Nebraska Strategic National Stockpile

User Manual

Version 8.6.0
Release Date: April 11, 2019
## Revision History

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<tr>
<td>E. Klipic</td>
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<td>Initial Nebraska version (version number aligned to current release)</td>
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System Requirements

You will need reliable Internet access to access SNS. Other hardware and software requirements are minimal:

- Pentium 100 MHz computer (500 MHz or higher recommended)
- 32 MB RAM (64 MB or higher recommended)
- 500 MB free disk space
- Web browser (evaluated with current versions of Google Chrome®, Microsoft Edge® and Internet Explorer®, and Mozilla Firefox®)
- PDF viewer such as Adobe Acrobat Reader®
- Port 443 of the network firewall must be open for outgoing HTTPS
Accessing SNS

To access SNS

1. Open your web browser
2. Type in the full address of the SNS portal (https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do) and press enter. Note: If you do not reach the Nebraska Directory Services Login screen after correctly typing in this address, port 443 of your network’s firewall may be closed. Contact your network administrator to open this port for outgoing HTTPS.

3. At the initial login screen, enter your username and password. Note: The information on this screen is case sensitive; enter the information exactly as you received it. Press “Sign In.”
4. You should now be at the NESIIS log in page. Press “login.”
5. Press either “I Agree” or “I Do Not Agree” in the security notification box that displays. If you choose “I Do Not Agree,” your access to SNS will be disabled. This box will appear at the first login and once every 365 days thereafter. (Not Pictured)
6. The SNS home page will now display.

Login Menu Items

At the top of the login page, three menu items appear: Home, Forms, and Related Links. By hovering the cursor over one of these menu items, you may access a drop-down menu. To select an item from the drop-down menu, simply click the desired item.

Post Login

Once in NESIIS, you may access the post-login page to switch organizations, manage users, or manage your own account. To do this, simply click the Manage Access/Account menu option at the top of the screen in SNS. The post-login page will display.
Exiting NESIIS
NESIIS may be exited from any screen within the system by pressing the Logout menu option at the top of the screen. Once you logout, you will be returned to the NESIIS login page.
Optimizing SNS

To access SNS quickly, we recommend you set SNS as a favorite (bookmark).

To add SNS to Favorites (Internet Explorer used for example):
1. Type in the SNS address: https://nesiis-dhhs-prod.ne.gov/prd_ir/portalInfoManager.do. Press OK.
2. Once at the login screen, prior to entering any information, click on Favorites on your browser’s menu bar, press the Favorites button, or enter <CTRL+D>:

   ![Add a Favorite]

   3. Press “Add.” SNS should now appear on your browser’s list of bookmarks (favorites).

Running reports with Acrobat Reader
SNS can use Acrobat Reader to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Displaying files in Acrobat Reader
The first time a report is displayed using Acrobat Reader, a window may appear asking whether you want to run the file or save the file to disk. Choose “Run the file” and “Do not display this message again.” If you get a small icon resembling a segmented cube and the report does not display, Acrobat Reader needs to be opened in a separate window – please refer to the following instructions: https://helpx.adobe.com/acrobat/using/display-pdf-in-browser.html.

File Transfer Protocol (FTP) server access
When running reports and data downloads, NESIIS queries a File Transfer Protocol (FTP) server to ready the file. If your network has blocked FTP access for any reason, or if FTP wasn’t installed with your browser, you will be unable to run reports or download data. Contact your information systems (IS) staff if you suspect your FTP access is blocked.
Home Page

The SNS home page opens after you have provided valid login information. The home page of SNS is divided into several sections.
Menu Bar
You have many menu options at the top of every screen within SNS. The options available are the following:

Home: Clicking this menu option will return you to the SNS home page from anywhere in the system.
Manage Access/Account: Clicking this menu option will bring you to the post-login page, where you may switch organizations, manage your account, manage access to other accounts, or access training options.
Forms: Not currently used in SNS
Related Links: Not currently used in SNS
Logout: Clicking on this menu option will log you out of your current SNS session and return you to the Login screen. You may logout from any screen within SNS.
Training: Not currently used in SNS
Help Desk: Clicking on this menu option will give you a screen with contact information for the SNS Help Desk.
Online Help: Clicking on the light bulb in the right corner of the screen brings up page-specific help.

Directly below the menu bar is a row of information highlighted in a distinct color. This row contains your organization’s name, your first and last name, and your role within the organization. If any of this information is incorrect, contact your organization administrator.

Menu Panel
The menu panel is color shaded and appears on the left of every screen within SNS. The menu panel contains links that, when clicked, take you to the functions of the SNS Web site. These links, which include functions under Inventory, Prophylaxis, Clients, Maintenance, and others, are used to navigate SNS. Your role will determine your access to these functions.

Announcements
The right portion of the home page contains the current information on enhancements and maintenance relating to SNS. Recent announcements that have not been viewed will have “New” highlighted in yellow alongside them. Once you have viewed the announcement and returned to the home page, the flag will disappear. To view a full announcement, click the underlined announcement title. The SNS Announcement screen will display, giving full details and the posting date of the selected title. Click the Return to Main Page link to return to the home page.

Release Notes
Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of SNS and features included in the releases. Release notes may be viewed in the same manner as announcements.

Inventory Alerts
The inventory alerts section will appear on the SNS home page for users with SNS Administrator and SNS Inventory Control levels of access. The inventory alerts section of the home page consists of three tables. The top table, Inventory Order/Transfer Notification, lists the status of recent or open orders and transfers. The middle table, Active inventory that is Going to Expire, lists inventory at each site that will expire within 60 days. The bottom table lists, by site, inventory that is almost depleted.
Manage My Account

1. Access the post-login page by logging in to SNS or by clicking the Manage Access/Account menu option at the top of the SNS screen.
2. Click Edit My User Account under the Manage My Account section of the menu panel.

3. Edit your first or last name in the appropriate fields. You also may enter or edit your middle initial, mailing address, e-mail address, or telephone number information in the appropriate fields.
4. Press “Save.” If changes were made, the message “User Updated” appears on the screen.
5. Return to the SNS application by clicking on SNS on the left-hand side of the screen (listed under the Applications section) then click on the name of your organization listed in the top of the white portion of the screen.
General SNS Behavior

**Required Fields**
Required fields are shown in blue type. For example, when entering information on the Add Physician screen, only the physician’s last name is required; thus, it is shown in blue type. All other input fields are optional.

**Use of Pick Lists in SNS**
When entering information in SNS, you will use pick lists for many fields. SNS uses pick lists—fields that contain a list of options from which you may choose—rather than free-text fields for certain input data. The advantages of pick lists over free-text fields include:

- **Ease of use.** Pick lists allow users to quickly fill in a data field without typing in the information.
- **Health Level 7 (HL7) compliant.** HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily.
- **Uniformity of entered data.** By choosing information from a pick list, users do not risk entering conflicting information that could decrease the accuracy of SNS reports. For example, one user using a free-text field might enter a county name using an abbreviation, while another user might spell out the entire name.
- **Confidentiality.** By using standard pick lists, SNS avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.
Maintenance

The Maintenance section on the menu panel allows users with administrator rights to add and update information on users, schools, physicians, clinic sites, clinicians, and events.

Managing Physicians
Administrators use the Add Physician/Edit Physician screens to enter new and update existing primary care providers. Health care organizations or clinic names may also be entered in the Add Physician screen. Physicians or health care organizations entered on this screen will be available for selection as primary care providers from a pick list on the Manage Client screen. Reports may then be generated from this data.

Adding Physicians
1. Click Manage Physicians under the Maintenance section of the menu panel.
3. At the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. The Prefix/Title field, for example, could be filled with “Dr.” and the Suffix field would then be “M.D.” To add a clinic name, type the site name in the Last Name field and the location in the First Name field.
4. Press “Save”
5. Once the physician is successfully saved, “Physician Added” will appear in the upper right corner of the Edit Physician box.
6. Press “Cancel” twice to return to the Manage Physicians screen.
Editing Physician Information

1. Click Manage Physicians under the Maintenance section of the menu panel.
2. On the Manage Physicians screen, choose the physician whose information you would like to edit from the Physician Name pick list at the top of the screen, or click the physician’s name in the Physician Listing at the bottom of the screen.

3. Add or change information in the Edit Physician box.
4. Press “Save.”
5. Once your changes are successfully saved, “Physician Updated” will appear in the upper right corner of the Edit Physician box.
6. Press “Cancel” twice to return to the Manage Physicians screen.
Deleting Physicians

1. Click Manage Physicians under the Maintenance section of the menu panel.

2. On the Manage Physicians screen, choose the physician whose information you would like to delete from the Physician Name pick list at the top of the screen, or click the physician’s name in the Physician Listing at the bottom of the screen.

3. In the Edit Physician box, press “Delete.”

4. A box will open asking if you want to delete this physician. Press “OK.”

5. Once your changes are successfully saved, “Physician Deleted” will appear in the upper right corner of the Manage Physicians screen.

Listing All Physicians

A list of all physicians entered into an organization’s database may be viewed by pressing “List All” on the Select a Physician to Edit screen.
Printing All Physicians

To print out a list of all the primary care providers in your organization's database, follow these steps:

1. Click Manage Physicians under the Maintenance section of the menu panel.
2. Press “List All” in the Select a Physician to Edit box.
3. Do either of the following:
   a. Choose Print, from your browser’s menu bar (under File in Internet Explorer, Settings and more in Edge, Customize and control Google Chrome in Chrome, or the Open menu in Firefox). In the Print dialog box, press “Print.”
   b. Press the printer icon on your browser’s toolbar.
4. If your printout is cut off, try setting your printer to landscape.
Managing Sites
Administrators use the Manage Site screens to add new or update existing sites that provide prophylaxis within their organizations. Once a site is added to SNS, it is available from several pick lists used for prophylaxis recording and reporting.

