

## Search, Add, Reconcile & Report Inventory

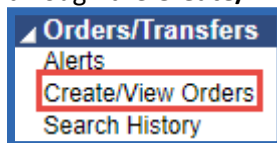
This guide covers how to add and manage your clinic's inventory in the Immunization Information System (IIS) and how providers enrolled in the Childhood Vaccine Program and/or Adult Vaccine Program submit their monthly inventory report.

### How Can I Add Vaccines to My Clinic's Inventory?

Receiving vaccine orders through the **Create/View Order** screen is the best way to add publicly-supplied vaccines to your clinic's inventory. You can also manually add vaccines to your inventory when needed.

#### Receiving Vaccine Orders

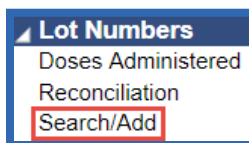
See [Vaccine Ordering and Receiving](#) for detailed instructions on how to receive an order in the IIS through the **Create/View Order** screen.



#### Manually Adding Vaccine to Inventory

Search for a lot number first before manually adding a vaccine to your clinic's inventory in the IIS. This prevents adding duplicate lot numbers. Follow these steps to search and add vaccine to your IIS inventory.

1. Click on the **Lot Numbers** heading in the left menu of the IIS. Then click **Search/Add** to open the **Lot Number Maintenance** screen.

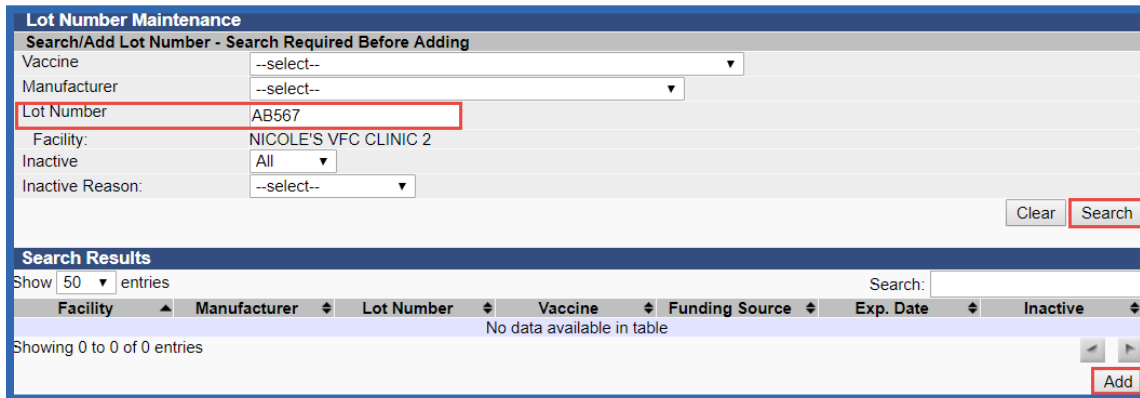


2. When adding vaccines to your WAIS inventory, enter the lot number information from the box, not the vial. **Ensure that the correct characters are entered (e.g. zero instead of the letter O).**  
***\*When adding inventory to your EMR, enter or scan the information on the box, not the vial. Vaccine lot information should be the same in the IIS and your EMR.***
3. Click **Search**.
4. If the lot number exists in your clinic's inventory, it will appear in the **Search Results** and should not be entered again. If the lot number does not appear, click the **Add** button to open the **Lot Number Maintenance [Add]** screen.

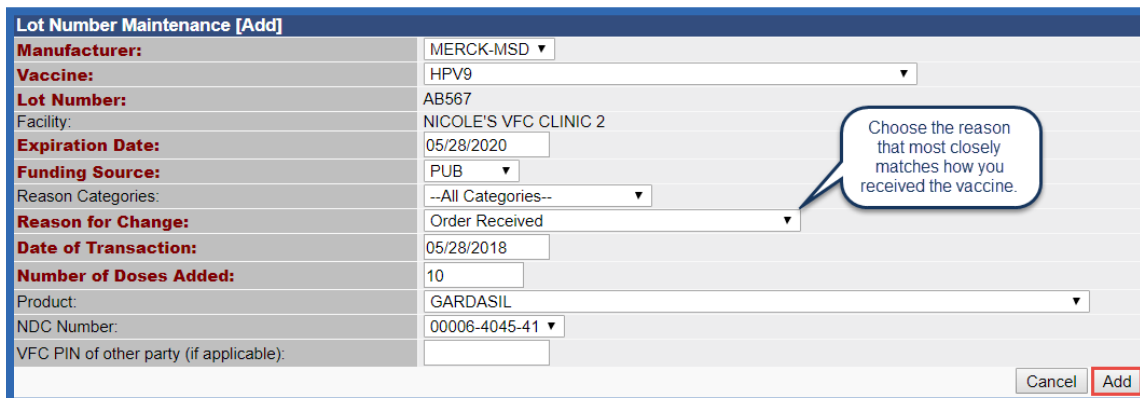


**Tip:** You can view your clinic's current inventory on the **Reconciliation** screen, found under the **Lot Numbers** heading in the left menu.

