

How do I prepare for a Reconciliation?



Connecticut Department of Public Health *Keeping Connecticut Healthy*







Things You Should

- Reconciliation is done by inventory
 location (refrigerator, freezer, COVID or private-optional). If
 both CVP and private vaccine are stored in the same
 inventory storage unit, both will have to be reconciled.
- Reconciliation of vaccines are done by vaccine, lot number, expiration date, CVX code, and Blended Public CVP (Funding Source).





The following things should occur prior to the reconciliation to ensure a smooth process:

- Resolve any immunizations added but not administered (UI clinics)
- Resolve any pending transfers or shipments
- Document properly any wastage
- Return any expired inventory
- Make sure any past reconciliations are marked as "closed".



Resolve any immunizations added but not administered



Connecticut Department of Public Health Keeping Connecticut Healthy





Navigate to Reports



CT WIZ • WEBINAR	TRAINING PEDIATRICS, WEBINAR TRAINING PEDIA Q PATIENT SEARCH	🤀 Support 🛛 🌲 Not	tifications 🚺 👻	A KIMBERLY -
WEBINAR TR	AINING PEDIATRICS, WEBINAR TRAINING PEDIATRICS HL7, 7500	Dependent		
Home		Connecticut Department of Public Health		
Patients 🛨	0			
Immunizations	Default Provider/Clinic			
Education	Provider(Clinic *			
Inventory	[WEBINAR TRAINING PEDIATRICS] WEBINAR TRAINING PEDIATRICS HL7 - C7500P7500 (7500)			
Clinic Tools	Select a clinic by typing provider, clinic, vfc pin, or clinic code			
Reports				
HL7 management	News			
App Version 24.2.0.0 Recommender Version 24.2.0.0 Copyright © 2001-2024 Envision Technology Partners Inc.	Welcome to CT WiZ Posted on 07/18/2019 by ALEJANDRA ARIAS			
<u>Third Party Notices</u>	Welcome to CT WiZ Training!			



Navigate to the "Vaccines Added by not Administered" Report



 Navigate to the Data Quality – User Section.
 Click on Vaccines Added

Administered.

but not

Data Quality - User
Data Quality - Statistics - Scheduled
Data Quality - Statistics
Data Quality - Patient Exceptions
Patients with Possible Duplicate Vaccinations - Datamart
Data Quality - Patient Immunization Exceptions
Patients with Possible Duplicate Vaccinations
Possible Patient Duplicates
Shots Before Birth
User Vaccination Details
Vaccines Added but not Administered 2
Inventory Management - Vaccine Daily Vaccinations Report
Aggregate Administered Doses
Inventory Adjustment Inquiry
Inventory On-Hand
Inventory Pending Transfers
Inventory Reconciliation Worksheet
Inventory Summary By Funding Source
Inventory Transaction Inquiry
Inventory Transfer Inquiry
Monthly Immunization Report (VFC and State)
Possible Duplicate Inventory Report
Unaccounted For Doses



Run the "Vaccines Added But Not Administered" Report



This report will assist you in your inventory counts by identifying unaccounted doses.

Vaccines Added but not Administered
Enter the selection criteria and click "Run Report" or click "Cancel" to return to the previous page.
Report Selection Criteria
Provider *
WE LOVE KIDS PEDIATRICS CT
Clinic * 1
WE LOVE KIDS NORTH
Clinic County
Υ
Vaccination Date Range *
From: 08/01/2018 🔄 Through: 08/10/2018 🔄 2
Output Type PDF EXTRACT - Delimiter: Run Report Cancel

- Make sure you have the right Provider and Clinic.
- Specify a Vaccination Date Range. The date range should match the reconciliation dates.
- 3. The report will automatically generate as a .pdf file. Ifyou would like the report in Excel, select the Extract option and enter a comma (,) into the delimiter field.
- 4. After you made your selection click on Run Report.