Adding Sites
1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, press “Add Site.”
3. Within the Add Site box, fill in the following information:
   a. Enter the site’s name in the Site Name field.
   b. Indicate whether the site maintains its own vaccine inventory or whether it draws inventory from another source by clicking the Yes or No radio button (☐) under Has Inventory. If the site draws inventory from another source, choose the source from the Draw Inv From pick list. All sites with inventory must be created prior to setting a site that draws from another.
   c. Enter the ZIP Code in the Zip field.
   d. Select Location Type from the drop-down menu.
   e. Complete any additional information you wish to supply on the site.
4. Press “Save.”
5. Once your site has been successfully saved, “Site Added” will appear in the upper right corner of the Edit Site box.
6. Press “Cancel” twice to return to the Manage Sites screen.

HAS INVENTORY

When inventory is drawn from another site, the source site must be selected from a pick list. Therefore, you will need to create all sites that maintain inventory prior to adding sites that draw from those inventories.

It is important to tie sites that draw inventory to their inventory sources. This way, the registry will be able to keep an accurate count of all products.

Sites that draw inventory from another site are shown indented on site pick lists in SNS.
**Editing Site Information**

1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to edit from the Site Name pick list at the top of the screen, or click the site name in the Site Listing at the bottom of the screen.
3. Add or change information on the Add Site box.
4. Press “Save.”
5. Once your site has been successfully saved, “Site Updated” will appear in the upper right corner of the Edit Site box.
6. Press “Cancel” twice to return to the Manage Sites screen.

**Deleting Sites**

1. Click Manage Sites under the Maintenance section of the menu panel.
2. On the Manage Sites screen, choose the site whose information you would like to delete from the Site Name pick list at the top of the screen, or click the site name in the Site Listing at the bottom of the screen.
3. In the Edit Site box, press “Delete.”
4. A box will open asking if you want to delete this site. Press “OK.”
5. NESIIS will return to the Manage Sites screen and the message “Site Deleted” will appear at the upper right corner of the screen.

**Listing All Sites**

A list of all sites entered into an organization’s database may be viewed by choosing List All on the Manage Sites screen. This table lists the name of the site, the contact name and telephone number for the site, and whether the site has its own inventory or draws from another site.

**Printing All Sites**

To print out a list of all sites in your organization, follow these steps:

1. Click Manage Sites under Maintenance on the menu panel.
2. Press “List All” in the Select a Site to Edit box.
3. Do either of the following:
   a. Choose Print, from your browser’s menu bar (under File in Internet Explorer, Settings and more in Edge, Customize and control Google Chrome in Chrome, or the Open menu in Firefox). In the Print dialog box, press “Print.”
   b. Press the printer icon on your browser’s toolbar.
4. If your printout is cut off, try setting your printer to landscape.
**Manage Clinicians**

Clinicians are the individuals within the organization who administer and/or approve the administration of prophylaxis. A clinician may be associated with one or more clinic sites. The organization administrator will use the Manage Clinicians function to enter new and update existing clinicians within the organization. Clinicians added to the registry through this function will be available from pick lists used for recording prophylaxis.

**Adding Clinicians**

1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. Press “Add Clinician.”
3. At the Add Clinician Information screen, choose a role for the clinician. Definitions of these roles are as follows:
   a. Clinician: The clinician is the person who administers the prophylaxis.
   b. Ordering Authority: In a public health department, the ordering authority is the medical director. In private practice, the ordering authority is the client’s pediatrician or primary care physician.
   c. Ordering Authority/Clinician: Select this option if the person both authorizes and administers prophylaxis, such as a pediatrician.
4. Fill in the required field, Last Name, and any other fields you wish to complete. The Prefix field, for example, might be filled with “Dr.” and the Suffix field would then be “M.D.”
5. In the Complete Site Listing field at the bottom of the screen, highlight a site with which the clinician will be associated and press “Add>.” Do this for each site at which the clinician may practice. If the clinician is associated with all the sites in the Complete Site Listing, press “Add All>>.”
6. Press “Save.”
7. After the clinician is successfully saved, the message “Inserted clinician: <last name>, <first name>” will appear at the bottom of the screen.
8. Press “Cancel” to return to the Manage Clinicians screen.

Editing Clinician Information
1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. Press “Find Clinician,” or choose a site from the Site List and click the appropriate clinician name on the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.
3. At the Clinician Search screen, enter the last and/or the first name of the clinician and press FIND to bring up his or her information. Then click his or her last name in the Search Results table. You may also leave both fields blank and press “Find” to bring up a list of clinicians within the organization. You may then click on the name of the clinician within the Search Results table to bring up their information.
4. Make the desired changes or updates to the clinician’s information.
5. Press “Save.”
6. Once the clinician’s information is successfully updated, the message “Record Updated” will appear at the top of the screen.
7. To return to the Manage Clinicians screen, press “Cancel.”

Merging Clinicians
Occasionally, clinicians are entered more than once in SNS, creating duplicate records. To eliminate extraneous records using the SNS merge clinician feature, follow these steps:
1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. Enter the name of the clinician (of leave blank to list all). Press “Find.”
3. Select at least two clinicians from the search results table and press “Merge.”
4. At the Clinician Merge screen, select the clinician record that you wish to keep. Press “Keep Selected.”
Deleting Clinicians
1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, choose a site from the Site List.
3. Press “Find Clinician,” or click the appropriate clinician name in the table at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 5.
4. Enter the name of the clinician (or leave blank to list all). Press “Find.”
5. Click the name of the clinician within the Search Results table to bring up their information.
6. At the Edit Clinician Information screen, press “Delete.”
7. A box will open asking if you want to delete this clinician. Press OK.
8. NESIIS will return you to the Manage Clinicians screen.

Listing All Clinicians
1. Click Manage Clinicians under the Maintenance section of the menu panel.
2. On the Manage Clinicians screen, press “Clinician List.”
3. The Clinician Listing screen will open, showing all available clinicians, their site association(s), and their role(s).
4. Press “Close” to return to the Manage Clinicians screen.

Printing All Clinicians
To print out a list of all the clinicians in your organization’s database, follow these steps:
1. Click Manage Clinicians under Maintenance in the menu panel.
2. Press CLINICIAN LIST at the Manage Clinicians screen.
3. Do either of the following:
   a. Choose Print, from your browser’s menu bar (under File in Internet Explorer, Settings and more in Edge, Customize and control Google Chrome in Chrome, or the Open menu in Firefox). In the Print dialog box, press “Print.”
   b. Press the printer icon on your browser’s toolbar.
4. If your printout is cut off, try setting your printer to landscape.
Managing Events

Events on the Event Listing screen are indexed in alphabetical order. To view a list of events entered in SNS, follow these steps:

1. Click Manage Events under the Maintenance section of the menu panel.

<table>
<thead>
<tr>
<th>Event Listing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Event</td>
</tr>
</tbody>
</table>

   Event Type: All Events  Show: Active

   | Index | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Event Type</th>
<th>City</th>
<th>Event Date</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 SNS September Exercise</td>
<td>Biological</td>
<td>LINCOLN</td>
<td>09/17/2018</td>
<td>Y</td>
</tr>
</tbody>
</table>

2. Select an Event Type from the pick list provided.

3. Select Active, Inactive, or Both by clicking the appropriate radio button.
**Adding/Editing Events**

When you add an event, an announcement with information regarding the event will appear on the SNS home page. Editing the event will also edit the information in the announcement. To add or edit an event, follow these steps:

1. Click Manage Events under the Maintenance section of the menu panel.
2. At the Event Listing screen, either press “Add Event” or click the underlined event name of the event you wish to edit.

![Edit Event Information](Image)

3. In the fields at the top of the Add or Edit Event Information screen, do the following:
   a. **Active/Inactive**: Click the appropriate radio button to indicate whether the event is active or inactive. If the event is currently in effect, choose “Active.”
   b. **Event Name**: Enter/edit the description of the event and its location in this field.
   c. **Event Type**: Select an event type from the pick list provided.
   d. **Event Date**: Enter/edit the date the event took place using the MM/DD/YYYY format or by using the calendar icon.
   e. **Event Description**: Enter/edit a detailed description of the event, its location, and circumstances.
Event Location

SNS users may identify up to four locations where an event has taken place. Users must enter at least one location per event.

1. For each location, enter/edit the following information:

2. Event Location Name: Enter a name for the location.
   a. Contact Name: Enter the name of a contact person for the location.
   b. County: Enter the county in which the location is found.
   c. Street 1: Enter a street address for the location.
   d. Street 2: Enter a second physical street address for the location.
   e. PO Box: Enter a post office box address for the location.
   f. City: Enter the city in which the location is found.
   g. State: Enter the state in which the location is found.
   h. Zip: Enter a 5-digit ZIP code and +4 for the location.
   i. Email Address: Enter an e-mail address for the contact person.
   j. Telephone Number: Enter a telephone number for the location, including area code, telephone number, and extension, if applicable.

3. Press “Save” to save all event information to the database.

4. Press “Cancel” if you do not wish to save the entered information. Once this button is pressed, the Event Listing screen will display.
Inventory

The inventory management function of SNS is used to view, add, or update any product in an organization’s inventory. This function is designed to be a tracking system for a provider’s product inventory.

