# Creating an Order

Users with the **Allow Online Orders** permission can create, edit, save, and submit vaccine orders. Depending on the state's configuration settings, users may be required to correct lot decrementing, and/or reconcile inventory before creating a new order. If the **Allow Only One Brand Selection per Vaccine** option is selected, providers are restricted from selecting multiple brands for the same vaccine in an order set. This allows for improved documentation accuracy.

Create a New Order

1. Click the **Orders & Returns > Orders & Transfers** link in the navigation menu, then click the **New Order** button on the **Orders and Transfers** page.
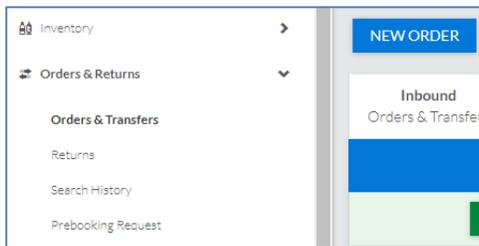
2. On the **Create New Order** page, the required workflow steps are displayed at the top of the page. The current step pulsates in blue to help identify the user's progress in the order process.

a. *Example*: If the user is required to correct lot decrementing or reconcile inventory before creating a new order, **Correct Lot Decrementing** or **Reconcile Inventory** may appear as the first step in the workflow.

b. Refer to the *Correct Lot Decrementing* Quick Reference Guide or the *Inventory Reconciliation* Quick Reference Guide for further details.

3. In the **Doses Requested** field, enter the quantity of doses requested for the vaccines

Choose an Order Set

1. Next, select an **Order Set** from the drop-down list. (If there is only one order set, the order set will automatically populate.)

2. The following columns/links appear after an **Order Set** is selected:

- **Inventory Report Links -** This includes the **Inventory Transaction** and **Lot Number Summary** Report. Select the report to go to the parameters page. Enter report criteria and click **Create Report** to generate the report.
- **Vaccine** – Vaccine name, brand name, packaging information, and NDC number
- **Funding Source** – Vaccine funding source, such as PUB (Public) or PRVT (Private)
- **Doses on Hand** – Current number of available doses
- **Doses Administered** – Number of doses that have been administered
- **Doses Requested** – Number of doses requested for the order. **Note**: this amount must be equal to or above the minimum order quantity
- **Comments** – Enter any order notes and/or temperature information

available in the **Order Set**.

4. When finished entering the information, click **Next** to move on to the next ordering step.
   a. If you are not ready to submit the order at this time, click **Save** to save the order and return to the **Order and Transfers** page where the saved order will be listed.

5. Next, you will be brought to the **Shipping info** page. To edit the delivery hours, click the Edit icon ( ) in the **Delivery Hours** heading. Click **Save** when finished.

DELIVERY HOURS

Day	Hours
Monday	
Tuesday	8:10 AM – 5:00 PM
Wednesday	8:10 AM – 5:00 PM
Thursday	9:00 AM – 5:00 PM
Friday	9:00 AM – 5:00 PM
Saturday	
Sunday	

6. If there are any special delivery instructions, enter them in the **Delivery Instructions** textbox.

DELIVERY INSTRUCTIONS

Do not enter Delivery Hours here. Driver will only use Delivery Hours specified to the left for valid delivery times.

Enter special instructions: landmarks, doors, etc.

7. Click **Submit Order**.

8. A confirmation pop-up will appear with the **Order Number**. Select **Close**.

SUBMIT ORDER CONFIRMATION

Order # **1705** has been submitted.

CLOSE

9. The **Orders and Transfers** page reopens with the new order added to the **Inbound Orders & Transfers** list.