Chapter 2 - Project Setup

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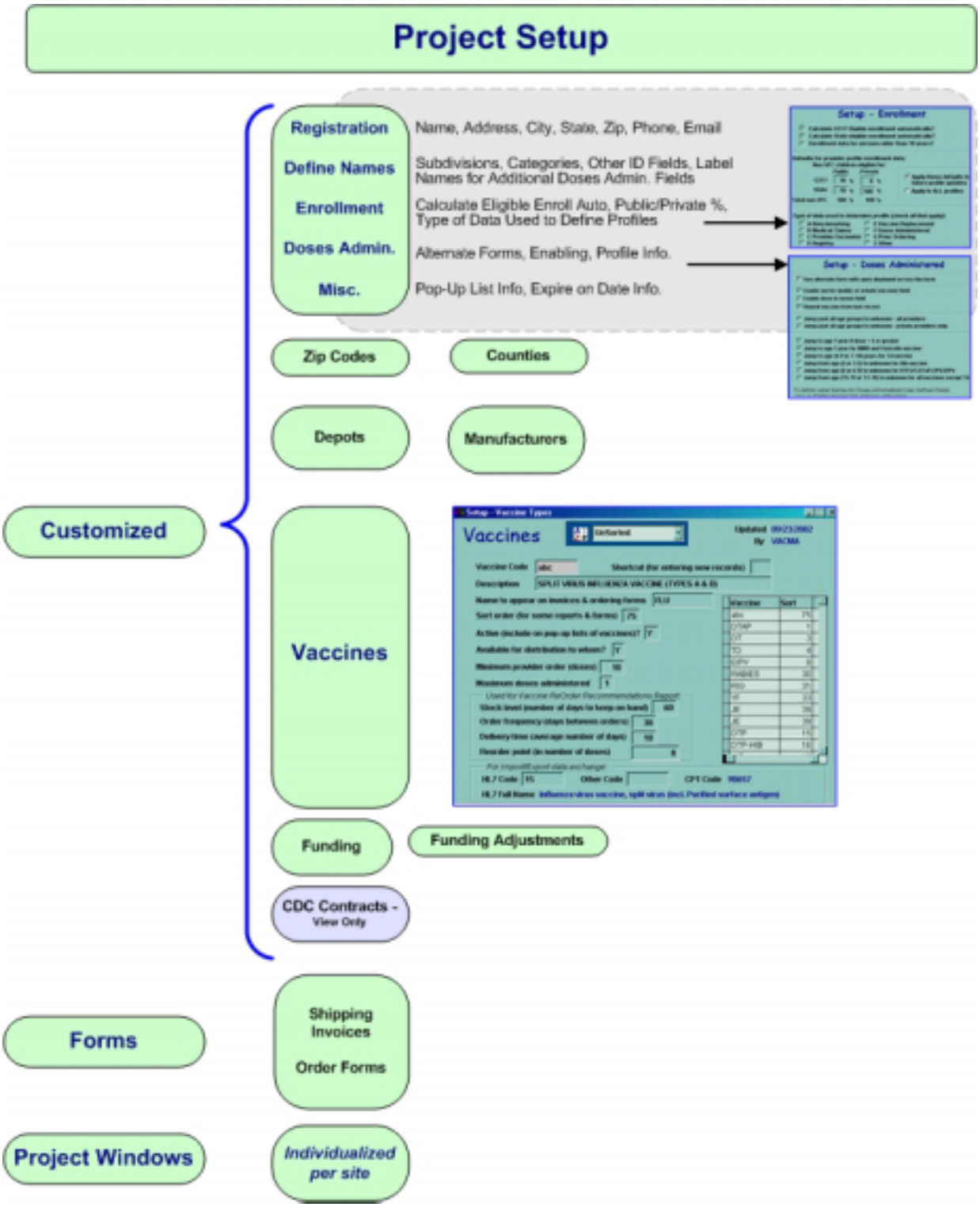
Overview of Project Setup

Projects perform a Project Information Setup shortly after installing VACMAN and as needed thereafter. Project Setup is divided into three sections: Customized, Project Windows, and Forms.



Customized Setup Overview

Projects are required to perform a ***Customized*** section setup at least once after installing VACMAN. The ***Customized*** section setup involves:

- ***Registering*** your project
- ***Defining names*** for customized windows and fields
- Defining calculations and default options for the ***Enroll Demographics*** window
- Defining calculations and default options for the ***Doses Administered*** window
- Establishing ***Miscellaneous*** default behaviors for various windows
- Entering commonly used ***Zip codes***
- Entering commonly used ***Counties***
- Setting up ***Depots***
- Setting up ***Manufacturers***
- Entering ***Vaccine*** information
- Entering ***Funding*** information
- Viewing ***CDC Contracts***

Registration Tab

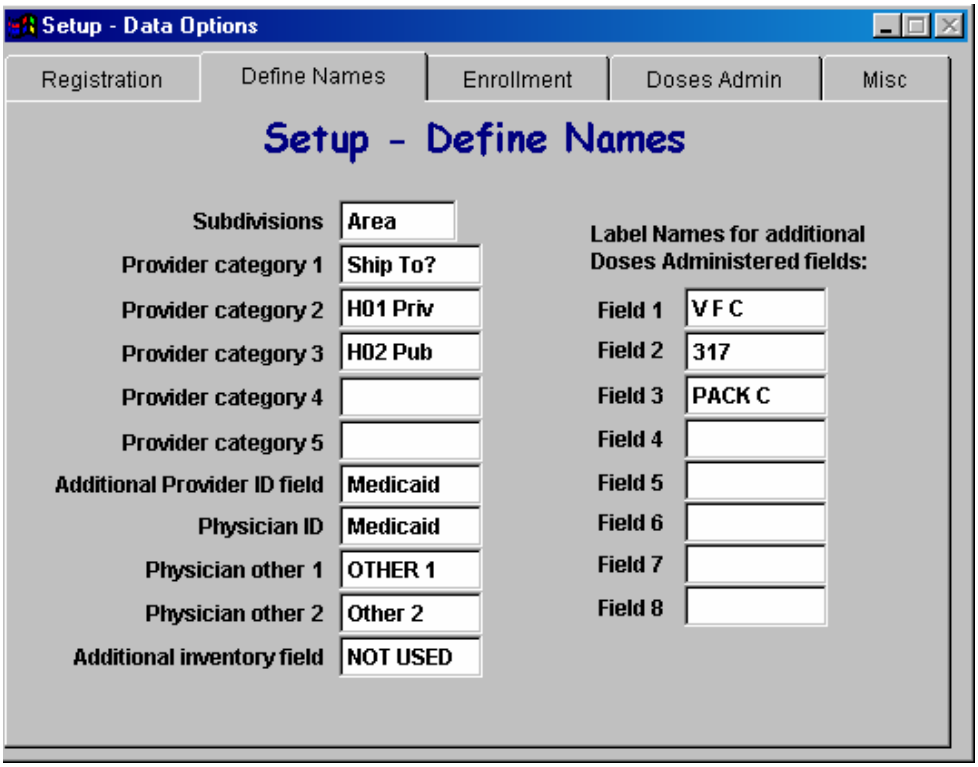
Use the Registration tab to enter specific information about your project. Except for contact information, it is uncommon for this information to change once it has been entered.

