



State of Nevada Immunization Information System (IIS)

Inventory Management and Reconciliation Guide Type 3 – Training Manual

<https://webiz.nv.gov>

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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 (ALL) ▼	Status ON-HAND ▼
Vaccine (ALL) ▼	Funding Source (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 ⓘ

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

Create **Cancel**

Date: 11/05/2014

Inventory Location: SMALL WORLD CLINIC > SMALL WORLD CLINIC INV

Vaccine | Mfg | NDC | Brand

Lot Number	Expiration Date	Funding Source	Doses Adjusted	Container Id	Comments
ADENOVIRUS, TYPE 4&7	BRR				
ANTHRAX	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	49281-0881-01			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

- 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. i

Add

Proceed with Create Cancel

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:

Proceed with Create Cancel

Note: Click here **NOT** exact match

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	? Add to this Inventory Line Item

Note: Click here **WITH** exact match

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: (ALL) ▼

Vaccine: CPOX (VARICELLA) ▼

(ALL)

ADENOVIRUS, TYPE 4

ADENOVIRUS, TYPE 4&7

ADENOVIRUS, UF

ANTHRAX

BCG

CHOLERA

CPOX (VARICELLA)

DIPHtheria ANTITOXIN

DT (PED)

Status: ON-HAND ▼

Funding Source: (ALL) ▼

Inquiry

Date	Funding Source	Doses On-Hand	
11/2016	Private	15	?

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

On-Hand Inventory

Inventory Location: (ALL) Status: ON-HAND

Vaccine: CPOX (VARICELLA) Funding Source: (ALL)

Buttons: Edit, Adjustment, Transfer, Inquiry

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

View

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

Buttons: Update, Cancel, Clear

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*.

The page at <https://webiztest.nv.gov> says:

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

Do you want to continue?

Buttons: OK, Cancel

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' interface with the following filters:

- Inventory Location:** (ALL)
- Vaccine:** CPOX (VARICELLA) (highlighted with a red box)
- Status:** ON-HAND
- Funding Source:** (ALL)

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)

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*.

The screenshot shows a web form for adjusting vaccine inventory. The form is enclosed in a light gray border. At the top, the 'Reason' field is a dropdown menu with 'WASTED' selected. Below it, the 'Doses Adjusted' field is a text input containing '-1'. To the right of this field is a small gray box with the text: '(Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)'. The 'Container Id' field is an empty text input. The 'Comments' field is a text area containing 'VACCINE WAS DRAWN AND NOT ADMINISTERED TO PATIENT'. At the bottom right, there are three buttons: 'Clear' (white), 'Create' (green), and 'Cancel' (gray). The 'Create' button is circled in red.

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' interface. At the top, there are filters for 'Inventory Location' (set to '(ALL)'), 'Vaccine' (set to '(ALL)'), and 'Status'. The 'Status' dropdown menu is open, showing options: 'DEPLETED/EXPIRED', '(ALL)', 'ON-HAND', 'DEPLETED/EXPIRED' (highlighted in blue), and 'EXPIRING SOON'. Below the filters are buttons for 'Edit', 'Adjustment', and 'Transfer'. The 'Adjustment' button is circled in red. Below the buttons is a table of inventory items. The table has columns: Vaccine (Brand), Mfg, NDC, Lot No, Exp Date, Funding Source, and Doses On-Hand. One row is highlighted with a red box: CPOX (Varicella) (Varivax (0.5 mL SDV x 1 MSD 00006-4826-00 SWC64826 12/31/2013 Private 15). Below the table 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						
CPOX (Varicella) (Varivax (0.5 mL SDV x 1 vial with diluent))	MSD	00006-4826-00	SWC64826	12/31/2013	Private	15

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

Add

Create Cancel

Date 01/01/2014 

Inventory Location SMALL WORLD CLINIC INV

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

Lot Number SWC64826

Expiration Date 12/31/2013 

Funding Source PRIVATE

Doses On-Hand 15

Reason

Doses Adjusted

Container Id

Comments

EXPIRED (ases the inventory. Enter a ventry.)
 WASTED
 MIS-HANDLED
 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

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

Doses Adjusted -15 (Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)

Container Id

Comments EXPIRED ON 12/31/2013 

Clear

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.

