



# State of Nevada Immunization Information System (IIS)

***Inventory Management and Reconciliation Guide***  
***Type 3 – Training Manual***

**<https://webiz.nv.gov>**

<p><b>Help Desk</b> <b>(775) 684-5954 or toll-free 1- 877-689-3249</b> <b>Email: <a href="mailto:izit@health.nv.gov">izit@health.nv.gov</a></b> <b>Fax: (775) 687-7596</b></p>
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As a Nevada WebIZ Type 3 user, you will experience greater ease and improved accuracy in managing your vaccine inventory. As vaccine inventory is added, adjusted, administered and transferred, the system automatically summarizes this data. Type 3 users are better equipped to more efficiently and effectively comply with federal and state regulations that require the documentation of vaccines by lot number, manufacturer, expiration date, administration site and date of administration. Nevada WebIZ tracks inventory levels for vaccines using a simple dose-based inventory unit of measure that eliminates the difficulty and ambiguity in maintaining inventory levels for immunization. Through the process of monthly reconciliation, vaccine inventory is adjusted and reported in compliance with VFC Program requirements. Welcome to Nevada WebIZ Type 3!

## **Inventory Management**

Each provider is set up with an Inventory Location, i.e. "Virtual Refrigerator." Inventory Locations are established by Nevada WebIZ staff. Inventory location is where vaccine data, including details such as lot number and expiration date, are stored. Each vaccine shipment received must be entered into the inventory location. **All vaccines, regardless of funding source (VFC, 317, Private, Other) must be entered into the "Virtual Refrigerator."**

**Note: Most organizations use only one inventory location. Additional locations may be added in special circumstances. Contact the Nevada WebIZ Helpdesk for assistance.**

To view vaccine inventory On-Hand:

1. Click + sign next to *Inventory*
2. Click + sign next to *Vaccines*
3. Click *On-Hand* to view the vaccine in your Inventory Location



Vaccine *On-Hand* inventory may be filtered and viewed by *Inventory Location*, *Status*, *Vaccine* type and/or *Funding Source* by clicking the drop down arrow to the right of each field.

On-Hand Inventory

Inventory Location	Status
(ALL)	ON-HAND
Vaccine	Funding Source
(ALL)	(ALL)

Edit Adjustment Transfer Inquiry Doses

1. *Inventory Location* field lists each separate location for which the organization stores vaccine inventory
2. *Status* field allows users to sort vaccine by *On-Hand*, *Depleted/Expired*, *Expiring Soon* or *All* inventory
3. *Vaccine* field allows users to sort by vaccine type
4. *Funding Source* field allows users to sort vaccine by its source of funding (*Private*, *VFC*, *317* or *Other*)

Vaccine inventory may be sorted with any combination of these fields.

# Add New Inventory

## For publicly funded vaccines (VFC, 317, state-funded)

For all publicly funded vaccine you have ordered through WebIZ, you must add that vaccine to your inventory using a different process than the one described in this section. When the vaccine order arrives at your clinic, please follow the instructions in the **Order and Return Publicly Funded Vaccine** user guide, in the section titled **Receive a shipment into inventory**.

1. Click *Add New Inventory*

Vaccine Inventory On-Hand

This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. Select "Add New Inventory" to add new inventory.

Add New Inventory i

Pending Inventory Transfers  
Pending VTrckS Shipments

2. Select the *Inventory Location* by clicking the drop down arrow to the right of the field.
3. Enter information for new vaccine inventory ensuring all required (bolded) fields are filled in.
4. When adding a new vaccine shipment to the inventory, if you do not see the appropriate type of funding source in the dropdown menu, please call the Help Desk immediately to have it added as a choice.

Add

Date: 11/05/2014 i

Inventory Location: SMALL WORLD CLINIC > SMALL WORLD CLINIC INV i

Date	Inventory Location	Vaccine   Mfg   NDC   Brand	Lot Number	Expiration Date	Funding Source	Doses Adjusted	Container Id	Comments
11/05/2014	SMALL WORLD CLINIC > SMALL WORLD CLINIC INV	ADENOVIRUS, TYPE 4&7	BRR	ANTHEAX	AB	7.5 ML MDV		
		ANTHRAX	MIP	64678-0131-01	10 SINGLE DOSE VIALS			
		ANTHRAX	MIP	64678-0111-05	BIOTHRAX (5 ML MD VIAL)			
		BCG	OTC	48642-9041-01	1CC VIAL			
		BCG	PMC	49281-0880-01	THERACYS (1 DOSE PACKAGE)			
		CPOX (VARICELLA)	MSD					
		CPOX (VARICELLA)	MSD	00006-4826-00	VARIVAX (0.5 ML SDV X 1 VIAL WITH DILUENT)			
		CPOX (VARICELLA)	MSD	00006-4827-00	VARIVAX (0.5 ML SDV X 10 VIALS WITH DILUENT)			
		DT (PED)	PMC					
		DT (PED)	PMC	49281-0225-10	DT (0.5 ML SDV X 10 VIALS)			
		DT (PED)	PMC	49281-0278-10	DT (5 ML SD VIALS X 10 VIALS)			
		DTaP, 5 PERTUSIS ANT	PMC	49281-0286-10	DAPTACEL (0.5 ML SDV X 10 VIALS)			

**Note:** When adding new inventory, be sure to enter the date on which the vaccine was received by your office.

**Note:** the NDC number is part of selecting the appropriate vaccine

5. Nevada WebIZ looks for similar line items to help minimize the chance of creating duplicate entries. Click *Proceed with Create* if data entered is correct and is **NOT** an exact match with current inventory **OR** click *Add to On-Hand* and add doses to an existing vaccine inventory item **WITH** an exact match.

Vaccine Inventory

Click "Create" to save the record or "Cancel" to return to the previous page.

Add

Date	11/05/2014	
Inventory Location	SMALL WORLD CLINIC > SMALL WORLD CLINIC INV	
Vaccine   Mfg   NDC   Brand	DTaP-HEP B-IPV   SKB   58160-0811-01   PEDIARIX (0.5 ML SDV X 1 VIAL)	
Lot Number	58160	
Expiration Date	12/31/2016	
Funding Source	VFC	
Doses Adjusted	15	
Container Id		
Comments		

**Note:** Click here **NOT** exact match

**Proceed with Create**   **Cancel**

Possible Duplicates

The following Inventory items have been found with similar criteria.  
If any of the following record(s) are the inventory item you are trying to create, select the item below.

Vaccine	Mfg	NDC	Lot No	Exp Date	Fund Src	Doses On-Hand
DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))	SKB	58160-0811-01	58160	12/31/2016	Private	15

**Note:** Click here **WITH** exact match

? **Add to this Inventory Line Item**

## Edit Inventory

This section explains how to use *Edit* to correct a Lot Number, Expiration Date and/or Funding Source.

- From the *On-Hand* Screen, filter inventory in order to more easily find the line item you are looking for, then click on the type of vaccine you need to edit.

On-Hand Inventory

Inventory Location	Status
(ALL)	ON-HAND
Vaccine	Funding Source
CPOX (VARICELLA)	(ALL)
(ALL)	Inquiry
ADENOVIRUS, TYPE 4	Doses
ADENOVIRUS, TYPE 4&7	Funding
ADENOVIRUS, UF	Source
ANTHRAX	On-
BCG	Hand
CHOLERA	
<b>CPOX (VARICELLA)</b>	
DIPHTHERIA ANTITOXIN	
DT (PED)	

2. Look for and select the appropriate lot number to edit.
3. Click Edit.

**On-Hand Inventory**

Inventory Location	Status
(ALL)	ON-HAND
Vaccine	Funding Source
CPOX (VARICELLA)	(ALL)
<input type="button" value="Edit"/> <input type="button" value="Adjustment"/> <input type="button" value="Transfer"/> <input type="button" value="Inquiry"/>	

4. Fields in gray cannot be edited. All remaining fields may be edited. Enter the correct vaccine information.
5. Click *Update*.

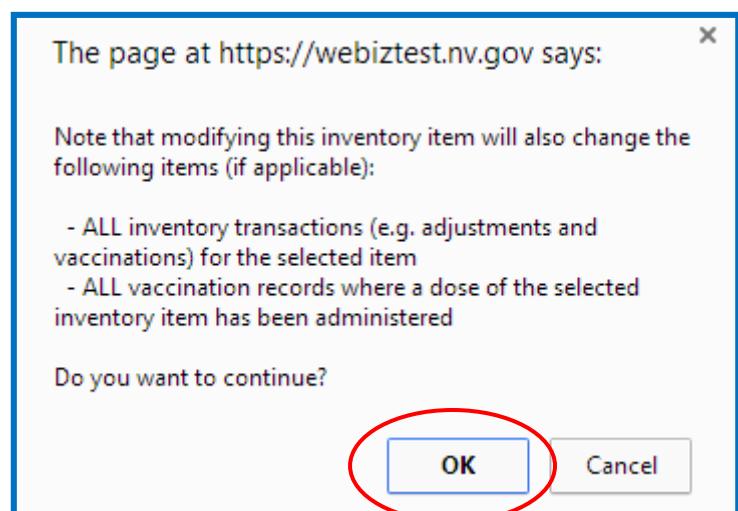
**View**

?	<input type="button" value="Update"/> <input type="button" value="Cancel"/>
Inventory Location	SMALL WORLD CLINIC INV
Vaccine	CPOX (VARICELLA)
Vacc   Mfg   NDC   Brand	CPOX (VARICELLA)   MSD   00006-4826-00   VARIVAX (0.5 ML SDV X 1 VIAL WITH DILUENT)
Funding Source	PRIVATE
Doses (initial)	15
Doses (current)	15
Lot Number	64826SWC
Expiration Date	12/31/2016
Container Id	
Orig. Exp. Date	12/31/2016

Note that modifying this inventory item will also change the following items (if applicable):

- ALL inventory transactions (e.g. adjustments and vaccinations) for the selected item
- ALL vaccination records where a dose of the selected inventory item has been administered

6. A pop-up box appears to confirm the correction;
7. This pop-up box reminds you that, if you have recorded vaccines already, any edits you make extend to those vaccinations so they do not need to be re-entered.
8. Click *OK*.



# Inventory Adjustment

This section explains how to *Adjust* vaccine inventory quantities on-hand to reflect wastage, expiration, mishandling, vaccine recall, etc. *Adjustment* can be utilized to increase or decrease quantity. *Adjustment* should only be used to balance inventory, account for multi-dose vials, or to correct the quantity initially entered.

## **For publicly funded vaccines** (VFC, 317, state-funded)

You must determine whether to discard unusable vaccine and adjust your inventory with the method in this section or return the vaccine to McKesson and have your inventory adjusted through the return function in WebIZ. Check the chart below to determine if you should process unusable vaccine(s) as an adjustment or a return.

Do NOT adjust any vaccine(s) that should be returned.

