.
3. Select the date range within which you would like to review transactions.
4. You may narrow the row.
5. Click View. Transactions will be displayed with a summary at the bottom of the page.

The transaction report will look very similar to those generated prior to use of a data exchange system, except that the “User Name” column will say “DATA EXCHANGE” because no NCIR user is logged in when the vaccine is recorded. Seeing “DATA EXCHANGE” is a sign that data is coming over correctly, but providers should closely review the information to ensure that it is correct and that no vaccines are missing.

REVIEWING OWNED-NOT DEDUCTED (OND) DOSES

Owned Non-Deducted Doses—When NCIR receives vaccine details that do not match those in NCIR inventory the vaccine is noted on the patient record as having been given by your office (owned), but it does not deduct from inventory. These doses are designated as “Owned Non-Deducted” or OND. Such doses will cause inventory counts to be incorrect. NCIR allows providers to review OND doses at any time.

1. Click dx imm transaction list.
2. Select the Immunization Created Dates or Immunization Administered Dates to determine the timeframe for review.
3. Select whether to review Owned Non-Deduct doses or Historical doses.

ERROR REASON EXPLANATIONS

Lot Number Is Invalid: The most common reason for EHR details not matching NCIR inventory are incorrect lot number, incorrect manufacturer, or incorrect funding source being selected. For most EHR systems, this can be corrected in the EHR, but some cases may require the user to log into NCIR, delete the error and log the correct dose directly into NCIR.

Quantity on hand for vaccine lot not sufficient to support deduction: Inventory in NCIR was at zero before submission of the dose, most likely due to a vaccine lot incorrectly recorded on a patient record or wasted in error. Once the error is corrected and the dose is returned to inventory resubmit the dose for correct deduction.

RXA Errors: Most RXA errors are the result of some required information being left out of the transaction.

REVIEWING PATIENT RECORDS IN NCIR

Data sent to a patient record can be reviewed in NCIR as needed.

1. Look up client history using Manage Immunizations.
2. Click on the “Edit” button for the shot you wish to review (the icon looks like a pencil and paper).
3. Ensure that all information has populated correctly.
4. Click the “View Update History” button.

5. Clicking on the “Job ID” number will allow you to review the data sent to NCIR via data exchange.

HOW TO ADD A CLINICIAN TO THE NCIR

It is critical that the names of your clinical staff in the NCIR Clinician List match the names of the same individuals in your EHR. If names are missing or are not a correct match, this field will remain blank in the NCIR vaccination record, in violation of North Carolina’s immunization rules. This information must be checked every three months by providers utilizing the Data Exchange.

NOTE: Clinicians are not the same as users. A clinician may be entered without being a user.

1. Click Manage Clinicians.
3. Choose the Role first:
   Clinician: anyone who administers vaccines.
   Ordering Authority: MD, DO, PA, or NP that signs orders for vaccines to be administered.
4. Enter the Last and First Name.
5. Choose Credentials from the drop-down menu.
6. Under the Complete Site Listing box click the name of the appropriate site and click Add to move it to the Selected Site box.
7. Address, phone, and e-mail are optional.
8. Click Save. You should see the message “Inserted clinician: Name.”

NOTE: Please remember to inactivate clinicians when they are no longer at your practice.
NCIR QUICK REFERENCE GUIDE: COVID-19 VACCINE SUPPLEMENT

MOVING COVID-19 VACCINE FROM CVMS

1. When a provider opts to use NCIR for COVID-19 data entry, they will receive an e-mail with a “close of business” deadline for all CVMS entry.
2. All doses must be recorded for patients prior to that deadline and all inventory must be reconciled.
3. Following that deadline, all inventory in CVMS will be inactivated for that provider and transferred into that provider’s active NCIR inventory.
4. Offices may resume use of COVID-19 vaccine, recording doses in NCIR at 8am the following morning.

