How do I prepare for a Reconciliation?

Things You Should Know

- 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).

Reconciliation Preparation

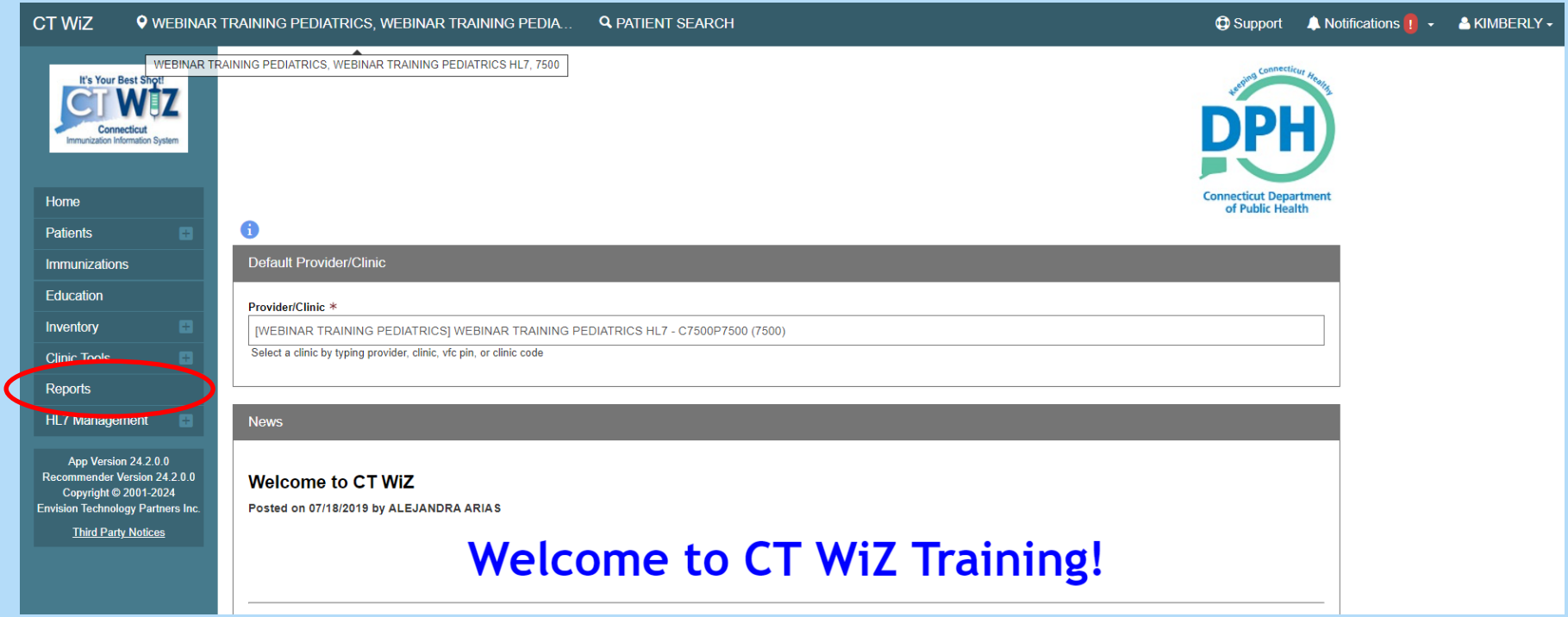
The following things should occur prior to the reconciliation to ensure a smooth process:

- 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".

It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

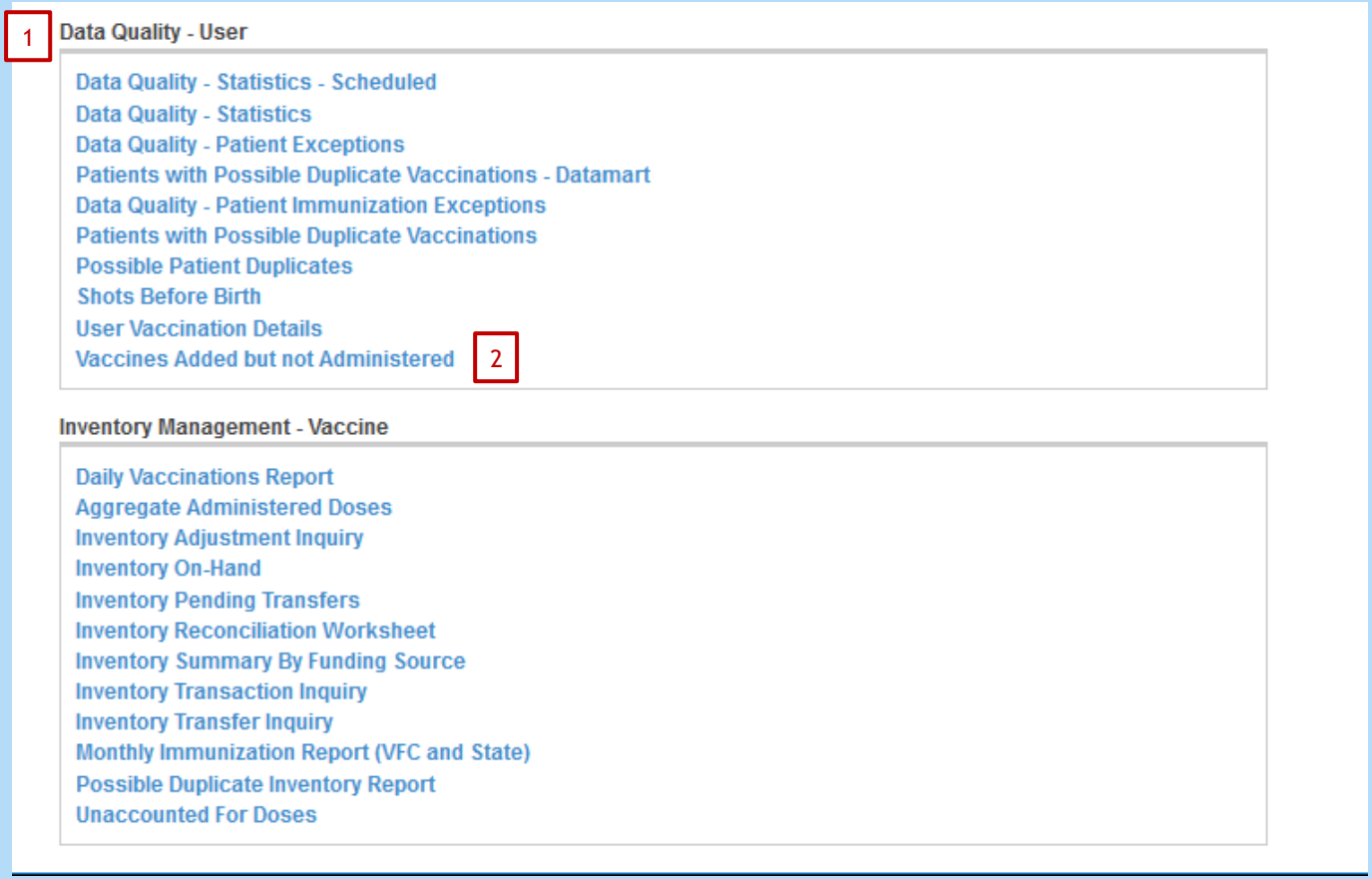
Resolve any immunizations added but not administered

Navigate to Reports



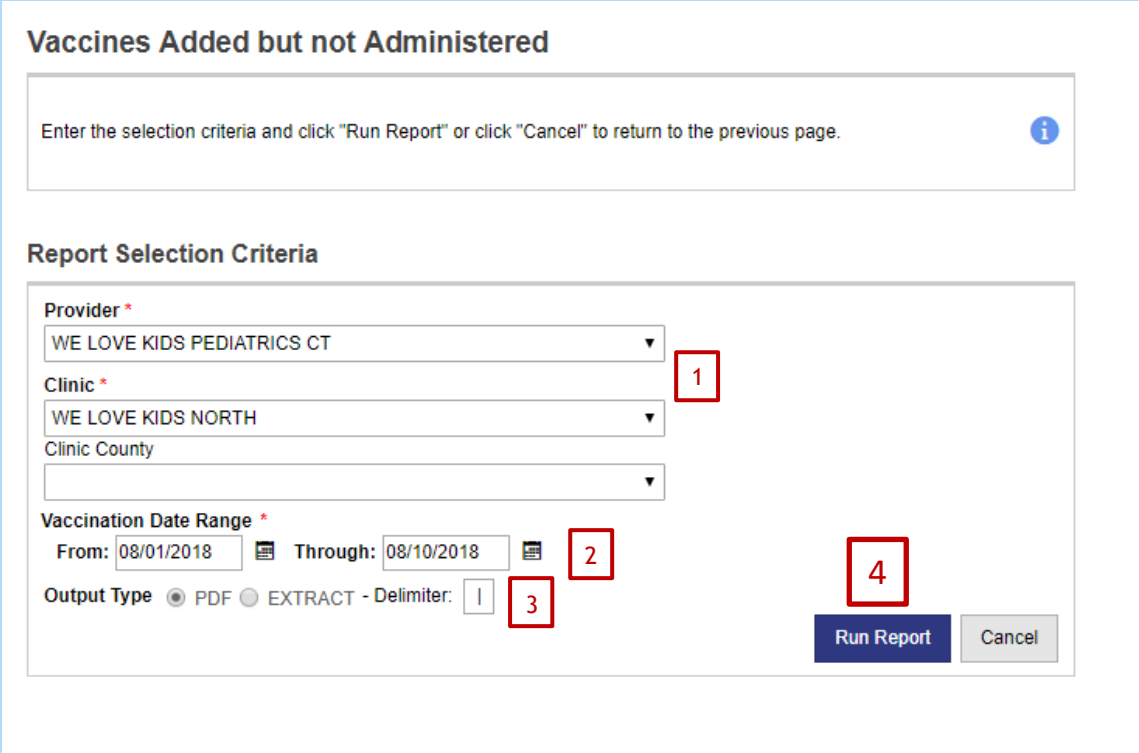
Navigate to the "Vaccines Added by not Administered" Report