Vaccines Added But Not Administered Report



Example of Report in PDF

Provider = WE LOVE KIDS PEDIATRICS CT, Clinic = WE LOVE	E KIDS NORTH, Vaccina	Connectic Vaccines Added but	ut WebIZ not Admin	08/10/2018			August 10, 2018
Patient	DOB	Vaccination	Dose	Clinic	Date	Age	Created By
POLIO, JOHNNY (854428)	08/06/2016	DTaP	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hep A, ped/adol, 2D	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hep B, ped/adol	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hib (PRP-T)	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Influenza Quad Inj P	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		MMR	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		PCV13	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Polio-IPV	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Varicella	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1

Example of Report in Excel with "," delimiter

	Α	В	С	D	E	F	G	Н	I.	J	К	L	M	N	0	Ρ
1	Patient ID	First Nam	Middle N	a Last Name	DOB	Age	Vaccinatio	Vaccination [Dose Num	Clinic ID	Clinic Cod	Clinic	Provider I	Provider	Created By	/
2	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	DTaP	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
3	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Нер Аре	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
4	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Нер В рес	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
5	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Hib (PRP-1	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
6	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Influenza	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
7	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	MMR	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
8	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	PCV13	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
9	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Polio-IPV	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
10	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Varicella	8/10/2018	1	3137	C5556P77	WE LOVE	882	WE LOVE	KIMBERLY	GIERLA1
11																



Recommend

Were the vaccines actually Administered to the Patient?

Auto-Populate Add Vaccines Screen



munizatio	ons Hor	me 🕦	D Lini	Add Vaccin Administer	t Action les Vaccine	is is	2
ew				Add Histor	1		
DOB	Age	History of Varicella?	Date of Varicella				
08/06/2016	2Y 0M 4D	NO	MM/DD/YYYY				
🔥 This patier	nt does not hav	e any recommended imm	unizations				
Please do not rely so ACIP recommended i http://www.cdc.gov/va accine DTaP / TD / Tdap DTaP olio Polio-IPV	lely on the Reco immunization sc accines/pubs/pin Dos 1	mmender to forecast immur hedules and the CDC Pink I ikbook/index.html#chapters se Date Age C 08/10/2018 2Y 0M 4D (08/10/2018 2Y 0M 4D (nizations. Utilize clinie Book @ Iinic C55556P7778 C55556P7778	cal judgment a	nd const	ult both	Delete
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For any vaccines that appear on this report:

Navigate to the patient's Immunization Home screen by clicking on **Patients**, **Search** (type 2 letters in both the Last Name and First Name boxes and include the birth date). Once the patient has been located, click the down arrow key next to Demographics and select **Immunizations** to bring up the Immunization Home screen.

- 1. If the vaccines(s) were not administered, click Delete at the end of the vaccine line.
- 2. If the vaccine(s) were administered, click Administer Vaccines and complete the immunization.

Only the nurse or doctor who is listed in the Administered By box on the Administer Vaccine screen can delete or administer a vaccine.

Make sure the administration date is the actual dategiven.



Resolve any pending transfers and shipments



Connecticut Department of Public Health Keeping Connecticut Healthy





View Pending Transfers



CT WIZ • WEBI	IAR TRAINING PEDIATRICS, WEBINAR TRAINING PEDIA Q PATIENT SEARCH	Support	🜲 Notifications 🊺 👻	📥 KIMBERLY 🗸
It's Your Best Shot! Connecticut Immunization Information System			H	
Home		of Public Heal	th	
Patients	0		_	
Immunizations	Default Provider/Clinic			
Education Inventory Vaccines 2	Provider/Clinic * [WEBINAR TRAINING PEDIATRICS] WEBINAR TRAINING PEDIATRICS HL7 - C7500P7500 (7500) Select a clinic by typing provider, clinic, vfc pin, or clinic code			
On-Hand				
3 ctronic Decrementing conciliation	News			
Vaccine Orders				
Vaccine Returns	Welcome to CT WiZ			
Vaccine Shipments	Posted on 07/18/2019 by ALEJANDRA ARIAS			
Clinic Tools				
Reports	weicome to CT wiz Training!			
HL7 Management				

- 1. Click on Inventory
- 2. Click on Vaccines
- 3. Click on On-Hand



View Pending Transfers



-Hand Inventory There are 4 Pending Inventory Transfers.		Click her view pen transfe	e to ding ers		
(ALL)	•	ON-HAND	•		
Vaccine	,	Funding Source			
(ALL)	•	(ALL)	•		



Accept the Transfer







View Pending Shipments







Receive the Shipment/Order



Pending VTrckS Shipme	ents								
Order ID / Line Number	Date Shipped	Vaccine	NDC	Lot Number	Quantity Shipped				
2014102965432201 / 1	10/29/2014	Influenza Ped Quad P	49281-0514-25	05DG05879	40	Details	Receive 2	Dismiss	?
2014102965432201 / 2	10/29/2014	Influenza Quad Inj P	58160-0901-52	75FG45879	10	Details	Receive	Dismiss	?
2014102965432201 / 3	10/29/2014	Influenza- LAIV Quad	66019-0301-10	56JH54874	30	Details	Receive	Dismiss	?