Inventory Alerts

Inventory Alerts display on the Manage Inventory screen that is displayed when you click on Manage Inventory under Inventory on the menu panel.

<table>
<thead>
<tr>
<th>Manage Inventory</th>
</tr>
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<tbody>
<tr>
<td>Show Inventory for Sites...</td>
</tr>
<tr>
<td>Show Transactions for Sites...</td>
</tr>
<tr>
<td>Update inventory Alerts...</td>
</tr>
<tr>
<td>Return to the Previous Screen...</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Inventory Order/Transfer Notification...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>Order(s)</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Active Inventory that is Going to Expire...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Name</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>A</td>
</tr>
<tr>
<td>A</td>
</tr>
<tr>
<td>A</td>
</tr>
<tr>
<td>A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inventory that is Running Low...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Description</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>Atropine 0.4mg/ml x 20ml soln. for inj., multi-dose vial</td>
</tr>
<tr>
<td>Atropine 0.4mg/ml x 20ml soln. for inj., multi-dose vial</td>
</tr>
</tbody>
</table>

The top table on this section, Inventory Order/Transfer Notification, updates you on the status of product orders and transfers. The next table, Active Inventory That is Going to Expire, lists products at each site that will expire within the number of days specified in the expired alert setting. The bottom table on the same screen lists inventory that is running low.

COLOR KEY

The red type in the View Inventory screen indicates that a product is inactive. A product may be inactive for various reasons; the inventory for that product’s lot number may be used up, the products in that lot may be expired, or the inventory may have been recalled.

Products on the View Inventory screen that are highlighted in pink will expire within 60 days.
Updating Inventory Alert Preferences

To change system options for expiration alerts and low inventory alerts, follow these steps:
1. Click on Manage Inventory under the Inventory section of the menu panel.
2. At the Manage Inventory screen, press “Update Alert Prefs.”
3. In the Inventory Expiration Alerts section, enter the number of days prior to the expiration date within which you wish to be notified. The expired alert setting has no effect or interaction with inventory items that do not have an expiration date.
4. The Low Inventory Alert gives a threshold quantity for the product throughout the organization. All inventory is counted, regardless of active status or expiration date. To enter a low-level alert, follow these steps:
5. Enter the number of doses/products that will indicate that the inventory is running low for each item listed on the Update Low-Level Alerts by Trade Name screen.
6. Press “Save.”
7. If the new preferences were saved successfully, the message “Updated Alert Preferences” will appear at the top of the screen.
8. To restore all inventory alerts to SNS system defaults, press “Reset to Default” and “OK.”
9. To return to the Manage Inventory screen, press “Cancel.”
**Viewing Inventory**

To view the inventory at a site, follow these steps:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. On the Manage Inventory screen, press “Show Inventory.”

<table>
<thead>
<tr>
<th>Site:</th>
<th>SNS Site</th>
<th>Event:</th>
<th>CRI Exercise Breakdown with Southeast</th>
<th>SNS/OJA:</th>
<th>SNS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show</td>
<td>Non-Expired</td>
<td>Add Inventory</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Inactive</td>
<td>Modify Quantity</td>
<td>SNS/OJA:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expired</td>
<td></td>
<td>Show Transactions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Select</th>
<th>Product Description</th>
<th>Lot Number</th>
<th>Product Type</th>
<th>QOH</th>
<th>Unit</th>
<th>Event</th>
<th>SNS or OJA</th>
<th>Exp Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gown, Surgical, Sterile, XL, 30 per case</td>
<td>gow987</td>
<td>Med/surg General</td>
<td>5</td>
<td>CS</td>
<td>CRI Exercise Breakdown with Southeast</td>
<td>SNS</td>
<td></td>
</tr>
</tbody>
</table>

3. The inventory table shown by default will include inventory for a default site within the organization, regardless of event, and will include nonexpired active and inactive products. To sort the inventory listing:
   a. Site: Select a site name from the Site pick list.
   b. Event: Select an event from the pick list provided, or leave this filter empty, which means the search is unrestricted.
   c. SNS/OJA: Either select SNS, Office of Justice Assistance (OJA), or Other from the pick list or leave this indicator empty, which means the search is unrestricted.
   d. Show: Select one of the following indicators:
      i. Active: Select the ‘Active’ option to view only those products that have valid (nonexpired) items remaining in the site’s inventory.
      ii. Inactive: Select the ‘Inactive’ option to view only those products that have either no remaining items or have expired.
      iii. Non-Expired: Select the ‘Non-Expired’ option to view any active or inactive inventory that has not yet expired.
      iv. Expired: Select the ‘Expired’ option to view any inventory that has expired.
The following is an explanation of the columns in the inventory table:

Select: A mark in this checkbox allows you to modify the quantity of the selected product or add inventory for the selected product.

Product Description: This column gives the descriptive name of the inventory item.

Lot Number: This column lists the lot number of the inventory item.

Product Type: This column gives both the type and subtype of the inventory item.

QOH: This column lists the quantity of inventory on hand; the number may include up to two decimal places.

Unit: This column lists the unit of measure for the inventory item.

Event: This column gives the event for which the inventory is allocated.

SNS or OJA: This column indicates whether the inventory item is an SNS or OJA item. All inventory should be SNS.

Exp Date: This column gives the item’s expiration date. Products that will expire within the number of days specified in the expired alerts setting are highlighted in pink.

**Printing Inventory**

To print out a list of the inventory at a site, follow these steps:

1. Follow Steps 1-3 under “Viewing Inventory.”
2. Click anywhere on the page.
3. Do either of the following:
   a. Choose Print, from your browser’s menu bar (under File in Internet Explorer, Settings and more in Edge, Customize and control Google Chrome in Chrome, or the Open menu in Firefox). In the Print dialog box, press “Print.”
   b. Press the printer icon on your browser’s toolbar.
4. If your printout is cut off, try setting your printer to landscape.
Adding New Inventory

Use the Add Inventory function only if you are adding a product with a new lot number. If you are adding a product with a lot number that already exists in your inventory, refer to Updating Inventory.

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press “Show Inventory.”
3. Select the site to which you will be adding inventory from the Site pick list.
4. Press “Add Inventory.”
5. At the Add Product Inventory Information screen, do the following:
   a. Site: Verify that the site at which the inventory will be located is listed under Site.
   b. Product Type: Select the product type from the pick list provided. The product type is the category describing the kind of inventory item being entered.
   c. Product Subtype: Select the product subtype from the pick list provided. This category further narrows down the type of inventory item being entered.
   d. Product Description: Enter a description of the product in the Product Description field.
   e. NDC/Mfr Item Number: Enter the NDC/Mfr Item Number associated with the product description.
   f. Lot Number: Enter the lot number for the inventory item.
   g. Expiration Date: Enter the date the inventory item expires in MM/DD/YYYY format.
   h. Item Active: Select Yes from the Item Active pick list. When adding new inventory, the lot may only be entered as active. This controls whether the lot shows up on pick lists.
   i. Price per UOM ($): Enter the price in dollars per unit of measure.
   j. Linked Event: Select the event to which the inventory is linked and for which it is allocated.
   k. SNS/OJA Indicator: Click “SNS” or “Other” to indicate from where the inventory originated (do not select OJA).
   l. Dispense to Client: Click “Yes” or “No” to indicate whether the inventory item will be available on the Add Client/Prophylaxis pick list.
   m. Container Number: Enter the container number for the inventory item for reference use.
   n. Seal Number: Enter the seal number for the inventory item for reference use.
   o. Locator: Enter the locator for reference purposes.
   p. Quantity on Hand: Enter the initial amount of inventory on hand for the item.
   q. Unit: Select the unit of measure used to determine quantity on hand. This field will most often be used to transfer and order the inventory item.

6. Define Unit Equivalency: Use this optional section to specify how many pieces of inventory are contained within the unit of measure. For example, 1 case = 24 each (units). If you do not enter anything in this field, SNS automatically populates this section to show that 1 unit of measure = 1 unit of measure and all inventory is tracked and distributed at the unit of measure level.
   a. Unit: Enter the type of unit used as the unit of measure. For example, unit is “Case.”
   b. Quantity/Unit: Enter the quantity of inventory and type of unit used to show number of units within each unit of measure. For example, Quantity is “24,” and Unit is “Each.”
   c. Press “Save.”

7. If the item was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the screen.

8. To return to the Show Inventory screen, press “Cancel.”
**Updating Inventory**

To change information on an existing inventory item, follow these steps:

1. Follow Steps 1-3 under “Viewing Inventory.”
2. Once the appropriate site’s inventory displays, select the inventory item you wish to update by clicking on the product’s description, which is underlined and in blue.
3. On the Edit Inventory screen, follow Steps 1-7 under “Adding New Inventory.”
4. To modify the quantity on hand, enter the following information:

   a. Action: Select to add to or subtract from the inventory on hand.
   b. Amount: Enter the amount of inventory to be added or subtracted. Then select the unit for the quantity you are adding or subtracting.
   c. Reason: Select a reason for adding or subtracting inventory from the following list:
      i. Receipt of Inventory: Use this reason when you are adding new inventory to a lot.
      ii. Error Correction: Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.
      iii. Items Used: Use this reason when subtracting inventory that has been used while responding to an event, but not associated with a specific client.
      iv. Items Returned: Use this reason when adding inventory to a lot because inventory was returned from another site.
      v. Items Transferred: Use this reason when subtracting inventory that has been transferred to another site.
      vi. Items Wasted/Damaged: Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.
      vii. Items Returned to CDC: Use this reason when inventory is subtracted because it was returned to the CDC.
   d. Press “Save.”
   e. Once your updates are saved to the registry’s database, the message “Inventory was updated successfully” will appear at the bottom of the screen.
   f. Press “Cancel” to return to the Show Inventory screen.
Modifying Quantities of Multiple Items

To change inventory quantities of multiple inventory items, follow these steps:

1. Follow Steps 1-2 under “Updating Inventory.”

2. Once the appropriate site’s inventory displays, put a check mark next to the inventory item(s) for which you want to modify the quantities.