Registration Field Descriptions

Field	Use this field to enter:
Project	Your project's name.
Contact	The name of your VACMAN end-user who answers questions about your project's VACMAN account.
Address	Your project's physical address. This field should not be confused with your project's depot address.
City	The city in which your project is located.
State	The state in which your project is located.
Zip code	The zip code in which your project is located.
Phone	Your project's main phone number or the direct phone number to your VACMAN contact.
Extension	The extension number of your VACMAN contact.
Fax	The fax number for your VACMAN personnel.
Email	The email address to your project's VACMAN contact.

Define Names Tab

Use the Define Names tab to customize names of various fields that appear within the Enroll Provider, Edit Physician, Doses Administered, and Inventory windows. Also, you can add unique titles to your customizable pop-up windows. These customizable field and window titles are divided into these general sections: provider, physician, additional inventory field and label names for additional doses administered fields.



Provider Section

The Provider section allows you to name three types of fields and windows: Subdivisions, Category, and one additional field. To name fields in any of these sections, click the **Edit** button, enter the new field names, and click the **Save** button.

Subdivisions

Entering a value in the Subdivisions field serves two purposes: it names the respective field in the Enroll Providers window, and titles the Subdivisions window. The Subdivisions window is used to enter contact information, a code, and a description for the subdivision.

Use the Subdivisions window to record contact information relative to the regions or subdivisions that your project distributes vaccines. The records you enter in this window become available in a drop-down list wherever a Subdivisions field is present.

Provider category fields, 1 - 5

The Provider Category fields (1-5) are displayed on the *Enroll Provider* window. When you name these fields, you will see the names appear as their respective field titles on the Enroll Providers window.

In addition, you will see the names you assign to these fields appear as the names of the Category links on the Setup tab on *VACMAN at a Glance*.

Finally, the names you assign to these fields will also be used as the names for their respective windows when you click on those links. The values you enter in these windows become the selections you can choose from in their respective fields on the Enroll Providers window.

Additional Provider ID Field

The Additional Provider ID field can be named and used in any way that is appropriate to your project. The value you enter for this field names an additional field on the Enroll Provider window. After naming this field, you can go to the Enroll Provider window and type in any text or numeric value for the field.

Physician Section

Use this section to name three fields: Physician ID, Physician other 1 and Physician other 2. All of these fields appear on the Edit Physician window with the titles you enter in this section. Projects often rename the ID field to "Tax ID #" or "Medicaid #." Physician other 1 and 2 can be used in any way that is appropriate to your project. For example, you might want to name these fields "License #" and "Pub/Priv" where you could record the physician's license number and whether the physician is a public or private practitioner. After naming these fields, go to the Edit Physician window and type in any text or numeric values.

Label names for additional doses administered fields

Use this section to name up to eight miscellaneous fields that appear on the Doses Administered window. Medicaid eligibility, uninsured, underinsured, and American Indian are names often given to the miscellaneous fields. After naming these fields, use the Doses Administered window and type in any numeric value.

Additional inventory field

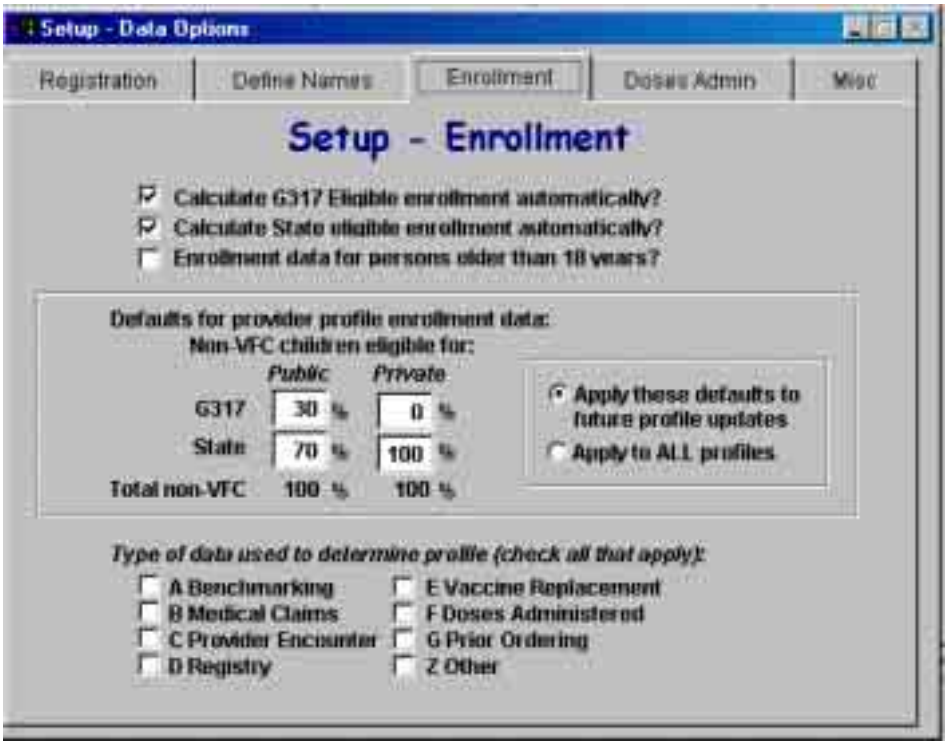
Use this field to name one additional inventory field called Field 1. This is for Non-CDC Inventory. This field appears on the Bulk Orders window and Non-CDC Inventory window.

Enrollment Tab

Use the Enrollment tab to establish the default options and statistical percentages for the Enrollment Demographics window.

The three main sections to the Setup-Enrollment window are:

1. Enrollment Defaults - Determines the default behaviors for fields on the Enroll Demographics window.
2. Profile Defaults - Determines the total number of doses a Provider can order based on the total number of non-VFC eligible children who need immunizations.
3. Profile Data - Determines the sources in which your project derives its percentages in the Profile Defaults Section.