1. Navigate to the **Data Quality – User** Section.
2. Click on **Vaccines Added but not Administered.**



Run the "Vaccines Added But Not Administered" Report

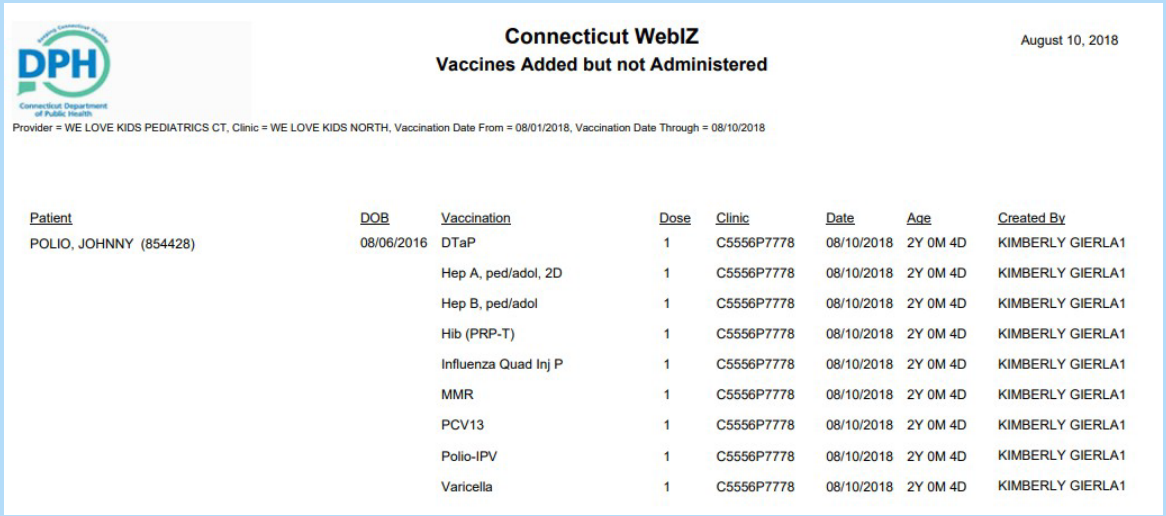
This report will assist you in your inventory counts by identifying unaccounted doses.



1. Make sure you have the right **Provider and Clinic**.
2. Specify a **Vaccination Date Range**. The date range should match the reconciliation dates.
3. The report will automatically generate as a .pdf file. If you 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



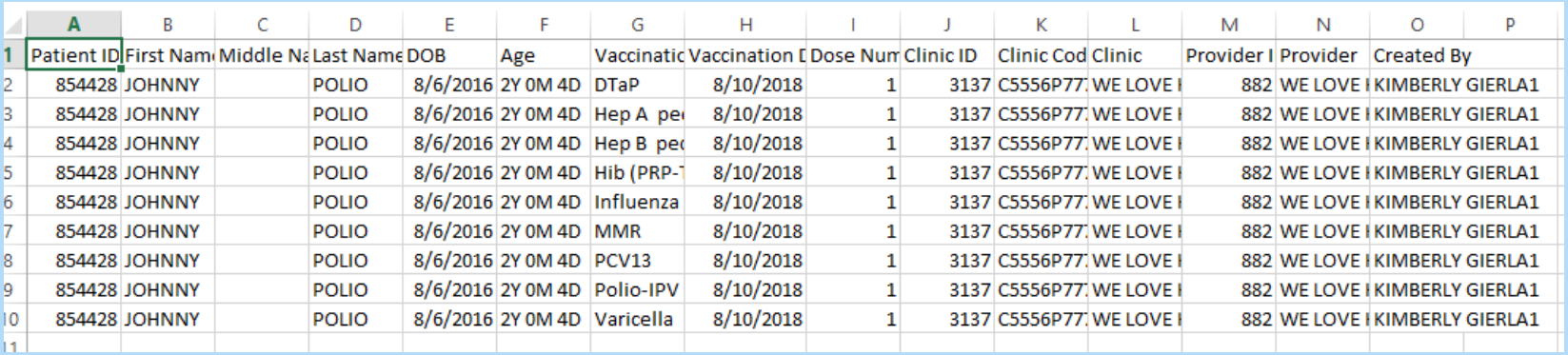
Connecticut WebIZ
Vaccines Added but not Administered

August 10, 2018

Provider = WE LOVE KIDS PEDIATRICS CT, Clinic = WE LOVE KIDS NORTH, Vaccination Date From = 08/01/2018, Vaccination Date Through = 08/10/2018

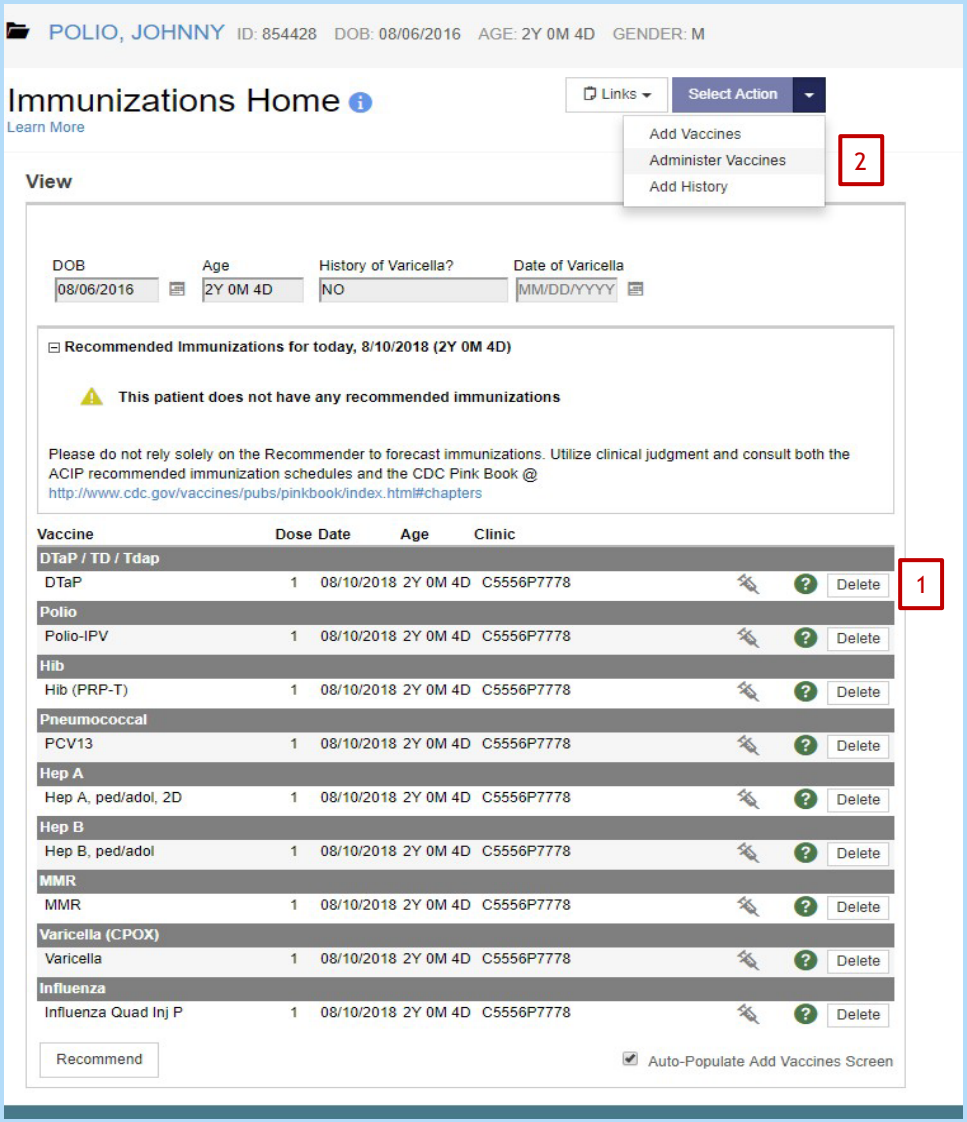
Patient	DOB	Vaccination	Dose	Clinic	Date	Age	Created By
POLIO, JOHNNY (854428)	08/06/2016	DTaP	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hep A, ped/adol, 2D	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hep B, ped/adol	1	C5556P7778	08/10/2018	2Y 0M 4D	KIMBERLY GIERLA1
		Hib (PRP-T)	1	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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Patient ID	First Nam	Middle Na	Last Name	DOB	Age	Vaccinatic	Vaccination D	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 I	882	WE LOVE I	KIMBERLY GIERLA1	
3	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Hep A pe	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
4	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Hep B pe	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
5	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Hib (PRP-	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
6	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Influenza	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
7	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	MMR	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
8	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	PCV13	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
9	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Polio-IPV	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
10	854428	JOHNNY		POLIO	8/6/2016	2Y 0M 4D	Varicella	8/10/2018	1	3137	C5556P77	WE LOVE I	882	WE LOVE I	KIMBERLY GIERLA1	
11																

Were the vaccines actually Administered to the Patient?



For any vaccines that appear on thisreport:

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.

