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.

UPDATE 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 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.
5. Click Continue.
6. 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.
7. Click Check Code.
8. Click Continue.
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.

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

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”).
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 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.

**ADD 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.

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.

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

**Dose:** magnitude (amount administered—e.g. full, half, etc.)

**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.

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

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

(continue to next page)
**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

**Category B Recommendations** require individual clinical decision-making based on a clinician-patient discussion of risks and benefits.

### 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.
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 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.
5. 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.
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)
- 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 link to view which organization administered the shot as well as the contact information.

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### 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 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 into 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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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 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.

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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 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.

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.
3. Click on the date under Create Date.
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
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. 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).
4. Put a check in the select column beside each vaccine lot to be removed and click Modify Quantity.

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 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.
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.

**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](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.

**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** inactive 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

**HOW TO VIEW VACCINE USAGE**

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.

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.

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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 pa-

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.

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.