### **Process as an ADJUSTMENT:**

- ✓ Syringes that were filled but not used
- ✓ Used syringes with or without needles attached to them
- ✓ Broken vials
- ✓ Multi-dose vial from which any doses have been withdrawn

### **Process as a RETURN:**

- X Vaccine in its original vial
- X Unused pre-filled syringes from manufacturers with an NDC printed on them

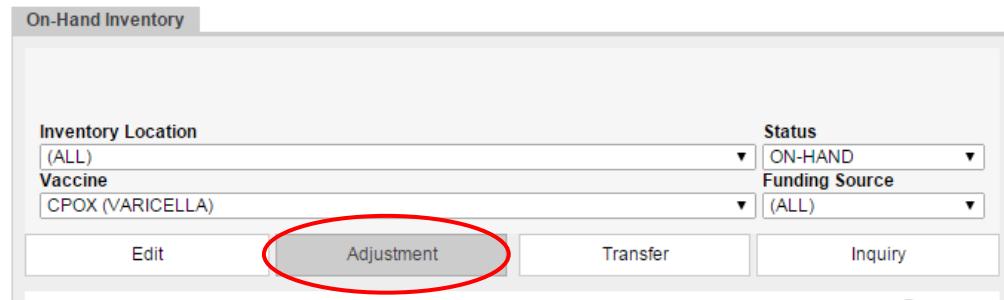
See the ***Order and Return Publicly Funded Vaccines*** user guide for instructions on returns.

Use the instructions in this section for adjustments.

1. From the *On-Hand* Screen, filter inventory in order to more easily find the line item you are looking for, then click on the type of vaccine you need to adjust.

The screenshot shows the 'On-Hand Inventory' screen. At the top, there are four dropdown filters: 'Inventory Location' (set to '(ALL)'), 'Status' (set to 'ON-HAND'), 'Funding Source' (set to '(ALL)'), and 'Vaccine'. The 'Vaccine' dropdown is currently active, showing a list of vaccines. The option 'CPOX (VARICELLA)' is highlighted with a blue selection bar, and a red rectangular box highlights the entire 'Vaccine' dropdown menu.

2. Look for and select the appropriate lot number to adjust.
3. Click *Adjustment*.



4. Enter the date of adjustment (fields in gray cannot be edited).
5. Select the appropriate reason from the drop down menu. For publicly funded vaccine, select one of the **VTRCKS** reasons. For all other vaccine, select the appropriate reason that does NOT have **VTRCKS** in front of it.

**NOTE: When entering a date of adjustment to balance reconciliation, the date must be within the period for which you are reconciling (see Pg22)**

Date	11/05/2014
Inventory Location	SMALL WORLD CLINIC
Vaccine   Mfg   NDC	CPOX (VARICELLA)
Lot Number	SWC64826
Expiration Date	12/31/2016
Funding Source	PRIVATE
Doses On-Hand	15
Reason	<input type="button" value="▼"/> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> EXPIRED</li> <li><input type="checkbox"/> WASTED</li> <li><input type="checkbox"/> MIS-HANDED</li> <li><input type="checkbox"/> BROKE VIAL</li> <li><input type="checkbox"/> EXTRA</li> <li><input type="checkbox"/> OTHER</li> <li><input type="checkbox"/> RECONCILIATION</li> <li><input type="checkbox"/> OPTED OUT VACCINATIONS</li> <li><input type="checkbox"/> RECALL</li> <li><input type="checkbox"/> VTRCKS - BROKEN VIAL/SYRINGE</li> <li><input type="checkbox"/> VTRCKS - LOST OR UNACCOUNTED FOR VACCINE</li> <li><input type="checkbox"/> VTRCKS - NON VACCINE PRODUCT (E.G. IG, HBIG, DIL)</li> <li><input type="checkbox"/> VTRCKS - OPEN VIAL BUT ALL DOSES NOT ADMINISTERED</li> <li><input type="checkbox"/> VTRCKS - OTHER</li> <li><input type="checkbox"/> VTRCKS - VACCINE DRAWN INTO SYRINGE BUT NOT ADMIN</li> </ul>
Doses Adjusted	
Container Id	
Comments	

6. Use positive (1) or negative (-1) numbers to increase or decrease inventory.

**Note: Entering a positive number increases the inventory and entering a negative number decreases the inventory. For example, +1 will add one dose and -1 will subtract one dose.**

7. Use the *Comments* field to record the reason for adjustment. Always add comments and clearly document why an adjustment was made (Important for tracking inventory; displays on reports).
8. Click *Create*.

Reason	WASTED
Doses Adjusted	-1
Container Id	
Comments	VACCINE WAS DRAWN AND NOT ADMINISTERED TO PATIENT

(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)

## How to Adjust Expired Vaccine:

### For publicly funded vaccines (VFC, 317, state-funded)

Publicly funded vaccine that has expired should be returned to McKesson and NOT adjusted with these instructions UNLESS: it's a syringe that was filled but not used, a used syringe (with or without needle attached), a broken vial, or a multi-dose vial from which any doses have been withdrawn. For instructions on how to return expired vaccine that is intact, see the **Order and Return Publicly Funded Vaccine** user guide.

All expired vaccine needs to be adjusted to zero (0) since it was discarded and is not in your refrigerator. Expired vaccines are not displayed with current viable inventory on the on-hand screen.

**NOTE: All Depleted/Expired vaccine must be adjusted to zero (0) using the next calendar date after the expiration date.**

1. From the Vaccine *On-Hand Inventory* screen, find the drop down menu to the right of the *Status* field and select Depleted/Expired. You may also filter by vaccine type (i.e. just Depleted/Expired CPOX (Varicella)) if your list of ALL expired vaccines is very long.
2. Select the vaccine lot number you want to adjust.
3. Click *Adjustment*.

The screenshot shows the 'On-Hand Inventory' screen. At the top, there are dropdown menus for 'Inventory Location' (set to '(ALL)'), 'Vaccine' (set to '(ALL)'), and 'Status'. The 'Status' dropdown is open, showing options: 'DEPLETED/EXPIRED', '(ALL)', 'ON-HAND', 'DEPLETED/EXPIRED', and 'EXPIRING SOON'. The 'DEPLETED/EXPIRED' option is highlighted with a red box. Below the dropdown is a toolbar with 'Edit', 'Adjustment' (which is circled in red), 'Transfer', and 'Inquiry'. The main table lists vaccines under the heading 'SMALL WORLD CLINIC INV'. One row is selected, showing 'CPOX (Varicella) (Varivax (0.5 mL SDV x 1 vial with diluent))' with details: Mfg (MSD), NDC (00006-4826-00), Lot No (SWC64826), Exp Date (12/31/2013), Funding Source (Private), and Doses (15). A question mark icon is next to the dose count. At the bottom of the table are buttons for 'Edit', 'Adjustment' (which is circled in red), 'Transfer', and 'Inquiry'.

4. Enter the appropriate date.
5. Select *Expired* as the *Reason* for the adjustment.

**Add**

**Create** **Cancel**

Date	01/01/2014 <input type="button" value="..."/>
Inventory Location	SMALL WORLD CLINIC INV
Vaccine   Mfg   NDC	CPOX (VARICELLA)   MSD   00006-4826-00
Lot Number	SWC64826
Expiration Date	12/31/2013 <input type="button" value="..."/>
Funding Source	PRIVATE
Doses On-Hand	15
Reason	<input type="button" value="▼"/> <b>EXPIRED</b> WASTED MIS-HANDED BROKE VIAL EXTRA OTHER RECONCILIATION OPTED OUT VACCINATIONS RECALL VTRCKS - BROKEN VIAL/SYRINGE VTRCKS - LOST OR UNACCOUNTED FOR VACCINE VTRCKS - NON VACCINE PRODUCT (E.G. IG, HBIG, DIL) VTRCKS - OPEN VIAL BUT ALL DOSES NOT ADMINISTERED VTRCKS - OTHER VTRCKS - VACCINE DRAWN INTO SYRINGE BUT NOT ADMIN
Doses Adjusted	<input type="text"/>
Container Id	<input type="text"/>
Comments	<input type="text"/>

**Create** **Cancel**

6. Enter a negative number corresponding to the number of vaccine doses you want to remove in the *Doses Adjusted* field (to remove 15 doses, enter “-15”).
7. Enter a comment in the *Comments* field and clarify the reason an adjustment was completed.
8. Click *Create*.

Reason	EXPIRED <input type="button" value="▼"/>
Doses Adjusted	-15
Container Id	<input type="text"/>
Comments	EXPIRED ON 12/31/2013 <input type="button" value="..."/>

(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)

**Create** **Cancel**

# Inventory Transfer

This section explains how to *Transfer* vaccine inventory information from one location to another.

Inventory transfers can only occur between Type 3 providers in Nevada WebIZ. If you are giving vaccine inventory to a Type 1 or Type 2 provider, you need to complete an inventory adjustment (see pages 7-9 of this guide).

## **How to Initiate an Outgoing Transfer:**

1. From the *On-Hand* screen, filter inventory listed in order to more easily find the line item you are looking for. Select vaccine type you wish to transfer.

On-Hand Inventory

Inventory Location  
(ALL)

Vaccine  
CPOX (VARICELLA)

Status  
ON-HAND

Funding Source  
(ALL)

2. Look for and select the appropriate lot number you wish to transfer.
3. Click *Transfer*.

On-Hand Inventory

Inventory Location  
(ALL)

Vaccine  
CPOX (VARICELLA)

Status  
ON-HAND

Funding Source  
(ALL)

Edit      Adjustment      Transfer      Inquiry

4. Enter the date of transfer (this date MUST reflect the date on which the vaccine was removed from your refrigerator).

Add

Date  
11/05/2014

Create      Cancel

Source Inventory Location

Inventory Location  
SMALL WORLD CLINIC INV

Vaccine | Mfg | NDC  
CPOX (VARICELLA) | MSD | 00006-4826-00

5. Under the *Destination Inventory Location* section, select the *Inventory Location* you are transferring vaccine inventory to from the drop down menu.

Destination Inventory Location	
Inventory Location	MORNING STAR HEALTH CENTER > MORNING STAR MOUNTAIN VIEW PEDIATRICS > MTN VIEW PEDIATRICS MT GRANT GENERAL HOSPITAL > MT GRANT HOSP INVENTORY MT GRANT MEDICAL CLINIC - RUCH > MT. GRANT MEDICAL CLINIC INVENTORY NEVADA STATE IMMUNIZATION PROGRAM > HAPPY LAND INC <b>NEVADA STATE IMMUNIZATION PROGRAM &gt; NV STATE IZ PROGRAM-INVENTORY</b> NEVADA URBAN INDIANS INC > NEVADA URBAN INDIANS, INC-RENO NEVADA YOUTH TRAINING CENTER > NEV YOUTH TRNG CTR
Doses Transferred	
Equivalent Cases	
Authorized By	

6. Enter the number of *doses* (not number of vials) you are transferring in the *Doses Transferred* field.  
 7. Select who authorized the transfer from the drop down menu.  
 8. Use the *Comments* field to record the reason for transfer. Always add comments to clearly document why a transfer was made.  
 9. Click *Create*.

