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**WHAT DOES IT MEAN TO CREATE A PLANNING REQUEST?**

COVID-19 vaccine is allocated by the NYS Vaccine Program to providers (outside of NYC) enrolled in the NYSDOH COVID-19 Vaccination Program. Creating Planning Requests for COVID-19 vaccine will allow providers to request an amount of vaccine they are able to store and administer during a specified time frame, as indicated in the most current guidance from NYSDOH. Providers will be able to create Planning Request amounts on an ongoing basis.

**FIRST STEPS**

- To create a Planning Request, order and administer COVID19 vaccine, NYS providers must first enroll with the Vaccine Program using the COVID19 Vaccine Program Provider Enrollment application located on the HealthCommerce System (HCS) from the link below:  
<https://commerce.health.state.ny.us/hpn/ctrldocs/covidvacc/#/vaccinationProvider>
- Planning Requests for COVID19 vaccine is performed in NYSIIS. Users must have valid HCS and NYSIIS accounts and have taken NYSIIS training prior to accessing this functionality.



### ACCESSING NYSIIS

Access NYSIIS via NYSDOH Health Commerce System (HCS)

Enter the Web Address: <https://commerce.health.state.ny.us>

A. Log in to the HCS Portal with your unique ID and password.

B. First time users must add the NYSIIS application to the My Applications section of the HCS Portal. This only needs to be added once and will remain in My Applications for all future access.

- From the top navigational bar, click on My Content then select All Applications.
- Click on the letter “N” and scroll down to locate NYSIIS - Production.
- Click on the green plus sign (+) to the far right.
- The application will automatically appear on the left side bar under My Applications.

From the HCS Homepage, click on NYSIIS – Production in your My Applications panel.

### CREATE PLANNING REQUEST

On the left side menu panel under the Inventory heading, click on Create Prebooking.

**Create Prebook Request**

**Vaccine Program PIN:** 999999      **Delivery Contact:** Julie Test     

**Initiating Organization:** Lori's Little Ones      **Delivery Address:** 123 Test Lane     

**Initiating User:** Lori Isabella-Rhoades      NEW WINDSOR, NY 12553     

**Org Phone:** [\(518\)473-2839](tel:5184732839)

**Org Fax:** [\(518\)473-2839](tel:5184732839)

**Request Date:** 02/11/2021

**Delivery Days/Hours:**  
 Mon 10:00AM-6:00PM  
 Tues 10:00AM-6:00PM  
 Wed 10:00AM-6:00PM  
 Thurs 10:00AM-6:00PM  
 Fri 10:00AM-6:00PM

**Delivery Instructions**

**Event**       **Campaign**

Trade Name	Packaging Description	Manufacturer	Intent	Prior Year Prebooked	Prior Year Shipped	Prior Season Admin	Prior Season Wasted /Returned	Suggested Order Qty	Min Order Qty	Doses on Hand	# Doses to Prebook
Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	0	0	0	0	0	100	6	<input type="text"/>
Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	0	0	0	0	0	1170	1247	<input type="text"/>



This screen will display your Vaccine Program PIN, organization contact info and delivery hours.

Event – the event field will default to the COVID-19 Event set up by NYSDOH. This is the only option to select.

Campaigns are set up by the Vaccine Program. Specific vaccines and NDC codes are grouped together to create campaigns. For COVID-19 vaccines, separate campaigns are set up for first doses and second doses. The Create Prebook Request screen and Manage Order screen will display any vaccine available for a Planning Request or order based on the campaigns your organization is assigned. Pharmacies are given COVID\_pharmacy 1 (for first doses) and COVID\_pharmacy2 (for second doses). All other providers are given COVID1 (for first doses) and COVID2 (for second doses).

Campaign – select the FIRST DOSE campaign you are creating a Planning Request for. **Do not enter any planning requests for second doses.** NYSDOH will manage your second dose campaign by creating necessary second dose planning requests and filling and accepting the allocation to an order.