## Search, Add, Reconcile & Report Inventory



5. Enter the information shown below to add the vaccine to your inventory. See [IIS Codes for Common Vaccines in Washington](#) for vaccine product, vaccine name, manufacturer and NDC information.
  - a. Select the **Manufacturer**.
  - b. Select the **Vaccine**.
  - c. Enter the lot **Expiration Date**. This date is set by the manufacturer.
  - d. Enter the **Funding Source** to indicate if the lot is publicly-supplied vaccine (PUB) or privately purchased vaccine (PRVT).
  - e. Select a **Reason for Change** from the drop down box.
  - f. Enter the **Number of Doses**.
  - g. Select the type of vaccine **Product** and then select the **NDC Number**. You must select the product first in order to have an NDC Number to select in the drop down.
  - h. Click the **Add** button to add the lot to your clinic's inventory. You will now be able to view this lot number in the **Reconciliation** screen.



## Search, Add, Reconcile & Report Inventory

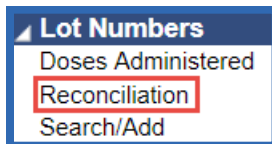
### How Can I Reconcile My Clinic's Inventory & Submit the Monthly Inventory Report?

Clinics enrolled in the Childhood Vaccine Program and/or the Adult Vaccine Program must reconcile their vaccine inventory and submit their inventory report monthly through the **Reconciliation** screen in the IIS.



**Tip:** Make sure you receive all inbound vaccine orders that arrive at your clinic before completing your inventory report. You can view and receive orders through the **Create/View Order** screen, found under the **Orders/Transfers** heading in the left menu.

1. Click on the **Lot Numbers** heading in the left menu, then click on **Reconciliation**.



2. Your inventory will display.

Reconcile Inventory				
Vaccine	Lot Number	Exp Date	Quantity on Hand	Physical Inventory
DTaP (Daptacel, Infanrix, Tripedia)	4354554	02/20/2019	4	<input type="text"/>



**Tip:** The vaccine brand names that display in the parentheses (as shown above) are not necessarily the only vaccine brands available for that vaccine.

3. Select the **Print** button at the bottom right of the **Reconciliation** screen to print the reconciliation worksheet.
  - a. Take the worksheet to your clinic's fridge or freezer and count your physical inventory.
  - b. Write your fridge/freezer counts in the **Physical Inventory** column.
  - c. Ideally, the **Quantity on Hand** should match your **Physical Inventory**. Document any discrepancies on the reconciliation worksheet.
  - d. Use the [Vaccine Loss Log](#) to track any wasted, spoiled, or expired vaccine throughout the month. When reconciling inventory in the IIS, account for the doses tracked on this log using the adjustment categories and reasons that match the **Vaccine Loss Log** documentation.
4. If the counts do not match, start by troubleshooting for any doses that did not subtract from your inventory. See page seven of this guide for additional troubleshooting reports.
  - a. The [Patient Detail Report](#) can help identify which patients received doses that did not subtract from your inventory.
  - b. The [Lot Usage and Recall Report](#) provides a list of patients who received a certain lot number.

## Search, Add, Reconcile & Report Inventory

- Once you identify doses that did not subtract from your inventory due to documentatn errors, you will need to correct those errors (e.g. incorrect lot number or manufacturer) in your electronic health record and/or the IIS. Once you correct any errors, those doses will subtract from your **Reconciliation** screen.
- If the **Quantity on Hand** in the IIS and your **Physical Inventory** counts still do not match, enter the number of doses from your physical count in the **Physical Inventory** field, then select a **Category** and **Reason** that best describes what happened to the doses (see the adjustment category and reason descriptions on the next page).
- You can enter in multiple categories and reasons by using the **Add Row (+)** button. Make sure the number in the Adjustment column represents the correct number you want to adjust.