1. Click **Details** to view the shipment

information.

- 2. Click **Receive** for each vaccine to add to your inventory on-hand.
 - OR

Click **Dismiss** to indicate the line item was never shipped and received.



Account for any wastage

Examples:

- Spoiled
- Partial multi-dosevial
- Lost vaccine
- Broken vial or syringe
- Drawn up dose notadministered



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Return Vaccine



CT WiZ	• WEBINAR	TRAINING PEDIATRICS, WEBINAR TRAINING PEDIA Q PATIENT SEARCH	🖨 Support	🙏 Notifications 🚺 👻	A KIMBERLY -
It's Your Con Immunization I	Best Shot! DECICAL Intercicut Information System			eu Health.	
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Education Inventory Vaccines On-Hand	1 2	Provider/Clinic * [WEBINAR TRAINING PEDIATRICS] WEBINAR TRAINING PEDIATRICS HL7 - C7500P7500 (7500) Select a clinic by typing provider, clinic, vfc pin, or clinic code			
3 ctronic E	Decrementing ion	News			
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Vaccine Re	turns	Welcome to CT WiZ			
Vaccine Ship	oments	Posted on 07/18/2019 by ALEJANDRA ARIAS			
Clinic Tools					
Reports		Welcome to CT WiZ Training!			
HL7 Manage	ement 🔳				

Click on Inventory
 Click on Vaccines
 Click on On-Hand



Return Vaccine-Wastage



Click on the **Action** button for thewasted vaccine. Then, click on **Adjustment**.





Information on Wastage



Vaccine Inventory Adjus	tment 🛈	Cancel	Create
Add			6
Date/Time Inventory Location	08/08/2018 II 12:00 AM (HH:MM A/P) REFRIGERATOR	_	
Vaccine Mig NDC Lot Number Expiration Date	IHEP B, PED/ADOL IMSD 00006-4981-00 1223 07/31/2019 Image: Comparison of the second s		
Funding Source Doses On-Hand	VFC 30		
Reason Modification	VTRCKS - BROKEN VIAL/SYRINGE	✓ 2	
Doses Adjusted 4 Container Id 5	TUSSY PATIENT		
Clear			

- 1. Enter the **Date/Time** of the wastage (double click for current date and time).
- Select the Reason for the wastage from the drop down.
- 3. Under **Modification**, select Subtract.
- 4. Enter the number of wasted doses under **Doses Adjusted.**
- 5. In the **Comments** box, note why the vaccine was wasted.
- 6. When finished, click **Create**.

This removes the vaccine from your on-hand inventory.



Return expired and spoiled inventory



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Things You Should

According to VFC regulations, all expired vaccines should be removed from your storage unit upon expiration date, noted in CT WiZ, and returned to McKesson according to VFC regulations.



1. Start Here

Starting a New Return



2. Click here to

				create a return
				~~~
	It's Your Best Shot	7	Vaccine Returns 3 Learn More	Add New Vaccine Return
	Connecticut Immunization Information Syn	stem	Search	
	Home		Clinic Return Status	
	Patients	B	Return Reason Return Type	
	Immunizations		<b>v v</b>	
	Inventory		Return Date Range Date Submitted to VTr From: 05/31/2018 From: 08/31/2018 From: MM/DD/YYYY	ckS Date Range
	Vaccines			
	On-Hand		Previous Criteria	Clear Search
-	Reconciliation			
	Vaccine Orders			
	Vaccine Returns			
	Locations			
	Clinic Tools	8		
	Reports			



#### Starting a New Return -Select Your Clinic



Vaccine Returns 🛈 Learn More	Cancel Next 2	1.	Click the drop
Add - Select Clinic *			down to choose your clinic, this is important if linked to multiple clinics.
		2.	Click on Next