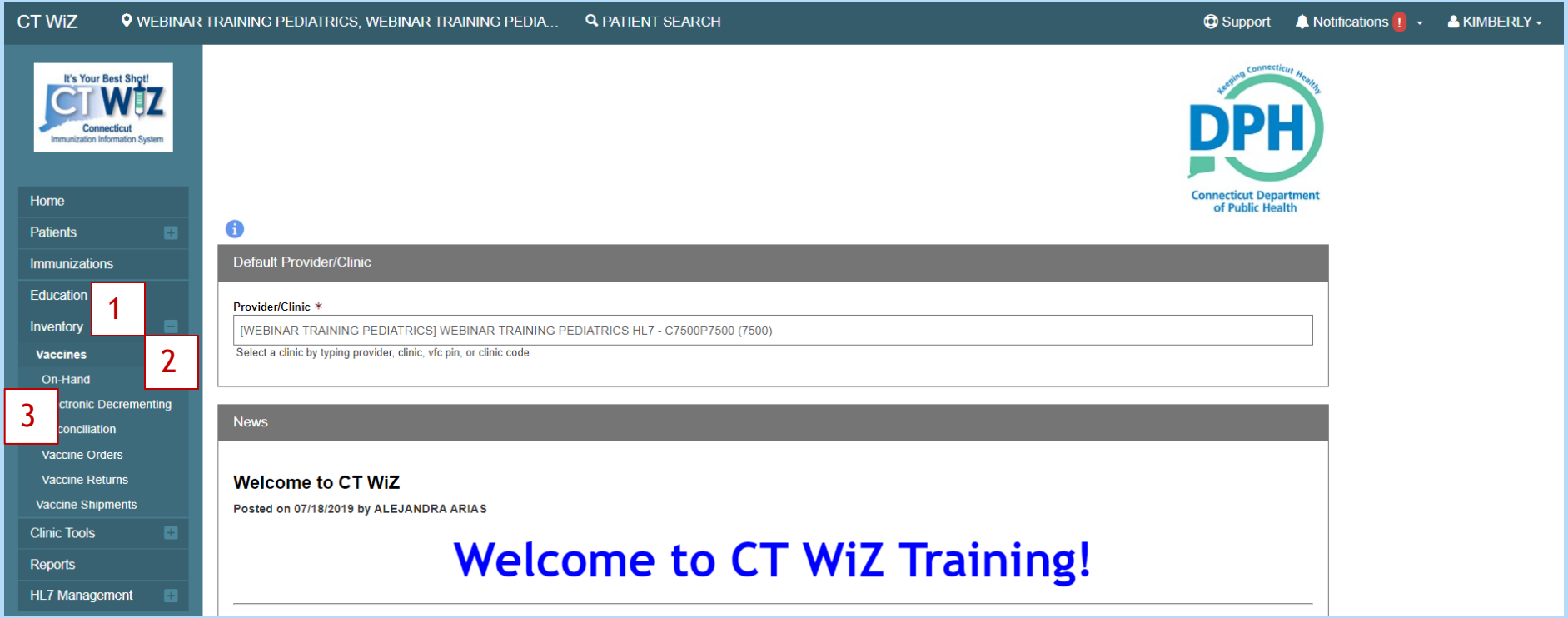
Only the nurse or doctor who is listed in the Administered By box on the Administer Vaccine screen can delete or administer a vaccine.

Make sure the administration date is the actual dategiven.

It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

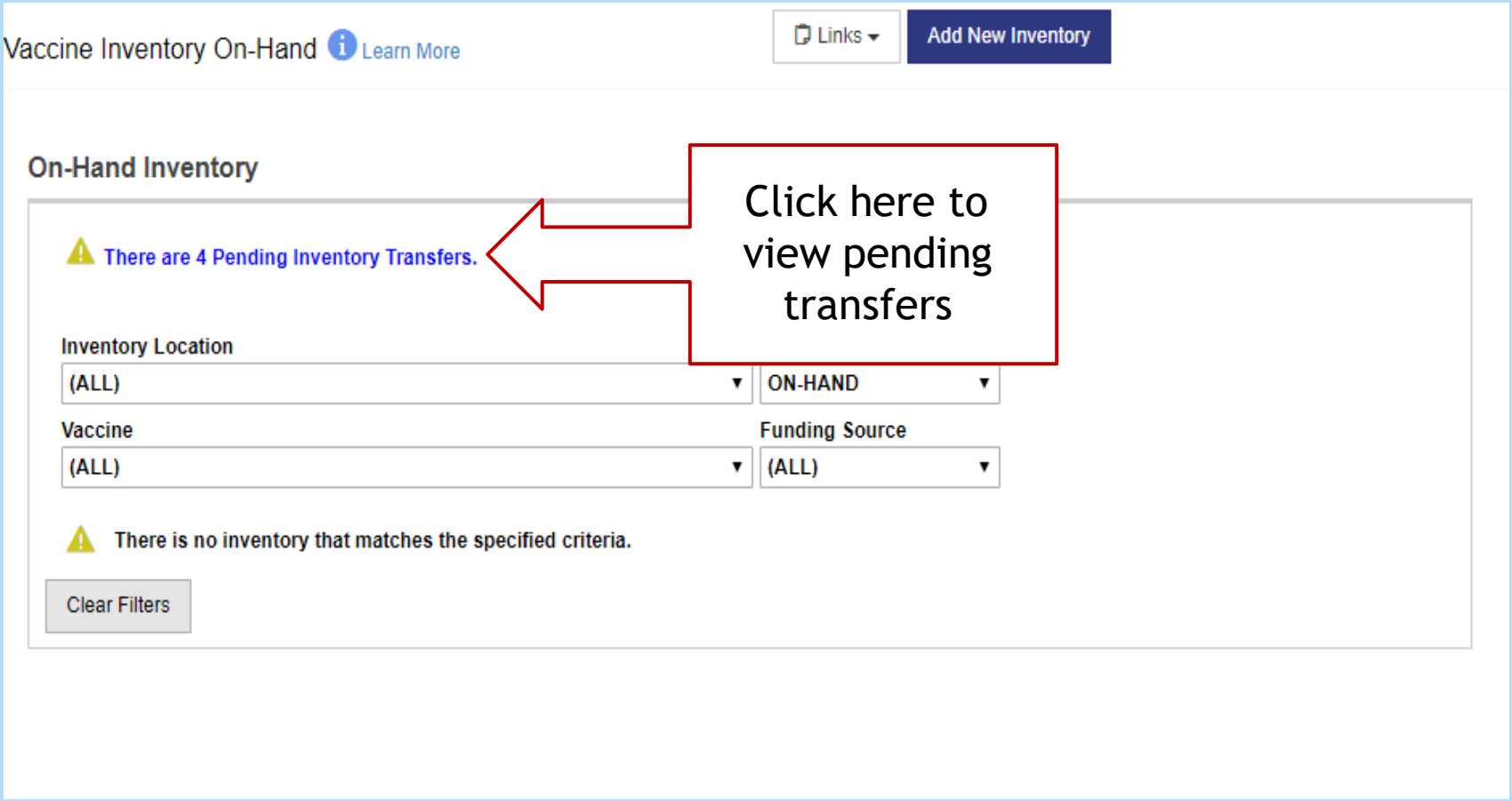
Resolve any pending transfers and shipments