Destination Inventory Location	
Inventory Location	NEVADA STATE IMMUNIZATION PROGRAM > NV STATE IZ PROG F
Doses Transferred	10
Equivalent Cases	
Authorized By	SCREENSHOT, SCREENSHOT (-) <b>SNVDATA4, SNVDATA4 (-)</b>
Inventory Picked By	
Inventory Picked Date	
QA Approved By	
QA Approved Date	
Shipped Date	
Comments	
<input type="button" value="Clear"/> <input type="button" value="Create"/> <input type="button" value="Cancel"/>	

## How to View a Pending Outgoing Transfer:

1. To view *Pending Outgoing Transfers*, select *Pending Inventory Transfers* from the *Vaccine Inventory On-Hand* screen.

Vaccine Inventory On-Hand	
This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. Select "Add New Inventory" to add new inventory.	
<a href="#">Pending Inventory Transfers</a> <span style="float: right;">Add New Inventory </span>	
<a href="#">Pending VTrckS Shipments</a>	

- To Delete or cancel a *Pending Outgoing Inventory Transfer*, click Delete.

Pending Outgoing Inventory Transfers						
Vaccine	Doses	NDC	Lot	Funding Source	Mfg	Receiving Location
<b>Source Location: SMALL WORLD CLINIC INV</b>						
CPOX (Varicella)	10	00006-4826-00	SWC64826	Private	MSD	NV STATE IZ PROGRAM-INVENTORY
						<a href="#">?</a> <a href="#">Delete</a> <a href="#">Update</a>

**Note: Deleting a transfer will add the vaccine doses back into your on-hand inventory.**

## How To Receive an Incoming Transfer:

Incoming transfers of inventory must be acknowledged and marked “Received” before the doses can be added to your On-Hand inventory.

- Click *Pending Inventory Transfers* from the *Vaccine Inventory On-Hand* screen.

Vaccine Inventory On-Hand						
This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. <a href="#">Add New Inventory</a> <a href="#">?</a>						
<a href="#">Pending Inventory Transfers</a> <a href="#">Pending VTrekS Shipments</a> <a href="#">?</a> <a href="#">i</a>						

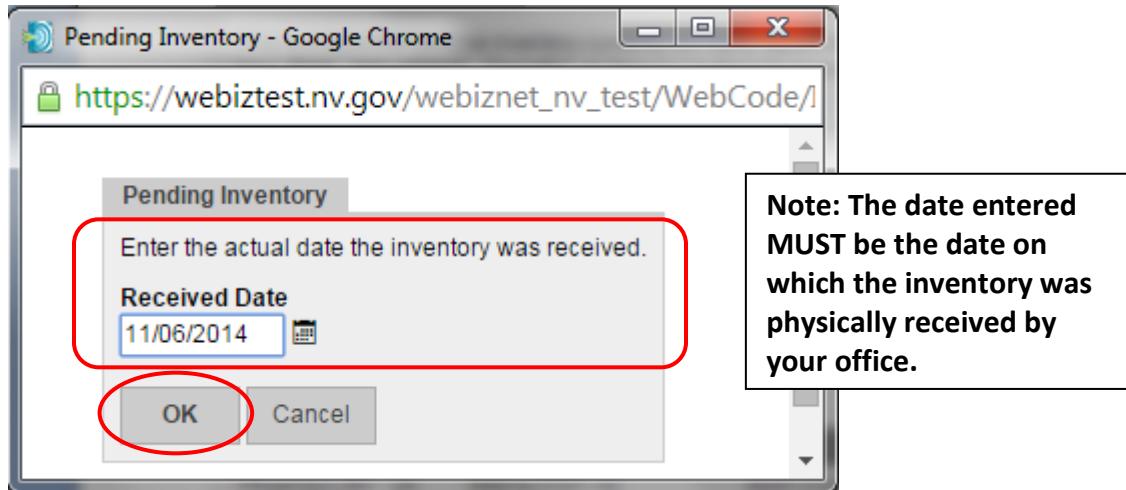
- From the *Pending Incoming Inventory Transfers* portion of the screen click *Received*.

Pending Incoming Inventory Transfers						
Vaccine	Doses	NDC	Lot	Funding Source	Mfg	Source Location
<b>Receiving Location: SMALL WORLD CLINIC INV</b>						
Influenza-LAIV	25	66019-0301-10	ADD123456	Private	MED	SMART TOTS IMMUNIZATION CLINIC OFF SITE
Quad (Flumist)						
Quad 2014-						
2014 (10 pack						
0.2mL						
applicator))						
						<a href="#">?</a> <a href="#">Received</a>

- When another Type 3 site has transferred inventory info to your clinic, marking it *Received* adds it to your inventory. There is no need to manually add the lot if you receive vaccines this way.

**NOTE: Ensure all Pending Incoming Inventory Transfers are marked “Received” prior to reconciling each month!**

4. From the *Pending Inventory* popup window, enter the *Received Date* and click *OK*.



## How To View Pending Incoming/Outgoing Inventory Reports:

Use *Pending Incoming/Outgoing Inventory Transfer* Reports to track transferred inventory.

1. Select the appropriate report from the *Vaccine Inventory Transfer* screen.

### Sample Report

**Pending Outgoing Inventory Transfers - Pick List**

November 17, 2014

NEVADA webIZ Nevada's Statewide Immunization Information System

Receiving Location: NEVADA STATE IMMUNIZATION PROGRAM NV STATE IZ PROGRAM-INVVENTORY (NSIP-INV) 4150 TECHNOLOGY WAY, UNIT #210 CARSON CITY, NV 89706	Source Location: SMALL WORLD CLINIC SMALL WORLD CLINIC INV (SWC13) 222 SMALL WORLD DR LAS VEGAS, NV 89148								
Trans Date	Vaccine	NDC	Manufacturer	Lot/Serial	Exp. Date	Funding Source	Container ID	Equiv. Cases	Trans. Qty
11/06/2014	DTaP-Hep B-IPV	58160-0811-01	SKB	58160	12/31/2016	VFC			(5)

Route/Stop      Inventory Picked By      Picked Date      QA Approved By      QA Date      Shipped Date      Received By

**NOTE:** The signature lines (shown above) at the bottom of the Pending Transfer reports pertain to the Countermeasures and Response Administration (CRA) module of Nevada WebIZ, used for emergency management purposes and may be disregarded for regular vaccine inventory management.

## Inventory Inquiry:

This section explains how to make *Inquiries* concerning the inventory in specified locations. This feature allows users to generate a list of inventory transactions based on certain criteria. Inventory transactions include events such as adding new inventory, editing inventory information, adjusting inventory quantities and vaccinations.

1. From the *On-Hand* Screen, filter inventory listed in order to more easily find the line item you are looking for.
2. Select the vaccine for which you want to run an inquiry.
3. Look for and select the appropriate lot number for the inquiry.
4. Click *Inquiry*.

On-Hand Inventory

Inventory Location <input type="button" value="Edit"/>	Status <input type="button" value="ON-HAND"/>
Vaccine <input type="button" value="CPOX (VARICELLA)"/>	Funding Source <input type="button" value="ALL"/>
<input type="button" value="Adjustment"/> <input type="button" value="Transfer"/> <input type="button" value="Inquiry"/>	

5. Fill in the desired *Transaction Date Range* fields.
6. Click *Run Report*.

Report Selection Criteria

Provider SMALL WORLD CLINIC	Inventory Location SMALL WORLD CLINIC INV	Funding Source PRIVATE
Vaccine CPOX (VARICELLA)	Manufacturer MERCK & CO, INC	Lot Number SWC64826
Expiration Date Range From: <input type="text" value="MM/DD/YYYY"/> <input type="button"/> Through: <input type="text" value="MM/DD/YYYY"/> <input type="button"/>		
Transaction Date Range From: <input type="text" value="10/01/2014"/> <input type="button"/> Through: <input type="text" value="10/31/2014"/> <input type="button"/>		
Output Type <input checked="" type="radio"/> PDF <input type="radio"/> HTML <input type="radio"/> EXTRACT - Delimiter: <input type="text"/>		
<input type="button" value="Run Report"/> <input type="button" value="Cancel"/>		

**NOTE: Please limit the transaction date range to no more than one (1) month to minimize impact on the IIS.**

7. A report is generated showing a list of inventory transactions that meet the specified criteria.

**NEVADA webIZ**

Nevada's Statewide Immunization Information System  
Inventory Transaction Inquiry

November 06, 2014

Provider = SMALL WORLD CLINIC, Inventory Location = SMALL WORLD CLINIC INV, Vaccine = DTaP-Hep B-IPV, Funding Source = Private, Manufacturer = GlaxoSmithKline, Lot = 58160, From Trans Date = 10/01/2014, Through Trans Date = 11/06/2014

Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg	NDC	Lot No	Fund Src	Exp Date	Type	Doses
2413634	SMALL WORLD CLINIC INV		11/06/2014	DTaP-Hep B-IPV	SKB	58160-0811-01	58160	Private	12/31/2016	ADJ	2
										Adjustment Reason:	Broke vial
	<u>Created By:</u> KEVIN FILIPPELLI on 11/06/2014 12:25:44									Comments:	TWO VIALS DROPPED ON THE FLOOR - UNUSABLE
	<u>Updated By:</u> KEVIN FILIPPELLI on 11/06/2014 12:25:44										
2413636	SMALL WORLD CLINIC INV	NV STATE IZ PROGRAM-INVENTORY	11/06/2014	DTaP-Hep B-IPV	SKB	58160-0811-01	58160	Private	12/31/2016	TFR	(5)
	<u>Created By:</u> KEVIN FILIPPELLI on 11/06/2014 12:28:15									Comments:	
	<u>Updated By:</u> KEVIN FILIPPELLI on 11/06/2014 12:28:15										
	<u>Authorized By:</u>										
2413537	SMALL WORLD CLINIC INV		10/27/2014	DTaP-Hep B-IPV	SKB	58160-0811-01	58160	Private	12/31/2016	ADJ	15
										Adjustment Reason:	Add Initial Inventory
	<u>Created By:</u> KEVIN FILIPPELLI on 10/27/2014 14:34:24									Comments:	
	<u>Updated By:</u> KEVIN FILIPPELLI on 10/27/2014 14:34:24										
2413538	SMALL WORLD CLINIC INV		10/27/2014	DTaP-Hep B-IPV	SKB	58160-0811-11	58160	Private	12/31/2016	ADJ	1
	<u>Created By:</u> KEVIN FILIPPELLI on 10/27/2014 14:35:40									Adjustment Reason:	Add Initial Inventory
	<u>Updated By:</u> KEVIN FILIPPELLI on 10/27/2014 14:35:40									Comments:	

## Vaccines Added but not Administered “Red Syringe” Report:

The *Vaccines Added but not Administered* report **MUST** be run monthly to ensure all immunizations are fully documented. Incomplete documentation means the lot number has not been selected and the vaccinations will not be statistically counted. The red syringe icon  appears on a patient record when vaccines are not fully recorded. This report should be run weekly for large volume provider offices.

