



# Full Inventory- Reconciliation Troubleshooting Guide

## When to use:

After typing in your final inventory count and you are *short* or *over* the amount of doses that you should have left according to SAIRS. Your inventory is not balanced. You have “deltas”.

## Orientation

What could have caused this delta? Here are the most common reasons...

- Counted wrong (most common!)
- Adjusted wrong
- Entered vaccine into inventory twice.
- Wrong lot number chosen from Administer Screen.
- Vaccines added but not administered
- Signed in under wrong clinic location
- Entered wrong vaccination date
- Chose wrong funding source
- Expired vaccines
- Incomplete transfer

Inventory Delta +/-
-23
-48
-50
-200
-68

## Step 1: Re-count all vaccines with deltas

First, do a careful re-count of every vaccine with a number  $\neq 0$  in the **INVENTORY DELTA** column.

**Note:** Check to see if any vaccines have been administered from the time of your final count to now. If yes, then make sure to subtract those doses from your corrected count.

## Step 2: Re-enter any changes from Step 1

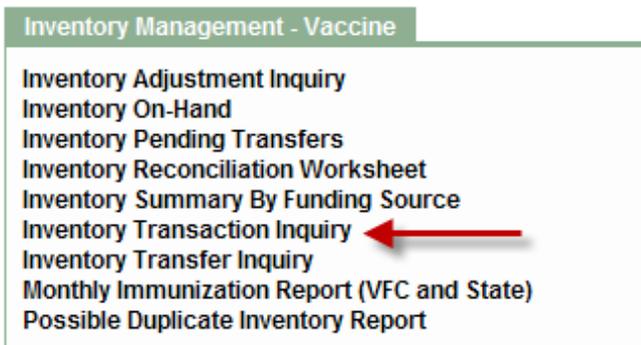
- Adjust any incorrect counts in your **ENDING INVENTORY** column.
- Click **UPDATE**.

IF:	THEN:
You have no more deltas	Close your reconciliation.
You <b>STILL</b> have deltas	Go to Step 3.

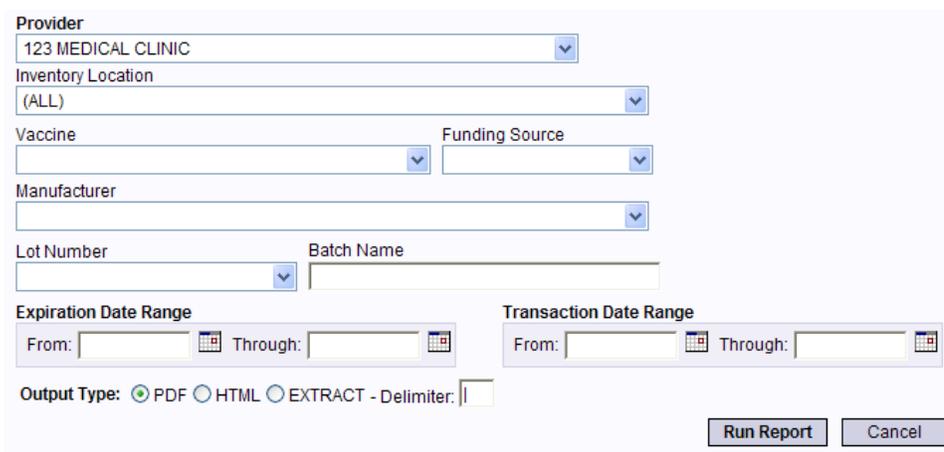
## Step 3: Run an Inventory Transaction Inquiry Report

- Click **REPORTS**.
- Find the Report Section: **INVENTORY MANAGEMENT – VACCINE**
- Click **INVENTORY TRANSACTION INQUIRY**.

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**Filter your search by:** Vaccine, Lot Number, and Transaction Date Range



Provider: 123 MEDICAL CLINIC

Inventory Location: (ALL)

Vaccine: [ ] Funding Source: [ ]

Manufacturer: [ ]

Lot Number: [ ] Batch Name: [ ]

Expiration Date Range: From: [ ] Through: [ ]

Transaction Date Range: From: [ ] Through: [ ]

Output Type:  PDF  HTML  EXTRACT - Delimiter: [ ]

Run Report Cancel

4. Check Adjustments made during your reconciliation period- did you forget to type a (-) sign for doses wasted, expired etc.?
  - a. Try reversing the adjustment by going back to ADJUSTMENT and doing the opposite adjustment on the same adjustment date.
    - i. Ex: If you wasted 10 doses but forgot to type a (-). Adjust for (-) 20 doses on that same date.
5. Check for duplicate entries.
  - a. Adjust for the extra entry.
6. Remove Lot # selection and just search by vaccine type- did someone select the wrong lot # or funding source on the administer screen?
  - a. Look up that patient's immunization record; click UPDATE next to the vaccine, click DELETE at the bottom left, add and administer the correct vaccine.
    - i. See Add and Administer Vaccines Job Aid if necessary.
7. Widen the Transaction Date Range- did someone enter the wrong vaccination date? Ex: Typed in 01/01/2011 instead of 01/01/2012.
  - a. Look up that patient's immunization record; click UPDATE next to the vaccine, change the vaccination date, click UPDATE AND RETURN.