View Pending Transfers

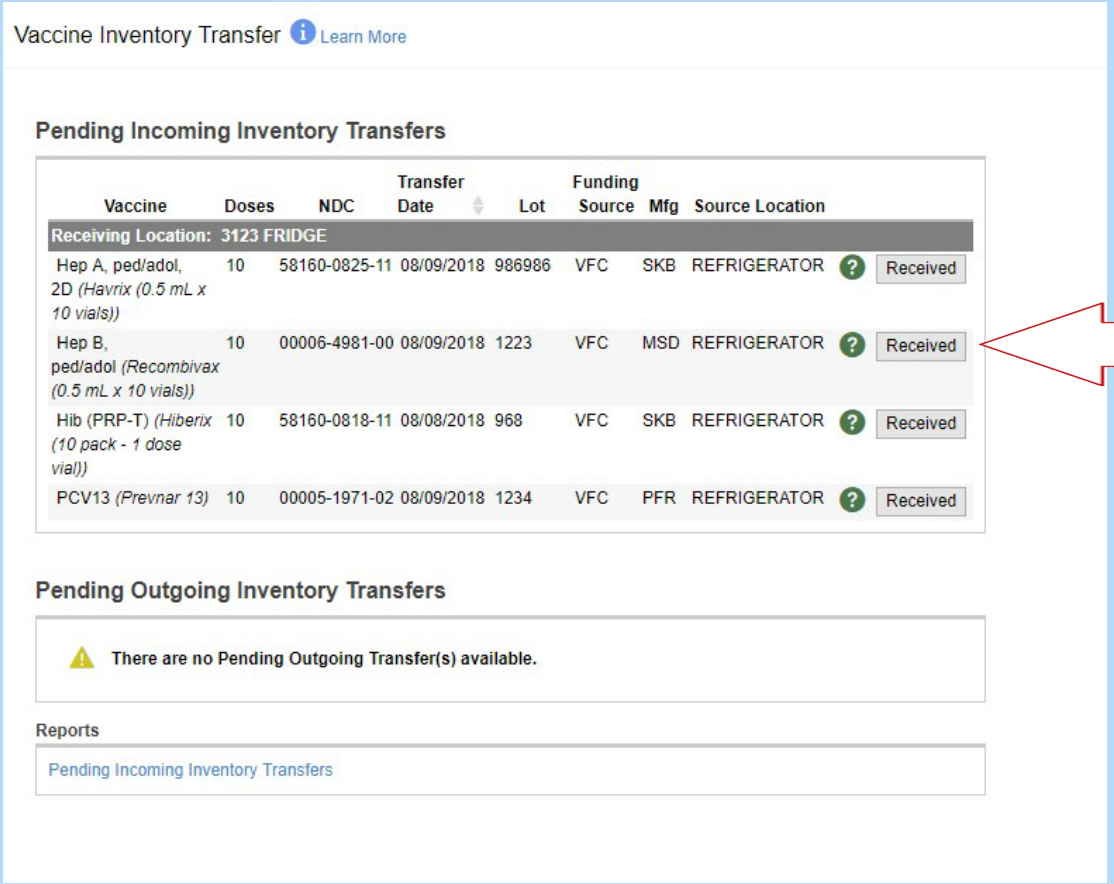


1. Click on Inventory
2. Click on Vaccines
3. Click on On-Hand

View Pending Transfers



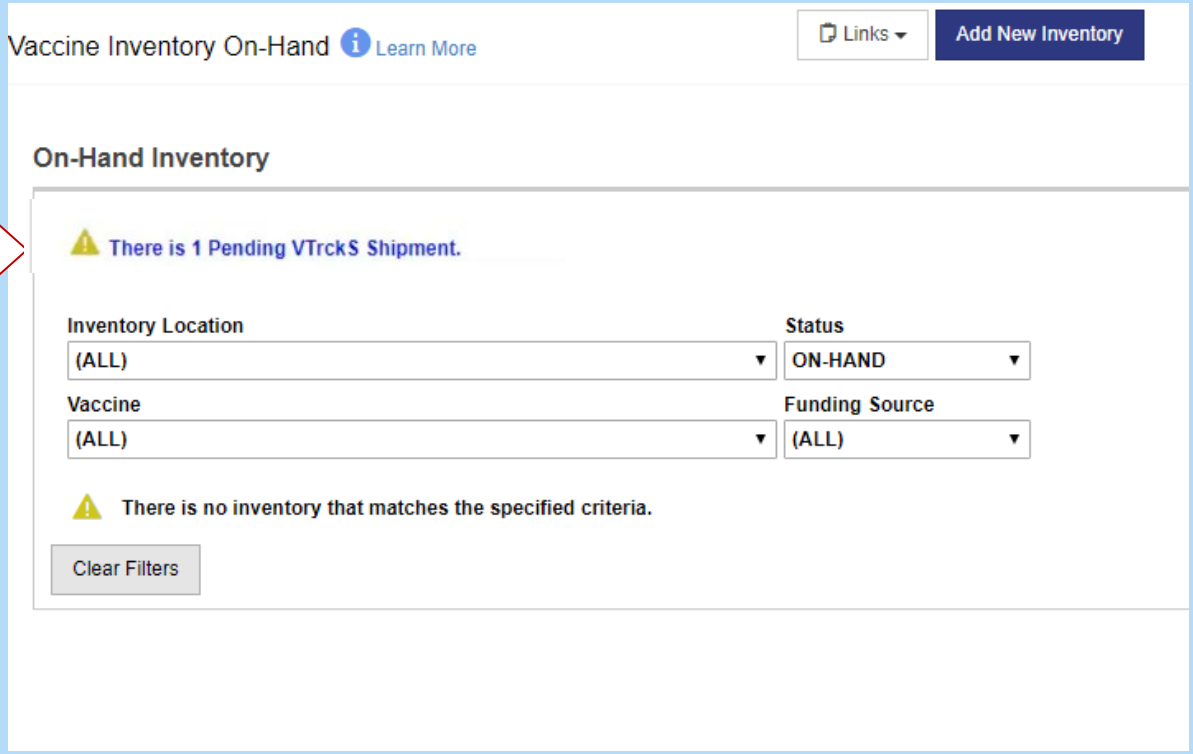
Accept the Transfer



Click on Received to accept the transfer

View Pending Shipments

Click on the blue link to view pending VTrckS shipments



Receive the Shipment/Order

Pending VTrckS Shipments

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	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
2

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.

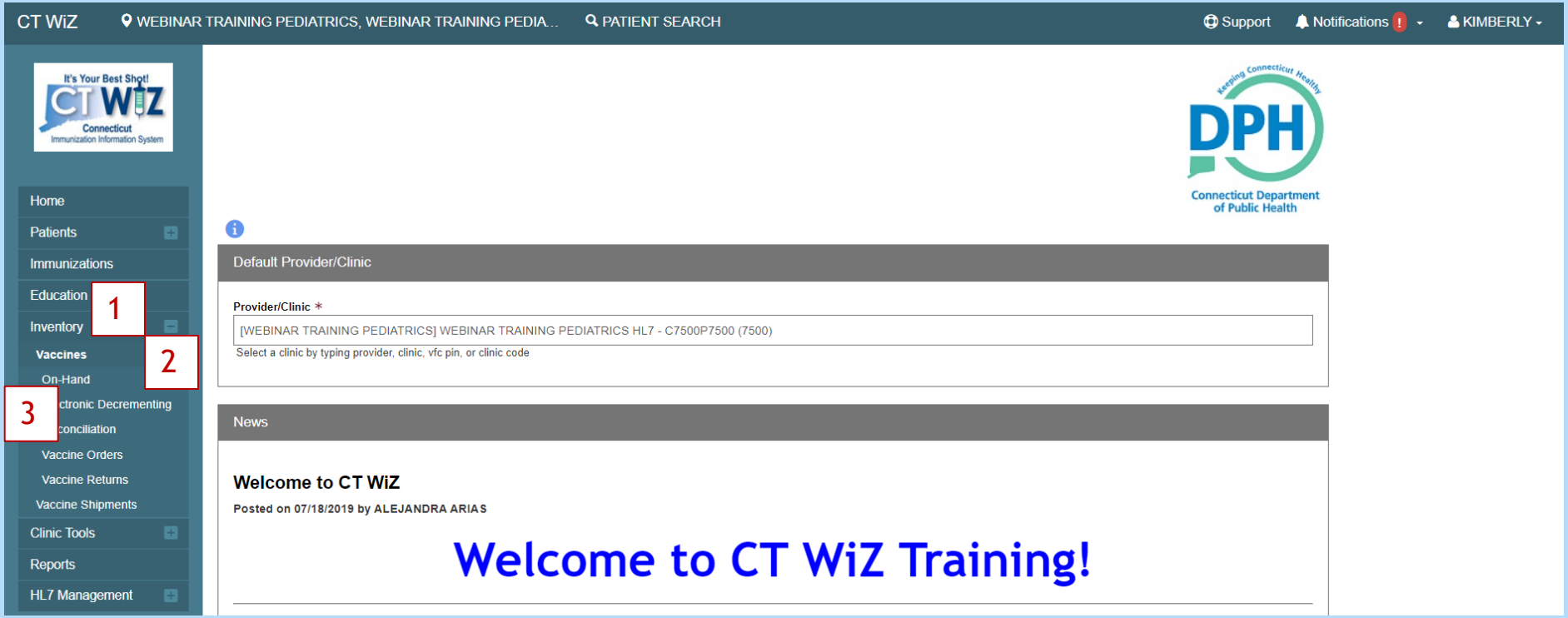
It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

Account for any wastage

Examples:

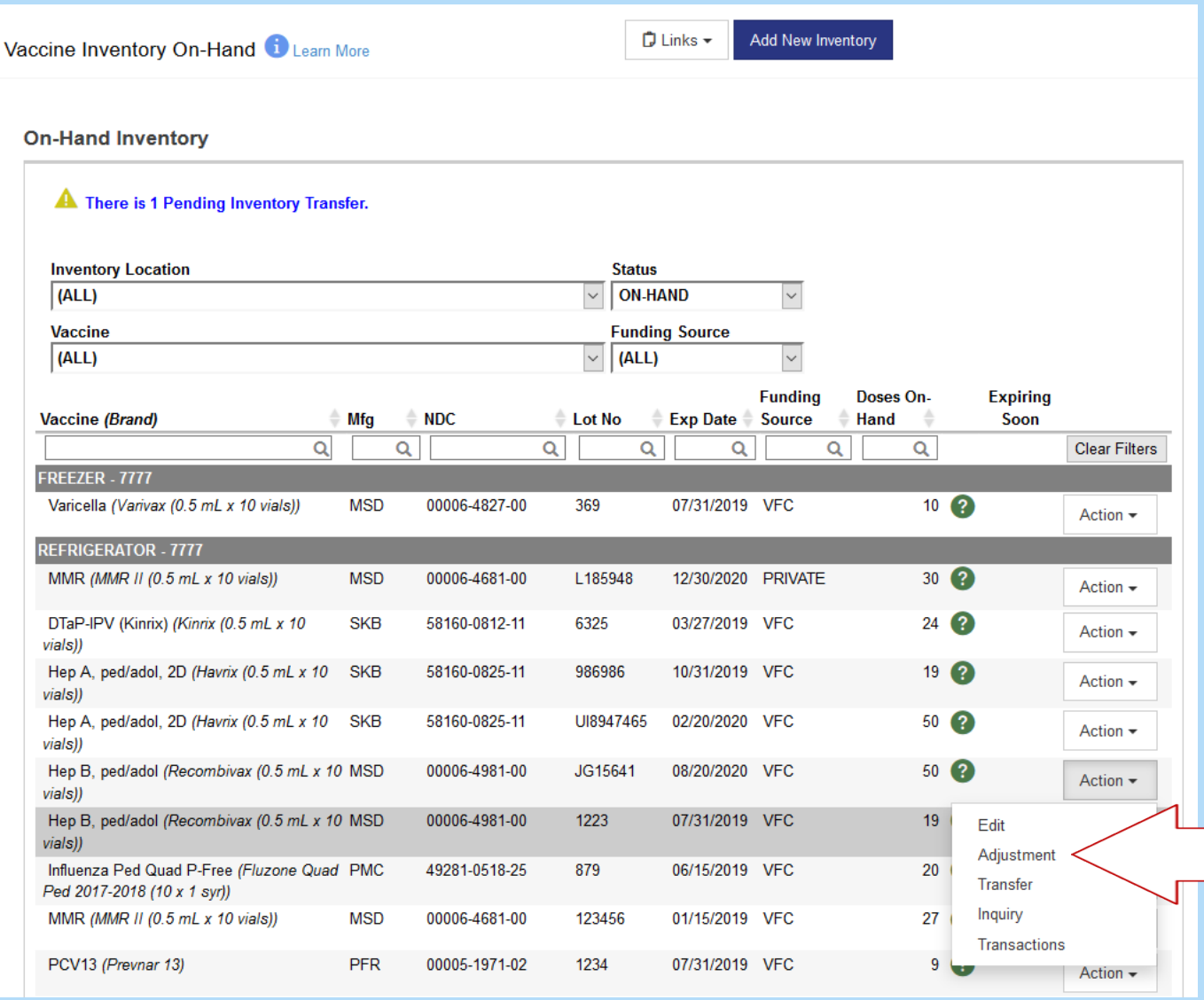
- Spoiled
- Partial multi-dose vial
- Lost vaccine
- Broken vial or syringe
- Drawn up dose not administered