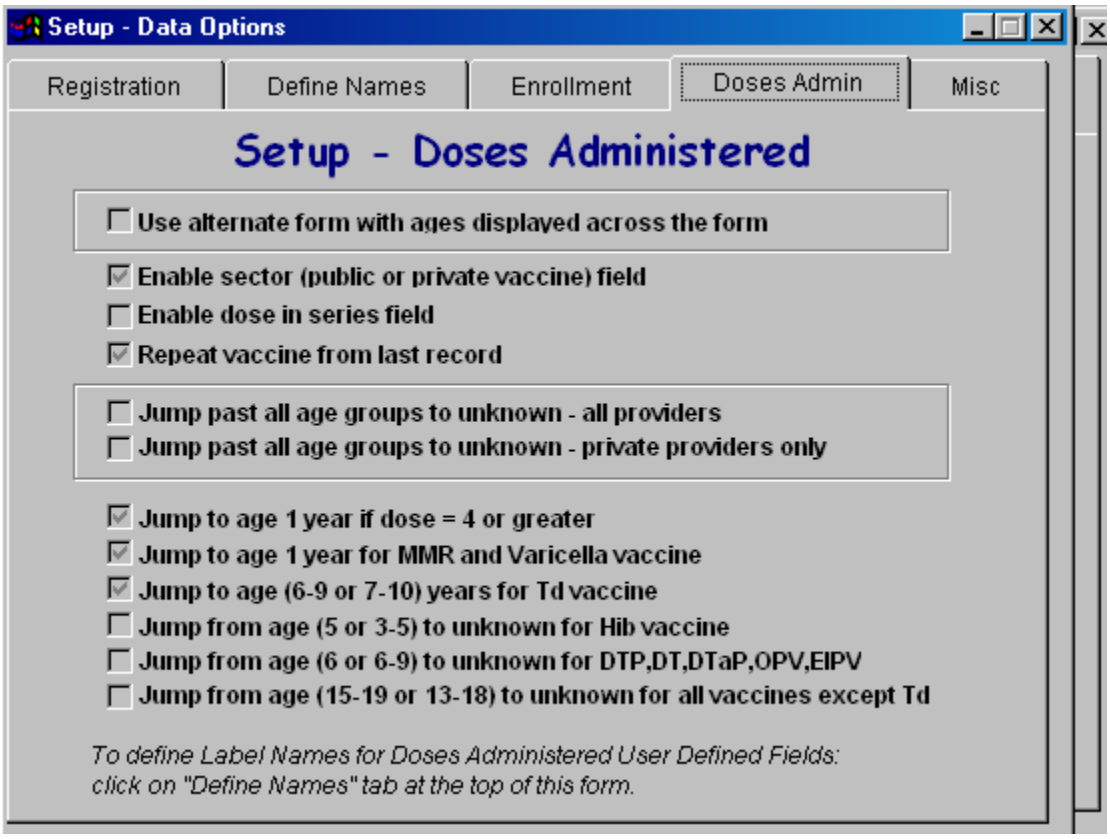


Setup Enrollment Field Descriptions

Field	Description
Enrollment Defaults This section allows you to select default behaviors for fields on the Enrollment Demographics window.	
Calculate G317	When you select this field, VACMAN will automatically calculate the number of children that are eligible for using G317 funding in the Enroll Demographics window.
Calculate State	When you select this field, VACMAN will automatically calculate the number of children that are eligible for using State funding in the Enroll Demographics window.
Older than 18 years	When you select this field, VACMAN will automatically calculate enrollment data for eligible candidates who are older than 18 years in the Enroll Demographics window.
Population Estimates This section establishes the total number of doses a Provider can order based on the total number of non-	

Field	Description
VFC eligible children who need immunizations.	
G317 Public	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using G317 public funding.
G317 Private	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using G317 private funding.
State Public	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using State public funding.
State Private	This field is used to enter a percentage that represents the number of children in a population who qualify to receive vaccines using State private funding.
Apply to updated profiles	This field is used to apply the above percentages only to profiles that are updated after the current date.
Apply to all profiles	This field is used to apply the above percentages to all profiles.
Source Data This section allows you to select the sources from which your project derives its percentages.	
Benchmarking	A process of collecting data over a set time frame (preferably three months), which are used to calculate an estimation for the same data over a larger time frame (usually a one-year period following the benchmark).
Medical Claims	A retrospective collection of data derived from medical claims that are used to calculate an estimation for the same data over a larger time frame (usually a one-year period following the benchmark). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Provider Encounter	A retrospective collection of the number of children who went to a specific Provider, regardless of whether or not they received any immunizations. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Registry	Registry represents the State Immunization Registry. States store information (including the number of immunization vaccines given to children) into a statewide electronic database called a Registry. Projects can use the electronic data to determine their vaccine enrollment data for the State. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Vaccine Replacement	A retrospective collection of the number of vaccine doses that a project distributes to a Provider. This data are then used to recalculate the number of doses the Provider administers. This data can be collected from a one-year time frame, or from benchmarking any period of time.
Doses Administered	A retrospective collection of the number of vaccine doses that a Provider administers regardless of the funding. This field differs from the Registry field by the medium in which the data are collected. (Doses Administered data is derived from paper-based records whereas Registry data is derived from electronic records). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Prior Ordering	A retrospective collection of the number of doses that a provider ordered over any period of time to determine the number of doses a project should send to that provider over a following year (without requiring the provider to order). This data can be collected from a one-year time frame, or from benchmarking any period of time.
Other	A retrospective collection of any data that is derived by a method that is not listed in the Source Data section, and used to calculate estimates for the same data in a following year. This data can be collected from a one-year time frame, or from benchmarking any period of time.

Doses Administered Tab



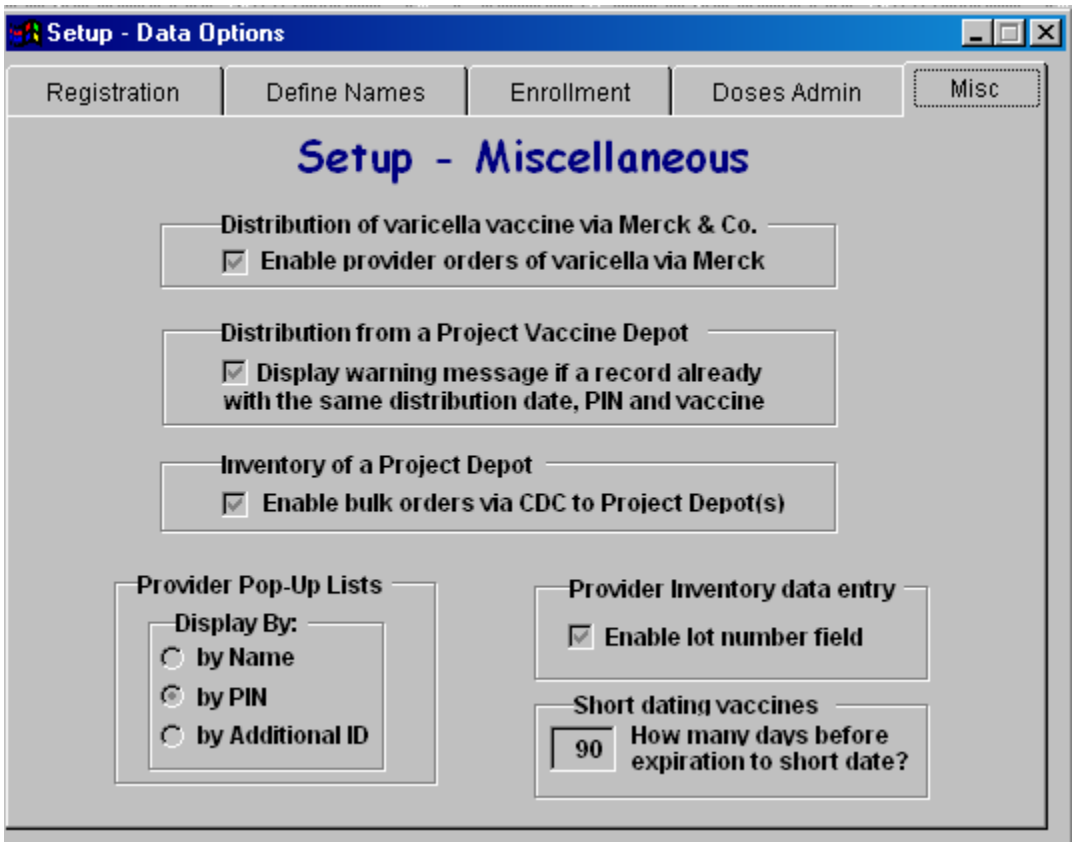
Use the Doses Administered tab to establish the default options for calculations and navigation in the Doses Administered window. Use the options in this window to:

- Use an alternate Doses Administered form that displays the age categories in a row across the page rather than in vertical columns
- Enable or disable the field that determines whether a vaccine is **public** or **private**
- Enable or disable the field that determines how many doses are given in a **series**
- Always repopulate new *Doses Administered* windows with vaccine information (**repeat vaccine**) that was entered in the previous record
- Jump past all of the age group fields to the Unknown field for **all providers**
- Jump past all of the age group fields to the Unknown field for **private providers** only
- Jump to the 1 Year field if the number of doses in a series is equal to 4 or greater
- Jump to the 1 Year field for all MMR and Varicella vaccines
- Jump to the (6-9 or 7-10) Year field for Td vaccines
- Jump from the (5 or 3-5) Year field to the Unknown field for Hib vaccines
- Jump from the (6 or 6-9) Year field to the Unknown field for DTP, DT, DTaP, OPV and EIPV vaccines
- Jump from the (15-19 or 13-18) Year field to the Unknown field for Td vaccines

Miscellaneous Tab

Use the Miscellaneous tab to establish the default options for calculations and navigation in the Doses Administered window. Use the options in this window to:

- Allow your project to place Varicella orders
- Display a warning if an order duplicates the distribution date, PIN, and vaccine type of an order that was previously entered for a provider
- Allow your project to place Bulk orders
- Define how the Provider pop-up window displays its data (either by the Provider's name, PIN, or additional information)
- Enable the lot number to be keyed into Provider Inventory
- Define how many days your project will allow for a short date for vaccine



Zip Codes Setup

Use the Zip Codes window to enter and store all of your frequently used zip codes. In addition to each zip code number, you can record the associated city, county, and state. The records you enter in this window become available in a drop-down list wherever a Zip Code field is present.

How to Add a Zip Code

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Zip Codes**.
2	Click the **Add** button in the toolbar.
3	Enter information in the **Zip Code**, **City**, **County**, and **State** fields.
4	Click the **Save** button in the toolbar. The new record is in the table below the fields.

How to Edit a Zip Code

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Zip Codes**.
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select ►a record in the table at the bottom of the window.
3	Click the **Edit** button in the toolbar.
4	Change the information in any of the fields.
5	Click the **Save** button in the toolbar.

How to Delete a Zip Code

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Zip Codes**.
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select ►a record in the table at the bottom of the window.
3	Click the **Delete** button in the toolbar.
4	At the *confirm deletion* message, click **OK** to confirm you want to delete the record.
5	"**Deleted record**" appears in red text at the top of the window. This indicates that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

Counties Setup

Use the Counties window to enter and store all of your frequently used counties. The records you enter in this window become available in a drop-down list wherever a County field is present.

How to Add a County

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Counties**.
2	Click the **Add** button in the toolbar.
3	Enter a county in the **County** field.
4	Click the **Save** button in the toolbar. The new record is in the table below the field.

How to Edit a County

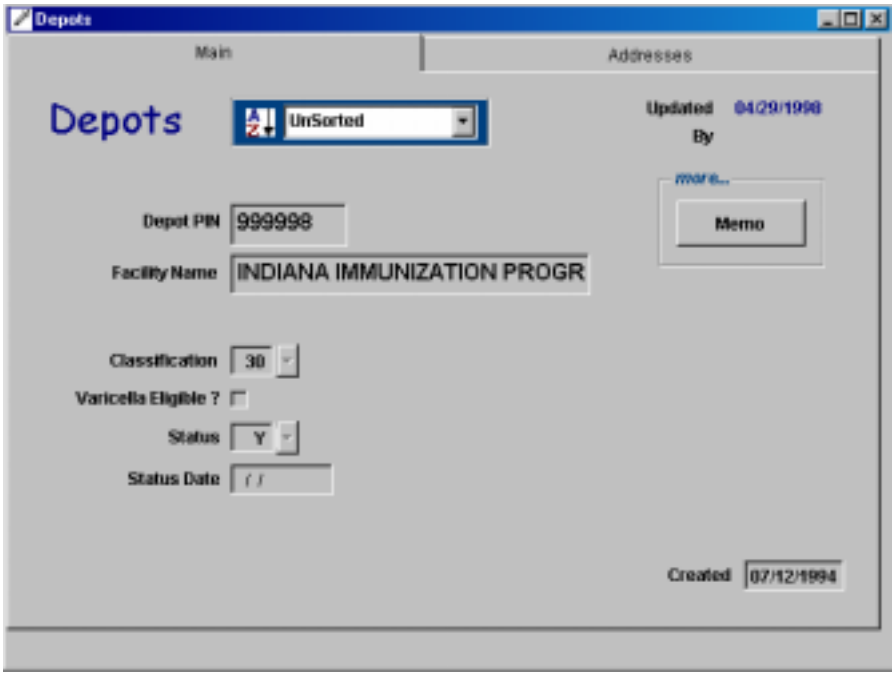
Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Counties**.
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select ►a record in the table at the bottom of the window.
3	Click the **Edit** button in the toolbar.
4	Change the information in the field.
5	Click the **Save** button in the toolbar.

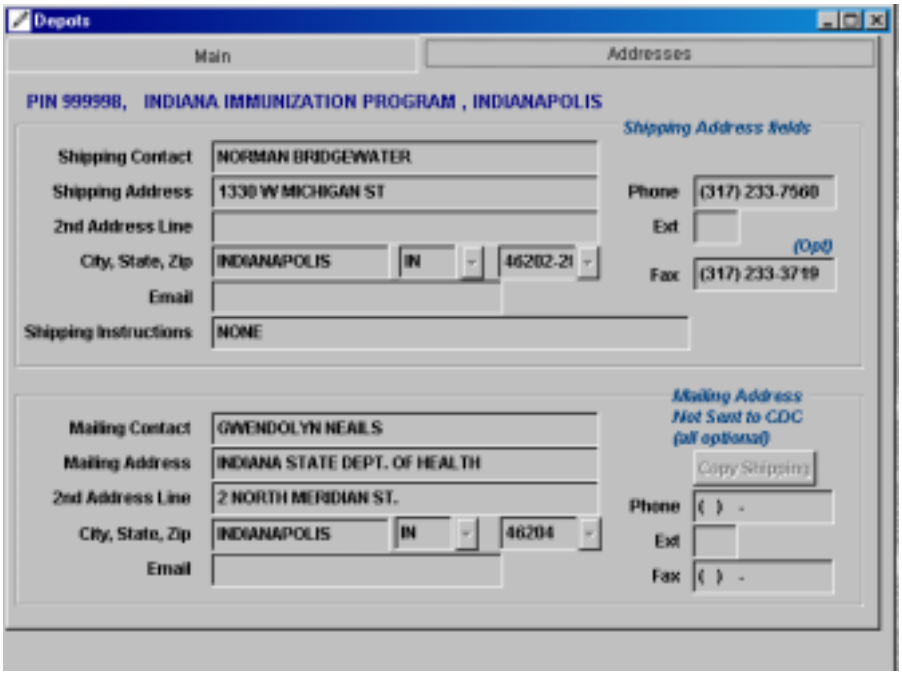
How to Delete a County

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Counties**.
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select ►a record in the table at the bottom of the window.
3	Click the **Delete** button in the toolbar.
4	A *confirm deletion* message box appears. Click **OK** to confirm you want to delete the record.
5	"**Deleted record**" appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

Depots Setup

Use the Depots window to record information about and set defaults for your project's depot(s). The records you enter in this window become available in a drop-down list wherever a depot field is present.