- Vaccine available for Planning Requests in the campaign selected will display in the table above.
- In the # Doses to Prebook column, enter the number of doses you want to create a Planning Request for in that campaign.
- Once you’ve selected all COVID19 doses you want to request for the campaign, click the Submit Prebook Request button.
- You will be directed to the Prebook Request Status Page and see the request with the date entered.

## PLANNING REQUEST STATUS

On the left side menu panel under the Inventory heading, click on Manage Prebooking.

The Prebook Request Screen will display a listing of all an organization’s prebook requests, along with the status of those requests.

Prebook Request Status														
Take doses from current vaccine allocation...												Request or Deny Vaccine		
Change previously Prebooked vaccine amounts...												Edit Prebook Request		
Return to Home page...												Cancel		
Prebook Request List														
Event COVID19 2020-21 pandemic event														
Select	Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Prebook Status	Total Prebooked	Total Allocated	Total Requested	Declined and Returned to Pool	Doses on Hand	Available Now
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Allocated	300	300	200	0	0	100
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	5000	2000	2000	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Cancelled	0	0	0	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	1170	0	0	0	0	0



Columns in the table include:

- Prebook Status
  - Prebooked - a Planning Request has been submitted.
  - Substitution - a Planning Request has been allocated but substituted with a different vaccine.
  - Allocated - displays when the Planning Request has been completely allocated.
  - Declined - some or all of the Planning Request amount was allocated, but the user declined it. **NOTE: At this time, the user does not have the opportunity to decline since the NYSDOH is entering the allocation and accepting the request at the same time.**
  - Shipped - when a complete allocation is completely requested, or a partial allocation is partly requested and the remaining is declined by the user.
  - Canceled - the user created a Planning Request, then canceled or zeroed it out.
- Total Prebooked - total amount the user created in their Planning Request.
- Total Allocated - total number of doses that have been allocated by the Vaccine Program to date.
  - you can request vaccine once it has been allocated to your organization.
- Total Requested - how much of the total amount allocated you have requested to date.
- Declined and Returned to Pool - amount that you declined or opted to return to the State pool.
- Doses on Hand - how many doses are currently available in your inventory.
- Available Now - when you see doses in this column, it means doses from your Planning Request have been allocated to your organization. You can request/order these doses.

**PLEASE NOTE: At this time NYSDOH is filling the allocations by accepting the request on behalf of providers in order to expedite submission of orders to CDC.**



## EDITING PLANNING REQUESTS

If you would like to make an edit to an existing Planning Request, click on Manage Prebooking on the left side menu panel under the Inventory heading. Select the Planning Requests you would like to edit by checking the box under the Select column, then click the Edit Prebook Request button. NYSIIS will display the Modify Prebook Request screen.

**Note: Providers can modify an original request if none or if a part of the Planning Request has been allocated. If the Planning Request has been fully allocated, it is not possible to modify it.**

Prebook Request Status														
Take doses from current vaccine allocation...													Request or Deny Vaccine	
Change previously Prebooked vaccine amounts...													Edit Prebook Request	
Return to Home page...													Cancel	
Prebook Request List														
Event: COVID19 2020-21 pandemic event														
Select	Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Prebook Status	Total Prebooked	Total Allocated	Total Requested	Declined and Returned to Pool	Doses on Hand	Available Now
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Allocated	300	300	200	0	0	100
<input checked="" type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	5000	2000	2000	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Cancelled	0	0	0	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	1170	0	0	0	0	0