3. Press “Modify Quantity.”

4. On the Modify Quantity On Hand for Selected Site(s) screen, enter the following information:
   a. Unit (for QOH): Select the unit type in which the quantity on hand is displayed.
   b. Action: Select to add to or subtract from the inventory on hand.
   c. Amount: Enter the amount of inventory to be added or subtracted.
   d. Unit: Select the unit type for the quantity you are adding or subtracting.
   e. Reason: Select a reason for adding or subtracting inventory from the following list:
      i. Receipt of Inventory: Use this reason when you are adding new inventory to a lot.
      ii. Error Correction: Use this reason when adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial.
      iii. Items Used: Use this reason when subtracting inventory that has been used while responding to an event, but not associated with a specific client.
      iv. Items Returned: Use this reason when adding inventory to a lot because inventory was returned from another site.
      v. Items Transferred: Use this reason when subtracting inventory that has been transferred to another site.
      vi. Items Wasted/Damaged: Use this reason when inventory is subtracted because of broken vials, faulty injections, etc.
      vii. Items Returned to CDC: Use this reason when inventory is subtracted because it was returned to the CDC.

5. Press “Save.”

6. Press “Cancel” to return to the Manage Inventory screen.
### Viewing Inventory Transactions

1. Click Manage Inventory under the Inventory section of the menu panel.
2. At the Inventory Alerts screen, press “Show Transactions.”

<table>
<thead>
<tr>
<th>Inventory Transactions for: IR Physicians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Entered [From]:</td>
</tr>
<tr>
<td>Date Item was Dispensed [From]:</td>
</tr>
</tbody>
</table>

| User Name: | All User Names |
| Transaction Type: | All Transaction Types |
| Site Name: | All Sites with Inventory |
| Product Description: | All Product Descriptions |
| Lot Number: | All Lot Numbers |
| Event: | All Events |
| SNS/OJA: | All SNS, OJA, and Other Inventory |
| Display Last Records: 200 |

3. At the Inventory Transactions screen, do the following:
   a. Enter the From and To dates for when the transactions were entered in SNS in MM/DD/YYYY format (Date Entered), or enter the From and To dates for when the inventory items were given to the client in MM/DD/YYYY format (Date Item was Dispensed).
   b. Select a specific user name or All User Names from the User Name pick list.
   c. Select a specific transaction type or All Transaction Types. These transactions relate to the Reason pick list on the Edit Inventory Information screen. Transaction types:
      i. Receipt of Inventory (REC): This type indicates inventory was added as new.
      ii. Error Correction (ERR): This type indicates inventory was added or subtracted to correct a previous error.
      iii. Items Returned (RET): This type indicates inventory was added to after being returned from another site or organization.
      iv. Items Transferred (TRA): This type indicates inventory was subtracted due to transfer to another site or organization.
      v. Items Wasted/Damaged (WAS): This type indicates inventory was subtracted because it was damaged or contaminated.
      vi. Items Used (USED): This type indicates inventory was subtracted because it was used in the normal course of an event, though not distributed to, nor associated with, a specific client.
      vii. Prophylaxis Given (GIVEN): This type indicates inventory was administered to a specific client.
      viii. Prophylaxis Deleted (DEL): This type indicates inventory was added because it was deleted from a client’s record.
      ix. Items Returned to CDC (RET-CDC): This type indicates inventory was subtracted because it was shipped back to the CDC.
   d. Select the inventory site whose transactions you wish to view, or choose All Sites with Inventory.
   e. Select the product description, lot number, event, and SNS/OJA indicator from the pick lists provided as needed.
   f. Enter the quantity of records you wish to view in the Display Last Records field.
   g. Press “View.” The Show Transactions Report will display.
Show Transactions Report – Inventory Transactions Detail

The top chart on the Show Transactions report gives the following information:

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Trans Date</th>
<th>Product Description</th>
<th>Lot Number</th>
<th>Event ID</th>
<th>Type</th>
<th>Qty</th>
<th>Unit</th>
<th>Client Name</th>
<th>DOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Albuterol Nebulizer Solution, 0.063% - 2.5mg/3ml vial</td>
<td>A4B41A</td>
<td>SNS REC</td>
<td>540</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Albuterol Nebulizer Solution, 0.063% - 2.5mg/3ml vial</td>
<td>A4B41A</td>
<td>SNS REC</td>
<td>480</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Alcohol pads, isopropyl, 70 1 1/4&quot; x 2 1/2&quot;</td>
<td>803797506</td>
<td>SNS REC</td>
<td>165</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Alcohol pads, isopropyl, 70 1 1/4&quot; x 2 1/2&quot;</td>
<td>803797506</td>
<td>SNS REC</td>
<td>45</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Alcohol pads, isopropyl, 70 1 1/4&quot; x 2 1/2&quot;</td>
<td>803797506</td>
<td>SNS REC</td>
<td>1530</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Alcohol pads, isopropyl, 70 1 1/4&quot; x 2 1/2&quot;</td>
<td>803797506</td>
<td>SNS REC</td>
<td>2145</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Alcohol pads, isopropyl, 70 1 1/4&quot; x 2 1/2&quot;</td>
<td>803797506</td>
<td>SNS REC</td>
<td>15</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>01/29/2019</td>
<td>Atropine 0.4mg/ml x 20ml soln, for inj, multi-dose vial 8mg</td>
<td>068023</td>
<td>SNS REC</td>
<td>30</td>
<td>EA</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Site Name: Transactions are first sorted alphabetically by site name.

Trans Date: Transactions are next sorted numerically by transaction date; the most recent transactions are shown first.

Product Description: A description of the transaction item.

Lot Number: The lot number for the transaction item.

Event ID: The quantity of inventory on hand; the number may include up to two decimal places.

SNS/OJA: The SNS/OJA indicator indicates whether the inventory item for the transaction is SNS, OJA, or Other.

Type: Refer to Transaction Types in this chapter for an explanation of the transaction codes shown.

Qty: The quantity added to or subtracted from inventory due to the listed transaction.

Unit: The units for the quantity listed in the Qty column.

Client Name: The client associated with the transaction is listed, if applicable.

DOB: The date of birth of the client is listed, if available.
Show Transactions Report – Inventory Transactions Totals

The chart at the bottom of the Show Transactions report gives the following summary information:

<table>
<thead>
<tr>
<th>Trans Code</th>
<th>Trans Description</th>
<th>Trans Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>REC</td>
<td>Receipt of Inventory</td>
<td>200</td>
</tr>
<tr>
<td>GIVEN</td>
<td>Prophylaxis Given</td>
<td>0</td>
</tr>
<tr>
<td>DEL</td>
<td>Prophylaxis Deleted</td>
<td>0</td>
</tr>
<tr>
<td>TRA</td>
<td>Items Transferred</td>
<td>0</td>
</tr>
<tr>
<td>WAS</td>
<td>Items Wasted</td>
<td>0</td>
</tr>
<tr>
<td>RET</td>
<td>Items Returned</td>
<td>0</td>
</tr>
<tr>
<td>ERR</td>
<td>Error Correction</td>
<td>0</td>
</tr>
<tr>
<td>RET-CDC</td>
<td>Items Returned to CDC</td>
<td>0</td>
</tr>
<tr>
<td>USED</td>
<td>Items Used</td>
<td>0</td>
</tr>
</tbody>
</table>

**Trans Code:** The abbreviated code that identifies the transaction type.

**Trans Description:** The full transaction type description.

**Trans Count:** The number of times a particular transaction type was performed within the dates you specified.

**Printing Inventory Transactions**

To print out a list of inventory transactions, follow these steps:

1. Follow Steps 1-3 under “Viewing Inventory Transactions.”
2. Click anywhere on the page.
3. Do either of the following:
   a. Choose Print, from your browser’s menu bar (under File in Internet Explorer, Settings and more in Edge, Customize and control Google Chrome in Chrome, or the Open menu in Firefox). In the Print dialog box, press “Print.”
   b. Press the printer icon on your browser’s toolbar.
4. If your printout is cut off, try setting your printer to landscape.
Inventory Usage Reports

The Inventory Usage Report will give you information about how many inventory items have been dispensed to clients by age group. To generate an inventory usage report for your organization, follow these steps:

1. Click Inventory Usage under the Inventory section of the menu panel.

2. At the Request Inventory Usage Report Criteria screen, select an event from the pick list or select All Events Combined or All Events Listed Separately.

3. Select a site from the pick list or select All Sites Combined or All Sites Listed Separately.

4. Select SNS, OJA, or Other from the pick list, or select All SNS, OJA, and Other Inventory.

5. In the From field under Report Date Range, choose a starting date on which transactions were entered into the SNS system using the MMDDYYYY format.

6. In the To field under Report Date Range, choose an ending date on which transactions were entered into the SNS system using the MMDDYYYY format.