**NEVADA webIZ**

Patient Search

Home

Patients +

Immunizations

Treatments

CRA Quick Add +

Inventory +

Hepatitis B +

Campaigns

**Reports**

Data Quality - User

- Data Quality - Statistics - Scheduled
- Data Quality - Statistics
- Data Quality - Patient Exceptions
- Patients with Possible Duplicate Vaccinations
- Possible Patient Duplicates
- Shots Before Birth
- User Vaccination Details
- Vaccines Added but not Administered**

3. Enter the *Vaccination Date Range* into the “From” and “Through” fields.
4. Click *Run Report*.

**Vaccines Added but not Administered**

Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page. (i)

**Report Selection Criteria**

**Provider**  
SMALL WORLD CLINIC

**Clinic**  
SML WRLD CLINIC

**Clinic County**

**Vaccination Date Range**

From:  ▼ Through:  ▼

Run Report Cancel

Results in this example of a *Vaccines Added but not Administered* report reflect one dose of HBIG where the Nevada WebIZ transaction was not completed. The vaccine entry must be completed or the reconciliation will be off by one dose.

**NEVADA webIZ** **Nevada's Statewide Immunization Information System** November 06, 2014

**Vaccines Added but not Administered**

Provider = SMALL WORLD CLINIC, Clinic = SML WRLD CLINIC, Vaccination Date From = 10/06/2014, Vaccination Date Through = 11/06/2014

Patient	DOB	Vaccination	Dose	Clinic	Date	Age	Created By
CHIPMUNK, SIMON (3118797)	06/24/2011	HBIG	1	12345	11/06/2014	3Y 4M 13D	KEVIN FILIPPELLI

**NOTE:** Vaccines Added but not Administered MUST be addressed before a reconciliation for the same time frame can be balanced and saved.

## How to Correct Vaccines Added but not Administered (“Red Syringes”) for a Reconciliation Period:

1. In the “Reports” section of Nevada WebIZ, under the “Data Quality - User” section, click on the “Vaccines Added but not Administered” report.
2. Select your provider and clinic name in the drop-down menu for “Provider” & “Clinic” fields.
3. Enter the date range for the vaccinations you want to include on the report in the “Vaccination Date Range” fields.
4. Click *Run Report*.

**Note: For Vaccination Date Range, enter the dates of the reconciliation period for which you are reconciling.**

The screenshot shows the Nevada WebIZ application. On the left, a sidebar lists various clinical functions like Patient Search, Home, Patients, Immunizations, Treatments, CRA Quick Add, Inventory, Hepatitis B, Campaigns, and Reports. The Reports section is highlighted with a red box. On the right, a detailed report configuration screen is displayed. It has a header "Data Quality - User" with a sub-menu including "Data Quality - Statistics - Scheduled", "Data Quality - Statistics", "Data Quality - Patient Exceptions", "Patients with Possible Duplicate Vaccinations", "Possible Patient Duplicates", "Shots Before Birth", "User Vaccination Details", and "Vaccines Added but not Administered". The "Vaccines Added but not Administered" option is also highlighted with a red box. Below this is a sub-header "Vaccines Added but not Administered" with a note: "Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page." A "Report Selection Criteria" section contains dropdown menus for Provider (set to "SMALL WORLD CLINIC") and Clinic (set to "SML WRLD CLINIC"). There is also a dropdown for "Clinic County". Under "Vaccination Date Range", the "From" field is set to "10/06/2014" and the "Through" field is set to "11/06/2014". At the bottom right are "Run Report" and "Cancel" buttons, with the "Run Report" button circled in red.

The screenshot shows the results of the "Vaccines Added but not Administered" report. The header reads "Nevada's Statewide Immunization Information System" and "Vaccines Added but not Administered" with a date "November 06, 2014". Below the header, it says "Provider = SMALL WORLD CLINIC, Clinic = SML WRLD CLINIC, Vaccination Date From = 10/06/2014, Vaccination Date Through = 11/06/2014". The main table displays one row of data:  
Patient: CHIPMUNK, SIMON (3118797) | DOB: 06/24/2011 | Vaccination: HBIG | Dose: 1 | Clinic: 12345 | Date: 11/06/2014 | Age: 3Y 4M 13D | Created By: KEVIN FILIPPELLI  
Below the table, three red boxes with arrows point to specific fields: "Patient Name & NV WebIZ #" points to the Patient column; "Vaccine Type" points to the Vaccination column; and "Date Administered" points to the Date column.

Patient	DOB	Vaccination	Dose	Clinic	Date	Age	Created By
CHIPMUNK, SIMON (3118797)	06/24/2011	HBIG	1	12345	11/06/2014	3Y 4M 13D	KEVIN FILIPPELLI

5. In Nevada WebIZ, search and find the patient record.
6. Click *Immunizations*.

**Search Criteria**

Patient ID 3118797	Identifier Type	Identifier Value	
Last Name	First Name	Middle Name	
Birth Info		DOB MM/DD/YYYY	Gender
Mother Last Name		Mother First Name	Mother Middle Name
Mother Maiden Name			
Previous Criteria		Clear	<b>Search</b>

**Search Results - 1 record(s)**

ID	Name	Phone	Insurance	VFC	Gender	DOB
3118797	CHIPMUNK, SIMON 222 MAIN ST LAS VEGAS, NV 89103			1	M	06/24/2011

Demographics   Local IDs   Programs   Allergy / Risks   Notes   Treatments

Events   **Immunizations**   Duplicates

**View CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 6M 30D**

Allergy / Risks ARE specified   Add Vaccines   **Administer Vaccines**   Add History

DOB 06/24/2011	Age 3Y 6M 30D	Reminder Date	History of Varicella?	Date of Varicella MM/DD/YYYY
-------------------	------------------	---------------	-----------------------	---------------------------------

**Vaccine      Dose      Date      Age      Clinic**

DTaP	1	11/07/2014	3Y 4M 14D	12345	Update
IPV	1	11/07/2014	3Y 4M 14D	12345	Update
MMR	1	11/07/2014	3Y 4M 14D	12345	Update
Hib (PRP-T)	1	11/07/2014	3Y 4M 14D	12345	Update
Hep B, ped/adol	1	06/24/2011	0Y 0M 0D	PR	Update
Hep B, ped/adol	2	08/24/2012	1Y 2M 0D	PR	Update
Hep B, ped/adol	3	11/07/2014	3Y 4M 14D	12345	Update
Hep A, ped/adol	1	11/07/2014	3Y 4M 14D	12345	Update
PCV-13 (Prevnar 13)	1	11/07/2014	3Y 4M 14D	12345	Update
Influenza w/preserv.	1	11/07/2014	3Y 4M 14D	12345	Update
HBIG	1	11/06/2014	3Y 4M 13D	12345	Delete

Recommend  Auto Populate Add Vaccines Screen

7. Click *Administer Vaccines*.

8. Select the individual that administered the vaccine from the *Administered By* drop down menu.
9. Select the appropriate vaccine detail from the drop down menu. The lot number administered to the patient MUST be active in your vaccine inventory in order to appear as a choice.

Administer CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 14D

Vaccination Time  
Patient is VFC eligible HH:MM AM/PM (HH:MM A/P)

**Administered By**

Vaccine HBIG TEST-A, USER-A (WEBIZ MANAGER) ▼ Mfg | Lot | Exp Date (MM/DD/YY) | Funding Src | Inv Loc | NDC | Brand  
(I) OTH | HBIG222333 | 12/31/16 | VFC | SWC13 | ▼

Did not Admin  Delete  Body Site Route LD INTRAMUSCULAR 0.5ML Dosage Campaign

VFC:Y

Update Cancel

10. Select the Body Site at which the immunization was administered.

11. Click *Update*.

Administer CHIPMUNK, SIMON (3118797) DOB: 06/24/2011 AGE: 3Y 4M 14D

Vaccination Time  
Patient is VFC eligible HH:MM AM/PM (HH:MM A/P)

**Administered By**

Vaccine HBIG TEST-A, USER-A (WEBIZ MANAGER) ▼ Mfg | Lot | Exp Date (MM/DD/YY) | Funding Src | Inv Loc | NDC | Brand  
(I) OTH | HBIG222333 | 12/31/16 | VFC | SWC13 | ▼

Did not Admin  Delete  **Body Site Route** LD INTRAMUSCULAR 0.5ML Dosage Campaign

VFC:Y

**Update** Cancel

**NOTE: If the vaccine list is blank when you get to the administer screen, a Red Syringe will be created on a patient record because the vaccine inventory has not been entered into the On-Hand inventory FIRST (prior to administering vaccines). Ensure all vaccine shipments are entered into Nevada WebIZ immediately!**

# Vaccine Inventory Reconciliation:

The goal of reconciliation is to balance physical vaccine inventory for each location with the virtual vaccine inventory recorded in Nevada WebIZ. This section will describe the vaccine inventory reconciliation process.

## For publicly funded vaccines (VFC, 317, state-funded)

Before you can place an order for publicly funded vaccine for your clinic, you must close a balanced reconciliation for the month prior to your order. For example, if you want to place an order in March, you must close a balanced reconciliation for the first through the last day of the month for February. This reconciliation needs to include all vaccines in your inventory, regardless of funding source.

The Immunization Program will review your reconciliation in WebIZ before processing your order for publicly funded vaccine. You do not need to print and submit the reconciliation.

The closed reconciliation will also be used by the program to identify doses administered by VFC eligibility, so do not submit a paper report or form.

**HL7 Users:** Providers using HL7 data transfer DO need to complete VFC Form 3: *Eligibility Report of Doses Administered* (since funding source data does not transmit via HL7, the program cannot verify doses administered by VFC eligibility by viewing your reconciliation).

1. Select *Inventory*, then *Vaccines*, then *Reconciliation* from the Nevada WebIZ menu.
2. Click *Add Reconciliation*.

The screenshot shows the Nevada WebIZ interface. On the left, there's a vertical sidebar with links: Home, Patients, Immunizations, Treatments, CRA Quick Add, Inventory (with three red arrows pointing to it), Vaccines, On-Hand, and Reconciliation (which is highlighted with a red box). The main area is titled 'Vaccine Inventory Reconciliation'. It has a message: 'Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record.' Below this is a 'Search Criteria' section with fields for 'Inventory Location Status' (set to '(ALL)'), 'Begin Date Range' (From: MM/DD/YYYY, Through: MM/DD/YYYY), 'End Date Range' (From: MM/DD/YYYY, Through: MM/DD/YYYY), 'Sort by' (Audit Date (descending) selected), and buttons for 'Previous Criteria', 'Clear', and 'Search'. In the top right corner of the search criteria panel, there's a button labeled 'Add Reconciliation' with a small blue circle containing the number '1' next to it. A red arrow points from the 'Reconciliation' link in the sidebar to this 'Add Reconciliation' button.