#### The dropdown list will include all the clinics you are associated with

#### Starting a New Return - Confirm Shipping and Delivery Information



dd									
Clinic:DPH	TRAININ	G CLINI	C 2						
Primary Shi	pping Co	ntact							
Name:									
Phone:									
Fax:									
Email:									
Shipping A	Idress								
450 CAPIT HARTFOR	OL AVE D, CT 06	106							
Delivery Inf	ormation								
	Deliver	y Time '	1 Deliver	y Time 2					
	From	То	From	То					
Monday	08:30	12:00	13:00	17:00					
i uesoay Wedneeda	08:30 v08:30	12:00	13:00	17:00					
Thursday	08:30	12:00	13:00	17:00					
Friday	08:30	12:00	13:00	17:00					
Sunday									
-				NOTDUCT					

Review the shipping and delivery information for your clinic. If it is all correct:

- 1. Click the check box.
- 2. Click Next.

If your clinic information is incorrect, view "How do I update my clinic information?" training material.





Vaccine Returns Dearn More	1. Choose <b>RETURN ONLY</b> .
Vaccine Returns       Cancel         Add         Clinic       Last Approved Return Date       Created By         WEBINAR TRAINING PEDIATRICS HL7       MM/DD/YYYY       1         Return Number       Return Status       Return Type *       2         R0306/2024750000       IN WORK       RETURN ONLY ~       0THER       2         Label Shipping Method *       Date Submitted to Program       Date Submitted to VTrcks       3         Clinic Comments       5       1       3	<ol> <li>Choose RETURN ONLY.</li> <li>Select a Return Reason.</li> <li>Enter the number of shipping labels needed (usually 1 label is enough).</li> <li>Choose email for your method of receiving the return label.</li> <li>Enter your spoilage letter under the Clinic Comments section. This is reviewed by the VEC</li> </ol>
VFC Program Comments          Vaccine   Mfg   NDC   Brand/Packaging   Funding Source   Lot Number   Expiration Date   Doses Remaining       Doses Returning       7       Add Return       8         EGIN TYPING A VACCINE, MFG CODE, NDC, BRAND/PACKAGING, FUNDING SOURCE, LOT #, OR DATE HERE       7       Add Return       8         Vaccines To Return       Vaccination       Mfg       NDC       Brand/Packaging       Funding Src       Lot Number       Expiration Date       Doses Remaining       Doses Returned         Hib (PRP-T)       PMC       49281-0545-03       ActHIB (5 pack - 1 dose vial)       BLENDED PUBLIC CVP       U029145       03/29/2024       25       25       25	<ul> <li>is reviewed by the VFC Coordinator.</li> <li>6. Choose the Vaccine to Return - Begin typing Vaccine, NDC, Brand, or Lot Number. Make sure you choose the correct lot number.</li> </ul>
	<ol> <li>2. Enter the number of doses being returned.</li> <li>8. Click Add Return.</li> <li>Repeat steps 6-8 for other vaccines to be returned.</li> <li>9. Click Create to save the work.</li> </ol>
Vaccine Returns 👩 🚯 Learn More	C Program Update

Once you click on Create, you will then see an option to Submit to VFC Program. Your return will not be submitted until you click this.



#### Navigate to Vaccine Returns



CT WiZ	WEBINAR TRAINING PEDIATRICS, WEBINAR TRAINING PEDIA Q PATIENT SEARCH	otifications 🚺 👻 🤮	KIMBERLY -
It's Your Conr Immunization in	hot connecticut Hoults		
Home	Connecticut Department of Public Health		
Patients		_	
Immunization	Default Provider/Clinic		
Education Inventory Vaccines On-Hand	Provider/Clinic *         [WEBINAR TRAINING PEDIATRICS] WEBINAR TRAINING PEDIATRICS HL7 - C7500P7500 (7500)         Select a clinic by typing provider, clinic, vfc pin, or clinic code		
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Vaccine Ore Vaccine Re Vaccine Ship	3 Welcome to CT WiZ Posted on 07/18/2019 by ALEJANDRA ARIAS		
Clinic Tools			
Reports	Welcome to CT WiZ Training!		
HL7 Manage			