The screenshot shows the 'On-Hand Inventory' interface. It features several dropdown menus for filtering: 'Inventory Location' (set to '(ALL)'), 'Vaccine' (set to 'CPOX (VARICELLA)'), 'Status' (set to 'ON-HAND'), and 'Funding Source' (set to '(ALL)'). A red rectangle highlights the 'Vaccine' dropdown menu.

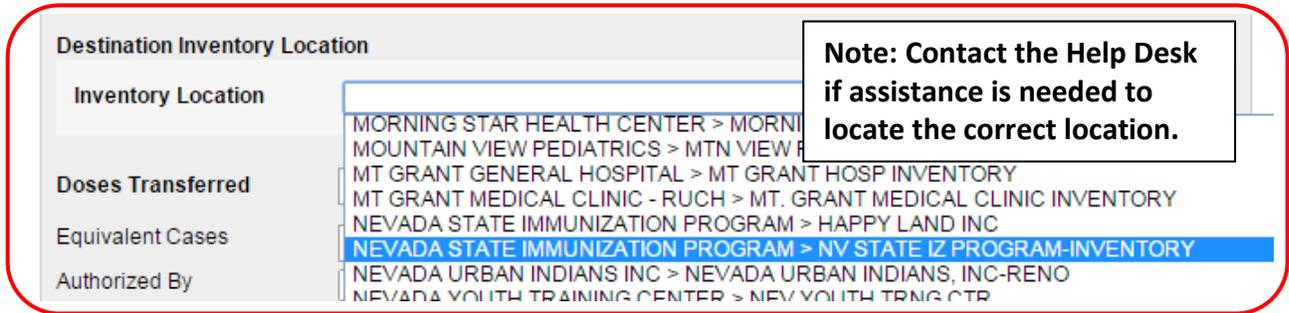
2. Look for and select the appropriate lot number you wish to transfer.
3. Click *Transfer*.

This screenshot shows the same 'On-Hand Inventory' interface as above. Below the filter dropdowns, there are four buttons: 'Edit', 'Adjustment', 'Transfer', and 'Inquiry'. The 'Transfer' button is circled in red.

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

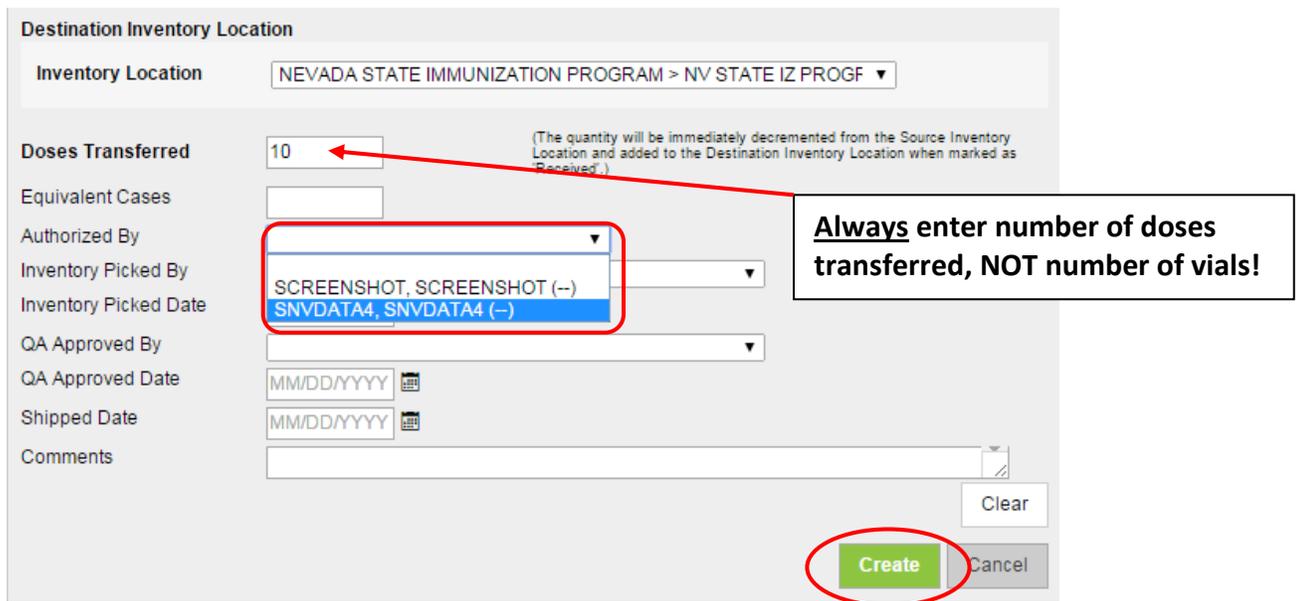
The screenshot shows the 'Add' screen for a transfer. It includes a 'Create' button and a 'Cancel' button. The 'Date' field is set to '11/05/2014' and is circled in red. Below the date field, there are two input fields: 'Source Inventory Location' (set to 'SMALL WORLD CLINIC INV') and 'Vaccine | Mfg | NDC' (set to 'CPOX (VARICELLA) | MSD | 00006-4826-00').