How to Add a Depot

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Depots**.
2	Click the **Add** button in the toolbar.
3	Enter information in the Main and Addresses tabs.
4	To enter notes about the depot: 1. Click the Memo button on the main tab. 2. Click the **Edit** button in the toolbar. 3. Enter your notes. 4. Click the **Save** button in the toolbar. 5. Close the Notes window.
5	Click the **Save** button in the toolbar.

How to Edit a Depot

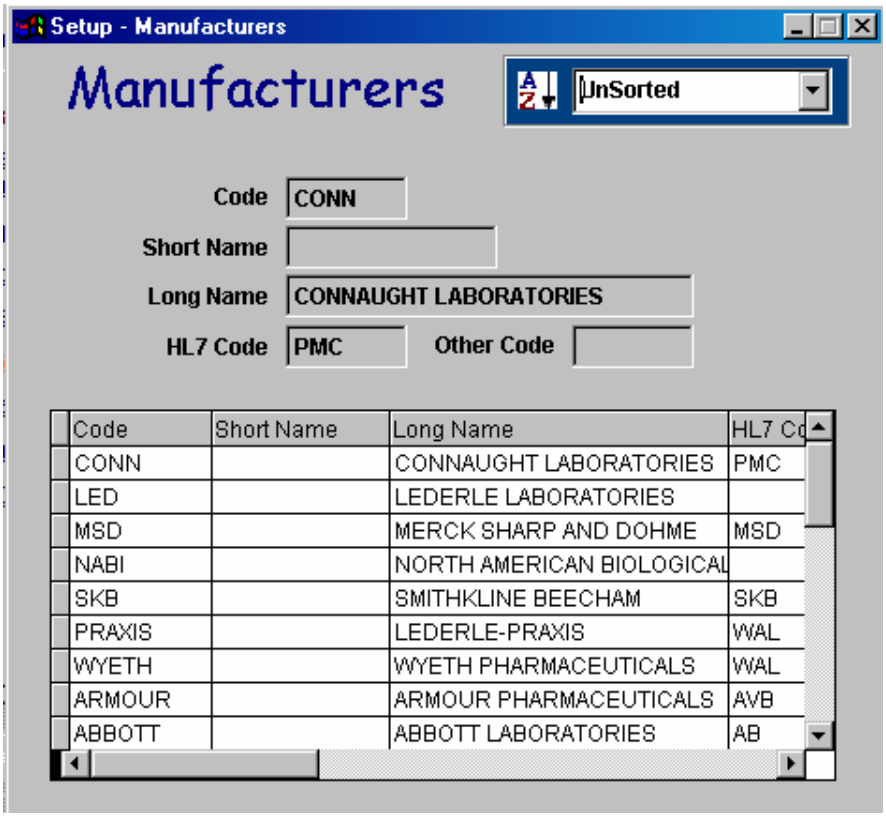
Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Depots**.
2	Use the navigation buttons in the toolbar to select the depot you want to edit.
3	Click the **Edit** button in the toolbar.
4	Enter information in the Main and Addresses tabs.
5	To enter notes about the depot: 1. Click the **Memo** button on the main tab. 2. Click the **Edit** button in the toolbar. 3. Enter your notes. 4. Click the **Save** button in the toolbar. 5. Close the Notes window.
6	Click the **Save** button in the toolbar.

How to Delete a Depot

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Depots**.
2	Use the navigation buttons in the toolbar to select the depot you want to delete.
3	Click the **Delete** button in the toolbar.
4	At the *confirm deletion* message, click **OK** to confirm deletion the record.
5	"**Deleted record**" appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

Manufacturers Setup

Use the Manufacturers window to enter and store information about all of the manufacturers that your project uses. The records you enter in this window become available in a drop-down list wherever a Manufacturer field is present.



How to Add a Manufacturer

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Manufacturer**.
2	Click the **Add** button in the toolbar.
3	Enter information in the **Code, Short Name, Long Name, HL7,** and **Other Code** fields above the table.
4	Click the **Save** button in the toolbar. The new record is in the table below the fields.

How to Edit a Manufacturer

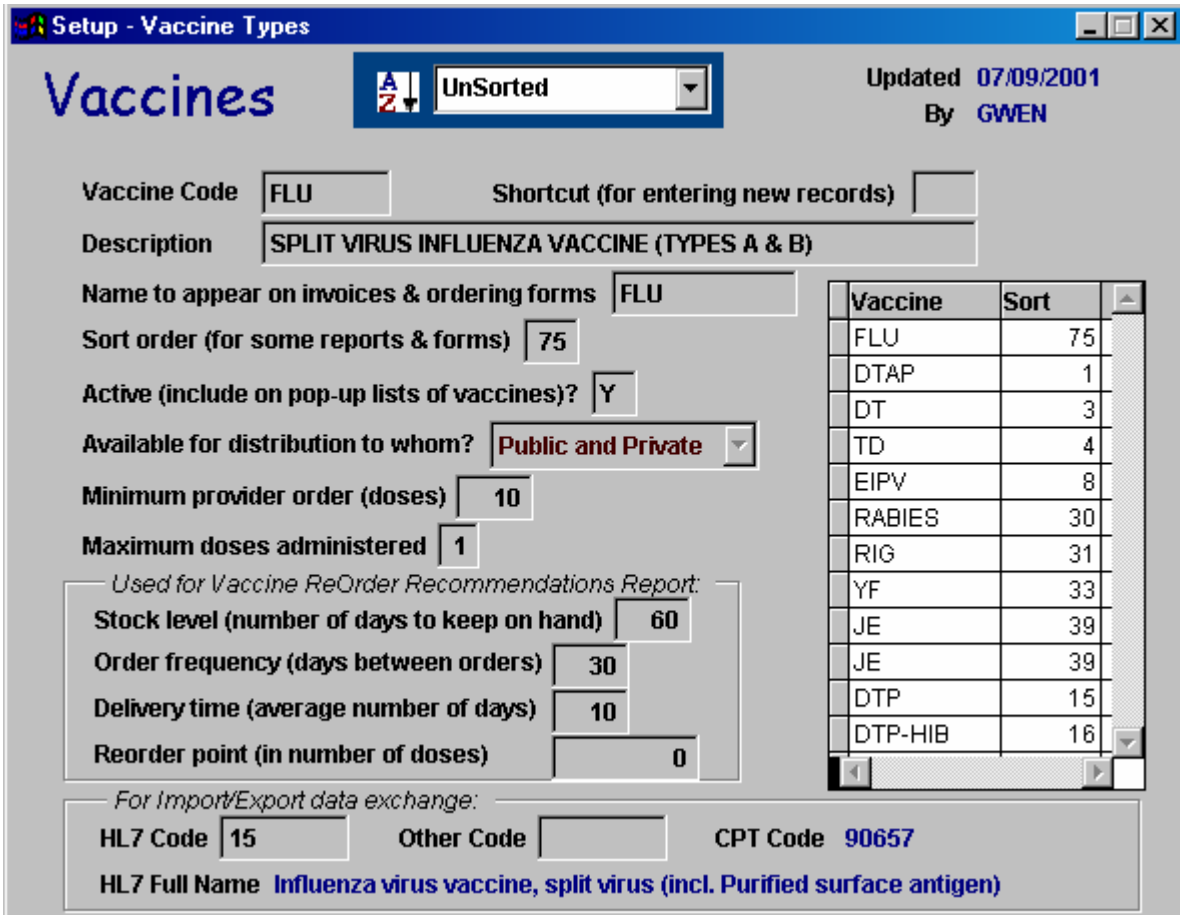
Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Manufacturer**.
2	To select the record you want to edit, either use the navigation buttons in the toolbar or select ► a record in the table at the bottom of the window.
3	Click the **Edit** button in the toolbar.
4	Change the information in any of the fields above the table.
5	Click the **Save** button in the toolbar.

