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

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

Updated: January 19, 2018
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
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.

Enter UserID and password and click Login.
If you forget your userID or password use the links provided.
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.

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 CAPTCHA requirements and click Verify.
5. 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.
8. Click Continue.

At this point, an NCIR Administrator in your organization must add your UserID (instructions on page 7). You must share your UserID, but NOT your password. Once you have been added, return to https://ncir.dhhs.state.nc.us to log in.
9. The first time you log in, you will be required to select and answer 5 challenge questions to verify your identity if your password is ever lost.
10. Once completing your challenge questions, you will be forwarded to NCIR.

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.

2. Click Find.

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”).

NCIR HOMEPAGE

Inventory Notifications
Program Announcements
Updates and Resources

(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.

Verify that this is the correct client

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

Click the last name to view the client record.

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

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 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.

DUPLICATE CLIENT RECORDS

- If you locate a duplicate client record, contact the NCIR Help Desk, at ncirhelp@dhhs.nc.gov.
- 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.

ADDING A NEW CLIENT

1. Enter all of the required information (noted by a blue asterisk): Last Name, First Name, DOB, and County of Residence.
2. Mother’s Maiden Name, Mother’s First Name, and gender assist with deduplication of clients.
3. Chart number is optional (organization specific). Please enter the correct Ethnicity/Race. Status defaults to “Active.”
4. Click SAVE.
5. If a client already exists in NCIR with exact or similar information to the client that you are creating, you may see the screen shown below.

The client's age displays in a solid blue field between the immunization history and before the recommendations.

Note: Age is calculated by DOB and today’s date.

ADDINg A NEW CLIENT

The history section lists vaccines the client has already received.

Vaccine Group: vaccine group for each immunization entered

Date Administered: day the client was given the vaccine

Series: sequence number within the immunization series

Trade Name: trade name of the vaccine received

Owned?: whether or not this shot was administered or entered by your organization (blank indicates “yes”)

Reaction: any reactions the client had after receiving the vaccine

Hist?: whether the recorded immunization was historical or not

Edit: will allow you to edit the recorded immunization (see EDITING A DOSE OF VACCINE for specifics)

The client’s age displays in a solid blue field between the immunization history and before the recommendations.

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 Recommended by Selecting Tracking Schedule.

Vaccines Recommended by Selecting Tracking Schedule are based on: Current ACIP Recommendations, Age of the client, History entered into NCIR, and Any client comments and/or contraindications.

(continue to next page)
Select: check boxes which can be used to pre-select any of the tracking schedule’s immunizations (for entering doses given from inventory)

Vaccine Group: recommended vaccine group name

Earliest Date: dates which note the earliest date the selected client could receive the corresponding immunization

Recommended Date: the date that the selected client is recommended to have the corresponding immunization

Overdue Date: notes the date that the client is past due for corresponding immunization

Latest Date: the date after which the client should not receive the corresponding immunization

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 in the middle of the page).
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.
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.

NOTE: for certain vaccines (e.g. combination vaccines, Hib, etc.) trade name is necessary to apply the correct vaccine schedule information.

ENTERING NEW IMMUNIZATIONS

New immunizations are immunizations given from 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 recommended vaccination, click the checkmark to remove it.
5. After making your vaccine choices, click Add Selected. Another entry screen will be displayed. The vaccines that you selected will have a checkmark in the New column.

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.

10. Click OK.

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, 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 hyperlink 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**.

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 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**.
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 of these blank forms on hand in case of an outage.

**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. 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.

(continue to next page)
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 under the Lot Number/Trade Name 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.

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

### 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.

### HOW TO SUBMIT AN INVENTORY COUNT

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

1. Click Inventory Count, under Inventory.
2. Click Enter New Count.
3. Enter the amount of vaccine physically on hand in the "Physical Count" column.
4. Click Save & Submit. You will be able to review the current Discrepancy Percentage in the lower right corner.
5. An order may be placed in the next 24 hours.

### HOW TO PLACE A VACCINE ORDER

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.
2. Click Create 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 vaccines you need at one time.
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.
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 USER**

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 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 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. Select the appropriate Preventative Action from the drop-down menu.

**NOTE:** If the physical count for a lot of vaccine is zero, enter a “0” in the physical count box and “None of These Apply To Me” and type “No vaccine on hand” in the text box.
6. Click Submit.
7. Verify that expired vaccine has been removed from your refrigeration unit.
8. Verify the correct e-mail address for mailing labels. If the e-mail address is incorrect, change the address immediately under “Manage Sites”

A pre-paid UPS shipping label will be sent to the e-mail address verified above and a “Return Packing List for VTrckS Return ID” will be generated for your return. Once the Packing List is complete, it will be visible under Notifications on the NCIR Home Page. This document MUST be printed and placed in the package with your expired vaccine.

**HOW TO REMOVE PRIVATE EXPIRED VACCINE**

1. Click Manage Inventory.
2. Click Show Inventory.
3. Select the Expired and Private (as below).

![Image](image_url)

4. Put a check in the select column beside each vaccine lot to be removed and click Modify Quantity.

![Image](image_url)

5. On the Modify Quantity screen choose “Remove—Expired Private” 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**

Before wasting any vaccine due to out-of-range temperatures 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.
2. Click Show Inventory. (continue to next page)
1. Click Add User.
2. Enter the userID into the box provided.
3. Click Verify.
4. Click View. Transactions will be displayed with a summary at the bottom of the page.

