

Record a stocktake

This information is OFFICIAL

1. With the Supply Dashboard open, click the **Site Information & Stock** button.

The screenshot shows the NHS Supply Dashboard interface. At the top, there's a navigation bar with 'Supply Dashboard' and 'Covid Metrics' tabs. A blue arrow points to the 'Site Information & Stock' button in the top right corner. Below the navigation bar, there's a section for 'Supply Plan' with a table of data. The table has columns for Supply Plan Name, Site Name, Product Name, Vaccine Category, Total Approved Volume (doses), Request for Additional Volume, Comments, Status, For Action By, and Updated By. The table contains three rows of data for 'Exceptions Test Plan for INC0307012' at 'MOCK PLG VC Site 1'.

Supply Plan Name	Site Name	Product Name	Vaccine Category	Total Approved Volume (doses)	Request for Additional Volume	Comments	Status	For Action By	Updated By
Exceptions Test Plan for INC0307012	MOCK PLG VC Site 1	Spikevax (JN.1)	covid	0	0	No value	Allocation ...	No value	JOHN PIPER
Exceptions Test Plan for INC0307012	MOCK PLG VC Site 1	Comirnaty 3 (THREE) [...]	covid	0	120	Test	For Review...	ICB	Caroline
Exceptions Test Plan for INC0307012	MOCK PLG VC Site 1	Comirnaty 10 (JN.1)	covid	0	0	No value	Allocation ...	No value	JOHN PIPER

2. A pop-up will appear from the right. Click the **Update Stocktakes** button.

The screenshot shows the NHS Site Details pop-up. At the top, there's a navigation bar with 'Site Information' and 'Site detail changes' tabs. A blue arrow points to the 'Update Stocktakes' button in the top right corner. Below the navigation bar, there's a section for 'Site Details' with a table of data. The table has columns for Site Name, Latest Stocktake from Site, Delivery Days, Site ODS Code, Intra Pillar Site Type, Region Name, ICB Name, Address Name, Address Line 1, Address Line 2, City, Postcode, Contact Label, Email, Name, and Phone. The table contains one row of data for 'MOCK PLG VC Site 1'.

Site Name	Latest Stocktake from Site	Delivery Days
MOCK PLG VC Site 1	Thu, Nov 21, 2024	Monday to Friday

3. The **Site Stock Manager** app will open. Click the **Add new record** button.

Site Stock Manager

Explore DatasetsGuidesView and filter site detailsANGIES CHEMIST - PINNER

Wave is not No valueandIs Temporary Site is NoSite status: active

We have made updates to this stocktake form to make it easier to submit a stock count including the possibility to submit multiple batches in one go. Please complete your stocktake **after daily activities conclude** to help us keep your inventory records accurate.

StockWasteTransfersPerpetual Inventory (PI)

Add new record button

Latest Stocktake

Add new record

Vaccine	Unit Of Measurement	Quantity	Record Date	Expiry Date	Batch Number	Record Time
Comimaty 30 (JN.1)	vials	10	20 Nov 2024	16 Jan 2024	LK8454	20 Nov 2024, 17:25

All Stocktakes

Edit selected recordDelete selected record

RECORD DATE

Start dateEnd date

Vaccine	Unit Of Measurement	Quantity	Record Date	Expiry Date	Batch Number	Time of submission	Last Edited At
Comimaty 3...	vials	10	20 Nov 2024	16 Jan 2024	LK8454	20 Nov 2024, 17:25	20 Nov 2024, 17:25
Spikevax (JN.1)	vials	0	19 Nov 2024	23 Nov 2024	812014A	19 Nov 2024, 13:31	19 Nov 2024, 13:31
Comimaty 3...	vials	10	19 Nov 2024	16 Jan 2025	LK8454	19 Nov 2024, 13:33	19 Nov 2024, 13:33
Spikevax (JN.1)	vials	1	18 Nov 2024	23 Nov 2024	812014A	18 Nov 2024, 12:58	18 Nov 2024, 12:58
Spikevax (JN.1)	vials	4	15 Nov 2024	23 Nov 2024	812014A	15 Nov 2024, 14:41	15 Nov 2024, 17:50
Spikevax (JN.1)	vials	6	14 Nov 2024	23 Nov 2024	812014A	14 Nov 2024, 14:41	14 Nov 2024, 14:41