Return Vaccine



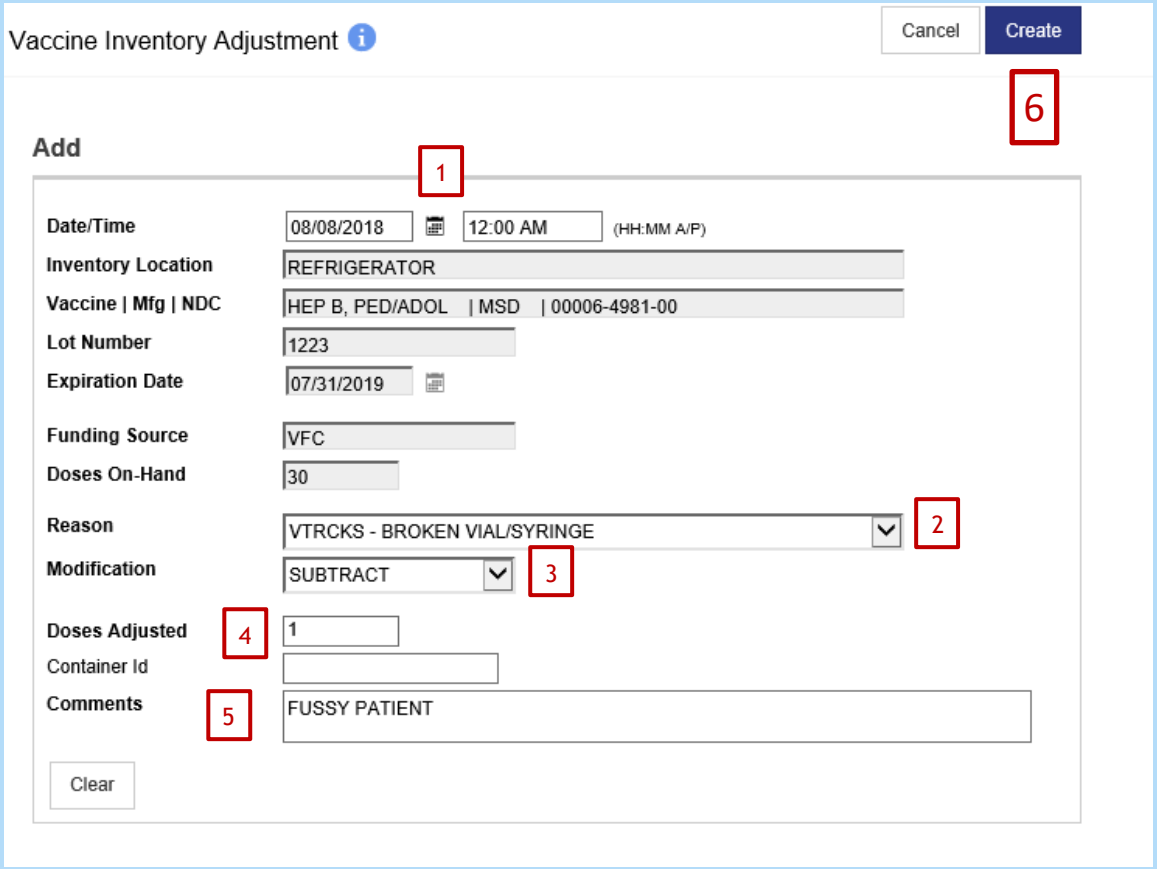
1. Click on Inventory
2. Click on Vaccines
3. Click on On-Hand

Return Vaccine-Wastage



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

Information on Wastage



1. Enter the **Date/Time** of the wastage (double click for current date and time).
2. 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.

It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

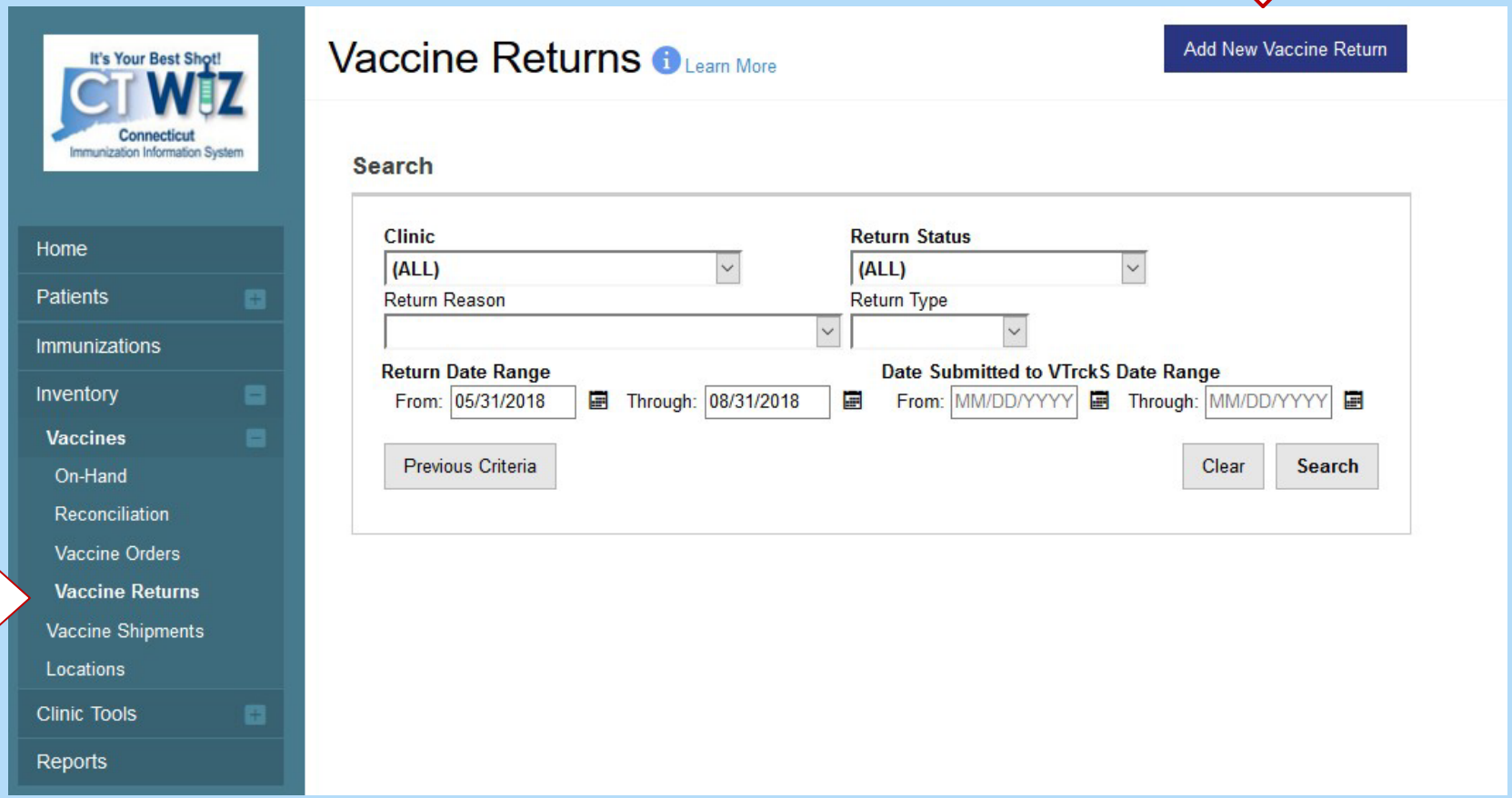
Return expired and spoiled inventory

Things You Should Know

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.