Click on Inventory
 Click on Vaccines
 Click on Vaccine Returns



#### Checking Return Status -Getting Started



Search			
Clinic (ALL) V Return Reason	2 Retu (AL Retu	Irn Status L) v Irn Type 4	
Return Date Range From: 05/03/2018	D Through: 08/03/2018	Pate Submitted to VTrckS Date From: MM/DD/YYYY To Three	Range bugh: MM/DD/YYYY 📰 Clear Search

You can select the following fields to narrow the search for orders by:

- 1. Clinic
- 2. Return status: In Work (not submitted for approval), Submitted for Approval, Rejected, Approved.
- 3. Return reason
- 4. Return date range Date ordered
- 5. Submitted to VTrckS date range Date order was submitted to VTrckS
- 6. Click Search



#### An example of Approved Returns



accine Returns	Learn More			ļ	Add New Va	ccine Return
Search						
Clinic (ALL)	~	Return Status	]			
Return Reason	~	Return Type	1			
Return Date Range From: 12/12/2023	Through: 03/12/2024	Date Submitted to VTrckS Date Ra	ange gh: MM/DD/YYYY	Y 🔳		
Date Submitted to Program	n Date Range Through: MM/DD/YYYY	1				
Previous Criteria					Clear	Search
Return	Return		Date Date Date Date	ate ubmitted	Return	
Return Number Date WEBINAR TRAINING PEDIA	Status Return Type F TRICS HL7 - 7500	leturn Reason	to Program to	VTrckS	Detail	
R03122024750000 03/12/202	4 APPROVED RETURN	AILURE TO STORE PROPERLY	03/12/2024		÷	? View



# Make sure any past reconciliations are closed



Connecticut Department of Public Health Keeping Connecticut Healthy





#### Reconciliations



CT WIZ <b>Q</b> WEBINAR	TRAINING PEDIATRICS, WEBINAR TRAINING PEDIA Q PATIENT SEARCH	Support	Notifications 🊺 🗸	🐣 KIMBERLY 🗸
It's Your Best Shot! Connecticut Immunization Information System		Dependence in the		
Home		of Public Health	hent	
Patients 📑	0			
Immunizations	Default Provider/Clinic			
Education Inventory Vaccines On Used	Provider/Clinic * [WEBINAR TRAINING PEDIATRICS] WEBINAR TRAINING PEDIATRICS HL7 - C7500P7500 (7500) Select a clinic by typing provider, clinic, vfc pin, or clinic code			
Electronic Decrementing Reconciliation 3 Vaccine Order	News			
Vaccine Returns	Welcome to CT WiZ			
Vaccine Shipments	Posted on 07/18/2019 by ALEJANDRA ARIAS			
Clinic Tools				
Reports	Welcome to CT WiZ Training!			
HL7 Management			_	
			1	

Click on Inventory
 Click on Vaccines
 Click on Reconciliations



	It's Your Best Shot!
2	Connecticut
	Immunization Information System

ventory Location Atus Status
rentory Location Reconciliation atus Status
atus Status
ALL) 🗸 OPEN 🗸
e (ALL)
D/YYYY 🔄 Turough: Open
Closed
Clear Search
)



#### **Close Open Reconciliations**



Vaccine Inventory F	Reconciliation g 🕦				Cancel Links - Update - Close Reconciliation
Inventory Location: 7500 FRE	EZER 1				
Description: *		Authorized By:	~ <b>†</b>	Status: * OPEN	~
Count Date: * 03/05/2024	Count Time: * 02:18 PM	Last Count Date/Time: 1/9/2020 10:37:00 AM		Last Order Date: 02/24/2021	
Inventory by Doses					
Description		Summary Aggı Admir	regate Physical Count istered	Inventory Acceptable Inv. Difference Difference	. Action Audit

Make any changes needed. If the reconciliation is ready to be closed, click the down arrow next to Update and then Close Reconciliation.



#### How to get help



- Click on the **()** located at the top of the page to get a description of whichever screen you are on.
- Some pages have a Learn More link. Click on this to see short "How To"videos. These appear on a separate page so you can play videos while navigating through CT WiZ.
- Visit the CT WiZ training page <u>here</u>. The training page has numerous documents and step by step videos to help you.
- Still can't find an answer to your question? After you exhausted all of the above options, submit a help desk ticket to get the quickest answer. You may do so by clicking <u>here</u>.