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



Note: Contact the Help Desk if assistance is needed to locate the correct location.

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



Always enter number of doses transferred, NOT number of vials!

How to View a Pending Outgoing Transfer:

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



Pending Inventory Transfers

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

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

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

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. Select "Add New Inventory" to add new inventory.



Pending Inventory Transfers

Pending V-Trek® Shipments

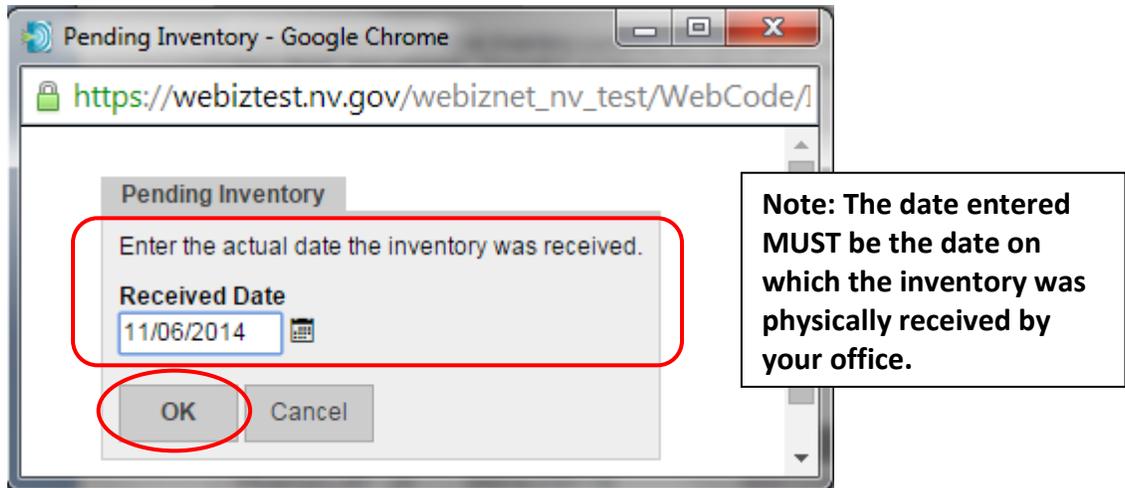
- From the *Pending Incoming Inventory Transfers* portion of the screen click *Received*.

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

- 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!

- 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.

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



Sample Report



Pending Outgoing Inventory Transfers - Pick List

Nevada's Statewide Immunization Information System

November 17, 2014

Receiving Location:
 NEVADA STATE IMMUNIZATION PROGRAM
 NV STATE IZ PROGRAM-INVENTORY (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: (ALL) Status: ON-HAND

Vaccine: CPOX (VARICELLA) Funding Source: (ALL)