3. Select the *Inventory Location* from the drop down menu. Upon selecting the Inventory Location for which you are reconciling, the *Begin Date* automatically populates based on the end date of the previous reconciliation. If this is the first reconciliation for the location, enter 01-01-2000 for the *Begin Date*. Following the initial Begin date, date range is recommended from the 1<sup>st</sup> of the month through the last day of the month.
4. Enter a *Description*.
5. Enter an *End Date*.
6. The *Status* remains “Open” and “Authorized By” will be filled-in upon completion of the reconciliation.
7. Click *Create*.

**Add**

Inventory Location	
SMALL WORLD CLINIC INV	▼
Description	Begin Date
OCTOBER 2014	10/01/2014 <input type="button" value="▼"/>
Status	End Date
OPEN	10/31/2014 <input type="button" value="▼"/>
Authorized By	
<input type="button" value="▼"/>	
<input type="button" value="Create"/> <input type="button" value="Cancel"/>	

## **HL7 Users: How to enter aggregate doses administered**

Providers who use HL7 to transfer data from their own Electronic Medical Records systems to WebIZ will enter their doses administered for each vaccine at this step.

### **Instructions:**

1. Refer to your EMR to determine the number of doses administered for each vaccine (preferably using a report).
2. In the **Aggregate Administered** column in WebIZ, enter the total number of doses administered during the reconciliation period for each vaccine. Enter these as a NEGATIVE number.
3. When you have entered doses administered for all vaccines, click **Update**.
4. You are now ready to print your report from WebIZ and complete your reconciliation. Continue with the instructions in this section.

Line No.	Vaccine (Brand) Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Aggregate Administered	Inventory Transferred	Inventory Returned/Expired/Recalled	Inventory Wasted	Inventory Unaccounted	Inventory Difference (+/-)	Ending Inventory	Inquiry	On-Hand
317	Hep A-Hep B (Twinrix (1 mL SDV x 10 vials)) SKB 58160-0815-11 925P2 03/22/2016	85	0	-24	0	0	0	0	-85	0		
2	Hep A-Hep B (Twinrix (1 mL SD syr x 10 syr)) SKB 58160-0815-52 797K7 04/29/2017	40	0	-32	0	0	0	0	-40	0		
3	HPV (Gardasil) (Gardasil (0.5 mL SDV x 10 vials)) MSD 00006-4045-41 J015378 04/09/2016	108	0	-56	0	0	0	0	-108	0		

**Edit**

**Inventory Location**

SMALL WORLD CLINIC INV	<b>Print</b>	
<b>Description</b>	<b>Begin Date</b>	<b>End Date</b>
OCTOBER 2014	10/01/2014	10/31/2014
<b>Status</b>	Authorized By	
CLOSED	SNVDATA4	SNVDATA4

**Inventory By Doses**

Line No.	Vaccine (Brand) Mfg NDC Lot Exp Date	Inventory Expired										On-Hand
		Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Inquiry	
<b>Private</b>												
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials)) SKB 58160-0811-11 58160 12/31/2016	0	1	-1	0	0	0	0	0	0		
<b>VFC</b>												
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial)) SKB 58160-0811-01 58160 12/31/2016	0	15	-1	0	0	0	0	0	14		
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr)) SKB 58160-0811-41 123456789 12/31/2016	0	12	-1	0	0	0	-1	0	10		

8. Click *Print* and print the vaccine inventory reconciliation worksheet.

## Vaccine Inventory Worksheet Column Descriptions:

Sample Worksheet

Inventory By Doses											Sample Worksheet	
Line No.	Vaccine (Brand) Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Inquiry	On-Hand
<b>Private</b>												
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial)) SKB 58160-0811-01 58160 12/31/2016	0	15	0	0	0	0	0	-15	0		
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials)) SKB 58160-0811-11 58160 12/31/2016	0	1	0	0	0	0	0	-1	0		
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr)) SKB 58160-0811-41 123456789 12/31/2016	0	12	0	0	0	0	0	-12	0		

This column...

Tells you this...

### Beginning Inventory

Number of doses in Nevada WebIZ on-hand as of the closing of the last reconciliation (In the first reconciliation, this column will show all zeros)

### Inventory Received

Number of doses received (added to on-hand) during the reconciliation period

### Inventory Administered

Number of doses administered to patients (and documented in Nevada WebIZ) during the reconciliation period. This column also includes doses adjusted out with the reason code of "Opted Out Vaccinations" to account for doses given to patients that opted out of participation in the IIS

*OR*

### Aggregate Administered (for HL7 providers)

Number of doses administered (entered by provider office; based on doses administered from provider's EMR)

### Inventory Transferred

Number of doses transferred in and out during the reconciliation period

### Inventory Recalled

Number of doses adjusted out due to a recall during the reconciliation period

### Inventory Expired or Wasted

Number of doses expired or wasted during the reconciliation period (Includes doses adjusted with a reason of "other")

### Inventory Unaccounted

Adjustments made to inventory for reason of "Reconciliation"

### Inventory Delta +/-

The difference between the remaining quantity of doses physically on-hand (Ending inventory) and the quantity of doses Nevada WebIZ indicates should remain

### Ending Inventory

Quantity of doses physically on-hand as of the End Date (must be entered by user). Before reconciling, the Ending Inventory column displays zeros, since this is where physical (refrigerator) counts of vaccine doses are entered

9. Use the worksheet and count physical vaccine inventory in the refrigerator, documenting the following detail for every lot regardless of funding source:
- Funding Source (Private, VFC, etc.)
  - Type of vaccine (DTaP, IPV, MMR, etc.)
  - Manufacturer
  - NDC Number
  - Lot Number
  - Expiration Date
  - Number of doses in refrigerator

**Note: Always count the number of vaccine doses – NOT number of vials!**

10. Type the actual number of vaccine doses in your refrigerator into the *Ending Inventory* column on the Nevada WebIZ worksheet. Be sure to click *Update* periodically and save your entries to prevent the screen from timing out.

**Note: Physical count of vaccine doses on-hand (in the refrigerator) MUST be completed at the END of the day on the End date (generally, the last day of the month for which you are reconciling). All vaccinations administered during the reconciliation period MUST be entered prior to attempting to balance.**

Line No.	Vaccine (Brand Name)	Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	On-Inquiry	On-Hand	
<b>Private</b>														
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))	SKB 58160-0811-01 58160 12/31/2016	0	15	0	0	0	0	0	-15	0			
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials))	SKB 58160-0811-11 58160 12/31/2016	0	1	0	0	0	0	0	-1	0			
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syrx 1 syr))	SKB 58160-0811-41 123456789 12/31/2016	0	12	0	0	0	0	0	-12	0			

11. Click *Update* once all ending inventory counts have been entered.

**Edit**

Inventory Location		Print
SMALL WORLD CLINIC INV		
Description	Begin Date	End Date
OCTOBER 2014	10/01/2014	10/31/2014
Status	Authorized By	
OPEN		
The record has been saved successfully.		
	Delete	

- A “0” value in the *Inventory Delta +/-* column indicates balanced inventory.
- Discrepancies will appear in the *Inventory Delta +/-* column.

Inventory By Doses													
Line No.	Vaccine (Brand) Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Inquiry	On-Hand	
<b>Private</b>													
1	DTaP-Hep B-IPV ( <i>Pediarix (0.5 mL SDV x 1 vial)</i> ) SKB 58160-0811-01 58160 12/31/2016	0	15	0	0	0	0	0	1	16			
2	DTaP-Hep B-IPV ( <i>Pediarix (0.5 mL SDV x 10 vials)</i> ) SKB 58160-0811-11 58160 12/31/2016	0	1	0	0	0	0	0	0	1			
3	DTaP-Hep B-IPV ( <i>Pediarix (0.5 mL SD syr x 1 syr)</i> ) SKB 58160-0811-41 123456789 12/31/2016	0	12	0	0	0	0	0	-1	11			

- All discrepancies **MUST** be corrected before reconciliation is closed and before VFC reports are submitted.

## Tips for Researching Discrepancies:

1. First, recount physical vaccine inventory for accuracy.
2. Determine whether there were any immunizations administered, but not yet entered into Nevada WebIZ. HL7 users, check that you've entered the correct number of doses from your EMR into the **Aggregate Administered** column (and that the number is correct in your EMR). Enter doses administered corrections as needed.
3. Determine whether all received vaccine inventory was entered into Nevada WebIZ.
4. Determine whether all vaccine doses were administered by running the Red Syringe report, see pages 17-18 of this guide to run the report and pages 19-21 to correct them.
5. Ensure all Pending Incoming Inventory Transfers are marked “Received,” and with the appropriate date.
6. Ensure all expired and wasted vaccine doses were removed from Nevada WebIZ’s on-hand via an adjustment (or for publicly funded vaccines, as appropriate, a return).
7. Run an inventory *Inquiry* and review all transactions for the lot number.
8. If necessary, use the inventory *Adjustment* section to increase or decrease vaccine doses as appropriate selecting *Reconciliation* as the reason for adjustment.

## Reconciliation Discrepancies

During reconciliation there may be discrepancies between the number of vaccine doses in Nevada WebIZ and the actual vaccine count in the refrigerator. This section will describe how to increase or decrease vaccine doses as appropriate.

**Note: Performing the following steps are only necessary after reviewing and completing discrepancy research described on the following page.**

# How to Research Discrepancies Having a Negative Number in the Inventory Delta +/- Column:

When an ending inventory number (refrigerator count) is less than what Nevada WebIZ says you should have, the inventory delta +/- on the inventory reconciliation worksheet will reflect a negative number.

In the marked example below:

- Beginning Inventory during the reconciliation period in Nevada WebIZ is zero (0), however, twelve (12) doses were received during the reconciliation period.
- One (1) vaccine dose was administered (Inventory Administered). Eleven (11) doses should remain.
- Ten (10) doses were counted in the refrigerator and entered in the Ending Inventory field.
- Therefore, -1 remains in the Inventory Delta +/- column.

Inventory By Doses												Inquiry	On-Hand	
Line No.	Vaccine (Brand Name)	Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Inquiry	On-Hand	
<b>Private</b>														
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))	SKB 58160-0811-01 58160 12/31/2016	0	15	-1	0	0	0	0	1	15			
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials))	SKB 58160-0811-11 58160 12/31/2016	0	1	-1	0	0	0	0	0	0			
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr))	SKB 58160-0811-41 23456789 12/31/2016	0	12	-1	0	0	0	0	-1	10			

Following steps 1-7 indicated on pages 16-17 of this guide, an inventory inquiry can be generated to determine if a second vaccination may have been documented with an incorrect date outside of the reconciliation date range.