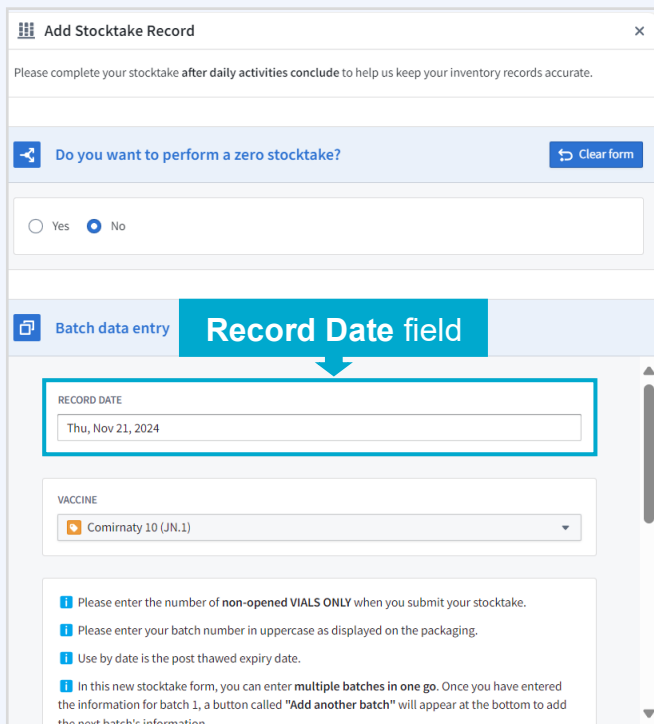
 **Note**

If you wish to submit a zero stocktake, you can select this at the top of the page and no further information is required. Simply click submit.

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- A pop-up appears from the right.
- The **Record Date** field is pre-populated with today's date.



Add Stocktake Record

Please complete your stocktake **after daily activities conclude** to help us keep your inventory records accurate.

Do you want to perform a zero stocktake? [Clear form](#)

☐ Yes ☒ No

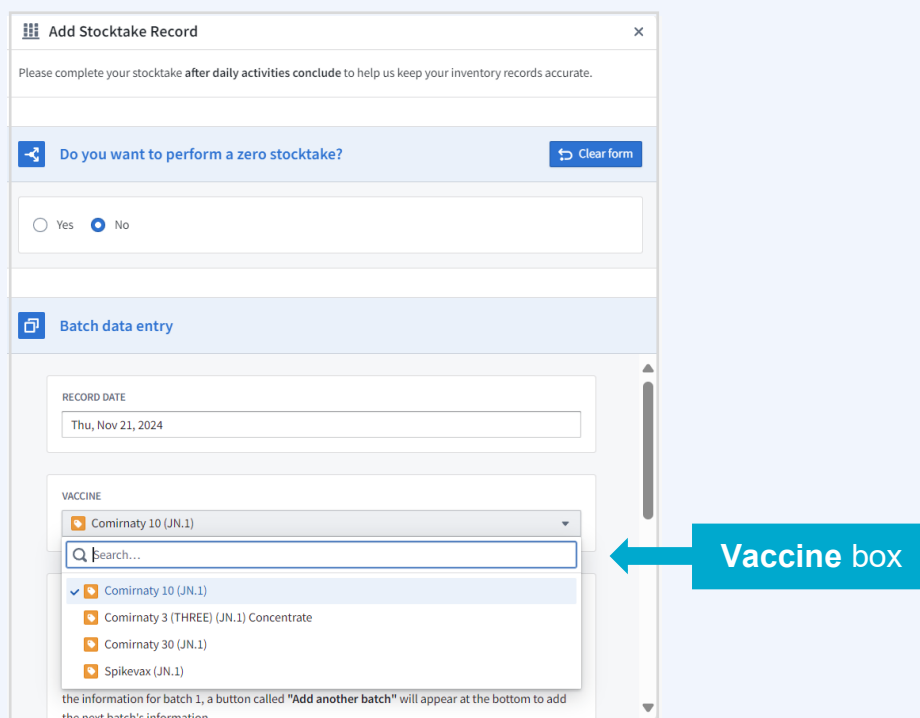
Batch data entry **Record Date field**

RECORD DATE
Thu, Nov 21, 2024

VACCINE
Comirnaty 10 (JN.1)

Please enter the number of **non-opened VIALS ONLY** when you submit your stocktake.
 Please enter your batch number in uppercase as displayed on the packaging.
 Use by date is the post thawed expiry date.
 In this new stocktake form, you can enter **multiple batches in one go**. Once you have entered the information for batch 1, a button called "Add another batch" will appear at the bottom to add the next batch's information.