Edit Adjustment Transfer **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

Vaccine: CPOX (VARICELLA) Funding Source: PRIVATE

Manufacturer: MERCK & CO, INC

Lot Number: SWC64826

Expiration Date Range: From: MM/DD/YYYY Through: MM/DD/YYYY

Transaction Date Range: From: 10/01/2014 Through: 10/31/2014

Output Type: PDF HTML EXTRACT - Delimiter: |

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

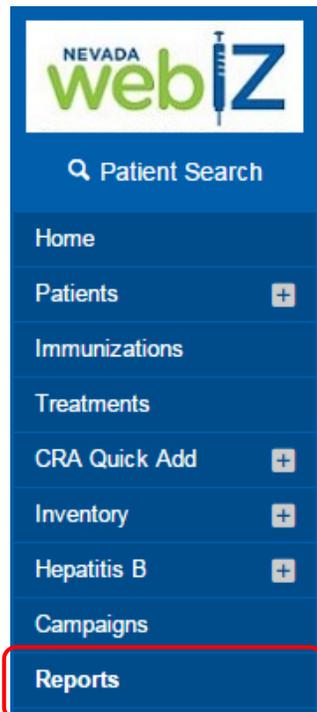
Run Report Cancel

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

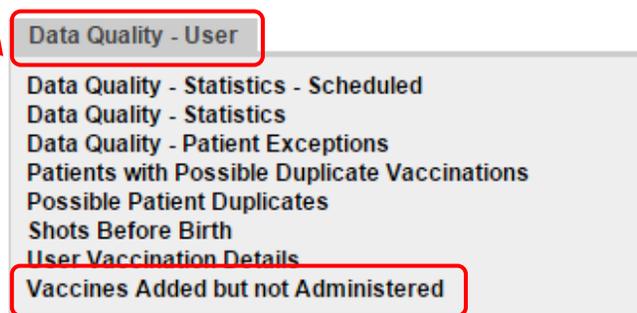
Trans ID	Src Inventory Location	Dest Inventory Location	Trans Date	Vaccine	Mfg NDC	Lot No	Fund Src	Exp Date	Type	Doses
2413634	SMALL WORLD CLINIC INV		11/06/2014	DTaP-Hep B-IPV	SKB 58160-0811-01	58160	Private	12/31/2016	ADJ	2
<p>Adjustment Reason: Broke vial</p> <p>Created By: KEVIN FILIPPELLI on 11/06/2014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

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.



1. Select *Reports* from the menu.
2. Under the *Data Quality – User* section, select *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: 10/06/2014 📅 Through: 11/06/2014 📅

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's Statewide Immunization Information System

Vaccines Added but not Administered

November 06, 2014

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 interface. On the left is a blue navigation menu with the following items: Patient Search, Home, Patients (+), Immunizations, Treatments, CRA Quick Add (+), Inventory (+), Hepatitis B (+), Campaigns, and Reports (highlighted with a red box). A red arrow points from the Reports menu to the right-hand side of the screen.

On the right-hand side, there is a dropdown menu for 'Data Quality - User' (highlighted with a red box). The menu items are: 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 (highlighted with a red box).

Below the menu is the 'Vaccines Added but not Administered' report configuration screen. It includes a text box for selection criteria, a 'Report Selection Criteria' section with dropdowns for Provider (SMALL WORLD CLINIC), Clinic (SML WRLD CLINIC), and Clinic County, and a 'Vaccination Date Range' section with 'From' (10/06/2014) and 'Through' (11/06/2014) date pickers. A green 'Run Report' button (highlighted with a red box) and a grey 'Cancel' button are at the bottom right.

The screenshot shows the report results page for 'Nevada's Statewide Immunization Information System'. The title is 'Vaccines Added but not Administered' and the date is November 06, 2014. The report parameters are: 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

Red boxes with arrows point to the following fields in the table:

- Patient Name & NV WebIZ #**: Points to the Patient column.
- Vaccine Type**: Points to the Vaccination column.
- Date Administered**: Points to the Date column.

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

Search Criteria

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

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?: NO 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 (Prenar 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

- 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

Update Cancel

Patient is VFC eligible Vaccination Time
 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 Body Site Route Dosage Campaign
 Delete LD INTRAMUSCULAR 0.5ML

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

Update Cancel

Patient is VFC eligible Vaccination Time
 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 Body Site Route Dosage Campaign
 Delete LD INTRAMUSCULAR 0.5ML

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 displays the Nevada WebIZ interface. On the left is a blue sidebar menu with the following items: 'Patient Search', 'Home', 'Patients', 'Immunizations', 'Treatments', 'CRA Quick Add', 'Inventory', 'Vaccines', 'On-Hand', 'Reconciliation', and 'Vaccine Orders'. Red arrows point to 'Inventory', 'Vaccines', and 'Reconciliation'. The main content area is titled 'Vaccine Inventory Reconciliation' and contains the following elements: a text box with instructions, an 'Add Reconciliation' button circled in red, a 'Search Criteria' section with dropdown menus for 'Inventory Location' and 'Reconciliation Status' (all set to '(ALL)'), date range pickers for 'Begin Date Range' and 'End Date Range', a 'Sort by' section with radio buttons for 'Audit Date (descending)' and 'Inventory Location, Begin Date (descending)', and buttons for 'Previous Criteria', 'Clear', and 'Search'.