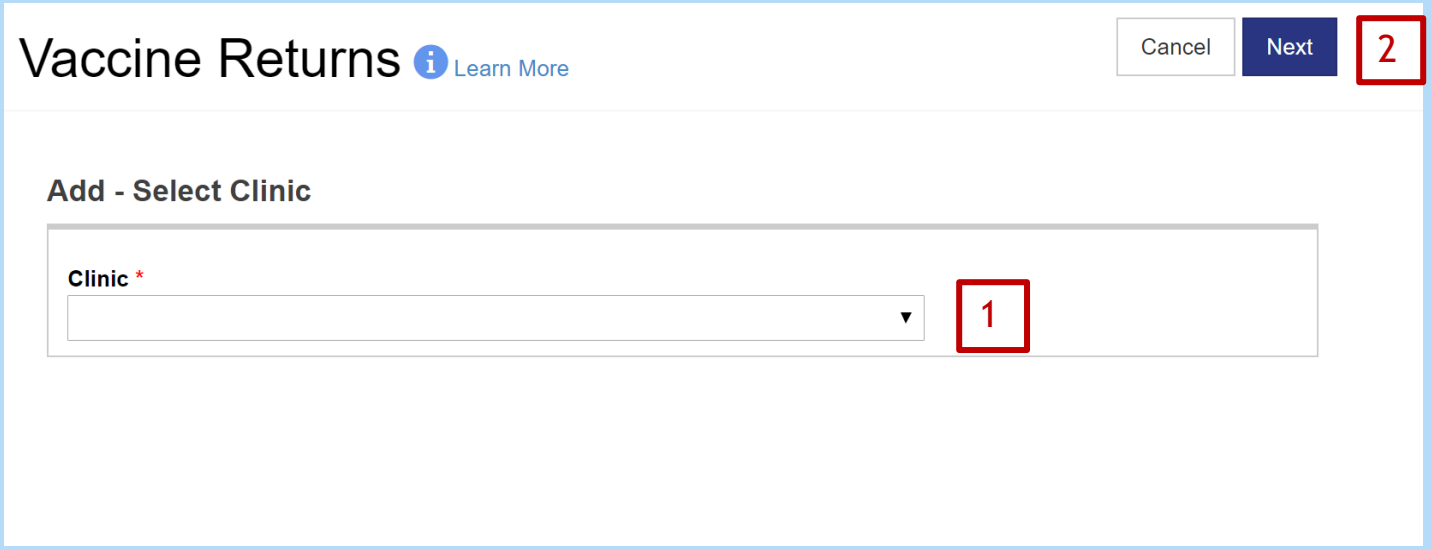
Starting a New Return

2. Click here to create a return



1. Start Here

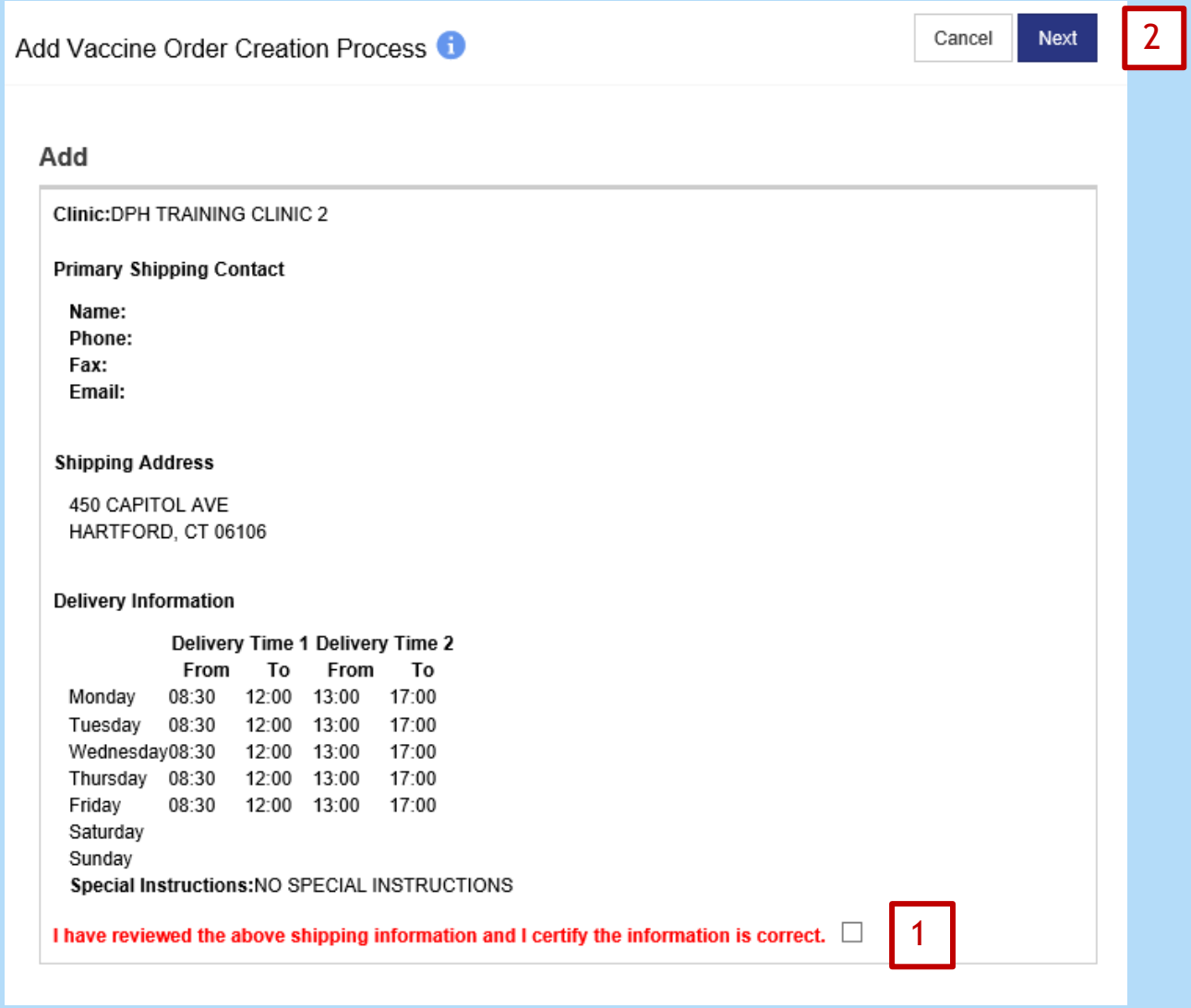
Starting a New Return – Select Your Clinic



1. Click the drop 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

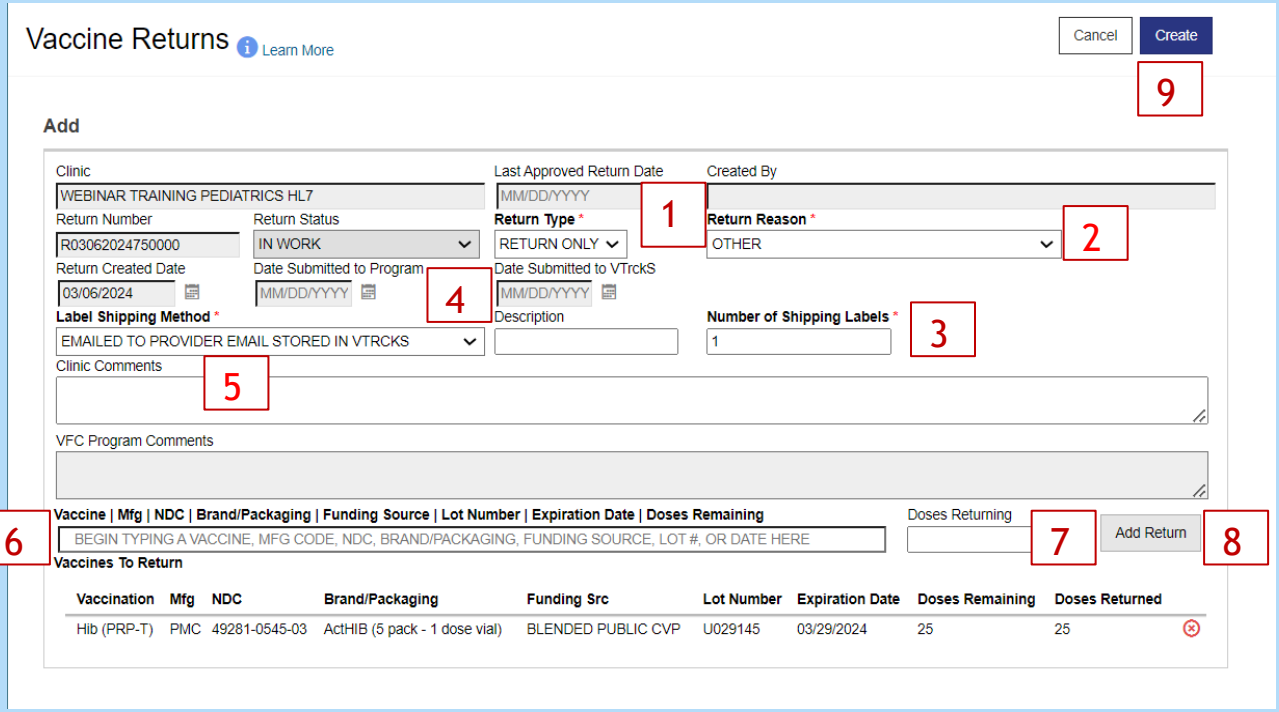


Review the shipping and delivery information for your clinic. If it is all correct:

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

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

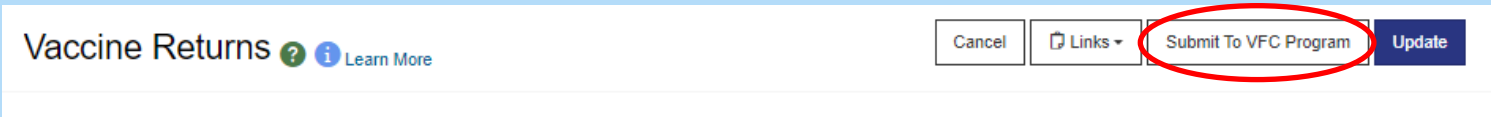
Enter Return Information



1. Choose **RETURN ONLY**.
2. Select a **Return Reason**.
3. Enter the number of shipping labels needed (usually 1 label is enough).
4. Choose email for your method of receiving the return label.
5. Enter your spoilage letter under the **Clinic Comments** section. This is reviewed by the VFC Coordinator.
6. Choose the **Vaccine to Return** - Begin typing Vaccine, NDC, Brand, or Lot Number. Make sure you choose the correct lot number.
7. Enter the number of doses being returned.
8. Click Add Return.