7. Press “Generate Report.”

8. Press Refresh after a few moments to check the status of your report.

9. Click the name of your report once it is underlined and displays in blue type.

10. The report displays in Acrobat Reader.

11. To print the report, select Print under the “More” menu on the Acrobat Reader toolbar.

12. Press “Print” in the Print dialog box.

13. To return to the previous screen, press “Cancel.”
**Transaction Summary Reports**

The Transaction Summary Report gives information on how many quantities are associated with all transactions, by transaction type, for each NDC/Mfr Item Number. The report also gives information on how much inventory was expired, transferred, received, restocked, wasted, or given in error. To generate a transaction summary report for one site or all sites in your organization, follow these steps:

1. Click Transaction Summary under the Inventory section of the menu panel.

<table>
<thead>
<tr>
<th>Transaction Summary Report Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Event(s):</strong></td>
</tr>
<tr>
<td><strong>Site(s):</strong></td>
</tr>
<tr>
<td><strong>SNS/OJA:</strong></td>
</tr>
</tbody>
</table>

2. At the Transaction Summary Report Criteria screen, select an event from the pick list or select All Events Combined.
3. Select a site from the pick list or select All Sites Combined.
4. Select SNS, OJA, or Other from the pick list, or select All SNS, OJA, and Other Inventory.
5. In the From field under Report Date Range, choose a starting date on which transactions were entered into the SNS system using the MMDDYYYY format.
6. In the To field under Report Date Range, choose an ending date on which transactions were entered into the SNS system using the MMDDYYYY format.
8. The report displays in Acrobat Reader.
9. To print the report, select Print under the “More” menu on the Acrobat Reader toolbar.
10. Press “Print” in the Print dialog box.
11. To return to the previous screen, press “Cancel.”
Manage Orders (not enabled)
The Manage Orders screen displays orders, including submission date and status. Orders are categorized as Current, Historical, or Both. To view the Manage Orders screen, click Manage Orders under the Inventory section of the menu panel.

Current Orders
By selecting the Current radio button, you will be able to view all new orders and processed orders that have not been accepted or rejected. These orders will show a status of one of the following:

Pending: A status of pending means the order has been created and submitted; however, the state has not yet opened the order. You may still modify or cancel the order through SNS.
In Progress: A status of in progress means the order is being filled by the state; you may no longer modify or cancel the order through SNS.
Shipped: A status of shipped means the order has been filled completely and has been shipped.
Backorder: A status of backorder means that all the inventory items need to be backordered; none of the items have yet been shipped.
Partial Ship: A status of partial ship means part of the order has been shipped and the remaining items are backordered.

Click the link for any order to view the order details, including product descriptions, and quantities ordered, shipped, or backordered.

Historical Orders
By selecting the Historical radio button, you will be able to view all orders completed within the last 30 days. You may also enter a date range in MMDDYYYY format to view completed orders; if you enter dates in these fields, press “Refresh List.”
Historical orders will show a status of one of the following:

Denied A status of denied means the order was reviewed by the state and completely denied.
Accepted A status of accepted means the inventory filled by the order has been received by the submitting organization.
Rejected A status of rejected means the order has been completely rejected by the receiving organization.
Partially Accept A status of partially accept means that the receiving site has partially accepted the order.

Click the link for any order to view the order details, including product descriptions and quantities denied.
Ordering Products

Product orders can be created in SNS and then tracked through the fulfillment process. SNS will automatically post the shipment to the organization’s inventory once an organization has accepted a shipment.

To create an order in SNS:
1. Click Manage Orders under the Inventory section of the menu panel.
2. Press “Create Order.”
3. Select an event for which the products are being ordered. If no linked event is specified, you may submit an order for any inventory, regardless of the linked event.
4. Select the site that will be receiving the product.
5. Enter the amount desired next to the chosen product(s).
6. Select the unit for the product amounts you have chosen.
7. Press “Submit Order.”
8. Once your order is submitted, the Manage Order screen will display. From this screen you can track the status of your order. Pending orders can be modified or cancelled by clicking the blue underlined “Pending” on the Manage Order screen.

Ordering for Another Organization

SNS allows you to create a new order for an organization other than the one to which you are logged in. To complete an order for another organization, follow these steps:
1. Click Manual Orders under the Inventory section of the menu panel.
2. Select the organization for which you want to create a new order from the pick list.
3. Press “Create Order.”
4. Create a new order for the selected organization by completing the instructions found in the Ordering Products section.
Modifying Orders

SNS allows you to modify or cancel orders that are in a pending status. To modify or cancel an order, follow these steps:

1. Click Manage Orders under the Inventory section of the menu panel.
2. Click the link to the pending order that you wish to edit.
3. Select a different linked event or receiving site, if this information has changed.
4. To remove an order item, click the Remove checkbox to the left of the item(s) to be removed from the order.
5. To modify the quantity of an ordered item, enter a new quantity next to the item under the Inventory Ordered section of the screen.
6. To add new products to the order, specify quantity and units desired next to the desired items under the Inventory from State section of the screen.
7. To submit the order press “Submit Order.”
8. To cancel the entire order, press “Cancel Order.”
9. To leave the order as is and return to the Manage Orders screen, press “Cancel.”
Manage Transfers

The Manage Transfers screen displays transfer types; the dates they were created and shipped, received, returned, or restocked; and the sending and receiving sites.

### Outbound Transfer

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org:Site</th>
<th>Receiving Org:Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/17/2016</td>
<td>TRANSFER</td>
<td>IR Physicians: SNS Site</td>
<td>Dakota County Health Department: Dakota County Corrections Facility</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/01/2016</td>
<td>TRANSFER</td>
<td>IR Physicians: SNS Site</td>
<td>N Central District HD: Rock County High School</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/01/2016</td>
<td>TRANSFER</td>
<td>IR Physicians: SNS Site</td>
<td>Public Health Solutions: Public Health Solutions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>01/07/2013</td>
<td>TRANSFER</td>
<td>IR Physicians: SNS Site</td>
<td>Test SNS Site: Public Health Solutions Sub Hub</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Inbound Transfer

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org:Site</th>
<th>Receiving Org:Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/24/2019</td>
<td>TRANSFER</td>
<td>Department of Health and Human Services: 2019 March Exercise Warehouse Site</td>
<td>IR Physicians: SNS Site</td>
<td>04/24/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>05/06/2010</td>
<td>TRANSFER</td>
<td>Scotts Bluff County Health Department</td>
<td>IR Physicians: SNS Site</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Historic Transfer (last 7 days by default)

<table>
<thead>
<tr>
<th>Create Date</th>
<th>Type</th>
<th>Sending Org:Site</th>
<th>Receiving Org:Site</th>
<th>Ship Date</th>
<th>Receive Date</th>
<th>Return Date</th>
<th>Restock Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No Historic Transfer.
Transfers are categorized as outbound, inbound, or historical. To view the Manage Transfers screen, click Manage Transfers under the Inventory section of the menu panel.

**Outbound**
An outbound transfer of inventory is a transfer that is shipped to another organization’s site.

**Inbound**
An inbound transfer is an incoming shipment of inventory to a site within your organization.

**Historical**
Historical transfers are those transfers for which your organization is either the sending or receiving organization and that have been totally accepted into inventory or otherwise completed. SNS, by default, displays transfers that have been completed within the last seven days. You may also enter a date range in MMDDYYYY format to view completed transfers; once you enter dates in these fields, press “Refresh List.”

To view further details on an inbound transfer that has not shipped or an outbound transfer that has shipped, click the Create Date link for the transfer.
Creating Transfers

SNS allows you to transfer products between sites within your organization or between two organizations. To create a transfer, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.

### New Transfer

**Sending Site:** SNS Site

**Internal Receiving Site:**

**Receiving Organization:**

**Receiving Site:**

*Note: Only those sites or organizations which have inventory set up are displayed.*

3. Enter the following information:
   a. The sending site from which the inventory will be transferred.
   b. The internal receiving site, or the external receiving organization and external organization receiving site to which the inventory is being transferred.
   c. The event with which the transfer is associated, if desired.
   d. SNS, OJA, or Other, if the transfer is restricted to inventory from one of these sources.
   e. Select active/non-expired or inactive/expired inventory by clicking the appropriate radio button.
4. Press “Save.”
5. If desired, press “Add All” to automatically pre-populate the transfer quantity and units fields with all the sending organization’s available inventory
6. Enter or edit:
   a. The amount of inventory to be transferred.
   b. The units for the amount to be transferred.
7. Press “Packing List” or “Label” to generate these documents if needed.
8. Either
   a. Ship
      i. Press “Ship” when ready to ship the inventory.
      ii. Either use today’s date or enter an alternate date in MMDDYYYY format.
      iii. Press “Ship.” The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
   b. Finish Transfer without Shipping (internal transfers only)
      i. To complete an internal transfer without printing shipping documents, press “Finish Trans.” The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.
Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see the Creating Transfers section of this chapter) or by using the following feature:

1. Click Shipping Documents under the Inventory section of the menu panel.
2. Click the linked date to view the packing list, if desired.
3. Enter the amount of packing lists and/or shipping labels you wish to generate in the Packing List Quantity and Label Quantity fields.
4. Press “Packing List” or “Label.” Print labels and/or packing list, if desired.
5. Enter a ship date if different from today’s date, using a MMDDYYYY format.
6. Check the box next to the job you wish to ship.
7. Press “Ship.”