### Modify Prebook Request:


Modify Prebook Request														
Vaccine Program PIN: 889384				Delivery Contact: Joe Johnsbury				Submit Updates						
Initiating Organization: Johnsbury Health Center				Delivery Address: 111 Doran Way, OSWEGO, NY 10287				Delete Prebook Request						
Org Phone: (315)123-4567				Delivery Days/Hours:				Cancel						
Org Fax: (315)123-3456				Mon: 6:00AM-10:00AM, 2:00PM-5:00PM										
				Thurs: 6:00AM-11:00AM, 1:00PM-8:00PM										
				Delivery Instructions:										
Original Prebook Request is Reflected Below														
Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Min Order Qty	Doses On Hand	Original Prebooked	Doses Remaining	Change Doses Prebooked To			
Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	100	0	5000	3000	<input type="text" value="5000"/>			



## Cancel a Planning Request

- If the planning request does not have any amount in the Total Allocated column, click the Delete Prebook Request button. A confirmation box will appear asking "Are you sure you want to delete your prebook request?" Click OK to complete the cancel.
- If the planning request has an amount in Total Allocated column, you must reduce the requested amount to the amount allocated to cancel the request.

**Prebook Request Status**

Take doses from current vaccine allocation...  
 Change previously Prebooked vaccine amounts...   
 Return to Home page...

Request or Deny Vaccine  
 Edit Prebook Request  
 Cancel

**Prebook Request List**

Event: COVID19 2020-21 pandemic event

Select	Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Prebook Status	Total Prebooked	Total Allocated	Total Requested	Declined and Returned to Pool	Doses on Hand	Available Now
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Allocated	300	300	200	0	0	100
<input checked="" type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	5000	2000	2000	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Cancelled	0	0	0	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	1170	0	0	0	0	0

**Original Prebook Request is Reflected Below**

Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Min Order Qty	Doses On Hand	Original Prebooked	Doses Remaining	Change Doses Prebooked To
Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	100	0	5000	3000	<input type="text" value="2000"/>

To add quantity to your Planning Request, enter the new quantity of vaccine you would like to request and click Submit Updates. This will add a new Planning Request line with the additional doses requested.

To subtract quantity from your Planning Request, enter the new quantity of vaccine that you would like to request and click Submit Updates. This will update the Total Prebooked column on the Prebook Request Status screen to display the new requested quantity.

## SUBSTITUTIONS

In some instances, the Vaccine Program may have to substitute your order with a different type of COVID19 vaccine. Allocations will be filled based on vaccine availability and storage capacity of each provider. The Vaccine Program will attempt to give brand preference, but in order to ensure as many providers can receive vaccine as possible during limited supply, substitutions may be needed. If your Planning Request vaccine is substituted for another brand, you are strongly encouraged to accept the substitution. Denying a substitution may result in a delay in receiving vaccine.





A Planning Request allocated with a substitution will display underneath the initial Planning Request row on the Manage Prebooking screen and will be highlighted in blue. Providers can then use the Request or Deny Vaccine button to place their orders for the vaccine or deny the allocation the same as they would do on their originally requested Planning Requests.

Prebook Request Status														
Take doses from current vaccine allocation...												Request or Deny Vaccine		
Change previously Prebooked vaccine amounts...												Edit Prebook Request		
Return to Home page...												Cancel		
Prebook Request List														
Event <span>COVID19 2020-21 pandemic event</span>														
Select	Trade Name	Packaging	Manufacturer	Intent	Campaign	Initiating User	Prebook Date	Prebook Status	Total Prebooked	Total Allocated	Total Requested	Declined and Returned to Pool	Doses on Hand	Available Now
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Allocated	300	300	200	0	0	100
<input type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	5000	2000	2000	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	12/10/2020	Cancelled	0	0	0	0	0	0
<input type="checkbox"/>	Pfizer COVID-19 Vaccine	CARTON, 195 MULTI-DOSE VIALS	Pfizer, Inc.(PFR)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Prebooked	1170	0	0	0	0	0
<input checked="" type="checkbox"/>	Moderna COVID-19 Vaccine	CARTON, 10 MULTI-DOSE VIALS	Moderna US, Inc(MOD)	Pandemic	COVID1	Lori Isabella-Rhoades	02/11/2021	Substitution	0	1000	0	0	0	1000

**Note:** Users cannot modify the quantity of a Substitution request.

## MANAGE ORDERS

Traditionally, when providers order publicly funded vaccine through NYSIIS, they use the Manage Order functionality. With Planning Requests, once a provider organization requests vaccine they have been allocated, an order is automatically created with a status of Final-Approved. This means it's already been approved by the Vaccine Program and is ready to be sent to the CDC for fulfillment.