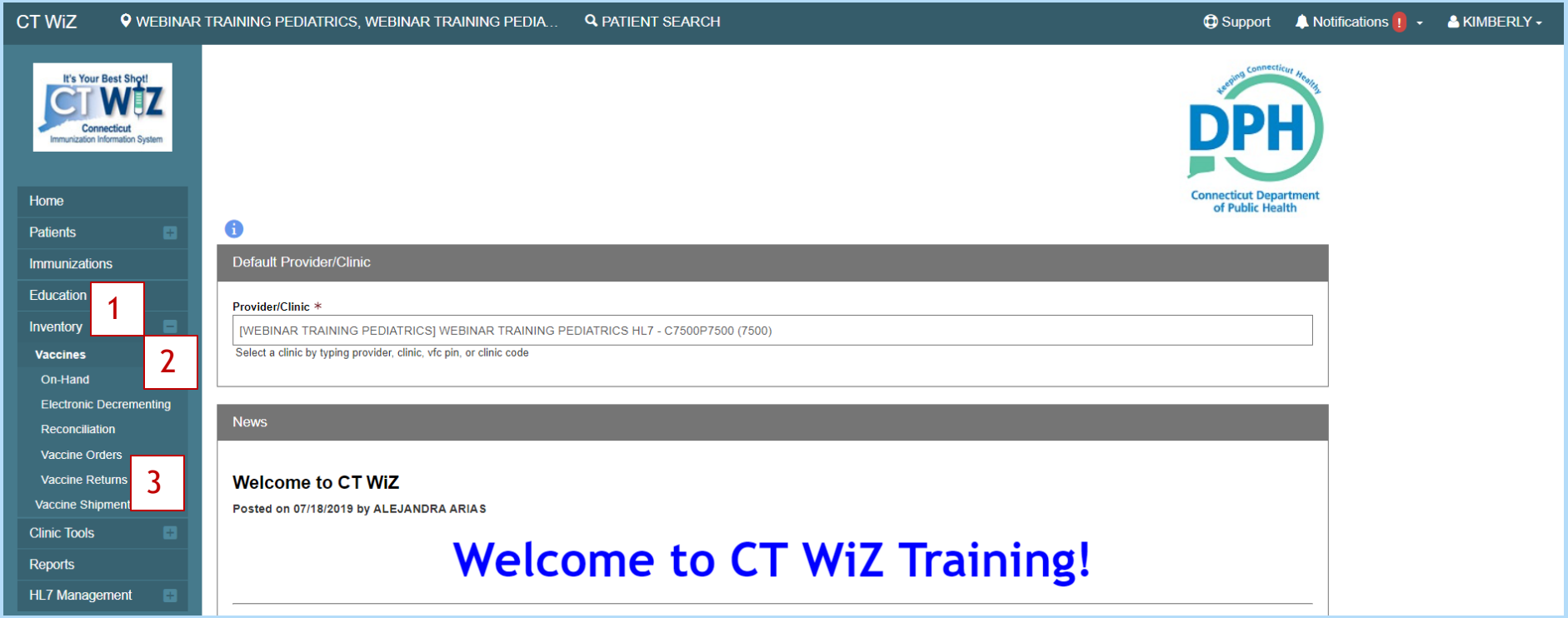
Repeat steps 6-8 for other vaccines to be returned.

9. Click Create to **save the work**.



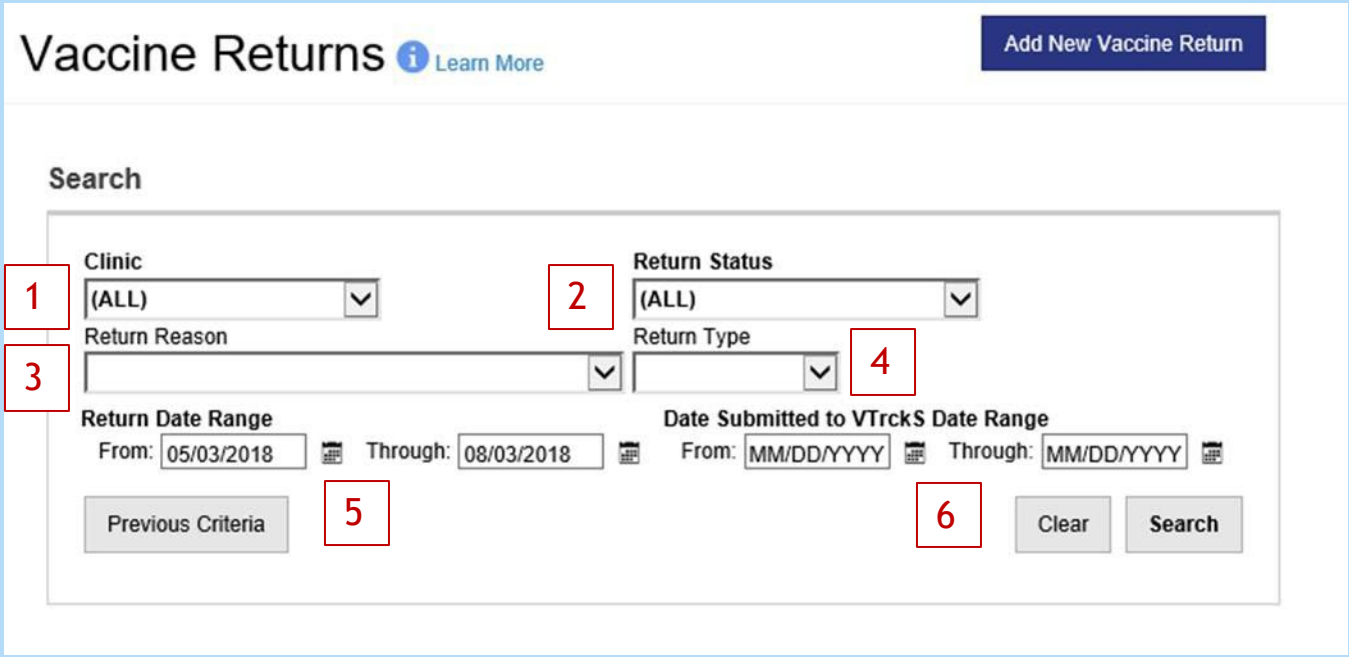
Once you click on Create, you will then see an option to Submit to VFC Program. Your return will not be submitted until you click this.

Navigate to Vaccine Returns



1. Click on Inventory
2. Click on Vaccines
3. Click on Vaccine Returns

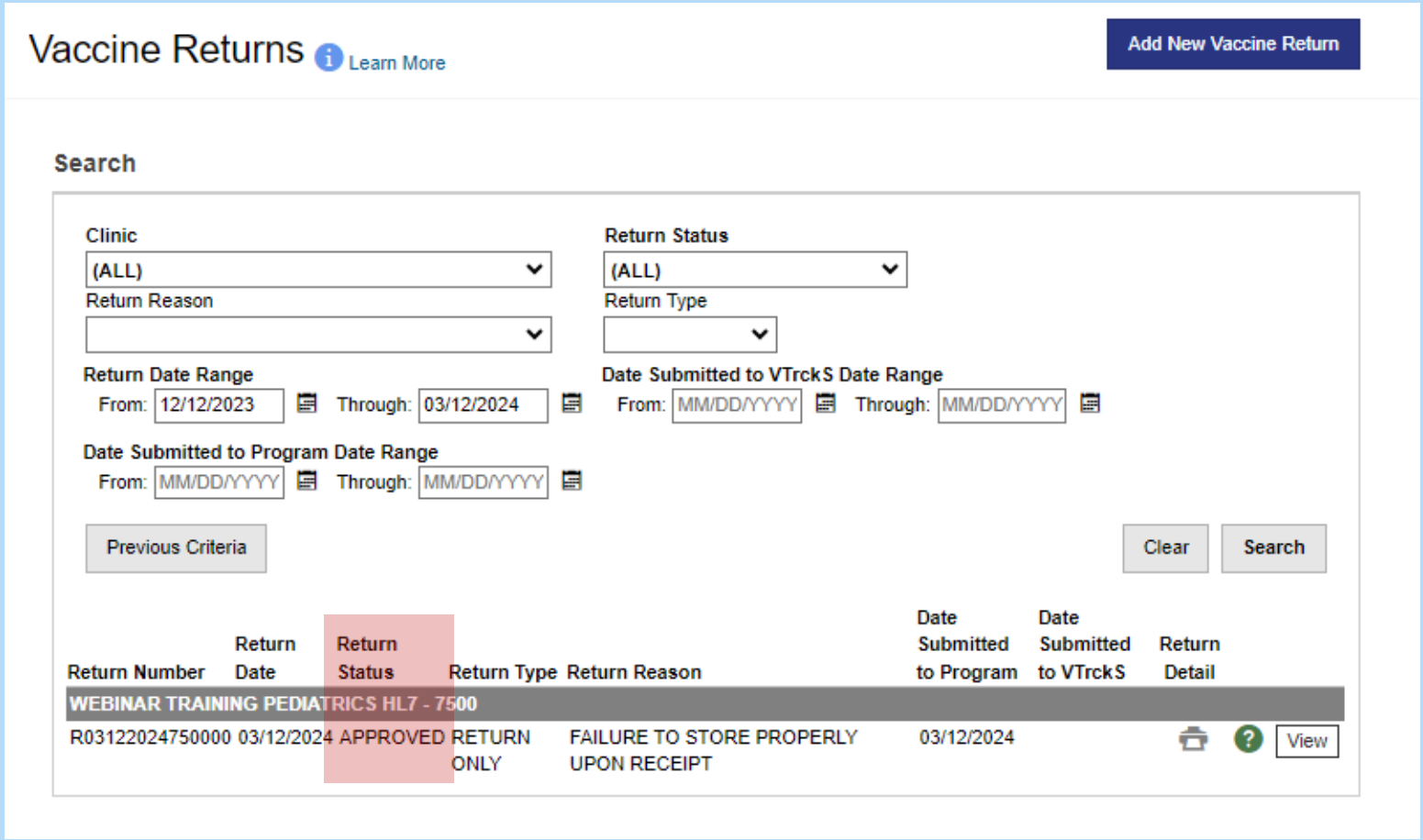
Checking Return Status - Getting Started