Modifying Transfers

Outbound transfers that have not yet shipped can be modified using the edit transfer function in SNS. The Edit Transfer screen has two sections; the top section lists all the inventory items that are part of the transfer, while the bottom section lists the sending site’s available inventory that could be added to the transfer. To modify an unshipped outbound transfer, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Click the link to the outbound transfer that you wish to edit.
3. To cancel the entire transfer, press “Cancel Transfer” and “OK.”
4. Select a different linked event or receiving site/organization, if this information has changed.
5. To remove a transfer item, click the Remove checkbox to the left of the item(s) to be removed.
6. To modify the quantity of a transferred item, enter a new quantity next to the item under the Add from Inventory section of the screen.
7. To add new transfer items, specify quantity and units next to the desired items under the Add from Inv section of the screen.
8. Press “Save.”
9. Press “Packing List” or “Label” to generate these documents if needed.
10. Either
   a. Ship
      i. Press “Ship” when ready to ship the inventory.
      ii. Either use today’s date or enter an alternate date in MMDDYYYY format.
      iii. Press “Ship.” The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
   b. Finish Transfer without Shipping (internal transfers only)
      i. To complete an internal transfer without printing shipping documents, press “Finish Trans.” The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.
Accepting or Rejecting Transfers

Orders and transfers made through SNS and received by the provider organization must be accepted, rejected, or partially accepted so that SNS can post and track inventory properly. To accept or reject a transfer in SNS:

1. Click on Manage Transfers under the Inventory section of the menu panel. The sections of the screen are described under Manage Transfers above.

2. Click the date underlined in the Create Date column that corresponds with the transfer you wish to receive.

<table>
<thead>
<tr>
<th>Receive Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept Entire Transfer....</td>
</tr>
<tr>
<td>Reject Entire Transfer....</td>
</tr>
<tr>
<td>Partially Accept Transfer....</td>
</tr>
<tr>
<td>Return to the Previous Screen....</td>
</tr>
</tbody>
</table>

3. At the Receive Transfer screen, you may accept the entire transfer, reject the entire transfer, or accept part of the transfer, while rejecting the remainder.
   
a. Accept Transfer: To accept the entire transfer, press “Accept Transfer.” Press “OK” to accept the transfer and add all transfer items into inventory.
   
b. Reject Transfer: To reject the entire transfer, press “Reject Transfer.” Select a reason for the rejection: Damaged, Not Wanted, Wrong Product, or Never Received. After selecting a reason, press “Reject.” Press “OK” to continue with the rejection and be returned to the Manage Transfers screen.
   
c. Partially Accept: To accept part of the shipment, press “Partially Accept.” At the Partially Accept Transfer screen, select the amounts and units of the items you wish to accept and a rejection reason for those you wish to reject. Press “Save” then “OK.”
Shipping and Restocking Transfers

When an order or transfer has been rejected with a reason code of Damaged, Not Wanted, or Wrong Product, it is necessary to ship and restock transfers in the system so that they are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you then reject, you must ship the rejected quantities back to the original sender:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Click the underlined rejected inbound transfer date under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer screen by entering the date in MMDDYYYY format. Press “Ship.”

<table>
<thead>
<tr>
<th>Transfer Product Item</th>
<th>Transfer Quantity</th>
<th>Unit</th>
<th>Product Description</th>
<th>Lot Number</th>
<th>Product Type</th>
<th>Reject Quantity</th>
<th>Unit</th>
<th>Reject Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>BT</td>
<td>Diazepam 10mg/2mL 10 dose vial</td>
<td>AF114A</td>
<td></td>
<td>1</td>
<td>BT</td>
<td>DAMAGED</td>
</tr>
</tbody>
</table>
Restocking a Rejected Transfer

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click Manage Transfers under the Inventory section of the menu panel.
2. Click the underlined transfer date of the rejected outbound transfer under the Create Date column.

3. Press “Save” at the Restock Rejected Transfer screen. The Manage Transfer screen will display, and the transfer will be added to the Historical section of the screen.
Managing Clients

SNS shares client information with the Nebraska State Immunization Information System (NESIIS). Since SNS clients may already be entered in NESIIS, you should attempt to find a client in SNS before entering them as a new client. However, SNS will attempt to deduplicate (compare entered information against information saved to the registry for duplicate clients) client records prior to saving the information on the Enter New Client screen.

Finding Clients

When searching for an existing client in SNS, more information is not always better. By entering too much information about a client (mother’s maiden name, social security number, phone number, birth date, etc.) you will increase your entry time and decrease the odds of finding the client due to typing and interpretation errors. We recommend that you supply three characters of the client’s last name and two characters of the first name only, unless the client’s name is very common, in which case supplying a complete name, birth date, or mother’s maiden name will help narrow the search.

1. Click Manage Client under the Clients section of the menu panel.
2. In the Client Search Criteria box, you have options for finding your client:
   a. Last Name: Entering the first three letters of the client’s last name, along with the first two letters of the first name, will initiate a search of all clients matching those letters. Entering fewer than three letters in the last name field will result in an exact name search; for example, entering the letters “Li” will produce only last names of “Li.” If the client’s name is common, typing in the full name will narrow the search.
   b. First Name: Entering the first two letters of the client’s first name, along with the first three letters of the last name, will initiate a search of all clients matching those letters. If the client’s name is common, typing in the full name will narrow the search.
   c. Middle Name: Entering the client’s middle name (or a portion of it) in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter data in this field.
   d. Mother’s Maiden Last: Entering the mother’s maiden last name, in combination with the data entered in the name fields, will narrow a search for a client with a common name. You may find all clients associated with a mother by entering only the mother’s maiden last name and mother’s first name.
   e. Mother’s First Name: Entering the mother’s first name, in combination with the data entered in the name and mother’s maiden last fields, will narrow a search for a client with a common last name. You may find all clients associated with a mother by entering only the mother’s maiden last name and mother’s first name.
f. Birth Date: Entering the client’s birth date in conjunction with his or her first and last name will narrow a search for a common name. Otherwise, it is not necessary to enter a date in this field.

g. Gender: Indicating the gender of the client will narrow a search for a common name, especially if the first name is androgynous.

h. SSN: Entering the Social Security number (SSN) only will produce a single name match. Note: To find a client by using their SSN, the number must have been entered previously for the client.

i. Phone: Entering the client’s telephone number only will produce a single name match. However, this method is not recommended, as a telephone number may not be entered for a client, and telephone numbers may change over time.

j. Chart #: Entering the client’s chart number only will produce a single name match. Note: To find a client using this method, the chart number must have been entered previously for the client.

3. Press “Find.”

   a. If multiple records are found matching the information you entered, a table listing up to 75 matches with detailed information on each will be shown below the Find Client Information box. To choose a client from this list, click the client’s underlined last name.

   b. If only one client matches your search, the Manage Client screen for that individual will display automatically.

   c. If no clients match your search, recheck the information you entered for accuracy. If you suspect the client has not been entered in SNS, proceed to “Editing/Entering Client Information.”

**Editing/Entering Client Information**

The Update Existing Client screen allows you to update or change specific information (other than prophylaxis) relating to any client in SNS. The Enter New Client screen, accessed by clicking this option on the menu panel, allows you to input this information for a client new to SNS. The Update Existing Client and Enter New Client screens are divided into five sections: Personal Information header, Client Information tab, Contact(s) tab, Client Symptom(s) tab, and I/Q Follow-Up tab (Isolation/Quarantine).
Personal Information Header

The Personal Information section at the top of the Manage Client/Enter New Client screens contains client-specific information fields used primarily to distinguish among clients when doing client searches. All fields shown in a blue font are required.

1. Last name: Required field.
2. First name: Required field.
3. Middle name: Optional field.
4. Mother’s Maiden Last: Required field. SNS will allow you to save the record without this field completed; however, SNS will remind you to gather this information for future deduplication.
5. Mother’s First Name: Required field. SNS will allow you to save the record without this field completed; however, SNS will remind you to gather this information for future deduplication.
6. SSN: The SSN field is optional. If the field is blank, an SSN may be entered. Once the SSN is entered and saved, however, a provider cannot change it. In addition, it will not show on the Manage Client screen (it will say “On File”) and will not appear on any reports. As the SSN cannot be easily changed once it is entered, enter this information very carefully.
7. Gender: Click the appropriate radio button to choose male or female. This field is optional.
8. Birth Date: This is a required field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. When using the calendar icon, choose a month and year from the pick lists at the top and choose a day by clicking on the appropriate calendar day. Press “OK.”
9. Country of Birth: This field defaults to “United States.” Use the pick list to select a different country of birth, if applicable.
10. Street Address/ Other Address/ P.O. Box: These fields are optional. Street Address/ Other Address/ P.O. Box fields are pertinent to the client.
11. The city field is optional and pertinent to the client.
12. State: This field defaults to “NE.” Use the pick list to select a different state of residence, if applicable.

13. Zip: The ZIP Code field is optional and pertinent to the client.

14. County of Residence: Required field. SNS will allow you to save the record without this field completed but entry is strongly encouraged to enable public health activities.

15. Telephone/Extension: Telephone/extension fields are optional but pertinent for client recall efforts.

16. Email: The email field is optional but pertinent for client recall efforts.

Below the Personal Information Header, the name of the organization that last updated the client’s information displays in bold, along with the date the update was entered.

**Client Information Tab**

The Client Information tab gives demographic and quarantine information about the client.

<table>
<thead>
<tr>
<th>Client Information</th>
<th>Contact(s)</th>
<th>Client Symptom(s)</th>
<th>I/Q Follow-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethnicity</td>
<td>Hispanic or Latino</td>
<td></td>
<td>Chart # 1234</td>
</tr>
<tr>
<td>Race</td>
<td>Asian</td>
<td></td>
<td>Event 2018 SNS September Exercise</td>
</tr>
<tr>
<td>PCP</td>
<td>Checkout, Sam</td>
<td></td>
<td>I/Q Start Date 10/01/2018</td>
</tr>
<tr>
<td>Restriction</td>
<td>Isolation</td>
<td></td>
<td>I/Q End Date 09/30/2019</td>
</tr>
</tbody>
</table>

1. Ethnicity: Choose the client’s ethnic background from the pick list provided.

2. Race: Choose the client’s race from the pick list provided.

3. PCP: Choose the client’s primary care physician (PCP) or health care organization from the pick list or press the “PCP” button to add a new physician or update the selected physician. If adding a new physician or updating an existing physician, enter data in the Add Physician screen and press “Save.” The Client Information tab will again display. Physician information is used only for reporting.