How to Delete a Manufacturer

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Manufacturer.**
2	To select the record you want to delete, either use the navigation buttons in the toolbar or select ► a record in the table at the bottom of the window.
3	Click the **Delete** button in the toolbar.
4	A *confirm deletion* message box appears. Click **OK** to confirm you want to delete the record.
5	"**Deleted record**" appears in red text at the top of the window. This indicated that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

Vaccines Setup

Use the Vaccines window to add new vaccines to your database and set default definitions for each vaccine. The records you enter in this window become available in a drop-down list wherever a Vaccine field is present.



How to Add a Vaccine

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Vaccines**.
2	Click the **Add** button in the toolbar.
3	Type in the vaccine's code, shortcut, and description within the first three fields, respectively.
4	Change any default information for that vaccine in the fields below the **Description** field.
5	Click the **Save** button. The new record displays in the table on the right side of the window.

How to Edit a Vaccine

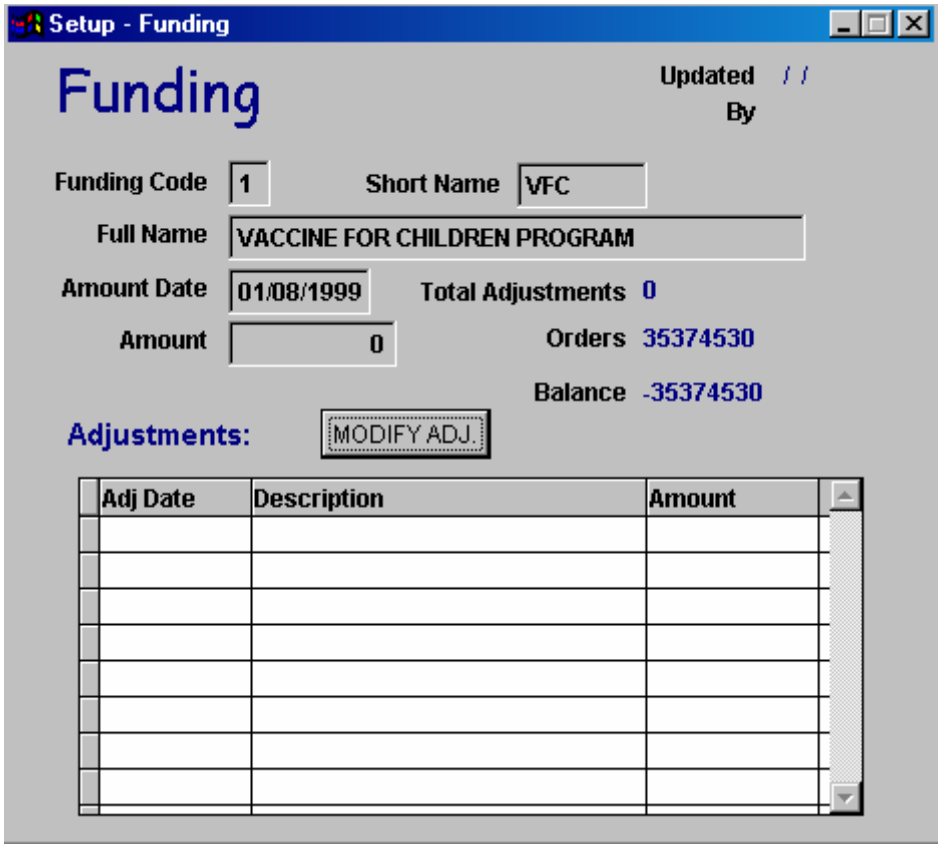
Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Vaccines**.
2	Use the navigation buttons in the toolbar to select the record you want to edit.
3	Click the **Edit** button in the toolbar.
4	Change the information in any of the fields.
5	Click the **Save** button in the toolbar.

How to make a Vaccine inactive

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Vaccines.**
2	Use the navigation buttons in the toolbar to select the vaccine you want to make inactive.
3	Click the **Delete** button in the toolbar.
4	At the *confirm* message, click **Yes** to confirm you want to make this vaccine inactive.
5	This vaccine is now marked as inactive and will not show up on the pop-up list of available vaccines.

Funding Setup

Use the Funding window to enter and store information about all of the funding that your project receives. The records you enter in this window become available in a drop-down menu wherever a Funding field is present.



How to Add Funding

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Funding**.
2	Click the **Add** button in the toolbar. **Note:** You cannot add records with funding codes 1, 2, or 3. These codes are used for VFC, G317, and State funding.
3	Enter information in the fields above the table.
4	Click the **Save** button in the toolbar. The new record is in the table below the fields.

How to Edit Funding

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Funding**.
2	Use the navigation buttons in the toolbar to select the record you want to edit.
3	Click the **Edit** button in the toolbar.
4	Change the information in any of the fields above the table.
5	Click the **Save** button in the toolbar.

How to Delete Funding

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Funding.**
2	Use the navigation buttons in the toolbar to select the record you want to delete. **Note:** You cannot delete Federally assigned funding.
3	Click the **Delete** button in the toolbar.
4	At the *confirm deletion* message, click **OK** to confirm you want to delete the record.
5	"**Deleted record**" appears in red text at the top of the window. This indicates that the record has been marked for deletion. However, the record will not be removed from the system until you Pack your data.

How to Add Adjustments for Funding

Use the Modify Adjustments (**MODIFY ADJ.**) button to make adjustments to funding you have assigned within VACMAN.

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Funding**.
2	Use the navigation buttons in the toolbar to select the record you want to add funding adjustments.
3	Click the **MODIFY ADJ.** button.
4	Click the **Add** button in the toolbar.
5	Key in adjustment date, description and amount.
6	Click the **Save** button in the toolbar. The new record is in the table below the fields.