5. Click Manage Inventory.
6. Enter a date in the From and To text boxes.
7. Click Generate Report.

A report will be generated, allowing you to review your offices use of each private and public vaccine and the number of clients that you have vaccinated.

**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 front page).

1. Click Manage Users.
2. Click Add User.
3. Type the userID into the box provided.
4. Click Verify.

**HOW TO VIEW VACCINE USAGE**

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. Under the Inventory section, click Request Vaccine Usage.
2. Enter a date in the From and To text boxes.
3. Click Generate Report.
4. A report will be generated, allowing you to review your offices use of each private and public vaccine and the number of clients that you have vaccinated.

Vaccine Totals

Client Totals

**VACCINE REPLACEMENT DUE TO BORROWING**

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.

**TRANSFERRING A PRIVATE DOSE INTO STATE INVENTORY**

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 Modify Quantity. Choose Subtract from the Action drop-down menu and "Transfer to Provider" from the Category drop-down menu.
6. Enter the number of doses to be transferred.
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 changed to Public inventory and shipped back to the provider.

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

**DOCUMETNING 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.

1. Enter the number of doses to be transferred.
2. From the Category drop-down menu, select "Vacciine Replacement Due to Borrowing - viable" and "Vaccine Replacement Due to Borrowing - non-viable" and "Preventative Action - "borrowed vaccine dosage" and "Preventative Action - Borrowing the same vaccine dosage".
3. From the Action drop-down menu, select "Transfer to Provider - Borrowing the same vaccine dosage - Shrine back to the provider".
4. Enter the number of doses that were wasted.
5. On the Modify Quantity screen choose "Subtract" from the Action drop-down menu.
6. Enter the number of doses that were wasted.
7. On the Modify Quantity screen choose "Subtract" from the Action drop-down menu.
8. Enter a Date.
9. On the Modify Quantity screen choose "Subtract" from the Action drop-down menu.
10. Enter the number of doses that were wasted.
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97. On the Modify Quantity screen choose "Subtract" from the Action drop-down menu.
98. Enter the number of doses that were wasted.
99. On the Modify Quantity screen choose "Subtract" from the Action drop-down menu.
100. Enter the number of doses that were wasted.
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:** 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
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.
9. Benchmark Report will be displayed showing any patients who are missing the requested vaccines.

### REVIEWING BENCHMARK RESULTS

<table>
<thead>
<tr>
<th>DTaP (3)</th>
<th>Hep B (2)</th>
<th>Hib (2)</th>
<th>MMR (1)</th>
<th>Polio (3)</th>
<th>Pneumo (1)</th>
<th>Varicella (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y N Y N</td>
<td>N Y N Y</td>
<td>N Y N Y</td>
<td>Y Y Y Y</td>
<td>Y Y Y Y</td>
<td>Y Y Y Y</td>
<td>C Y C Y C Y</td>
</tr>
</tbody>
</table>

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 overdue 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](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](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.
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.

Updated January 2018
**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></td>
</tr>
<tr>
<td>Asian</td>
<td></td>
</tr>
<tr>
<td>Black or African American</td>
<td></td>
</tr>
<tr>
<td>Name of Parent or Guardian Responsible for Patient (Last, First, Middle Initial)</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>P.O. Box</td>
</tr>
<tr>
<td>City</td>
<td>County</td>
</tr>
<tr>
<td>Email Address (if applicable)</td>
<td>Home Telephone Number</td>
</tr>
</tbody>
</table>

**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>
<th>mL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Influenza</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>IM</td>
<td>RV</td>
<td>LV</td>
</tr>
<tr>
<td>PPSV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>IM</td>
<td>SC</td>
<td>RV</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<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
Registro de inmunizaciones de North Carolina
Registro de administración de vacunas

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

Nombre del paciente (apellido, primer nombre, segundo nombre)  Nombre de soltería de la madre (apellido, primer nombre)

Fecha de nacimiento (mm/dd/aaaa)  Sexo
[ ] varón  [ ] hembra

Raza (Marque toda respuesta que aplique)
[ ] Asiático  [ ] América indígena
[ ] Negro o Afro-Amerciano  [ ] Nativo de Hawaii o de otras Islas del Pacífico
[ ] Otra raza

Nombre del padre/madre o tutor responsable por el paciente (apellido, primer nombre)

Dirección  Contrato Estado  Código postal

Dirección de correo electrónico (si corresponde)  Número telefónico de la casa  Número telefónico del trabajo  Extensión

**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

[ ]

**Fecha de la firma**

**Eligibility:**  [ ] American Indian/Alaskan Native  [ ] Medicaid  [ ] Not Insured  [ ] Underinsured  [ ] NC Health Choice  [ ] Insured

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<td>RV, LD</td>
<td></td>
</tr>
<tr>
<td>PPSV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>IM, SC</td>
<td>RV, LD</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
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<td></td>
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* RV = Right Vastus Lateralis  LV = Left Vastus Lateralis  LD = Right Deltoid  LD = Left Deltoid  BN = Bilateral Nares  RN = Right Naris  LN = Left Naris

SIGNATURE AND TITLE – Person Administering Vaccine  Date Vaccine Administered

**OFFICE USE ONLY**