ORDERING COVID-19 VACCINE

All COVID-19 vaccine is currently ordered outside of NCIR. Providers need to submit requests via the Allocation Request Form, available here: https://surveymax.dhhs.state.nc.us/TakeSurvey.aspx?SurveyId=98MI76m3#

1. Requests must be received by Thursday at 10am to be considered for shipment the following week.
2. NCDHHS will review all requests to ensure requests are in line with guidelines below.
3. Orders are confirmed on Friday.
4. Orders are delivered the following Tuesday or Wednesday.

**NOTE:** In most cases, denied requests will be due to insufficient administration history and/or forecasted booster dose demand at your site. Please only request direct allocation if you can administer the Minimum Order Quantity (MOQ) within 3 months of receipt.

If you believe your vaccine request was denied or in error, please review the ordering guidelines below and resubmit with sufficient justification for how you will administer all doses within 3 months of receipt.

You can review our most current ordering guidance including minimum orders for the various brands of COVID-19 vaccine and allocation timelines here: https://covid19.ncdhhs.gov/media/3323/open

TRANSFERRING COVID-19 DOSES TO AN OFFICE USING CVMS

**NOTE:** Transfers of COVID-19 vaccine between users using two different systems (CVMS and NCIR) is strongly discouraged. Offices who cannot use the minimum order quantity, and cannot find a user on the same system that can transfer doses to you should call the NC Vaccines Help Desk at 1-877-873-6247, option #1.

If there is no other solution, the NCIR provider sending vaccine must submit a Vaccine Transfer Form to https://ncgov.servicenowservices.com/csm_vaccine or 1-800-544-3058 (fax) and receive approval prior to sending any vaccine to a non-NCIR provider:


Guidance will then be provided via the Help Desk.

RECEIVING COVID-19 DOSES FROM AN OFFICE USING CVMS

**NOTE:** Transfers of COVID-19 vaccine between users using two different systems (CVMS and NCIR) is strongly discouraged. Offices who cannot use the minimum order quantity, and cannot find a user on the same system that can transfer doses to you should call the NC Vaccines Help Desk at 1-877-873-6247, option #1.

If there is no other solution, the CVMS provider sending vaccine must submit a Transfer Request within CVMS and receive approval before sending any COVID-19 doses.

Guidance will then be provided via the Help Desk.

REPORTING WASTED, SPOILED, OR EXPIRED COVID-19 VACCINE

Instructions for wasting COVID-19 vaccines do not differ from other, routine vaccines. However, providers should dispose of all COVID-19 vaccine on site and SHOULD NOT attempt to send any COVID-19 vaccine back to McKesson Specialty, Pfizer, the State of North Carolina, or the Centers for Disease Control and Prevention.

The following reasons may be recorded in the provided text box when using “Wasted Doses” in the Modify Quantity function to waste COVID-19 vaccine.

- Broken Vial/Syringe
- Expired Vaccine
- Failure to store properly upon receipt
- Lost or unaccounted for vaccine
- Mechanical failure Natural disaster/Power outage
- Open vial but all doses not administered
- Recall
- Storage Unit too cold
- Storage Unit too warm
- Vaccine drawn into syringe but not administered
- Vaccine spoiled in transit (Freezer/Warm)
- Insufficient Quantity – Pfizer (5 doses)
- Insufficient Quantity – Janssen (4 doses)
- Insufficient Quantity – Moderna (13 doses)

No other reasons should be recorded, and all non-COVID-19 vaccine must be subject to a viability study by Immunization Branch Storage and Handling Staff prior to destruction, wastage, and/or return.