How to Modify Adjustments for Funding

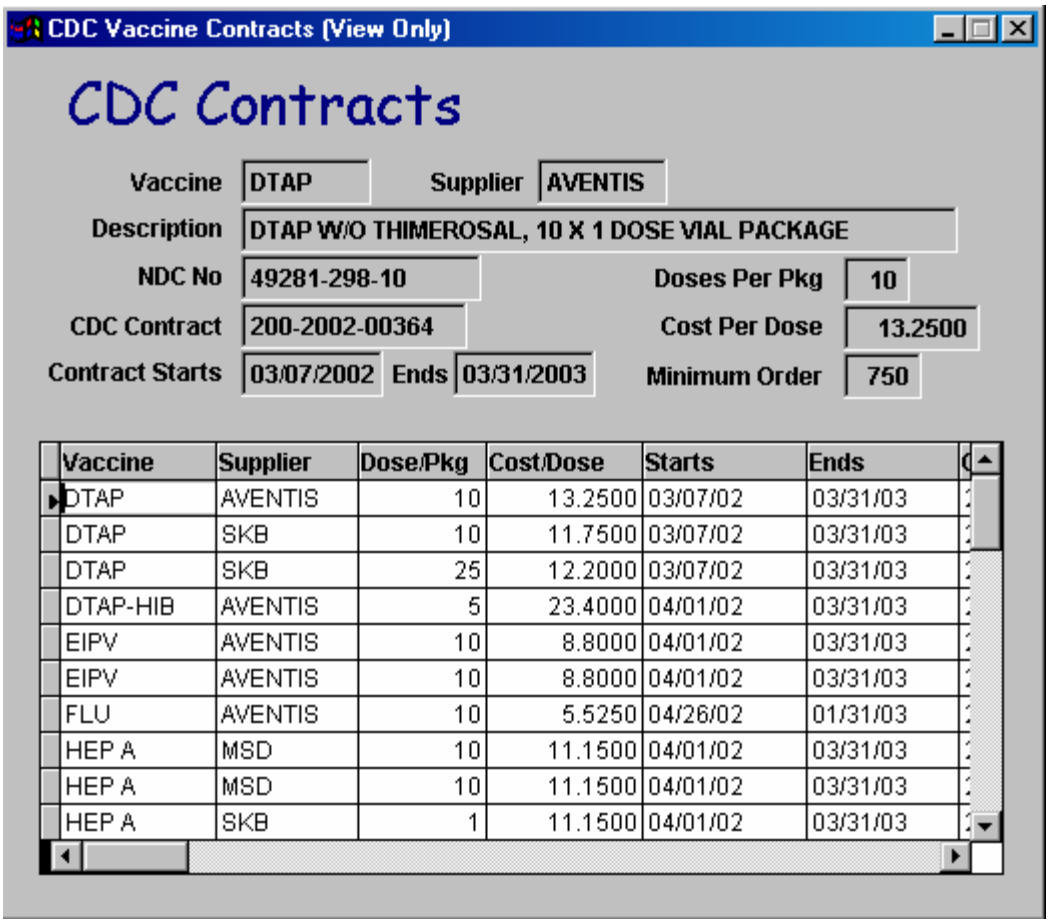
Use the Modify Adjustments (**MODIFY ADJ.**) button to make adjustments to funding you have assigned within VACMAN.

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Funding**.
2	Use the navigation buttons in the toolbar to select the record you want to modify.
3	Click the **MODIFY ADJ.** button.
4	Select ► the record you want to adjust in the table at the bottom of the window.
5	Click the **Edit** button in the toolbar.
6	Change the information in any of the fields above the table.
7	Click the **Save** button in the toolbar.

CDC Contracts (view only)

Use the Contracts window to **view** the current contracts that CDC has with vaccine manufacturers. The Contracts window is **view-only** and is automatically updated in VACMAN by CDC. Contract information includes:

- Vaccine name
- Vaccine description
- Manufacturer name
- NDC number
- CDC contract number
- The dates that the contract starts and ends
- The number of doses per package
- The cost per dose
- The minimum number of doses that are required per order



Vaccine	Supplier	Dose/Pkg	Cost/Dose	Starts	Ends
DTAP	AVENTIS	10	13.2500	03/07/02	03/31/03
DTAP	SKB	10	11.7500	03/07/02	03/31/03
DTAP	SKB	25	12.2000	03/07/02	03/31/03
DTAP-HIB	AVENTIS	5	23.4000	04/01/02	03/31/03
EIPV	AVENTIS	10	8.8000	04/01/02	03/31/03
EIPV	AVENTIS	10	8.8000	04/01/02	03/31/03
FLU	AVENTIS	10	5.5250	04/26/02	01/31/03
HEP A	MSD	10	11.1500	04/01/02	03/31/03
HEP A	MSD	10	11.1500	04/01/02	03/31/03
HEP A	SKB	1	11.1500	04/01/02	03/31/03

Setup for Forms

Ordering forms and Shipping Invoices are frequently used when ordering vaccines and managing vaccine inventory. However, once established, instructions for invoices and forms seldom change. Forms setup involves:

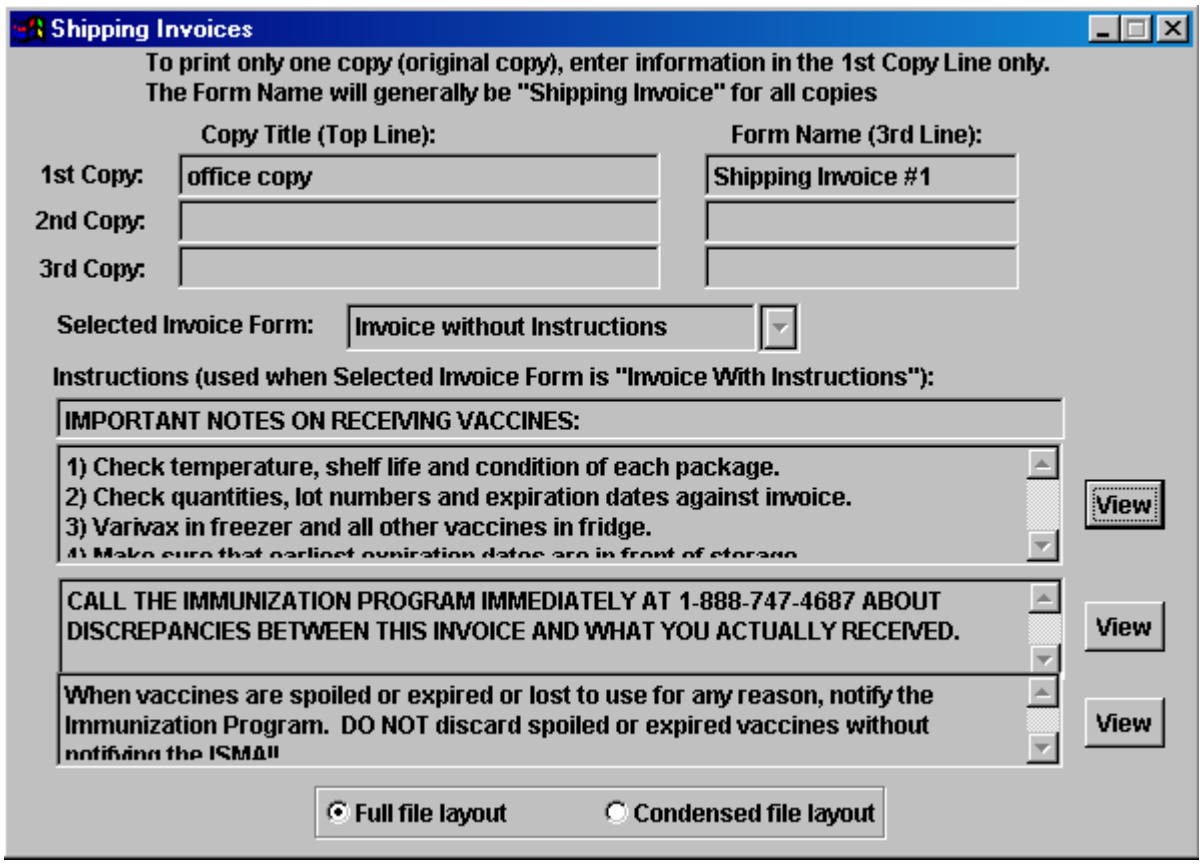
- Assigning defaults to ordering forms and shipping invoices
- Entering the instructions to be printed with ordering forms and shipping invoices
- Determining the number of invoice copies to print and to whom each copy is distributed

Shipping Invoices

Use the Shipping Invoices window to determine the number of invoice copies to print and to whom each copy is distributed, enter the instructions that you want to be printed with each shipping invoice.