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 1st 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

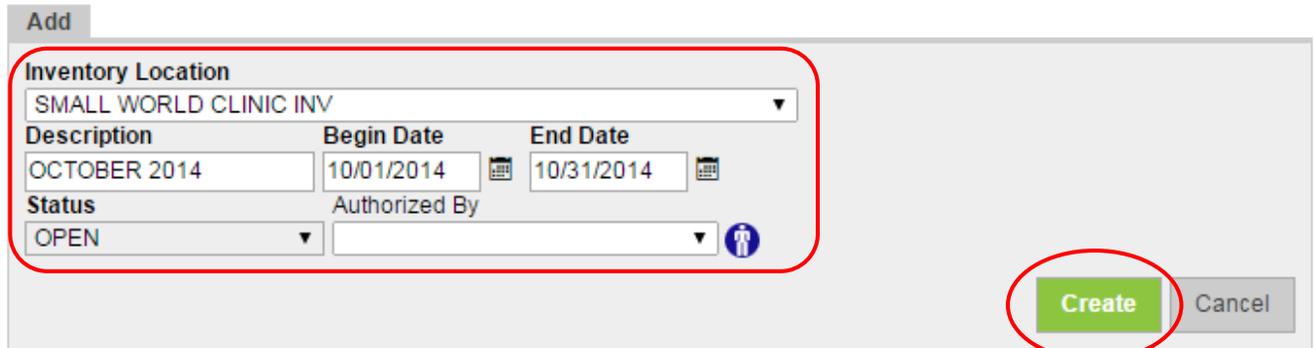
Inventory Location
SMALL WORLD CLINIC INV

Description	Begin Date	End Date
OCTOBER 2014	10/01/2014	10/31/2014

Status
OPEN

Authorized By

Create 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.

Buttons:

Inventory By Doses

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												
1	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

Description
OCTOBER 2014

Begin Date
10/01/2014

End Date
10/31/2014

Status
CLOSED

Authorized By
SNVDATA4 SNVDATA4

Buttons: **Print** (circled in red), **Delete**, **Update**, **Cancel**

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
Private												
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		
VFC												
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		Beginning Inventory	Inventory Received	Inventory Administered	Inventory Transferred	Inventory Recalled	Inventory Expired or Wasted	Inventory Unaccounted	Inventory Delta +/-	Ending Inventory	Inquiry	On-Hand
Private												
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	<input type="text" value="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	<input type="text" value="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	<input type="text" value="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:
 - a. Funding Source (Private, VFC, etc.)
 - b. Type of vaccine (DtaP, IPV, MMR, etc.)
 - c. Manufacturer
 - d. NDC Number
 - e. Lot Number
 - f. Expiration Date
 - g. 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) 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
Private												
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	<input type="text" value="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	<input type="text" value="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	<input type="text" value="0"/>		

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

Edit

Inventory Location: SMALL WORLD CLINIC INV Print

Description: OCTOBER 2014 Begin Date: 10/01/2014 End Date: 10/31/2014

Status: OPEN Authorized By:

The record has been saved successfully.

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

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
Private												
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	1	16		
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	0	1		
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	-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.

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
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 can be generated to determine if a second vaccination may have been documented with an incorrect date outside of the reconciliation date range.



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:

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.

Pending Inventory Transfers
Pending VTrckS Shipments

On-Hand Inventory

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

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)

Vaccine (Brand)	Mfg	NDC	Lot No	Exp Date	Funding Source	Doses On-Hand
SMALL WORLD CLINIC INV						
<input type="radio"/> DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 via))	SKB	58160-0811-01	58160	12/31/2016	Private	11
<input checked="" type="radio"/> DTaP-Hep B-IPV (Pediarix (0.5 mL SD syr x 1 syr))	SKB	58160-0811-41	123456789	12/31/2016	Private	11

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

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

Add

Create Cancel

Date

Inventory Location

Vaccine | Mfg | NDC

Lot Number

Expiration Date

Funding Source

Doses On-Hand

Reason

Doses Adjusted

Container Id

Comments

EXPIRED
 WASTED
 MIS-HANDLED
 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

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

Container Id

Comments

Clear

Create 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		Inventory										
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
Private												
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 10:59:40
 Updated By: KEVIN FILIPPELLI on 11/07/2014 10:59:59
 Comments: Created from update on vaccination of Patient TOM TURKEY (3119048) on 10/21/2014

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.