To view the status of your COVID19 vaccine order, click Manage Orders on the left side menu panel under the Inventory heading.

You will see a list of any current orders and their status.



organization **Johnsbury Health Center** • user **Lori Isabella-Rhoades** • role **Admin User (Provider)**

**Manage Orders** Create Order

**Order List** Show:  Current  Historical  Both

**Current Orders**

User	Submit Date	Status	Order #
Lori Isabella-Rhoades	02/11/2021	<a href="#">FINAL-APPROVED</a>	5
Lori Isabella-Rhoades	02/11/2021	<a href="#">FINAL-APPROVED</a>	4
Lori Isabella-Rhoades	12/10/2020	<a href="#">SENT TO CDC</a>	3
Mary Ann Dillon-Markle	06/17/2008	<a href="#">PENDING</a>	

**Historical Orders** (last 30 days by default)

Show Historical Orders by Date From:  To:  Refresh List

User	Submit Date	Status	Order #
No Historical Orders Logged For Date Range			

To see the order details, click the Status hyperlink to review your order.

organization **Johnsbury Health Center** • user **Lori Isabella-Rhoades** • role **Admin User (Provider)**

**View Order: 5** Print Preview

VFC PIN: 889384	<b>Delivery Contact:</b> Joe Johnsbury	<span>Exit Page</span>
<b>Initiating Organization:</b> Johnsbury Health Center	<b>Delivery Address:</b> 111 Doran Way OSWEGO, NY 10287	
<b>Initiating User:</b> Lori Isabella-Rhoades	<b>Delivery Days/Hours:</b>	
<b>Org Phone:</b> <a href="tel:3151234567">(315) 123-4567</a>	Mon 6:00AM - 10:00AM 2:00PM - 5:00PM	
<b>Org Fax:</b> <a href="tel:3151233456">(315) 123-3456</a>	Thur 6:00AM - 11:00AM 1:00PM - 8:00PM	
<b>Order Created Date:</b> 02/11/2021	<b>Delivery Instructions:</b>	
<b>Order Submitted Date:</b> 02/11/2021		
<b>Previous Order Date:</b> 02/11/2021		
<b>Order Status:</b> FINAL-APPROVED		

**Historical Notes**

Created By	Create Date	Note
No Historical Notes		

**Vaccines Ordered**

Item #	Qty Ordered	Vaccine Group	Trade Name	NDC	Doses on Hand	Doses Admin	Qty Apprvd	Qty Shipped	Status
1	100	COVID-19, mRNA, LNP-S, PF, 0.5mL	Moderna COVID-19 Vaccine	80777-0273-99	0	-	100		FINAL-APPROVED

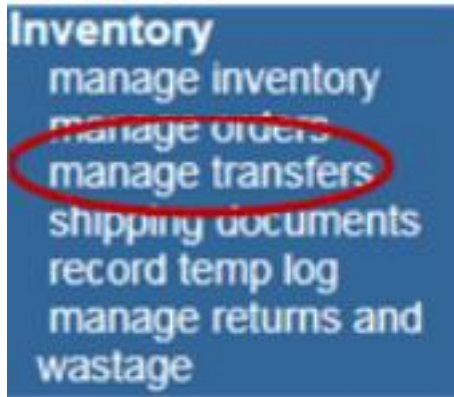
After your order has been fulfilled and shipped by the CDC, your order will display as Shipped. When your shipment is physically received, check it over. Make sure you received what was ordered and approved and no vaccine has been damaged in transit. After placing the vaccine into your storage unit, you will log into NYSIIS and accept these vaccine lots into your NYSIIS inventory.