**NEVADA webIZ**

Nevada's Statewide Immunization Information System  
Inventory Transaction Inquiry

November 07, 2014

Provider = SMALL WORLD CLINIC, Inventory Location = SMALL WORLD CLINIC INV, Vaccine = DTaP-Hep B-IPV, Funding Source = Private, Manufacturer = GlaxoSmithKline, Lot = 58160, From Trans Date = 10/01/2014, Through Trans Date = 10/31/2014

Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg	NDC	Lot No	Fund Src	Exp Date	Type	Doses
2413642	SMALL WORLD CLINIC INV		10/20/2014	DTaP-Hep B-IPV	SKB	58160-0811-01	58160	Private	12/31/2016	VAC	(1)

Created By: KEVIN FILIPPELLI on 11/07/2014 10:56:06  
Updated By: KEVIN FILIPPELLI on 11/07/2014 10:57:58

Comments: Created from update on vaccination of Patient PETER PUMPKIN-EATER (3119047) on 10/20/2014

In the previous example, Nevada WebIZ thinks there should be eleven (11) doses of DTaP-Hep B-IPV vaccine in the refrigerator since there were twelve (12) doses received one (1) dose was administered to Peter Pumpkin-Eater on 10/20/2014 during the October reconciliation period. In this example, we assume the clinic did not discover another vaccination to record. To balance a reconciliation, a one dose (-1) adjustment is needed. Probable causes are the following:

- A vaccination was not appropriately administered on a patient record in Nevada WebIZ.
- A dose of vaccine was wasted and not reported for adjustment in Nevada WebIZ.

## How to Create a Vaccine Inventory Adjustment to Balance a Reconciliation-Decrease:

- From the *Vaccine Inventory On-Hand* screen, sort vaccine and show only the vaccine type you want to adjust.

The screenshot shows the 'Vaccine Inventory On-Hand' page. On the left, there's a navigation menu with links like 'Patient Search', 'Home', 'Patients', 'Immunizations', 'Treatments', 'CRA Quick Add', 'Inventory', 'Vaccines', and 'On-Hand'. The 'On-Hand' link is highlighted with a red box. On the right, there's a search bar with placeholder text 'This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item.' Below the search bar are buttons for 'Add New Inventory' and a help icon. Underneath, there are sections for 'Pending Inventory Transfers' and 'Pending VTrckS Shipments'. The main area is titled 'On-Hand Inventory'. It has filters for 'Inventory Location' (set to '(ALL)'), 'Status' (set to 'ON-HAND'), 'Funding Source' (set to '(ALL)'), and 'Vaccine' (set to 'DTAP-HEP B-IPV'). These last three filters are also highlighted with a red box. At the bottom of this section are buttons for 'Edit', 'Adjustment', 'Transfer', and 'Inquiry'.

- Select the vaccine inventory you want to adjust.
- Click *Adjustment*.

The screenshot shows the 'On-Hand Inventory' screen after selecting the 'Adjustment' button. The 'Adjustment' button is highlighted with a red circle. The table below lists vaccines with columns for 'Vaccine (Brand)', 'Mfg', 'NDC', 'Lot No', 'Exp Date', 'Funding Source', and 'Doses On-Hand'. There are two entries for 'DTaP-Hep B-IPV':  
1. DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))  
2. DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr))  
The second entry is highlighted with a red box. At the bottom are buttons for 'Edit', 'Adjustment', 'Transfer', and 'Inquiry'.

Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand
SMALL WORLD CLINIC INV						
DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))						
DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr))						

4. Enter the *Date*.
5. Select the *Reason as Reconciliation*.

**Note: The Adjustment date MUST be within the reconciliation period!**

Add

	<input type="button" value="Create"/>	<input type="button" value="Cancel"/>
Date	<input type="text" value="10/31/2014"/> <input type="button" value="Calendar"/>	
Inventory Location	SMALL WORLD CLINIC INV	
Vaccine   Mfg   NDC	DTAP-HEP B-IPV   SKB   58160-0811-41	
Lot Number	<input type="text" value="123456789"/>	
Expiration Date	<input type="text" value="12/31/2016"/> <input type="button" value="Calendar"/>	
Funding Source	<input type="text" value="PRIVATE"/>	
Doses On-Hand	<input type="text" value="11"/>	
Reason	<input type="button" value="▼"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <small>✓ EXPIRED WASTED MIS-HANDED BROKE VIAL EXTRA OTHER <b>RECONCILIATION</b> OPTED OUT VACCINATIONS RECALL VTRCKS - BROKEN VIAL/SYRINGE VTRCKS - LOST OR UNACCOUNTED FOR VACCINE VTRCKS - NON VACCINE PRODUCT (E.G. IG, HBIG, DIL) VTRCKS - OPEN VIAL BUT ALL DOSES NOT ADMINISTERED VTRCKS - OTHER VTRCKS - VACCINE DRAWN INTO SYRINGE BUT NOT ADMIN</small> </div>	
Doses Adjusted	<input type="text" value=""/>	
Container Id	<input type="text"/>	
Comments	<input type="text" value=""/>	
	<input type="button" value="Clear"/>	<input type="button" value="Create"/>
	<input type="button" value="Create"/>	<input type="button" value="Cancel"/>

6. Enter the number of doses adjusted in the *Doses Adjusted* field.
7. Enter the reason for adjustment in the *Comments* field.
8. Click *Create*.

**NOTE: Be certain to enter the adjustment reason in the *Comments* field and clearly document why an adjustment was made.**

Doses Adjusted	<input type="text" value="-1"/>	(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)
Container Id	<input type="text"/>	
Comments	<input type="text" value="OCTOBER 2014 RECONCILIATION"/>	
	<input type="button" value="Clear"/>	<input type="button" value="Create"/>
	<input type="button" value="Create"/>	<input type="button" value="Cancel"/>

**Remember! Entering a positive number increases the inventory quantity.  
Entering a negative number decreases the inventory quantity.**

# How to Research Discrepancies Having a Positive Number in the Inventory

## Delta +/- Column:

When an ending inventory number is more than what Nevada WebIZ says you should have, the inventory delta +/- on the inventory reconciliation worksheet will reflect a positive number.

In the marked example below:

- Beginning Inventory during the reconciliation period in Nevada WebIZ is zero (0).
- Fifteen (15) doses of vaccine were received during the reconciliation period (Inventory Received).
- One vaccine dose was administered (Inventory Administered). Fourteen (14) doses remain in Nevada WebIZ.
- Fifteen doses were counted in the refrigerator and entered in the Ending Inventory field.
- Therefore, +1 remains in the Inventory Delta +/- column.

Inventory By Doses											
Line No.	Vaccine (Brand)	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	On-Hand Inquiry
<b>Private</b>											
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial)) SKB 58160-0811-01 58160 12/31/2016	0	15	-1	0	0	0	0	1	15	
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials)) SKB 58160-0811-11 58160 12/31/2016	0	1	-1	0	0	0	0	0	0	
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr)) SKB 58160-0811-41 123456789 12/31/2016	0	12	-1	0	0	0	0	-1	10	

Following steps 1-7 indicated on pages 16-17 of this guide, an inventory inquiry is generated to determine whether the initial on-hand count was entered accurately and/or whether a vaccination was documented for a patient when it was not actually administered.



Nevada's Statewide Immunization Information System  
Inventory Transaction Inquiry

November 07, 2014

Provider = SMALL WORLD CLINIC, Inventory Location = SMALL WORLD CLINIC INV, Vaccine = DTaP-Hep B-IPV, Funding Source = Private, Manufacturer = GlaxoSmithKline, Lot = 58160, From Trans Date = 10/01/2014, Through Trans Date = 10/31/2014

Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg	NDC	Lot No	Fund Src	Exp Date	Type	Doses
2413643	SMALL WORLD CLINIC INV		10/21/2014	DTaP-Hep B-IPV	SKB	58160-0811-11	58160	Private	12/31/2016	VAC	(1)
	Created By: KEVIN FILIPPELLI on 11/07/2014 0:59:40	Comments: Created from update on vaccination of Patient TOM TURKEY (3119048) on 10/21/2014	Updated By: KEVIN FILIPPELLI on 11/07/2014 10:59:59								

**NOTE: Look closely at the transaction dates for a single transaction.  
Many times a discrepancy occurs when a transaction is updated  
after a previous reconciliation was closed.**

In the previous example, Nevada WebIZ thinks there should be fourteen (14) doses DTaP-Hep B-IPV vaccine in the refrigerator since there were fifteen (15) doses added one (1) dose was administered to Tom Turkey on 10/21/14 during the October reconciliation period. To balance the reconciliation, a one dose (+1) adjustment is needed. Probable causes are the following:

- A vaccination was not administered on a patient record in Nevada WebIZ with the correct date.
- A dose of vaccine was previously adjusted in Nevada WebIZ with an incorrect transaction date.

## **How to Create a Vaccine Inventory Adjustment to Balance a Reconciliation-Increase:**

1. From the *Vaccine Inventory On-Hand* screen, sort vaccine and show only the vaccine type you want to adjust.

**Vaccine Inventory On-Hand**

This is a list of the vaccine inventory currently on-hand. Select an inventory item below and click "Edit", "Adjustment", "Transfer", or "Inquiry" buttons to manage the selected item. Select "Add New Inventory" to add new inventory.

Add New Inventory ?

Pending Inventory Transfers  
Pending VTrckS Shipments

**On-Hand Inventory**

Inventory Location	Status
(ALL)	ON-HAND
Vaccine	Funding Source
DTAP-HEP B-IPV	(ALL)

Edit    Adjustment    Transfer    Inquiry

2. Select the vaccine inventory you want to adjust.
3. Click *Adjustment*.

**On-Hand Inventory**

**Inventory Location** (ALL) **Status** ON-HAND

**Vaccine** DTAP-HEP B-IPV **Funding Source** (ALL)

Edit    **Adjustment**    Transfer    Inquiry

Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand
<b>SMALL WORLD CLINIC INV</b>						
DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))	SKB	58160-0811-01	58160	12/31/2016	Private	11 <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px;">?</span>

4. Enter the Date.
5. Select the Reason as Reconciliation.

**Note: Adjustment date MUST be within the reconciliation period!**

Add

	<input type="button" value="Create"/>	<input type="button" value="Cancel"/>
Date	<input type="text" value="10/31/2014"/> <input type="button" value="Calendar"/>	
Inventory Location	SMALL WORLD CLINIC INV	
Vaccine   Mfg   NDC	DTAP-HEP B-IPV   SKB   58160-0811-01	
Lot Number	58160	
Expiration Date	<input type="text" value="12/31/2016"/> <input type="button" value="Calendar"/>	
Funding Source	PRIVATE	
Doses On-Hand	11	
Reason	<input style="width: 150px; height: 25px; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="RECONCILIATION"/> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9; width: 150px; height: 150px; display: inline-block; vertical-align: top;"> <small>✓</small> EXPIRED  <small>WASTED</small>  <small>MIS-HANDED</small>  <small>BROKE VIAL</small>  <small>EXTRA</small>  <small>OTHER</small>  <b>RECONCILIATION</b>  <small>OPTED OUT VACCINATIONS</small>  <small>RECALL</small>  <small>VTRCKS - BROKEN VIAL/SYRINGE</small>  <small>VTRCKS - LOST OR UNACCOUNTED FOR VACCINE</small>  <small>VTRCKS - NON VACCINE PRODUCT (E.G. IG, HBIG, DIL)</small>  <small>VTRCKS - OPEN VIAL BUT ALL DOSES NOT ADMINISTERED</small>  <small>VTRCKS - OTHER</small>  <small>VTRCKS - VACCINE DRAWN INTO SYRINGE BUT NOT ADMIN</small> </div>	
Doses Adjusted	<input type="text" value="1"/> <small>(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)</small>	
Container Id	<input type="text"/>	
Comments	<input type="text" value="RECONCILIATION"/>	
	<input type="button" value="Clear"/>	<input type="button" value="Create"/>
	<input type="button" value="Create"/>	<input type="button" value="Cancel"/>

6. Enter the number of doses adjusted in the *Doses Adjusted* field.
7. Enter the reason for adjustment in the *Comments* field.
8. Click *Create*.