CURRENT: 10/29/2021
Best Practices for Successfully Using the NCIR

"Data Integrity" Best Practices:
✓ Keep the NCIR immunization patient/chart copy in the front of the medical record (or in a consistent location within the record). Immunization flow sheets that stand out (e.g. printed on colored paper) also aid in quickly locating vaccine information.
✓ Update all historical immunization information into the NCIR as soon as the information is available.
✓ Prior to or during each visit, review the "history recommend" screen to determine which vaccines are recommended.
✓ Enter all currently administered immunizations into the NCIR as soon as possible.
✓ Document any adverse reactions or contraindications to vaccines in the "client comment(s)" section.
✓ Document in the medical record when a child transfers from your practice to another provider and make their NCIR client status "inactive".
✓ Document in the medical record any attempt to communicate missed appointments or to remind parents that vaccines are due.
✓ Document one hundred percent 100% of age-appropriate immunization in the NCIR for all individuals receiving immunization services from your facility by close of business the day the immunization was given (as per your signed NCIR agreement).
✓ Only enter immunizations administered by you, under your username.
✓ Verify that you have located the correct patient prior to entering immunizations or changing a patient’s immunization history.
✓ If you are searching for a Medicaid patient and you do not find them within the NCIR, think twice before entering them as a new patient. We receive a nightly Medicaid feed and most Medicaid patients should already be in the NCIR.
✓ Report duplicates as you find them. (Detailed instructions are available on the homepage, under ‘resources on the web’.)
✓ When entering a new client or searching for an existing client that has a double surname or hyphenated last name, enter BOTH surnames in the last name field, with a space separating them.
✓ Do not enter fictitious patient information into the NCIR. The NCIR is a medical information system containing confidential patient data.

"Workflow" Best Practices:
✓ Keep computers in areas that are convenient for immunizations and are not ‘high traffic’.
✓ Use ‘manage client’ instead of ‘manage immunization’ to ensure that you are entering doses on the correct patient.

"Administrative" Best Practices:
✓ Keep a list of UserIDs and Passwords for each NCIR user in your facility.
✓ Inactivate users when they leave your practice.
✓ Keep ordering authorities and clinicians up to date.
✓ Ensure your facility has a contingency plan in place for use during periods of internal Internet interruption and/or NCIR outages.

"Inventory" Best Practices:
✓ Document all doses that have been administered, transferred, wasted and/or expired within the NCIR.
✓ Please remember to wait until the close of business to accept your vaccine order into the NCIR.
✓ Complete a physical inventory of all state-supplied vaccine at least once per week and properly reconcile within NCIR.
North Carolina Immunization Registry
Mass Clinic Form

Name of Organization: ___________________________ Chart Number: ___________________________

YOU MUST COMPLETE ALL FIELDS BELOW
Information collected on this form will be used to document authorization for receipt of vaccine(s).

<table>
<thead>
<tr>
<th>Patient’s Name (Last, First, Middle Initial)</th>
<th>Mother’s Maiden Name (Last, First, Middle Initial)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth (mm/dd/yyyy)</td>
<td>Gender</td>
</tr>
<tr>
<td>Date of Birth (mm/dd/yyyy)</td>
<td>Male</td>
</tr>
<tr>
<td>Race (Check all that apply)</td>
<td>Hispanic</td>
</tr>
<tr>
<td>Asian</td>
<td>Hispanic</td>
</tr>
<tr>
<td>Black or African American</td>
<td>Hispanic</td>
</tr>
<tr>
<td>Native Hawaiian or Other Pacific Islander</td>
<td>Hispanic</td>
</tr>
<tr>
<td>Other Race</td>
<td>Hispanic</td>
</tr>
</tbody>
</table>

Name of Parent or Guardian Responsible for Patient (Last, First, Middle Initial) | Relationship to Patient

Address
City
County
State
Zip Code

Email Address (if applicable)
Home Telephone Number
Work Telephone Number
Extension

PLEASE ANSWER ALL OF THE FOLLOWING:

1. Is the person to be vaccinated sick today? □ YES □ NO
2. Does the person to be vaccinated have an allergy to a component of the vaccine? □ YES □ NO
3. Has the person to be vaccinated ever had a serious reaction to influenza in the past? □ YES □ NO
4. Has the person to be vaccinated ever had Guillain-Barré syndrome? □ YES □ NO
5. Are you currently pregnant? □ YES □ NO

I am authorized by the parent, guardian, or person standing in loco parentis of the above-named child to obtain needed immunizations for the child.

I/parental designee have received the “Vaccine Information Statements” (VIS) about the disease(s) and vaccine(s). I have had a chance to review the VIS(s) and to ask questions that were answered to my satisfaction. I understand the benefits and risks of the vaccine(s) and request the vaccine(s) indicated below to be given to me or the person named above for whom I am authorized to make this request.