Pending Inventory Transfers
Pending VTrckS Shipments

On-Hand Inventory

Inventory Location: (ALL) Status: ON-HAND
 Vaccine: DTAP-HEP B-IPV Funding Source: (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
SMALL WORLD CLINIC INV						
DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial))	SKB	58160-0811-01	58160	12/31/2016	Private	11

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

Note: Adjustment date MUST be within the reconciliation period!

Add

Create Cancel

Date 10/31/2014

Inventory Location SMALL WORLD CLINIC INV

Vaccine | Mfg | NDC DTAP-HEP B-IPV | SKB | 58160-0811-01

Lot Number 58160

Expiration Date 12/31/2016

Funding Source PRIVATE

Doses On-Hand 11

Reason RECONCILIATION

Doses Adjusted

Container Id

Comments

EXPIRED
WASTED
MIS-HANDLED
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 ADMINISTERED

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

Clear

Create 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 RECONCILIATION

Doses Adjusted 1 (Entering a positive number increases the inventory. Enter a negative number to decrement inventory.)

Container Id

Comments OCTOBER 2014 RECONCILIATION

Clear

Create 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: (ALL) (ALL) SMALL WORLD CLINIC INV

Inventory Location Status: (ALL)

Reconciliation Status: (ALL)

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		View

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 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
1	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 1 vial)) SKBJ58160-0811-01 58160 12/31/2016	0	15	-1	0	0	0	0	0	14		
2	DTaP-Hep B-IPV (Pediarix (0.5 mL SDV x 10 vial/s)) SKBJ58160-0811-11 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)) SKBJ58160-0811-41 123456789 12/31/2016	0	12	-1	0	0	0	-1	0	10		

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.

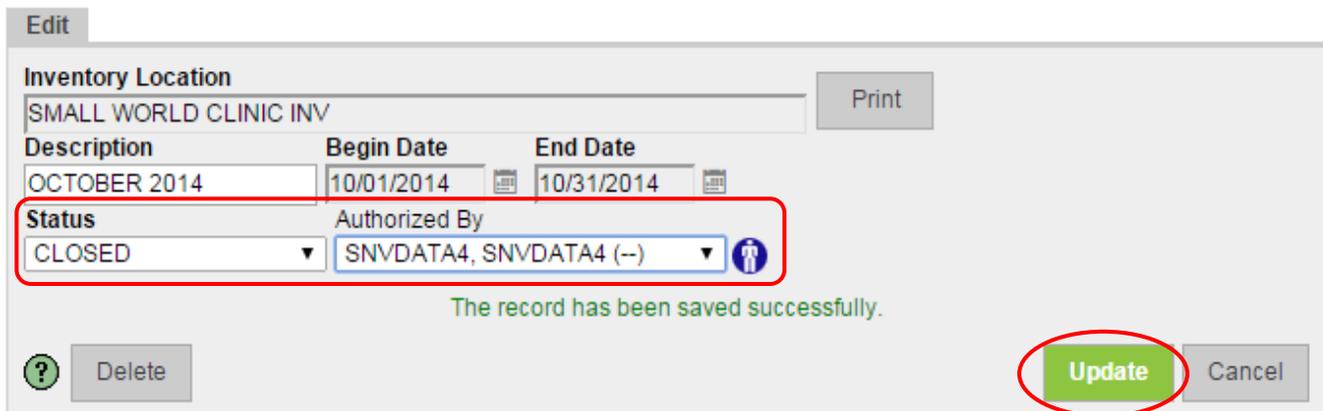
Tips For More Successful Reconciliations:

- 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:

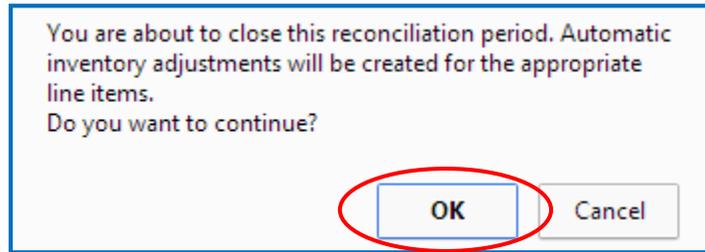
Once the inventory reconciliation is balanced with all zeros in the *Inventory Delta +/-* column, it's time to *Close* the reconciliation period.