Reason	<input style="width: 150px; height: 25px; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="button" value="RECONCILIATION"/>
Doses Adjusted	<input type="text" value="1"/> <small>(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)</small>
Container Id	<input type="text"/>
Comments	<input type="text" value="OCTOBER 2014 RECONCILIATION"/>
	<input type="button" value="Clear"/>
	<input type="button" value="Create"/>
	<input type="button" value="Cancel"/>

**Remember! Entering a positive number increases the inventory dosage. Entering a negative number decreases the inventory dosage.**

# Reviewing the Reconciliation After Adjustments

Now that discrepancies have been researched and corrected in Nevada WebIZ, it is time to review the reconciliation and verify inventory is balanced.

1. Select *Reconciliation* on the menu.
2. Select the *Inventory Location* from the drop down menu.
3. Click *Search*.

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

Vaccine Inventory Reconciliation

Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record. [Add Reconciliation](#)

Search Criteria

Inventory Location	Inventory Location Status	Reconciliation Status
(ALL)	(ALL)	(ALL)
(ALL)	(ALL)	(ALL)
SMALL WORLD CLINIC INV	Range	Range

From: MM/DD/YYYY Through: MM/DD/YYYY From: MM/DD/YYYY Through: MM/DD/YYYY

Sort by

Audit Date (descending)  Inventory Location, Begin Date (descending)

[Previous Criteria](#) [Clear](#) [Search](#)

4. Click *View* to review the worksheet for the period you are reconciling.

Search Results - 1 record(s)

Status	Description	Begin Date	End Date	Authorized By	Inv Summary
Open	OCTOBER 2014	10/01/2014	10/31/2014		<a href="#">View</a>

5. Inventory should now be balanced on the reconciliation worksheet screen reflecting all zeros in the *Inventory Delta +/-* column. If inventory is not in balance, additional research and corrections are needed.

Inventory By Doses

Line	Vaccine (Brand) No. Mfg NDC Lot Exp Date	Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Ending Inquiry	On- Hand
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial)) SKB 58160-0811-01 58160 12/31/2016	0	15	-1	0	0	0	0	0	14	<a href="#">View</a>	<a href="#">Print</a>
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vials)) SKB 58160-0811-11 58160 12/31/2016	0	1	-1	0	0	0	0	0	0	<a href="#">View</a>	<a href="#">Print</a>
3	DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr)) SKB 58160-0811-41 123456789 12/31/2016	0	12	-1	0	0	0	-1	0	10	<a href="#">View</a>	<a href="#">Print</a>

**Note:** Attempting to close a reconciliation that is not in balance allows Nevada WebIZ to make adjustments to correct the discrepancies. Some discrepancies cannot be corrected this way. You are advised to correct them yourself, if able. You may also contact the Helpdesk for assistance.

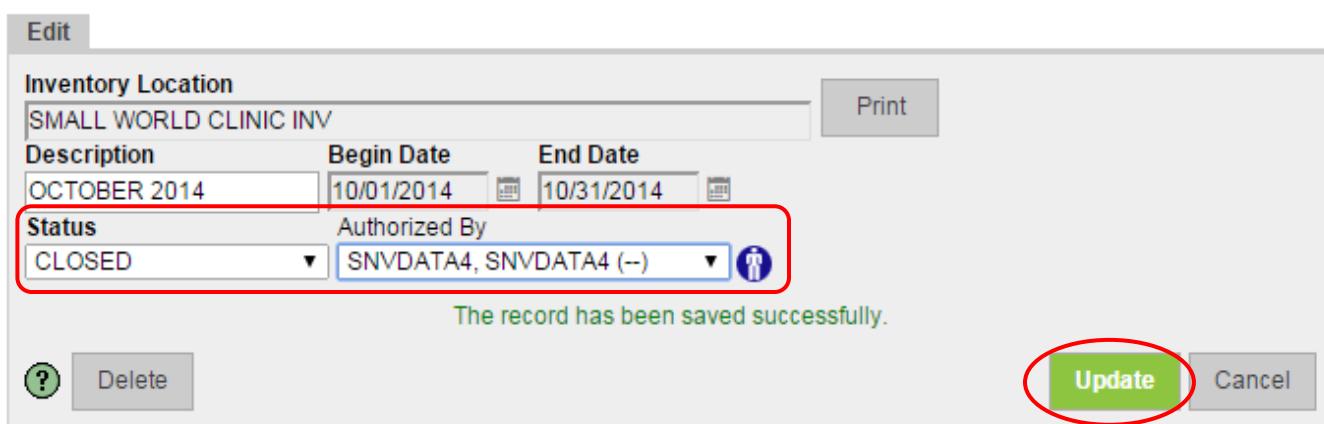
## **Tips For More Successful Reconciliations:**

- Physical count of vaccine doses on-hand (in the refrigerator) MUST be completed at the END of the day on the End date (generally, the last day of the month for which you are reconciling).
- Reconciliations should NOT be closed and cannot become properly balanced until AFTER all immunizations for the period have been entered into WebIZ .
- When entering adjustments or other transactions to correct discrepancies, the date on the entry MUST be within the Beginning and End dates of the reconciliation period.
- Ensure all Pending Incoming Inventory Transfers are marked received.
- Ensure all depleted/expired vaccines are adjusted to 0 doses.
- Ensure all “Vaccines Added but not Administered” (red syringe) icons are corrected for the period in which you are reconciling.
- Complete and accurate data entry is KEY!!!
  - Good data entry makes reconciliation easy and efficient.
  - Poor data entry makes reconciliation difficult and time consuming.

## **Closing a Balanced Reconciliation:**

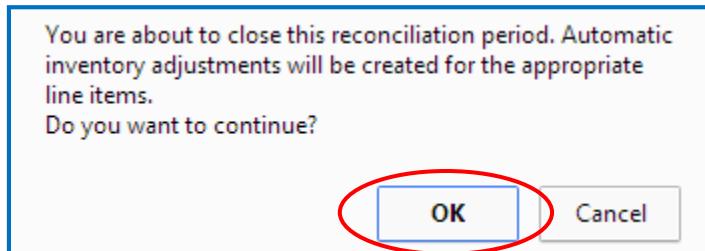
Once the inventory reconciliation is balanced with all zeros in the *Inventory Delta +/-* column, it's time to *Close* the reconciliation period.

1. Select *Closed* in the Status drop down field.
2. Select the person responsible for the reconciliation in the *Authorized By* field one of two ways:
  - Select the person's name from the drop down menu right of the *Authorized By* field **or**
  - To enter your name in the *Authorized By* field, select the figure  to the right of the field.
3. Click Update.

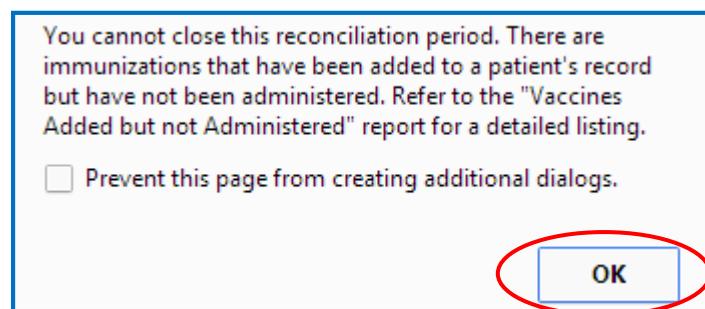


The screenshot shows the 'Edit' screen for a reconciliation record. At the top, there is a 'Print' button. Below it, the 'Inventory Location' is set to 'SMALL WORLD CLINIC INV'. The 'Description' field contains 'OCTOBER 2014', and the 'Begin Date' and 'End Date' fields show '10/01/2014' and '10/31/2014' respectively. The 'Status' dropdown is set to 'CLOSED', and the 'Authorized By' dropdown contains 'SNVDATA4, SNVDATA4 (-)' followed by a user icon. A red box highlights this 'Authorized By' field. Below the form, a message says 'The record has been saved successfully.' At the bottom, there are 'Delete', 'Update' (which is circled in red), and 'Cancel' buttons.

4. A message box will generate stating, **You are about to close this reconciliation period. Automatic inventory adjustments will be created for the appropriate line items. Do you want to continue?**
5. Click OK.



6. If there are vaccines not properly administered during the reconciliation period, a message box generates stating, **You cannot close this reconciliation period. There are immunizations that have been added to a patient's record but have not been administered. Refer to the "Vaccines Added but not Administered" report for a detailed listing.**

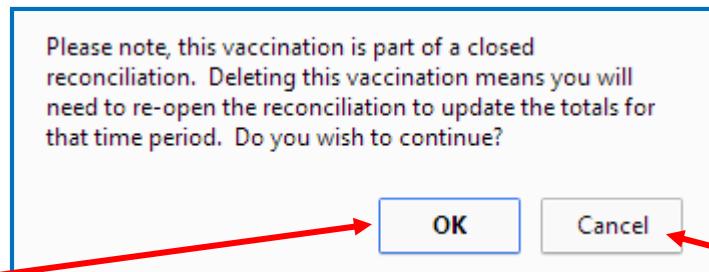


7. Refer to Pages 17-21 of this guide for instructions to extract the **"Vaccines Added but not Administered"** report and correct all vaccines added but not administered on patient records.

**NOTE: Contact the Nevada WebIZ Help Desk for assistance as needed**

## Warning Message (when deleting a vaccination):

Attempting to delete recorded vaccinations affecting a closed reconciliation will generate a message that states, **“Please note, this vaccination is part of a closed reconciliation. Deleting this vaccination means you will need to re-open the reconciliation to update the totals for the time period. Do you wish to continue?”** Deleting the vaccination will add the dose of vaccine back into your inventory, affecting the previously closed reconciliation.



Click *OK* to complete the transaction and add the vaccine dose back into inventory OR click *Cancel* to cancel the transaction.

**NOTE: You MUST contact the Nevada WebIZ Helpdesk to re-open a previously closed reconciliation.**

## Printing the Vaccine Inventory Reconciliation Worksheet

Even though you do not need to submit Vaccine Inventory Reconciliation Worksheets to the Immunization Program, you may wish to print them for other reasons. You can print worksheets for current or past reconciliations.

1. Select *Reconciliation* on the menu.
2. Select the *Inventory Location* from the drop down menu.
3. Click *Search*.

PROVIDER: SMALL WORLD CLINIC, CLINIC: SML WRLD CLINIC

Vaccine Inventory Reconciliation

Click "View" to see the details of an existing record, "Add Reconciliation" to create a new record.