### ACCEPTING TRANSFERS

Click on Manage Transfers on the left side menu panel:



This will take you to the Manage Transfer screen. If you have transfers that need to be accepted, they will display as hyperlinks under the Transfer ID column. A Transfer ID may have a single or multiple vaccine products ready to be accepted.

**Manage Transfer**

Create a New Transfer.... New Transfer

Display Date Range:  To:  Refresh List

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**Transfer List**

*Outbound Transfer*

Create Date	Transfer ID	Order ID Number	Sending Org	Receiving Org	Ship Date	Accept Date
No Outbound Transfer.						

*Inbound Transfer*

Create Date	Transfer ID	Order ID Number	Sending Org	Receiving Org	Ship Date	Accept Date
11/08/2013	<a href="#">1781</a>	1	NYS Vaccine Program	Dr. Smith Pediatrics	11/06/2013	

Click on one of the Transfer IDs that needs to be accepted. You will navigate to the Receive Transfer screen. Here you will see detailed information about the order including: quantity shipped, tradename, lot number, expiration date, and NDC description. Inspect the physical inventory received and make sure it matches all of the information in NYSIIS. Next, click the Accept Transfer button in the upper right-hand corner.



# Requesting COVID-19 Vaccine in NYSIIS

**Receive Transfer**

Accept Entire Transfer.... Accept Transfer

Return to the Previous Screen.... Cancel

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**Transfer Number: 1781**      **Created on: 11/06/2013**

Sending Entity		Receiving Entity	
<b>Organization</b>	NYS Vaccine Program	<b>Organization</b>	Dr. Smith Pediatrics
<b>Address</b>	ESP CORNING TOWER , ROOM 649 ALBANY, NY 12237	<b>Address</b>	10 main street ALBANY, NY 12303
<b>Contact</b>	NYS VAC PROG CONT	<b>Contact</b>	Lori Isabella
<b>Phone #</b>	(800) 543-7468	<b>Phone #</b>	(518) 999-9999
<b>Ship Date</b>	11/06/2013	<b>Order #</b>	<a href="#">1</a>

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**Transfer Vaccine Item**

Qty	Vac Group	Trade Name	Lot Number	Exp Date	NDC Description	Ship Info
20	DTP/aP - Hib - Polio - Td/Tdap	Pentacel	2345678910	09/04/2019	DTAP-IPV-HIB, PKG 5 X 1 DOSE VIALS	<a href="#">UPS</a>
10	Influenza	Flu-Mist	4345678914	09/07/2019	10 SPRAYERS, SYRGL, 10 DOSE PKG	<a href="#">UPS</a>

Once the item or items are accepted, NYSIIS will populate your inventory with the lot information automatically.



## APPENDIX – TABLE HEADERS DEFINITIONS

*Columns in the Planning Request tables include:*

Trade name	
Packaging Description	-based on NDC code.
Manufacturer	
Intent	-the ordering intent for all COVID19 vaccine will display as Pandemic.
Prior Year Prebooked	-in subsequent years this field will populate accordingly for this NDC.
Prior Year Shipped	-in subsequent years this field will populate accordingly for this NDC.
Prior Season Admin	-in subsequent years this field will populate accordingly for this NDC.
Prior Season Wasted/Returned	-in subsequent years this field will populate accordingly for this NDC.
Suggested Order Qty	-in subsequent years this field will populate accordingly for this NDC. Based on the previous year's administered doses.
Min Order Qty	-the smallest quantity orderable. Based on the NDC packaging.
Doses on Hand	-how many doses are currently available in your inventory.
Campaign	-the campaign you selected when you prebooked that NDC.
Initiating user	-NYSIIS user who submitted the prebook request.
Pre-Book Date	-the date the prebook was submitted to the Vaccine Program.