

CT WiZ Quick Reference Guide Inventory Management

Viewing Inventory

1. Located on the left hand side module, navigate to Inventory and select the + sign to expand your module view.
2. Next, click on the **Vaccines** plus sign to expand your view further.
3. Select **Vaccines On-Hand** in the dropdown menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. You may filter your search by Inventory Location, Vaccine, Status or Funding Source.
6. **On-hand Inventory** will display the vaccine brand, manufacturer, NDC#, Lot #, Expiration Date, Funding Source, and Doses On-Hand.

Adding New Inventory

*For entry of Flu vaccines, frozen vaccines, and private purchase vaccines only. VFC and State vaccines should be received according to "Receiving Vaccine Shipments" instructions".

1. Located on the left hand side module, navigate to **Inventory** and select the plus sign to expand your module view.
2. Next, click on the **Vaccines** plus sign to expand your view further.
3. Select **Vaccines On-Hand** in the drop down menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. Click the **Add New Inventory** button located in the top right hand corner to add vaccine with a *new* lot number. Each field marked with a red * is a required field.
6. Select your Inventory Location
7. Utilizing your dropdown menu, select the

Trade Name of the vaccine or type in the first few letters of the vaccine name. Based on the recognized values entered, the vaccines will be displayed.

8. Enter your lot number.
9. Enter your expiration date.
10. Select your funding source.
*For frozen VFC/State vaccines:
-Frozen vaccine shipping box tops that are White with Teal lettering are VFC doses.
-Frozen vaccine shipping box tops that are Teal with white lettering are state doses.
11. Enter the **Doses Adjusted** and select create to finalize.
**Repeat steps 1-11 for each vaccine needed to be added to inventory on- hand.

Receiving Vaccine Shipments

1. Located on the left hand side module, navigate to **Inventory** and select the plus sign to expand your module view.
2. Next, click on the Vaccines plus sign to expand your view further.
3. Select Vaccine Shipments
4. The **Receive Vaccine Orders** screen will be displayed.
5. Click Details to view shipment details for each line item.
6. Click Receive to add the line item into the inventory on hand
7. Click Dismiss if the line item was never shipped or received.

Modifying Inventory Quantity

Do not adjust inventory for the following reasons:

- Account for Doses administered
- Remove doses transferred to another facility

1. Located on the left hand side module, navigate to **Inventory** and select the + sign to expand your module view.
2. Next, click on the **Vaccines** + sign to expand your view further.
3. Select **Vaccines On-Hand** in the dropdown menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. Click the radio button next to the desired vaccine lot and click the **Adjustment** button.
6. At the Vaccine Inventory Adjustment screen, select the **Date** and appropriate **Reason** from the drop down menu.
7. Under Modification, select add or subtract.
8. Under Doses Adjusted, enter the amount of doses you wish to modify.
9. Click the Create button to save.

Modifying Inventory Description

1. Located on the left hand side module, navigate to **Inventory** and select the plus sign to expand your module view.
2. Next, click Vaccines + sign to expand your view further.
3. Select **Vaccines On-Hand** in the dropdown menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. Click the radio button next to the desired vaccine lot and click the **Edit** button.

6. In the **Vaccine Inventory Item** you will now be able to view details associated with this vaccine
7. You may now edit the Vaccine, Manufacturer, and NDC & Brand, Lot #, Expiration Date and Funding source. Click update to save. *Note: any modifications where the vaccine has been administered will also be reflected in the patient's record and grayed out areas are not editable fields.*

Doses Administered Report

1. Located in the left hand side module, navigate to the **Reports** Module.
2. Located under Coverage Statistic report category, select **Doses Administered**
3. Under Report Selection Criteria, ensure all required fields marked with a red * are completed
4. Click **RUNREPORT**

Aggregate Doses Administered Report for Data Exchange Providers

1. Located in the left hand side module, navigate to the **Reports** Module.
2. Located under **Inventory Management-Vaccine** report category, select **Aggregate Administered Doses**
3. Under Report Selection Criteria, ensure all required fields marked with a red * are

- completed
4. Click **RUNREPORT**

View/Accept/Reject Inventory Transfers

1. Located on the left hand side module, navigate to **Inventory** and select the + to expand your module view.
2. Next, click on the **Vaccines** + sign to expand your view further.
3. Select **Vaccines On-Hand** in the dropdown menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. For any pending incoming or outgoing transfers, a blue hyperlink with a yellow exclamation will be displayed directly under your On-Hand Inventory
⚠ **There are 27 Pending Inventory Transfers.**
6. Click the blue hyperlink to get an itemized listing of incoming and outgoing transfers.
7. The vaccine, dose, NDC #, Lot #, funding source, manufacturer, source location, date and time and status will be displayed.
8. **Pending Incoming Inventory Transfers** may either be received or dismissed.
9. To receive, click the received button and a pending inventory window will pop up. Enter the actual date the inventory was received and mark it "ok".
10. Inventory will not be added to your on-hand inventory until you receive the transfer. The same is true for the transferring provider, the inventory will not be deducted from their on-hand inventory until the receiving provider

receives the transfer.

11. **Pending Outgoing Inventory Transfers** may either be deleted or updated.
12. To delete a transfer, simply click the **Delete** button.
13. To update the details regarding the pending outgoing transfer, click the update button and modify the details of the transfer and click **Update**.
14. Located at the bottom of the page is a pending incoming and pending outgoing inventory report that may also be generated by the user.

Creating Transfers

1. Located on the left hand side module, navigate to **Inventory** and select the + to expand your module view.
2. Next, click on the **Vaccines** + sign to expand your view further.
3. Select **Vaccines On-Hand** in the dropdown menu.
4. The **Vaccine On-Hand Inventory** screen will now be displayed.
5. Using the radio button, select the desired vaccine and click **Transfer**.
6. The **Vaccine Inventory Transfer** Add screen is now displayed. Select a **Destination Inventory Location** from the dropdown menu (site where you are sending the vaccine).
7. Enter the number of doses in the **Doses Transferred** field and repeat the steps for each of the **Trade Name Vaccine Groups** being transferred.
8. Click **Create**.

Questions? please visit <https://portal.ct.gov/DPH/Immunizations/All-About-CT-WiZ> or view the training videos associated with that page in CT WiZ by clicking the drop down by your name at the top right off the page and going to Application Help.