SIGNATURE – Person to receive vaccine or person authorized to sign on the patient’s behalf

X

Date Signed

FOR OFFICE USE ONLY:

Eligibility:

□ American Indian/Alaskan Native □ Medicaid □ Not Insured □ Underinsured □ NC Health Choice □ Insured

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>Trade Name</th>
<th>Lot #</th>
<th>VIS Pub. Date</th>
<th>Date VIS Presented</th>
<th>Body Route</th>
<th>Body Site*</th>
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<tbody>
<tr>
<td>Influenza</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>IM</td>
<td>RV LV RD LD</td>
<td></td>
</tr>
<tr>
<td>PPSV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>IM SC</td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* RV = Right Vastus Lateralis LV = Left Vastus Lateralis RD = Right Deltoid LD = Left Deltoid BN = Bilateral Nares RN = Right Naris LN = Left Naris

SIGNATURE AND TITLE – Person Administering Vaccine

Date Vaccine Administered
La información colectada en este formulario será utilizada para documentar la autorización para recibir la(s) vacuna(s).

<table>
<thead>
<tr>
<th>Nombre del paciente (apellido, primer nombre, segundo nombre)</th>
<th>Nombre de soltera de la madre (apellido, primer nombre)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fecha de nacimiento (mm/dd/yyyy)</td>
<td>Sexo</td>
</tr>
<tr>
<td></td>
<td>varón</td>
</tr>
<tr>
<td>Raza (Marque toda respuesta que aplique)</td>
<td></td>
</tr>
<tr>
<td>☐ Asiático</td>
<td>☐ Indio Americano o nativo de Alaska</td>
</tr>
<tr>
<td>☐ Negro o Afro-Americano</td>
<td>☐ Nativo de Hawaii o de otras Islas del Pacífico</td>
</tr>
<tr>
<td>Nombre del padre/madre o tutor responsable por el paciente</td>
<td>Relación con el paciente</td>
</tr>
<tr>
<td>(apellido, primer nombre)</td>
<td></td>
</tr>
<tr>
<td>Dirección</td>
<td>Apdo. postal</td>
</tr>
<tr>
<td>Ciudad</td>
<td>Condado</td>
</tr>
<tr>
<td></td>
<td>Estado</td>
</tr>
<tr>
<td></td>
<td>Código postal</td>
</tr>
<tr>
<td>Dirección de correo electrónico (si corresponde)</td>
<td>Número telefónico de la casa</td>
</tr>
<tr>
<td></td>
<td>Número telefónico del trabajo</td>
</tr>
<tr>
<td></td>
<td>Extensión</td>
</tr>
</tbody>
</table>

Favor de contestar las preguntas siguientes:

1. ¿La persona a vacunarse está enferma hoy?    ☐ Sí ☐ No
2. ¿La persona a vacunarse alguna vez ha tenido una reacción seria a la vacuna? ☐ Sí ☐ No
3. ¿La persona a ser vacunada tiene una alergia a un componente de la vacuna? ☐ Sí ☐ No
4. ¿La persona a vacunarse alguna vez tuvo síndrome de Guillain-Barré? ☐ Sí ☐ No
5. ¿Estás embarazada actualmente? ☐ Sí ☐ No

Yo/Designado como padre he recibido las “Declaraciones de Información Sobre las Vacunas” (VIS-por sus siglas en inglés) respecto las enfermedades y las vacunas. He tenido la oportunidad de revisar el VIS y de hacer preguntas que fueron contestadas a mi satisfacción. Yo entiendo los beneficios y riesgos de las vacunas y pido que las vacunas mencionadas abajo sean administradas a mi o la persona nombrada arriba por quien yo tengo la autorización de hacer esta solicitud.

FIRMA – Persona que recibirá la vacuna o persona autorizada para firmar en nombre del paciente

X

FOR OFFICE USE ONLY:

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<th>Eligibility:</th>
<th>American Indian/Alaskan Native</th>
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