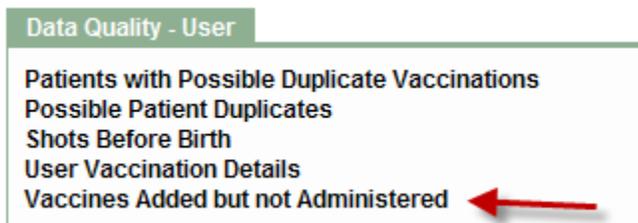


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IF:	THEN:
You have no more deltas	Close your reconciliation.
You <b>STILL</b> have deltas	Go to Step 4.

## Step 4: Run a Vaccines Added but not Administered Report.

1. Click **REPORTS**.
2. Find the Report Section: **DATA QUALITY- USER**.



3. Click **VACCINES ADDED BUT NOT ADMINISTERED**.

**NOTE:** Only the **BOLDED** fields are required.

**Provider**

**Clinic**

**Clinic County**

**Vaccination Date Range**  
 From:  Through:

**For any vaccines that appear on report:**

**Were these vaccines actually administered to the patient?**

If no, click **DELETE** next to vaccine.

If yes, click **ADMINISTER VACCINES** and complete the process. Make sure the administered date is correct. (See [Add and Administer Vaccines](#) Job Aid if necessary.)

IF:	THEN:
You have no more deltas	Close your reconciliation.
You <b>STILL</b> have deltas	Go to Step 5.

## Step 5: Run a User Vaccination Details Report.

1. Click **REPORTS**.
2. Find the Report Section: **DATA QUALITY- USER**.

**Data Quality - User**

- Patients with Possible Duplicate Vaccinations
- Possible Patient Duplicates
- Shots Before Birth
- User Vaccination Details** ←
- Vaccines Added but not Administered

3. Click **USER VACCINATION DETAILS**.

**Vaccine**  
(ALL VACCINES)

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**Provider**  
123 MEDICAL CLINIC

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**Clinic**  
123 MEDICAL CLINIC

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**Vaccination Date Range**  
From:   Through:  

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**Audit Create Date Range**  
From:   Through:  

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**Audit Update Date Range**  
From:   Through:  

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**Vaccinations**  
 All  
  Historical  
  Invalid

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**Vaccinations Created and Updated By**

8. Did someone log in under the wrong clinic location? Ex: Administered vaccines at another clinic but was logged in under default clinic location.
  - a. To fix this:
    - i. Log in as the clinic that administered the vaccine.
    - ii. Look up that patient's immunization record
    - iii. Click **UPDATE** next to the vaccine
    - iv. Click **DELETE** at the bottom left
    - v. Add and Administer the vaccine. (See [Add and Administer Vaccines Job Aid](#) if necessary.)
9. Did someone enter the wrong vaccination date? Ex: Typed in 01/01/2011 instead of 01/01/2012.
  - b. To fix this:
    - i. Look up that patient's immunization record
    - ii. Click UPDATE next to the vaccine
    - iii. Change the vaccination date
    - iv. Click UPDATE AND RETURN

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10. Did someone select the wrong lot number or funding source on the administer screen?

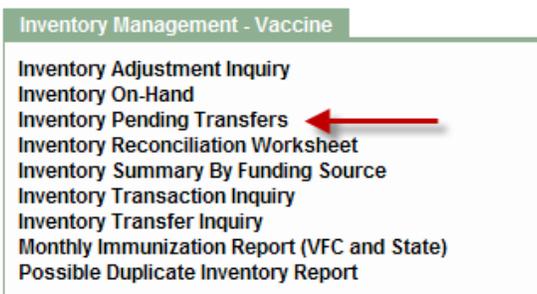
c. To fix this:

- i. Look up that patient’s immunization record
- ii. Click **UPDATE** next to the vaccine
- iii. Click **DELETE** at the bottom left
- iv. Add and Administer the vaccine. (See Add and Administer Vaccines Job Aid if necessary.)

IF:	THEN:
You have no more deltas	Close your reconciliation.
You <b>STILL</b> have deltas and you transferred vaccines during this reconciliation period.	Go to Step 6.
You <b>STILL</b> have deltas but did not transfer vaccines during this reconciliation period.	Contact the SAIRS Team for further assistance.

## Step 6: Run an Inventory Pending Transfers Report.

1. Click **REPORTS**.
2. Find the Report Section:  
**INVENTORY MANAGEMENT – VACCINE**



3. Click **INVENTORY PENDING TRANSFERS**.
4. Did the receiving clinic accept the transfer in SAIRS?
  - a. Call your contact at the receiving clinic and remind them that they need to manually accept the transfer.

**IF YOU ARE STILL NOT BALANCED, THEN CONTACT THE SAIRS TEAM A.S.A.P.**