- Click inside the **Vaccine** box and select the required vaccine type from the dropdown menu.



Add Stocktake Record

Please complete your stocktake **after daily activities conclude** to help us keep your inventory records accurate.

Do you want to perform a zero stocktake? [Clear form](#)

☐ Yes ☒ No

Batch data entry

RECORD DATE
Thu, Nov 21, 2024

VACCINE
Comirnaty 10 (JN.1)

Search...

- ✓ Comirnaty 10 (JN.1)
- Comirnaty 3 (THREE) (JN.1) Concentrate
- Comirnaty 30 (JN.1)
- Spikevax (JN.1)

the information for batch 1, a button called "Add another batch" will appear at the bottom to add the next batch's information

Vaccine box

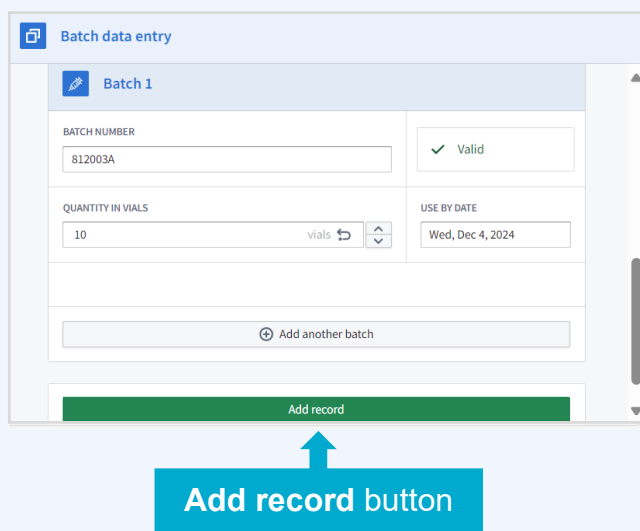
5. Use the scroll bar at the right to scroll down to the **Batch data entry** section and in the **Batch Number** box type the relevant batch number.
6. In the **Quantity in Vials** box type the number of unopen vials you have in stock.
7. Click inside the **Use by Date** box and select the expiry date of the vaccine from the calendar pop-up.

The screenshot shows the 'Add Stocktake Record' form. At the top, there is a question 'Do you want to perform a zero stocktake?' with 'Yes' and 'No' radio buttons, and a 'Clear form' button. Below this is the 'Batch data entry' section. It contains a 'Batch 1' header, a 'BATCH NUMBER' field with the value '812003A' and a 'Valid' status, a 'QUANTITY IN VIALS' field with the value '10' and a 'vials' unit selector, and a 'USE BY DATE' field with the value 'Wed, Dec 4, 2024'. There is an 'Add another batch' button below these fields and an 'Add record' button at the bottom. Three blue callout boxes with arrows point to the 'BATCH NUMBER' field, the 'QUANTITY IN VIALS' field, and the 'USE BY DATE' field, labeled 'Batch Number box', 'Quantity in Vials box', and 'Use by Date box' respectively.

8. Multiple batches can be recorded in one transaction. To add an additional batch, click the **Add another batch** button.

This is a close-up screenshot of the 'Batch data entry' section of the form. It shows the 'Batch 1' header, the 'BATCH NUMBER' field with '812003A', the 'QUANTITY IN VIALS' field with '10', and the 'USE BY DATE' field with 'Wed, Dec 4, 2024'. Below these fields is the 'Add another batch' button, which is highlighted by a blue callout box with an arrow pointing to it, labeled 'Add another batch button'. The 'Add record' button is visible at the bottom.

9. Once all batches have been entered click the **Add record** button.



The screenshot shows a web form titled "Batch data entry". Inside, there's a section for "Batch 1" with a pencil icon. It contains a "BATCH NUMBER" field with the value "812003A" and a "Valid" status indicator with a green checkmark. Below that is a "QUANTITY IN VIALS" field with the value "10" and a "USE BY DATE" field with the value "Wed, Dec 4, 2024". At the bottom of the form is a green button labeled "Add record". A blue arrow points from a blue box labeled "Add record button" to the "Add record" button.

10. The **SC Inventory** dialogue box will be displayed. Click the **Submit** button at the bottom right of this dialogue box.

- A green status box with the message **Edits successfully applied** will appear at the top of the screen to show that the action has been successful.