Add Reconciliation 1

Inventory Location

(ALL)

(ALL)

SMALL WORLD CLINIC INV

From: MM/DD/YYYY Through: MM/DD/YYYY From: MM/DD/YYYY Through: MM/DD/YYYY

Inventory Location Status

(ALL)

Reconciliation Status

(ALL)

Sort by

Audit Date (descending) Inventory Location, Begin Date (descending)

Previous Criteria Clear Search

4. From the Search Results, click *View*.

Search Results - 1 record(s)						
Status	Description	Begin Date	End Date	Authorized By	Inv	Summary
<b>SMALL WORLD CLINIC INV</b>						
Open	OCTOBER 2014	10/01/2014	10/31/2014			<b>View</b>

5. From the Vaccine Inventory Reconciliation screen click "*Print*" to print the report.

Edit

Inventory Location		Print
SMALL WORLD CLINIC INV		
Description	Begin Date	End Date
OCTOBER 2014	10/01/2014	10/31/2014
Status	Authorized By	
CLOSED	SNVDATA4 SNVDATA4	
	Delete	Update  Cancel

## Other Reports

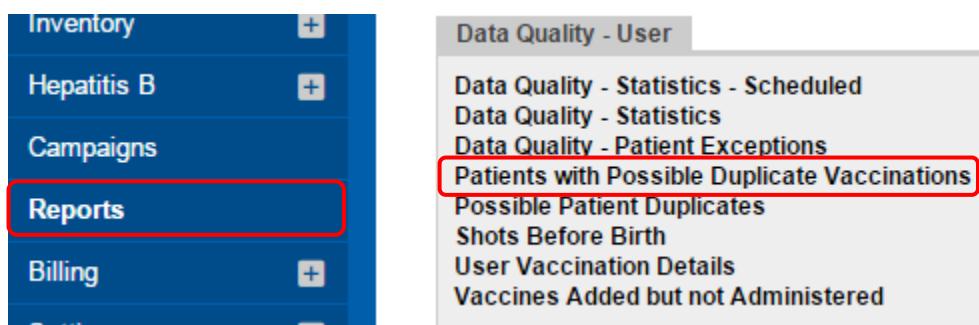
This section explains how to extract certain reports before each reconciliation to ensure all immunization entries are completed.

### Patients with Possible Duplicate Vaccinations Report:

The Patients with Possible Duplicate Vaccinations report finds patients that may have duplicate vaccines documented within a selected number (7-10) of days. Two examples of when this could occur:

- Data entry error: one user enters a DTaP-HepB-IPV combination dose and another user enters the event as **separate individual** doses of DTaP-HepB and IPV.
- Duplicate patient records were combined and not reviewed for clean up afterwards. For example, one record may show the DTaP-HepB-IPV dose and the other shows the individual doses of DTaP, HepB-IPV separately as in the above explanation.

1. Click *Reports* from the Nevada WebIZ menu.
2. Under the Data Quality – User reports section, select "*Patients with Possible Duplicate Vaccinations*."



3. Click "Run Report."

Number Of Days (Plus Or Minus) From Vaccination Date To Detect Possible Duplicate  
7

Vaccine Series

- DTAP/TD/TDAP
- POLIO
- MMR/MEASLES
- HIB
- HEPB
- HEPA
- PNEUMOCOCCAL
- ROTA
- VARICELLA(CPOX)
- INFLUENZA

Note: hold the Ctrl key to select multiple items.

Always use a value of 7-10 days for this report.

## Correcting Patients with Possible Duplicate Vaccinations:

1. First check the patient record and verify the vaccines were actually administered to the patient.
2. Delete and enter the appropriate vaccines into Nevada WebIZ only once on the patient's record.

**Remember: When a combination vaccine is administered on a patient record in Nevada WebIZ, enter the combination vaccine on the patient record ONLY ONCE!**

NEVADA webIZ

Nevada's Statewide Immunization Information System  
Patients with Possible Duplicate Vaccinations

November 07, 2014

\*This query can take >5 minutes.

Run Report Cancel

**NOTE: Deleting previously administered vaccines may affect previously closed reconciliations and will generate a warning message; refer to page 38 of this guide.**

## Inventory Management Reports:

The Inventory Management reports section is designed specifically for Type 3 clinics. Type 3 clinics manage the quantity of vaccine inventory in Nevada WebIZ. Inventory reports can assist with successful completion of monthly reconciliations.

**Inventory Management - Vaccine**

- [Daily Vaccinations Report](#)
- [Inventory Adjustment Inquiry](#)
- [Inventory On-Hand](#)
- [Inventory Pending Transfers](#)
- [Inventory Summary By Funding Source](#)
- [Inventory Transaction Inquiry](#)
- [Inventory Transfer Inquiry](#)
- [Possible Duplicate Inventory Report](#)
- [Unaccounted For Doses](#)

- **Daily Vaccinations Report:** Summary of vaccines administered per clinic, inventory location, vaccine type, funding source, and number of doses.
- **Inventory Adjustment Inquiry:** Displays the date, reason for adjustment, vaccine details and number of vaccine doses that were adjusted for the clinic during a specified period.
- **Inventory On-Hand:** Displays a detailed list of vaccine currently on-hand for the clinic by inventory location.
- **Inventory Pending Transfers:** Displays any pending transfers for a specified period.
- **Inventory Summary By Funding Source:** Generates a report by funding source for any closed reconciliations.
- **Inventory Transaction Inquiry:** Displays the date, type of transaction, vaccine details and number of vaccine doses involved. The report includes all types of transactions, including vaccinations, transfers and adjustments.
- **Inventory Transfer Inquiry:** Displays the date, vaccine details, comments and number of doses transferred to or from the inventory location for a specified period.
- **Possible Duplicate Inventory Report:** Displays a list of possible duplicate vaccine inventory entries with similar manufacturers, lot numbers, NDC codes, and/or expiration dates.
- **Unaccounted For Doses:** Identifies all transactions per provider/inventory location indicated that have 'unaccounted' for doses.

## Nevada WebIZ Quick Start Guide

### Inventory Management and Reconciliation

#### **Add New Inventory**

1. Select *On-Hand* to view the contents of your Inventory Location
2. Click *Add New Inventory*
3. Enter information for new inventory. If data is exact match to existing inventory, the doses are added to the existing line item (NOTE: The NDC number is now part of selecting the appropriate vaccine)
4. System looks for similar line items to help minimize chance of duplicates
5. Click *Proceed with Create* if data entered is correct OR click *Add to On-Hand* to add doses to an existing inventory item

#### **Edit Inventory**

1. From the *On-Hand* Screen, filter inventory listed in order to more easily find the line item you are looking for
2. Select the vaccine you want to edit, click *Edit*
3. Edit and change vaccine detail, Lot Number, Expiration Date and/or Funding Source
4. Click *Update*
5. Click *Confirm*

(NOTE: Changes made here affect ALL transactions including immunizations associated with that line item)

#### **Inventory Adjustment**

1. Use this screen to account for vaccine wasted, expired, recalled, mishandled, etc. (except for publicly funded vaccine that should be returned)
2. From the *On-Hand* Screen, filter inventory listed in order to more easily find the line item you are looking for
3. Select the vaccine you want to adjust, select Adjustment
4. Use positive/negative numbers to increase or decrease inventory (NOTE: Entering a positive number increases the inventory in Nevada WebIZ and entering a negative number decreases the inventory in Nevada WebIZ)
5. Click *Create*

#### **Inventory Transfer**

1. From the *On-Hand* Screen, filter inventory listed in order to more easily find the line item you are looking for
2. Select the vaccine you want to transfer, click *Transfer*
3. Inventory can be transferred from one location to another
4. Contact the Help Desk for assistance in selecting the appropriate location when transferring vaccine out.
5. Incoming transfer inventory must be acknowledged and marked received before it's added to your inventory dosage
6. Use Pending Incoming/Outgoing Transfer reports to track transferred inventory

## **Inventory Inquiry**

1. From the *On-Hand* Screen, filter inventory listed in order to more easily find the line item you are looking for
2. Select the vaccine you want to run an inquiry, select *Inquiry*
3. Fill in the *Transaction Date Range* fields (i.e. From: 02/01/2012 Through: 02/28/2012)
4. Click *Run report*
5. This generates a list of inventory transactions that meet specified criteria

## **Inventory Reconciliation**

Like balancing a checkbook, the goal of reconciliation is to balance physical inventory in the refrigerator for each location with the virtual inventory recorded in Nevada WebIZ

1. Select *Reconciliation*
2. Click *Add Reconciliation*
  - a. Enter Inventory Location, Period (i.e. March 2012), Begin and End Date (Begin date is pre-populated based on ending date of previous reconciliation)
  - b. Reconciliation date range is recommended from the 1<sup>st</sup> of the month through the last day of the month
3. Click *Create* to save the reconciliation
4. HL7 Users Only: Enter doses administered for each vaccine (identified in your EMR) into *Aggregate Administered* fields
5. Click *Print* to print the reconciliation worksheet
6. Use the worksheet to count physical inventory in your refrigerator by:
  - a. Type of vaccine (DTaP, IPV, MMR, etc.)
  - b. Lot #
  - c. NDC #
  - d. Expiration Date
  - e. Funding Source (VFC and/or Private)
  - f. Number or doses (**always counts vaccine in doses, not vials/boxes**)
7. Type actual, physical on-hand inventory dosage count into the *Ending Inventory* column
8. Click *Update*
9. A "0" value in the *Inventory Delta +/- Column* indicates balanced inventory
10. Discrepancies will appear in the *Inventory Delta +/- Column*
  - a. Check for un-entered immunizations
  - b. Use the adjustment/transfer functions as appropriate
11. Manage discrepancies by:
  - a. First, recount physical inventory in your refrigerator for accuracy
  - b. Determine if there were any immunizations not yet entered into Nevada WebIZ
  - c. Record any un-entered immunizations
  - d. Run an Inventory Inquiry to show all transactions for the vaccine lot #
  - e. Ensure all wasted vaccines, inventory received, etc. were recorded
  - f. If necessary, use the *Inventory Adjustment* button to increase/decrease doses, selecting *Reconciliation* as the reason for adjustment NOTE: All adjustments must be dated within the reconciliation period
  - g. Be sure to enter the adjustment reason in the *Comments* field

12. Click *Add*
13. Inventory should be balanced on the Reconciliation screen
14. Once inventory is balanced, select *Authorized By* individual
15. Change Status from *Open* to *Closed*
16. Click *Update*

#### **Tips For More Successful Reconciliations**

1. Physical vaccine dosage counts MUST be completed at the END of the day on the End date (generally, the last day of the month you are reconciling)
2. Reconciliations should NOT be closed until AFTER all immunizations for the period have been entered into Nevada WebIZ
3. When entering adjustments or other transactions to correct discrepancies, the date on the entry MUST be within the Beginning and End dates of the reconciliation period
4. Complete and accurate data entry is KEY!!!
  - a. Good data entry makes reconciliation easy and efficient
  - b. Poor data entry makes reconciliation difficult and time consuming