4. Restriction: Choose whether the client is subject to voluntary isolation or compulsory quarantine by clicking the appropriate button.

5. Chart #: Enter your organization’s chart number for the client in this field, if desired. A client may have multiple chart numbers associated; each number is organization dependent.

6. Event: Choose the event name from the pick list through which the client was exposed.

7. I/Q Start: Enter the date that the client must begin his or her contact restrictions using the MMDDYYYY format or by selecting the calendar icon.

8. I/Q End: Enter the date that the client will end his or her contact restrictions using the MMDDYYYY format or by selecting the calendar icon.

9. Previous Event Exposure: Choose an event(s) name and number from the list to which the client may previously have been exposed. To select an event, double-click on the event name or highlight the event name and press “Add.”
Contacts Tab
The Contact(s) tab allows you to identify those responsible for the care of the client and those who may have been in contact with or exposed to the client.
1. Click the Contact(s) tab.

2. Either:
   a. Edit an existing contact:
      i. Click the Select radio button next to the name of the person you wish to edit.
      ii. Change or add information for the fields listed below.
      iii. Press “Next.”
   b. To enter a new contact:
      i. Last Name: Enter the last name of the contact into this field.
      ii. First Name: Enter the first name of the contact into this field.
      iii. Middle Name: Enter the contact’s middle name in this field.
      iv. Relation: Choose the relationship of the contact to the client from the pick list provided. This is a required field.
      v. Telephone: Enter the contact’s telephone number, including the area code, in this field.
      vi. Extension: Enter the contact’s extension to the above telephone number, if any, in this field.
      vii. E-mail: Enter the contact’s e-mail address, if any, in this field.
      viii. Street Address: Enter the contact’s street address into this field.
      ix. Other Address: Enter the contact’s additional address information, if any, into this field. For example, a suite number or apartment number could be entered here.
      x. P.O. Box: Enter the contact’s post office box, if any, into this field.
      xi. City: Enter the contact’s city into this field.
      xii. State: Choose the contact’s state from the pick list provided. This field defaults to “NE.”
      xiii. Zip: Enter the contact’s ZIP Code in this field.
      xiv. +4: Enter the contact’s ZIP Code +4 extension in this field, if it is known.
      xv. Language: Choose the primary language that this contact speaks.
      xvi. Primary?: Check this box to indicate that the contact is the primary or emergency contact for the client.
xvii. Permitted Visitor?: Check this box to indicate that the contact is permitted to visit the client while in isolation/quarantine.

3. To enter a new contact and save the information you entered, press “Next.”
4. To clear existing information and enter a new contact, press “Clear.”
5. To display previously updated material for editing, press “Cancel.”

Copying an existing contact record
1. Select the record you wish to copy on the Contact Listing.
2. Press “Copy.”
3. This information may now be edited and saved as another contact.

Deleting an existing contact record
1. Select the record you wish to delete on the Contact Listing.
2. Press “Delete.”
3. Press “OK” in the confirmation box.

Client Symptoms Tab
The Client Symptoms tab allows you to enter information on any symptoms the client may be exhibiting.
1. Click the Client Symptom(s) tab.

2. Enter the following information:
   a. Choose the appropriate symptom from the Client Symptom pick list.
   b. Enter the first date the client began showing the symptom in the From Date field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field.
   c. Enter the last date the client showed the symptom in the To Date field. Fill in the field using the MMDDYYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field.

3. To enter the symptom into the Client Symptoms Listing and enter a new symptom or view the next symptom, press “Next.”
4. To clear existing information and enter a new symptom, press “New.”
5. To display previously updated information for editing, press “Cancel.”
6. To read a list with more than 8 symptoms, use the scrolling arrows at the top right corner of the box. A counter near the scrolling arrows displays the number of symptoms entered.

Deleting an existing symptom
1. Select the symptom you wish to delete on the Client Symptom Listing.
2. Press “Delete.”
3. Press “OK” in the confirmation box.

I/Q Follow-Up Tab
The I/Q (Isolation/Quarantine) Follow-Up tab allows you to enter information on clients in isolation or quarantine.
1. Case Classification: Select a case classification from the pick list provided.
2. Total Persons at Location: Enter the number of persons at the treatment/care location.
3. Telephone: Enter the contact telephone number for the location.
4. Location: Select the type of location from the pick list provided.
5. IQ Address: Enter the address of the isolation/quarantine location.
6. City: Enter the city where the isolation/quarantine facility is located.
7. State: Select the state where the isolation/quarantine facility is located.
8. Zip: Enter the zip code of the location.
9. +4: Enter the ZIP Code +4 extension, if known.
10. Location Notes: Enter the name of the facility at which the client was isolated or quarantined. This field will alphabetically sort the I/Q Daily Call List.
11. Disease: Select the disease to which the client was exposed from the pick list provided.
12. Disease Notes: Enter any notes applicable to the disease.
13. Infection Control Precautions: Select infection control precautions applicable to the client from the list provided. To add a precaution, double-click on the selected precaution or highlight it and press “Add.”
14. Special Needs: Select all applicable special needs for the client from the list provided. To add a special need, double-click on the selected special need or highlight it and press “Add.”
15. Special Needs Notes: Enter any notes applicable to the client’s special needs.
16. General Notes: Enter any general notes on the case.

Documenting Exposed Clients
SNS allows users to track exposure from one client to others. Users may choose whether to link exposed clients by event; in the case of secondary exposure, clients would not be linked by event. To add an existing client to the exposed client listing, follow these steps:
1. Press “Exposed Event List” at the top of the Update Existing Client or Enter New Client screen.
2. Select a current linked event, previous event exposure, and/or none on the Event for Exposed Client Listing screen. Press “OK.”
3. At the top of the Exposed Client Listing screen, other clients already identified as exposed to the client are listed. To search for additional clients, enter the last name, first name, and other search criteria as documented in “Finding Clients.” Press “Find.”

4. Select the appropriate client(s) from the list of potential matches at the bottom of the screen by clicking the “Select” box next to the client’s name. Press “Save.”

If the client for whom you were searching did not display on the list of potential matches, follow these steps:
1. Press “Create New Exposed Client.”
2. Enter known information for the client on the Enter New Client screen.
3. Press “Save.” The client will be added to the exposed client listing.

**Removing Exposed Clients from the Listing**
To remove a client from the exposed client listing, follow these steps:
1. Follow steps 1-2 under “Documenting Exposed Clients.”
2. Select the client(s) to be removed by checking the box next to the name at the top of the Exposed Client Listing screen.
3. Press “Remove Selected Client from Exposed Client Listing.”
Saving Client Information

There are many ways to save information on the Manage Client/Enter New Client screens:

**Save**
When pressed, the “Save” button at the top of the screen will save all changes, provided all required fields are filled and the data entered is valid. Once the information is saved, the Add Client Prophylaxis screen will display.

**Immunizations**
As with the “Save” button, the “Immunizations” button will save all information fields. Once the information is saved, the user will either be directed to the client’s NESIIS Immunization History screen or to read-only screen listing immunization history, depending upon the user’s role.

**History Prophylaxis**
When the “History Prophylaxis” button is pressed, all information fields will be saved, and the View Client Prophylaxis screen will display.

**Record Prophylaxis**
As with the “Record Prophylaxis” button, the button will save all information fields. Once the information is saved, the Select Client Prophylaxis screen will display.

**Add Next**
When the “Add Next” button is pressed, all information fields will be saved, and a blank Enter New Client screen will display.

**Reports**
When the “Reports” button is pressed, all changes will be saved, and the View Client Reports screen will display.

**Exposed Event List**
When the “Exposed Event List” button is pressed, all information fields will be saved, and the linked event screen will display. Select a linked event and press “OK.” SNS will then display the Exposed Client Listing screen.

**PCP**
The “PCP” button for updating primary care physician information will also save the client record when pressed.

When pressed, the “Cancel!” button clears all entered information and does not save it to SNS.
### Deduplicating Client Records

After you enter a new client and press one of the buttons that will save the data, SNS initiates a process that ensures that the client information you entered does not duplicate a client that already exists in SNS. If after attempting to save a new client you receive a message box titled “Client Match Detected,” you should read the message and proceed carefully.

#### Client Match Detected

Based on the information you entered, your client is likely already in NESIIS and is one of the clients listed below. Please review the demographic information for each of these clients and if none of them appears to be your client, you may then click the **Create New Client** button.

Please keep in mind that if you choose to ignore a client match and create a new record, that client will have two records in NESIIS, neither of which will be complete and accurate!

**Create New Client**

#### Possible Client Matches: 3

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Birth Date</th>
<th>Chart #</th>
<th>Mother’s Maiden First</th>
<th>Mother’s Maiden Last</th>
<th>Gender</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT</td>
<td>TEST</td>
<td>01/01/2000</td>
<td>1</td>
<td>MOTHER</td>
<td>MAIDEN</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>CLIENT</td>
<td>TEST</td>
<td>01/02/2000</td>
<td></td>
<td></td>
<td></td>
<td>U</td>
<td></td>
</tr>
<tr>
<td>CLIENT</td>
<td>TEST</td>
<td>01/02/2000</td>
<td></td>
<td></td>
<td></td>
<td>U</td>
<td></td>
</tr>
</tbody>
</table>

A table below the message box contains one or more names of potential matches within SNS. If one of these names matches your client, click the client’s last name to display his or her information. SNS will identify matching clients even if the client has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your client's record.