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

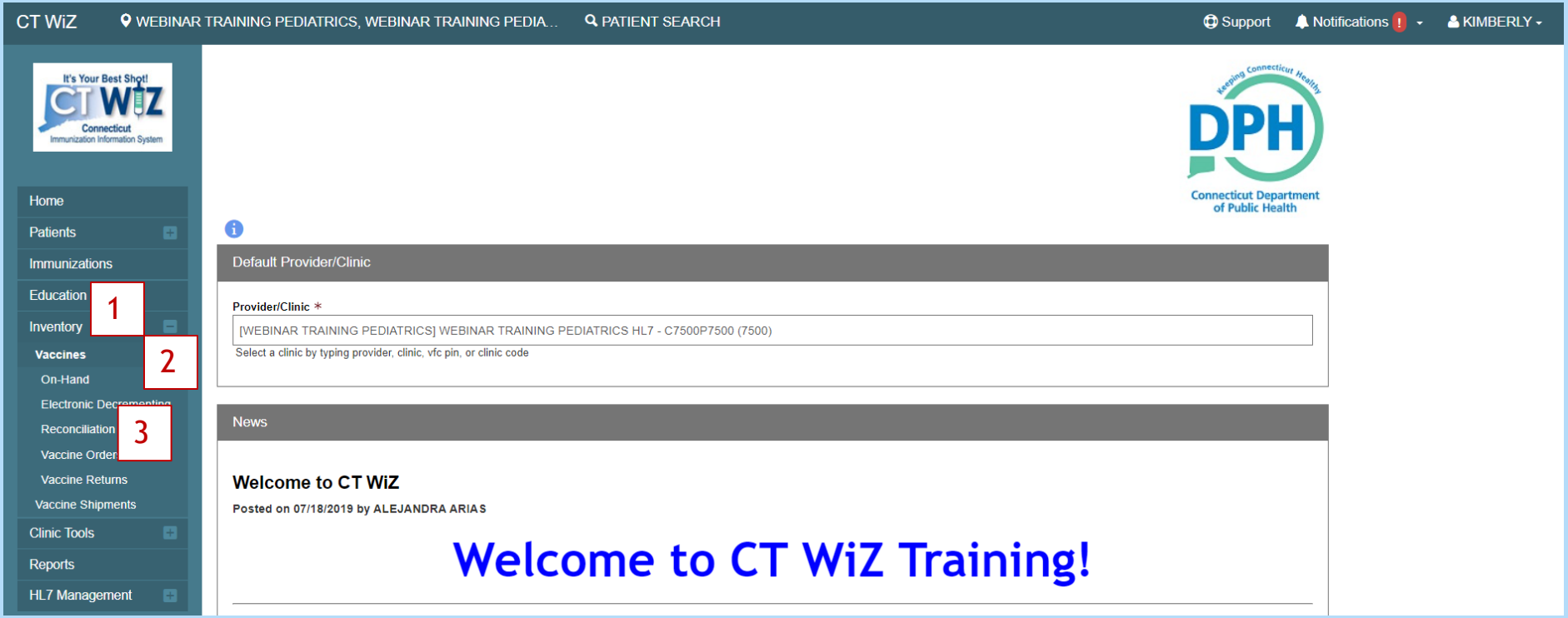
An example of Approved Returns



It's Your Best Shot!
CT WIZ
Connecticut
Immunization Information System

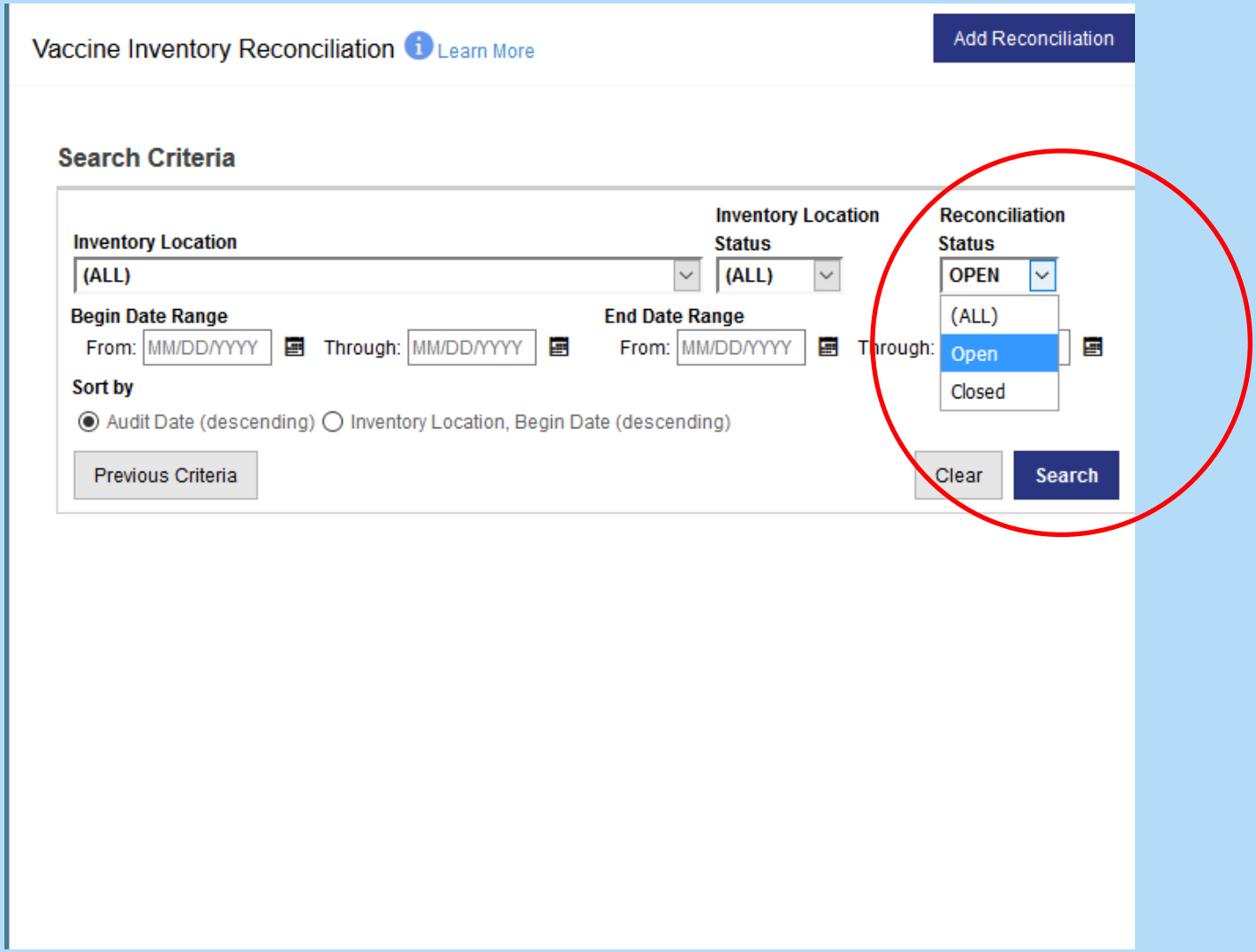
Make sure any past reconciliations are closed

Reconciliations

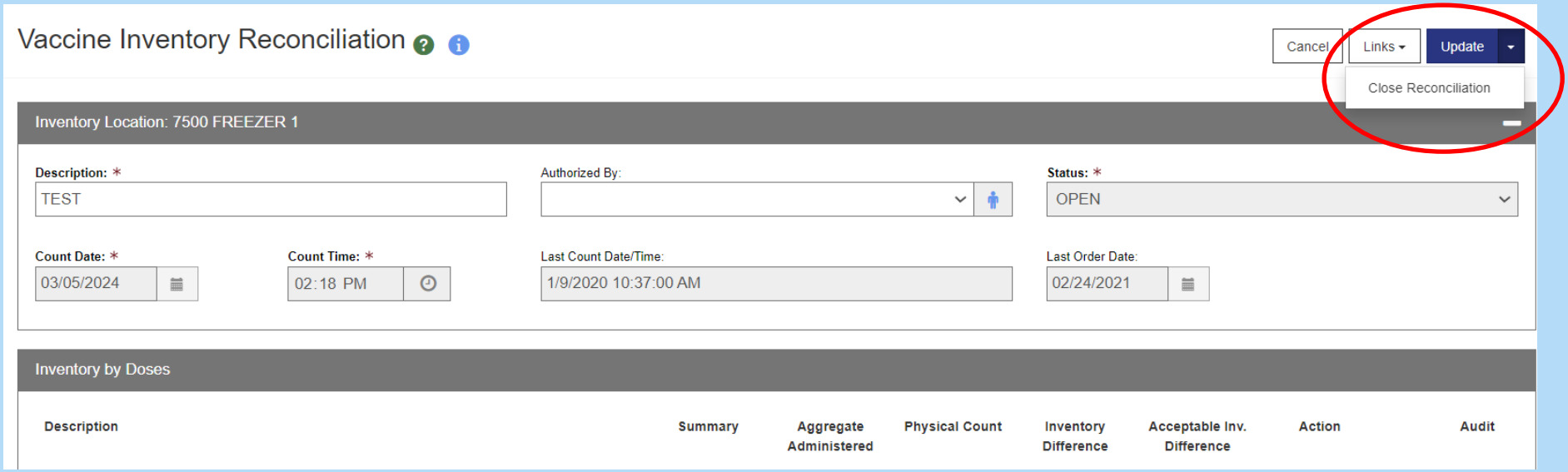


1. Click on Inventory
2. Click on Vaccines
3. Click on Reconciliations

Search Open Reconciliations



Close Open Reconciliations



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 descriptionof 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 whilenavigating through CT WiZ.
- Visit the CT WiZ training page here. The training page has numerous documents and step by step videos to helpyou.
- 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 here.