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.

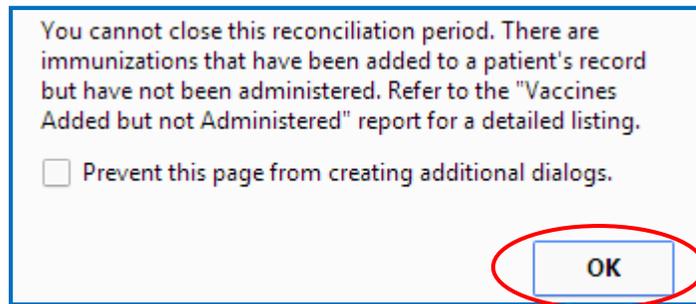


The screenshot shows the 'Edit' form for an inventory reconciliation. The 'Inventory Location' is 'SMALL WORLD CLINIC INV'. The 'Description' is 'OCTOBER 2014', 'Begin Date' is '10/01/2014', and 'End Date' is '10/31/2014'. The 'Status' dropdown is set to 'CLOSED'. The 'Authorized By' dropdown is set to 'SNVDATA4, SNVDATA4 (--)' with a person icon to its right. A green message below the form states 'The record has been saved successfully.' The 'Update' button is highlighted with a red circle.

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.**

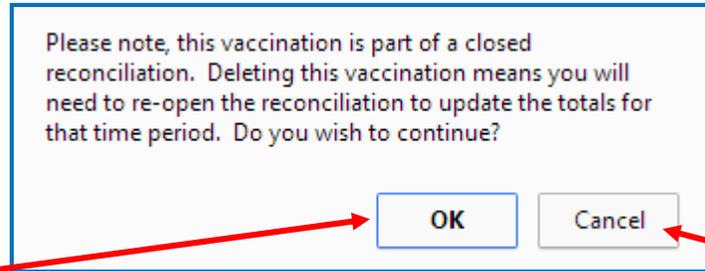


7. Refer to Pages 17-21 of this guide for instructions to extract the *“Vaccines Added but not Administered”* report and correct all vaccines added but not administered on patient records.

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.



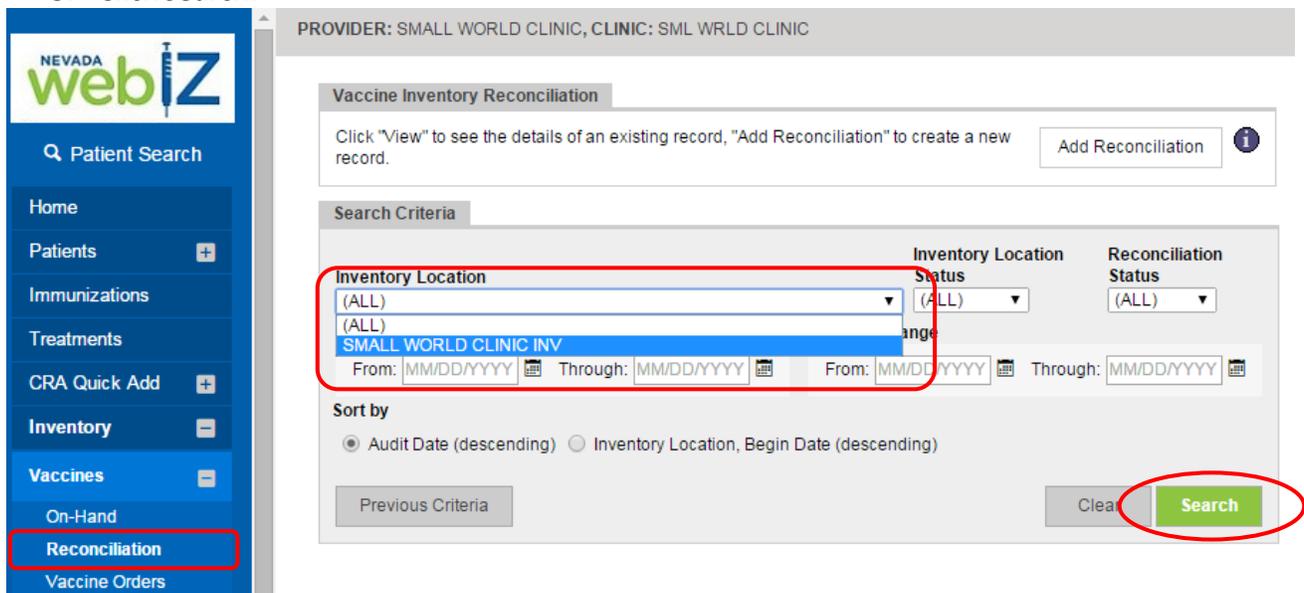
Click *OK* to complete the transaction and add the vaccine dose back into inventory OR click *Cancel* to cancel the transaction.