If after reviewing all the names given in the table you do not find a match for your client, press the “Create New Client” button. A confirmation box will appear; press “OK.” Be aware that if you do override the listed matches and end up creating a duplicate record for a client, it will be difficult to manage the client’s immunization and personal information, and the registry will lose its accuracy and efficiency.

You may also receive the “Single Client Match Detected” message box, which does not give the option to create a new client, in situations where a match of a newly entered client to one client is extremely close.

#### Single Client Match Detected

Based on the information you entered, the system has determined that the client already exists in NESIIS. Please select the client below and update the information on the client as needed.

**Possible Client Matches: 1**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Birth Date</th>
<th>Chart #</th>
<th>Mother’s Maiden First</th>
<th>Mother’s Maiden Last</th>
<th>Gender</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLIENT</td>
<td>TEST</td>
<td>01/01/2000</td>
<td>1</td>
<td>MOTHER</td>
<td>MAIDEN</td>
<td>M</td>
<td></td>
</tr>
</tbody>
</table>

Please contact the helpdesk for assistance in client entry if you still feel that the new client is distinct after reviewing the proposed client match.
Managing Prophylaxis

SNS allows users to add, edit, view, and print prophylaxis administered to a client. Prophylaxis can only be entered for a client if it was deducted from inventory.

When adding or editing prophylaxis information, a specific client may be accessed one of two ways:
1. From the Manage Client screen, press “Record Prophylaxis” to save entered information and display the Add Client Prophylaxis screen.
2. Choose Manage Prophylaxis under the Prophylaxis section of the menu panel. This will bring up the Find Client screen. For information on finding clients, refer to the Finding Clients section in Managing Clients.

Viewing Prophylaxis
The View Client Prophylaxis screen allows you to view all records of any medication administered to a client resulting from an event. The screen has two sections: Client Information and History.

### Client Information
The Client Information section at the top of the screen gives vital information about the client, such as name, date of birth, chart number, address, and a list of symptoms. Use this information to verify that the client indicated is the client for whom you were searching. To edit this information, press “Edit Client” and refer to the Editing/Entering Client Information section Managing Clients.

### History
The History section of this screen shows a list of prophylaxis administered to the client and the event with which the administration was related. The information in this section includes the product description, date administered, event, quantity, reaction, and an edit icon.

### Printing the View Client Prophylaxis Screen
To print a copy of the View Client Prophylaxis screen, press “Print.”
Adding Prophylaxis

The Add Client Prophylaxis screen contains three main sections. In the first section, the user can view client information. The second section contains an area where the user can identify the defaults relating to the inventory from which the prophylaxis will come. The third section outlines any prophylaxis administered to the client.

To add a prophylaxis for a located client, follow these steps:

1. At the Add Client Prophylaxis screen, review the information at the top section of the screen to confirm you have the correct client record.
2. In the Defaults for New Prophylaxis portion of the screen, select the event that resulted in prophylaxis being administered.
3. Select the organization site that is the source of prophylaxis deducted.
4. Select the ordering authority; this is the person authorized to order prophylaxis for this client.
5. Select the name of the individual who administered the prophylaxis.
6. Enter the date that the prophylaxis was administered in MMDDYYYY format. Press “Activate Expired” to show all inventory for the site and date selected.
7. In the Active Prophylaxis Inventory section of the screen, select the lot number and quantity for each prophylaxis used for this client.
8. Press “OK” to save, or “Cancel” to not save. The View Client Prophylaxis screen will display.
To edit a prophylaxis for a located client, follow these steps:

1. At the View Client Prophylaxis screen, select the prophylaxis you wish to edit by pressing the appropriate notepad icon in the Edit column.
2. Select the amount of prophylaxis administered under Quantity.
3. Check the Partial Dose box only if the amount administered was not an adequate amount for prophylaxis.
4. Enter the date that the prophylaxis was administered in MMDDYYYY format.
5. Select the ordering authority, the person authorized to order prophylaxis for this client.
6. Select the name of the person who administered the prophylaxis.
7. Select the event that resulted in prophylaxis being administered.
8. In the Reactions to Prophylaxis section of the screen, check any reactions that apply to this prophylaxis.
9. Press “Save” to save, “Delete” to remove the entire prophylaxis record, or “Cancel” to exit without saving any changes. The View Client Prophylaxis screen will display.
Reports and Forms

SNS allows users to generate contracts, such as the Voluntary Client Isolation Contract and Isolation Orders. SNS users can also generate reports, such as the Isolation/Quarantine Daily Call List, Isolation/Quarantine Event Statistics, and the Isolation/Quarantine Follow-Up reports.

Client Reports
The View Client Reports screen has three main sections: Client Information, Reports Available for this Client, and Report Viewing Requirements. The screen can be accessed one of two ways:
1. Press “Reports” on the Update Existing Client screen, discussed in Managing Clients.
2. Press “Reports” on the View Client Prophylaxis screen, discussed in Managing Prophylaxis.

### Client Information

<table>
<thead>
<tr>
<th>Client Name (First - MI - Last)</th>
<th>DOB</th>
<th>Gender</th>
<th>Mother’s Maiden</th>
<th>Chart #</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST M. CLIENT</td>
<td>01/01/2000</td>
<td>M</td>
<td>MAIDEN</td>
<td>1</td>
</tr>
<tr>
<td>Address</td>
<td>100 Main Street, KEARNEY, NE 68845</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### SNS Reports Available for this Client

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Isolation/Quarantine Individual Follow-Up Report</td>
<td>Provides client information that can be used for isolation and quarantine follow-up.</td>
</tr>
<tr>
<td>Voluntary Client Isolation Contract</td>
<td>Provides a legal document requesting voluntary isolation and highlighting the procedures that isolation will involve.</td>
</tr>
<tr>
<td>Isolation Orders</td>
<td>Provides a legal document ordering isolation and highlighting the procedures that isolation will involve.</td>
</tr>
</tbody>
</table>

You will need to have a PDF viewer such as Acrobat Reader® to view client reports. To view a client-specific report, click the desired link under Reports Available for this Client. The reports available are:

- Isolation/Quarantine Individual Follow-Up Report: To access a blank version of this form, click I/Q Follow-Up under Reports on the menu panel. This report facilitates individual follow-up for clients who have been isolated or quarantined. When generated from the View Client Reports screen, this report is populated with client information.
- Voluntary Client Isolation Contract: To access a blank version of this form, click Client Isolation Contract under Reports on the menu panel. This contract is a legal document that contains information about the client’s restriction and includes blanks for signatures from a member of the health department staff, the client, and a witness. When generated from the View Client Reports screen, this report is populated with client information.
- Isolation Orders: To access a blank version of this form, click Isolation Orders under Reports on the menu panel. This contract is a legal document that orders the client into isolation or quarantine. The Isolation Orders form contains information about the client’s restriction and includes blanks for signatures from the health officer, the client, a witness, and the server. When generated from the View Client Reports screen, this report is populated with client information.
**Isolation/Quarantine Daily Call List**

The Isolation/Quarantine Daily Call List is a legal listing of clients in isolation and quarantine that health departments will use to contact clients regarding the status of their disease. The list is sorted alphabetically by location. To access the Isolation/Quarantine Daily Call List, click IQ Daily Call List under the Reports section of the menu panel.

**Isolation/Quarantine Event Statistics Report**

The Isolation/Quarantine Event Statistics Report allows the user to produce a report outlining the number of clients in isolation and quarantine by disease, location, case classification, and special needs.

To generate an Isolation/Quarantine Event Statistics Report, follow these steps:

1. Click Event Statistics under the Reports section of the menu panel.

   ![Event Statistic Report Criteria](image)

2. Select an Organization from the pick list provided. Users may only enter the organization they are logged into.
3. Select an event name or select all events.
4. Uncheck the Currently in Isolation/Quarantine field if you wish to report on all clients, not only on those clients currently in isolation or quarantine.
5. Press “Generate Report.”
Help and Support

Online Help
SNS’s online help function provides you with screen-specific help – to access:

1. Press the light bulb on the menu bar in the right corner of the screen on which you would like help.
2. A box with screen-specific help information will display. This help box may have any of the following features:
   a. Purpose describes what the screen is meant to do or what kind of information needs to be entered.
   b. Required fields lists the required fields on the screen and describes the information needed for these fields.
   c. Other fields lists and describes non-required fields.
   d. Information provided lists the information that may be found on the screen.
   e. Functionality gives step-by-step instructions on how to enter information on the screen or features on the screen and describes their function.
   f. Results describes the outcome of a search, report, download, or other information request.
   g. User tips. This section has advice or further information on how to use this screen.

3. To view these features, you may either click the links under the Purpose section or scroll down the box.

4. To close the help box, press the “X” button in the top right corner of the box.

**NESIIS Help Desk**

If you are experiencing difficulties or have questions regarding NESIIS, you may contact the NESIIS Help Desk.

- The NESIIS Help Desk hours are 8:00 a.m. to 5:00 p.m. (CT), Monday through Friday.
- Help Desk telephone number: (888) 433-2510
- Help Desk e-mail address: dhhs.nesiis@nebraska.gov