Reconcile Inventory										
Vaccine	Lot Number	Exp Date	Quantity on Hand	Physical Inventory	Adjustment (+/-)	Category	Reason	Funding Source	Inactive	Add Row
DTaP	5675309	11/14/2019	20	19	-1.0	Wasted	Drawn up, not used	PUB	<input type="checkbox"/>	+
DTaP	8675309	11/13/2018	16		0.0	--No Category Required	--No Reason Required--	PUB	<input type="checkbox"/>	+



**Tip:** Click the **Inactive** checkbox next to the lot number to inactivate and remove vaccines from your **Reconciliation** page that are no longer in use. **Ensure that any returns or transfers are completed before inactivating a lot.**

- Adjusting inventory with a Return Category is the first step to submitting an [online vaccine return](#).
- When you finish reconciling your inventory, click the **Submit Monthly Inventory** button at the bottom of the screen to submit the inventory report or click the **Save** button to save changes. Selecting **Save** will not submit your inventory report, it will only update your adjusted totals in the Quantity on Hand column of the **Reconciliation** page.

Print	Reset	Save
Submit Monthly Inventory		

## Search, Add, Reconcile & Report Inventory

### Inventory Adjustment Categories & Reasons

The following tables list positive and negative adjustment categories, the reasons listed for each category, and the scenarios for which each **Category** and **Reason** can be used.

#### Positive Adjustments

These adjustments are used when **Physical Inventory** is greater than the **Quantity on Hand** in the IIS.

Category	Reason	Scenario
Order Received	Dose count variance multi-dose vial	You have a multi-dose vial where you miscounted the total doses.
	Received directly from vendor, not VFC supplied	You received private vaccines directly from the vendor.
	Received from CDC, not VFC supplied	You received 317(Adult Vaccine Program)/outbreak response vaccines from CDC.
	Received from VFC program	You received publicly supplied vaccines through the Childhood Vaccine Program.
Transfer	Borrowed from private inventory	Washington State Childhood Vaccine Program and the Adult Vaccine Program do not allow borrowing. Borrowing is when you run out of state supplied vaccine and use your private inventory as public supplied vaccine.
	Borrowed from public inventory	Washington State Childhood Vaccine Program and the Adult Vaccine Program do not allow borrowing. Borrowing is when you run out of private vaccine, and you use your public inventory as private supplied vaccine.
	Received from another provider	You received viable vaccines from another provider. Request to transfer vaccine must be approved by the Washington State Childhood or Adult Vaccine Program in the IIS 48 hours before movement of vaccine.

#### Negative Adjustments

These adjustments are used when **Physical Inventory** is less than the **Quantity on Hand** in the IIS.

Category	Reason	Scenario
Administered	Administered but not linked to a vaccine	Your clinic sends immunization data or enters immunizations on patient records in the IIS and the administered vaccine is not able to subtract from inventory.
	Administered to a client who chose not to be in the registry	Patient does not want their administered vaccine added to the IIS, but your clinic needs to account for the vaccine.
	System non-user aggregate reporter only	Your clinic does <u>not</u> send immunization data or enter immunizations on patient records in the IIS.
Expired	Expired	Vaccine expired.
	Expired, multi-dose vial	An opened multi-dose vial (MDV) expired. If the MDV was opened or partially used it is not returnable.
Recall	Vaccine recall	The CDC and/or manufacturer recalled the vaccine.

## Search, Add, Reconcile & Report Inventory

Category	Reason	Scenario
<b>Spoiled</b>	Cold chain not maintained during shipment	The manufacturer failed to store the vaccines properly and once the vaccines were delivered, they were not viable. Contact the manufacturer immediately if the vaccines were not stored properly upon receipt.
	Failure to store properly upon receipt	You did not place the vaccines in their proper storage unit once the vaccine was delivered, and they were determined to no longer be viable.
	Natural disaster/power outage	A storm or countrywide power surge interrupts power to storage units for a length of time that caused vaccines to spoil.
	Not stored properly	You stored frozen vaccines in the refrigerator or refrigerated vaccines in the freezer that are not supposed to be stored this way. Or any instance where you did not follow the storage recommendations for the vaccine.
	Fridge/freezer mechanical failure	Your storage unit stopped working resulting in spoiled vaccine.
	Fridge/freezer too cold	You have a temperature excursion where the unit became too cold.
	Fridge/freezer too warm	You have a temperature excursion where the unit became too warm.
	Vaccine spoiled in transit	Vaccines were spoiled during a vaccine transfer.
<b>Transfer</b>	Restock private inventory from public	Washington State Childhood Vaccine Program and Adult Vaccine Program do not allow borrowing. You should not move publicly supplied vaccine to your private stock.
	Restock public inventory from private	You wish to account for a public vaccine that was used outside the Childhood Vaccine Program or the Adult Vaccine Program requirements by adding a private stock vaccine to your public stock.
	Returned to vendor, non-VFC supplied	You have privately purchased vaccines you wish to return to the manufacturer.
	Transferred to another provider	Vaccines were successfully transferred to another provider.
<b>Wasted</b>	Broken/dropped/spilled	Vaccines are not viable because they broke, spilled, or were dropped.
	Drawn up, not used	Dose was drawn up and the parent changed their mind.
	Lost and unaccounted	You have searched all records and can't account for the dose in any other category. You don't have documentation that identifies what happened to the vaccine.
	Vaccine damaged in transit	Vaccine was damaged during a vaccine transfer.