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 Worksheet 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*.



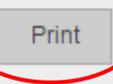
4. From the Search Results, click *View*.

Search Results - 1 record(s)

Status	Description	Begin Date	End Date	Authorized By	Inv Summary
Open	OCTOBER 2014	10/01/2014	10/31/2014		  

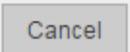
5. From the Vaccine Inventory Reconciliation screen click "*Print*" to print the report.

Edit

Inventory Location
SMALL WORLD CLINIC INV 

Description: OCTOBER 2014
Begin Date: 10/01/2014
End Date: 10/31/2014

Status: CLOSED
Authorized By: SNVDATA4 SNVDATA4

 Delete  

Other Reports

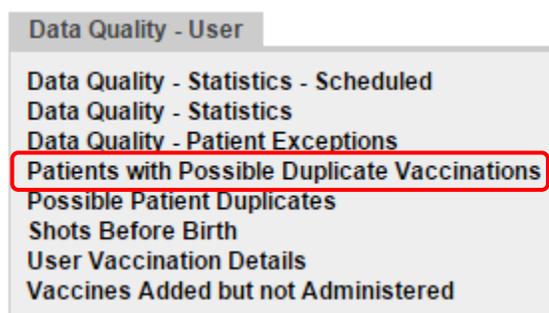
This section explains how to extract certain reports before each reconciliation to ensure all immunization entries are completed.

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

Vaccine Series

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

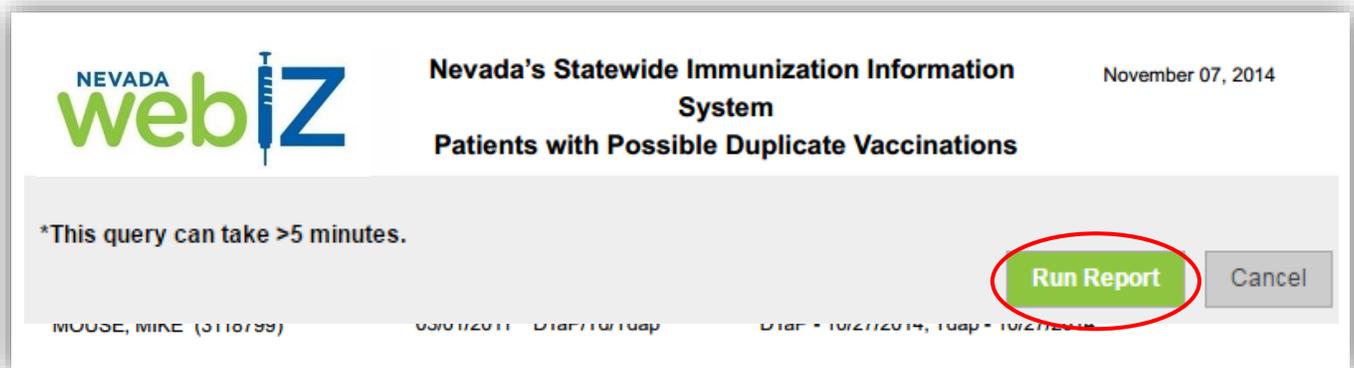
Note: hold the Ctrl key to select multiple items.

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

November 07, 2014

Patients with Possible Duplicate Vaccinations

*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 1st 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