If your project depot is shipping vaccine, you will need to print shipping invoices. You have the option of printing up to three copies of the invoice for each order. You can print these copies with or without shipping instructions. CDC recommends printing these with shipping instructions, since you can give providers additional information about the order.

Note: Full file layout and condensed file layout has to do with saving the file to a different format (.dbf, .xls, .txt) or for exporting the data. If you save it to a full file format, you will have 45 fields, which include optional user-defined fields. If you save in a condensed file layout, you will have 29 fields.

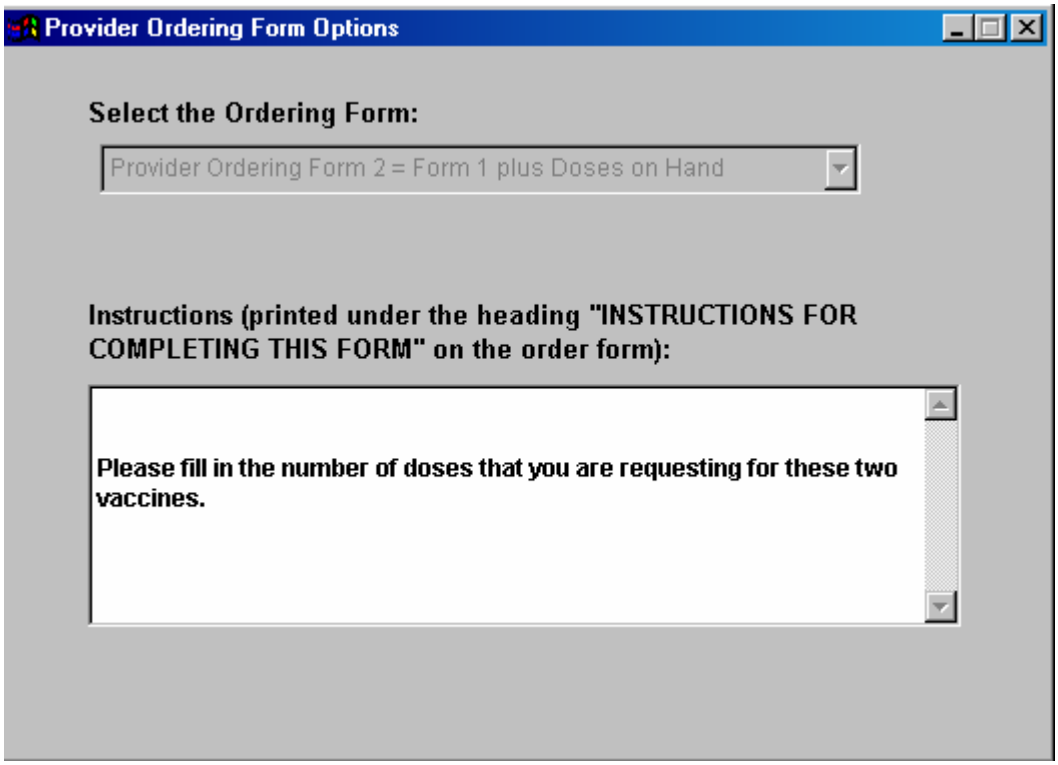


How to Edit a Shipping Invoice

Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Shipping Invoice**.
2	Click the **Edit** button in the toolbar.
3	Enter who the copies go to in the **Party** field.
4	Enter the title of the form in the **Title** field.
5	Select which invoice you want to use from the **Invoice** field.
6	Click the **Edit** button next to the instruction text boxes to enter or edit instructions.
7	Click the **Save** button in the toolbar.

Order Forms

You can send vaccine order forms to your providers. Options include a basic order form, plus doses on hand, wasted doses and information sheets.



How to Edit a Form

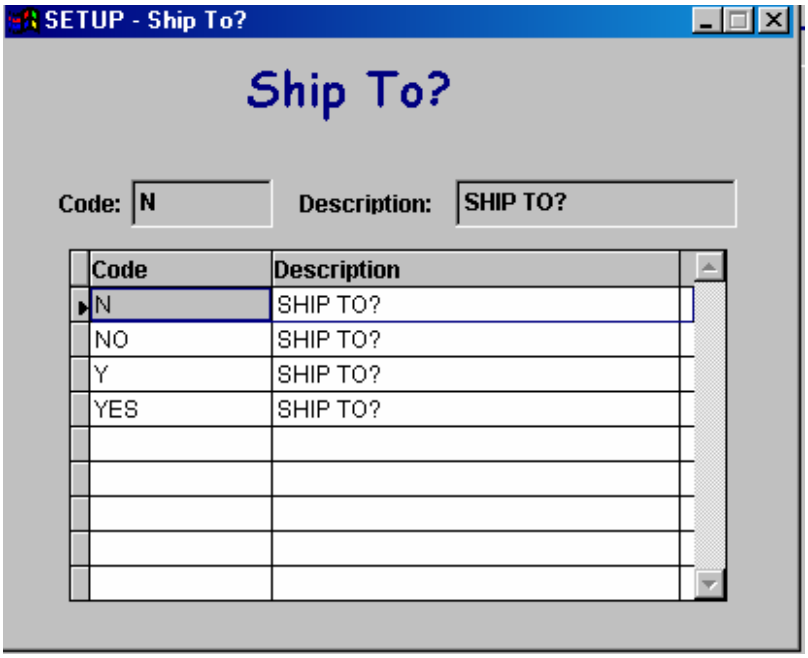
Step	Action
1	From the Setup tab in *VACMAN at a Glance*, click **Order Forms**.
2	Click the **Edit** button in the toolbar.
3	Select which form you want to edit from the **Form** field. Forms include: • Provider Ordering Form 1 = Basic Data • Provider Ordering Form 2 = Form 1 plus Doses on Hand • Provider Ordering Form 3 = Form 2 plus Wasted Doses • Provider Ordering Form 4 = Form 3 plus Info Sheets
4	Enter, change, or delete the instructions you want to edit.
5	Click the **Save** button in the toolbar.

Provider Categories

The Define Names tab under the Customized Section is where you name category windows and various fields according to your project's needs.

After you have named the category windows, you can click on their new customized links (under the Project Windows section) to customize the data within the windows.

For example, you might name one of the windows "Specialties" and, within the window, assign specific codes to different specialties (like Pd=Pediatrician, Gp-General Practitioner, etc.).



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