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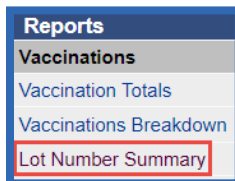
### Other Inventory Troubleshooting Tools

The following tools may also be helpful when troubleshooting inventory discrepancies (when **Quantity on Hand** in the IIS does not match your **Physical Inventory** counts).

#### Lot Number Summary Report

This report shows a summary of how many doses have been used, adjusted, or wasted for a selected lot number during a specified date range.

1. Click on **Report Module** under the **Reports** heading in the left menu.
2. Click on the **Lot Number Summary** report under the **Vaccinations** heading.

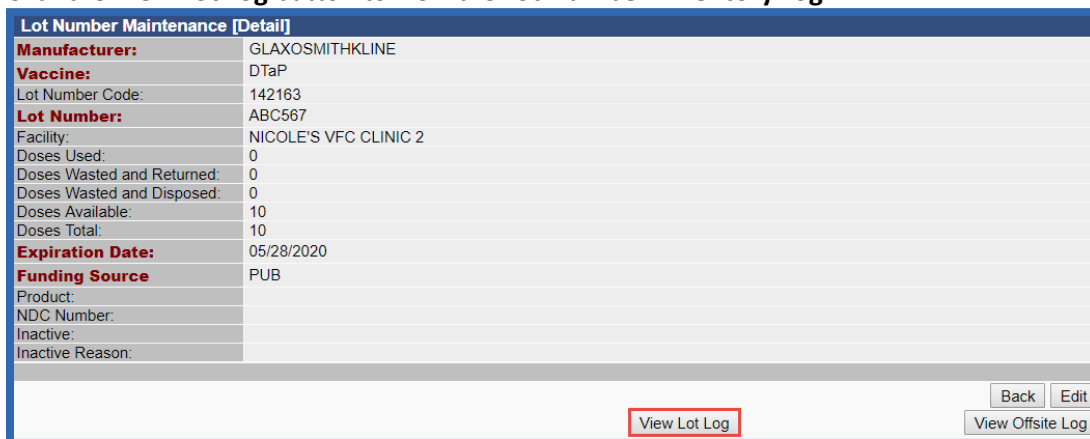


3. Enter a report date range and select any other report parameters to apply (e.g. specific vaccines, lot number, active or inactive lots)
4. Click the **Create Report** button.

#### Lot Number Inventory Log

The **Lot Number Inventory Log** displays the entire history of inventory transactions for a specific lot number. This log is most useful for viewing the date a lot number was received into inventory or the dates doses were added or subtracted. This log does not show doses administered data. You must run the **Doses Administered Report** to obtain that data.

1. Click on the **Lot Numbers** heading in the left menu, then click **Search/Add**.
2. On the **Lot Number Maintenance** screen, enter a lot number and click the **Search** button.
3. Select the lot number from the **Search Results** list to open the **Lot Number Maintenance [Detail]** screen as shown below.
4. Click the **View Lot Log** button to view the **Lot Number Inventory Log**.



The screenshot shows the 'Lot Number Maintenance [Detail]' screen. It contains the following fields:

<b>Manufacturer:</b>	GLAXOSMITHKLINE
<b>Vaccine:</b>	DTaP
<b>Lot Number Code:</b>	142163
<b>Lot Number:</b>	ABC567
<b>Facility:</b>	NICOLE'S VFC CLINIC 2
<b>Doses Used:</b>	0
<b>Doses Wasted and Returned:</b>	0
<b>Doses Wasted and Disposed:</b>	0
<b>Doses Available:</b>	10
<b>Doses Total:</b>	10
<b>Expiration Date:</b>	05/28/2020
<b>Funding Source:</b>	PUB
<b>Product:</b>	
<b>NDC Number:</b>	
<b>Inactive:</b>	
<b>Inactive Reason:</b>	

At the bottom right of the screen, there are two buttons: 'View Lot Log' (highlighted with a red box) and 'View Offsite Log'.



**Questions?** Contact the IIS Help Desk at 1-800-325-5599 or [WAIISHelpDesk@doh.wa.gov](mailto:WAIISHelpDesk@doh.wa.gov)