Updated Guidance for Borrowing VFC/STATE Vaccine via SIMON

> **Special Note:** This is a supplemental guide to the VFC Provider Handbook to provide steps on documenting borrowing within SIMON. It is important that all providers familiarize and understand the protocols for borrowing in the VFC Provider Handbook. Please note as stated in the VFC Provider Handbook, prior approval is required before borrowing can take place.   Maintain borrowing report on-site for 3 years, this report must be available for site reviewers.

Direct Data Entry (DDE) Providers and HL7 Providers

Below are the directions on borrowing vaccines for sites that directly enter patients' immunizations into the SIMON registry and send messages through HL7 to the registry. ***The replacement of borrowed doses and documentation is handled directly in the vaccine inventory On-Hand module as described below***:

DDE Providers must add and administer vaccines directly into the SIMON system.

Please review the following video and guide on the steps to add and administer vaccines in SIMON:

Video: Add and Administer Vaccines

Written Guidance: Adding and Administering Vaccines as a Provider Tracking Inventory in SIMON

Steps For Adding A Borrowed Vaccine For DDE Providers:

1. As referenced in the *Adding and Administering Vaccines as a Provider Tracking Inventory in SIMON* Guide, select the vaccine that is currently available in the inventory under the Patient's Immunization Module.

2. If the available vaccine selected is not one that patient is eligible for (Ex. A private purchased vaccine needs to be given to a VFC eligible child because a site is awaiting a VFC shipment) a similar message below will appear:

Funding Source Mismatch

You have selected a vaccine with a funding source marked as 'STATE'. However this funding source is not appropriate per the patient's eligibility status of 'Not VFC Eligible - Insured'.

Conflicting Vaccine:

Varicella

OK

3. Select "Ok".

4. Provider must provide a borrowed reason that is most appropriate for the given scenario.

| Mfg | Lot | Exp Date (MM/DD/YY) | Funding Src | Inv Loc | NDC | Brand * |

(I) MSD | S030228 | 09/26/21 | STATE | IVFC140000 | 00006-4827-00 | VARIVAX (0.5 ML ✔

Body Site * | **Route *** | Dosage | Refusal Reason
LA ✔ | SUBCUTANEOUS ✔ | 0.50 | ✔

Borrowed Reason * | Comment
✔ |

5. Once all fields are completed for administered doses select "Create" at the top of the screen.

6. The vaccine selected for administering will be deducted from the vaccine on-hand inventory.

7. The provider will need to document the borrowing on the Vaccine Borrowing Report and run a Vaccine Borrowing Report in SIMON to account for the doses borrowed since the last reconciliation and to be able to complete the current month's reconciliation. *Maintain borrowing report on-site for 3 years, this report must be available for site reviewers.*

Borrowing of Vaccines For HL7 Providers

1. HL7 providers will need document approved borrowing between stocks on the Vaccine Borrowing Report and pull the **Aggregate Administered Doses Report** prior to reconciliation each month. Since HL7 providers administered doses are sent electronically it is important that HL7 providers account for borrowing of vaccines during each reconciliation. HL7 providers who have approved immunization messages going to the registry will not need to document the borrowed doses within the patient's record but will document the borrowing in the On-Hand Inventory.

Written Guidance: [SIMON Aggregate Vaccine Inventory Reconciliation Checklist](#)

2. Under the Reconciliation Module, doses that were borrowed will need to be accounted for in the Aggregate Administered column to reflect the current On Hand Inventory.

Reconciling Vaccine Inventory To Account For Borrowing- DDE Providers and HL7 Providers

Review the following document on [How To Receive a Vaccine Shipment in SIMON](#)

Once the vaccine shipment is accepted in SIMON and listed in the On-Hand Inventory please complete the following steps:

1. Locate the vaccine that needs to be paid back from borrowing in the On-Hand Inventory

      Ex. Private purchased pediatric Gardasil vaccine dose was administered to a VFC-eligible child.

2. On the On-Hand Inventory page select **"Action"** drop down box

3. Click on **"Adjustment"**

4. On the Vaccine Inventory Adjustment Page all required fields must be completed

5. Select the most appropriate reason for borrowing that are listed below:

REPLACEMENT OF PRIVATE VACCINE

REPLACEMENT OF VFC/STATE VACCINE

7. For Modification field select "Subtract" and for the Doses On-Hand input the number of doses that were borrowed for the specific vaccine.

IMPORTANT: If there are any discrepancies in the vaccine inventory as it relates to borrowing the Immunization Division will reach out to providers individually to provide documentation of borrowing between vaccine stocks.

8. Add a detailed comment on the scenario for the vaccine borrowing in the comment box.

9. Click **Create** at the top of the screen once all fields are complete.

REPLACE BORROWED DOSES TO APPROPRIATE STOCK

Follow the steps below to replace the borrowed doses back to the appropriate stock:

1. Add the number of doses that were borrowed back into the On-Hand Inventory manually as new inventory by clicking on "Add New Inventory"
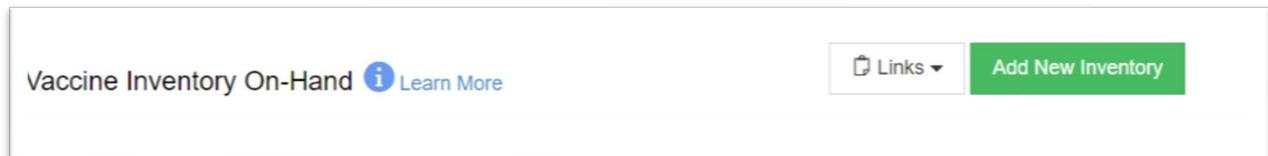
2. Complete all required fields on the Vaccine Inventory page

Vaccine Inventory ⓘ Learn More DEPARTMENT: 140000   Cancel 🗋 Links ▾ **Create**
View

Date/Time *	12/05/2020 📅 HH:MM AM/PM (HH:MM A/P)
Inventory Location *	▾
Vaccine | Mfg | NDC | Brand *	▾
Lot Number *	
Expiration Date *	MM/DD/YYYY 📅
Funding Source *	▾
Doses Adjusted *	
Container Id	
Comments	

3. For "**Funding Source**" select the appropriate funding source for replacement.

4. Once the borrowed doses are replaced in SIMON; site will need to re-label vaccine appropriately and put in the correct funding stock (Private/Publicly funded) in the storage unit.

> *For example, if one private dose of Gardasil was borrowed to give to a VFC eligible child until shipment arrives; once the VFC Gardasil vaccine shipment arrives at the office, one dose will be subtracting from the VFC Gardasil stock and added back into the Vaccine Inventory with the same "Lot Number" and "Expiration date" but the Funding Source will now become "Private" for that one dose.*