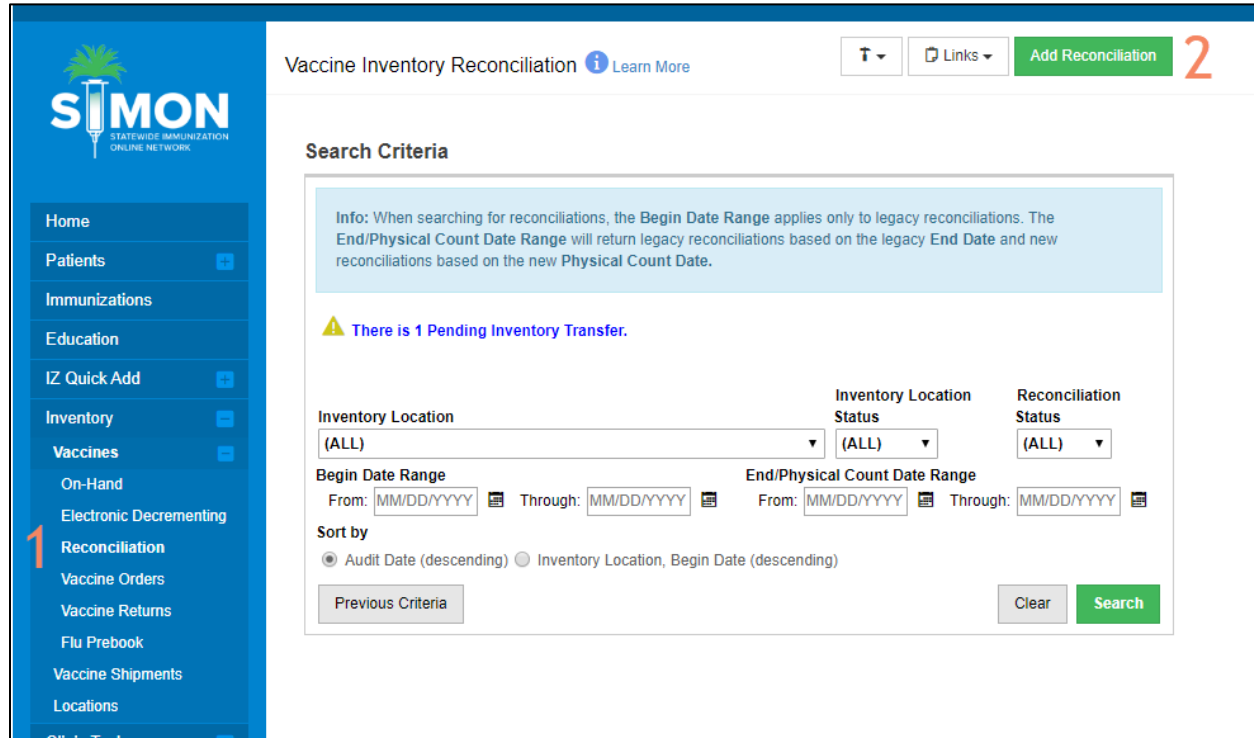


## Reconciliation Process – HL7 (Aggregate Reporter) Clinics

1. From the main menu, navigate to 'Inventory > Vaccines > Reconciliation'.
2. Click 'Add Reconciliation'.



Vaccine Inventory Reconciliation [Learn More](#) Links Add Reconciliation **2**

**Search Criteria**

Info: When searching for reconciliations, the Begin Date Range applies only to legacy reconciliations. The End/Physical Count Date Range will return legacy reconciliations based on the legacy End Date and new reconciliations based on the new Physical Count Date.

**⚠ There is 1 Pending Inventory Transfer.**

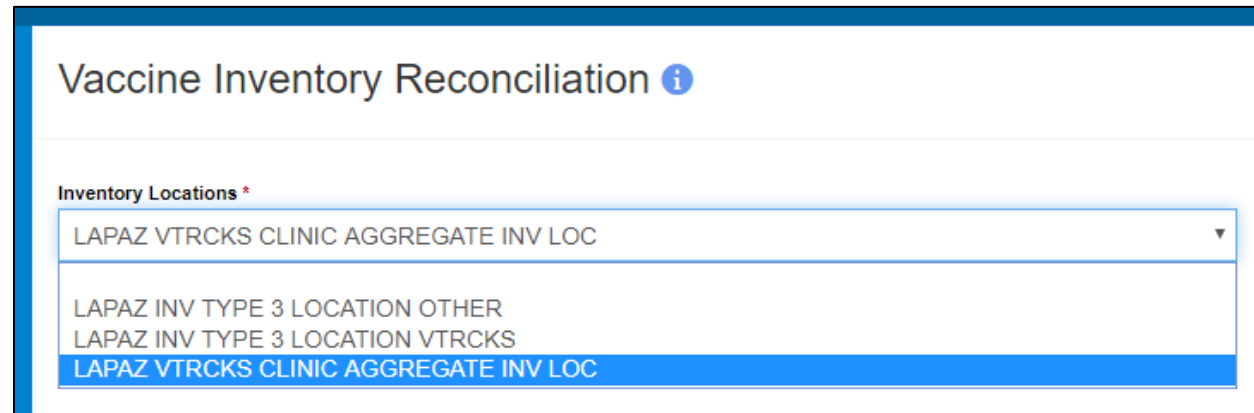
Inventory Location: (ALL) Inventory Location Status: (ALL) Reconciliation Status: (ALL)

Begin Date Range: From: MM/DD/YYYY Through: MM/DD/YYYY End/Physical Count Date Range: From: MM/DD/YYYY Through: MM/DD/YYYY

Sort by:  Audit Date (descending)  Inventory Location, Begin Date (descending)

Previous Criteria Clear Search

3. Select your Inventory Location from the drop-down.



Vaccine Inventory Reconciliation [i](#)

**Inventory Locations \***

LAPAZ VTRCKS CLINIC AGGREGATE INV LOC

LAPAZ INV TYPE 3 LOCATION OTHER

LAPAZ INV TYPE 3 LOCATION VTRCKS

LAPAZ VTRCKS CLINIC AGGREGATE INV LOC

4. The system will do a "Pre-Check" to make sure that all requirements to create a reconciliation have been met.
5. The Pre-Check Results pop-up will list any items that need to be resolved.

- A Reconciliation cannot be created until all the pre-checks have been met. If a pre-check has not been met, click the 'Resolve' button for the item to complete the required action.

**Pre-Check Results**

- No Open Reconciliation for this inventory location
- No Returns in Process for this Clinic
- No Rejected Returns outstanding for this Clinic
- No Expired Inventory at this inventory location
- No Vaccines Added but not Administered
- No Pending Inventory Transfers
- No Pending VTrckS Shipments

- Once all pre-checks have been met, the 'Proceed' button is displayed. Click 'Proceed'.
- Enter a description (typically the month and year of the count), the authorizing staff member, and the count date and time.

Vaccine Inventory Reconciliation

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Inventory Location: INV: LUCIA'S TYPE 3 IZ CLINIC

<b>Description: *</b> <input type="text" value="DOSE TEST"/>	<b>Authorized By:</b> <input type="text" value=""/> <small style="text-align: right;">▼ </small>	<b>Status: *</b> <input type="text" value="OPEN"/>
<b>Count Date: *</b> <input type="text" value="MM/DD/YYYY"/>	<b>Count Time: *</b> <input type="text" value="HH:MM AM/PM"/>	<b>Last Count Date/Time:</b> <input type="text" value="11/4/2019 1:49:00 PM"/>
		<b>Last Order Date:</b> <input type="text" value="03/20/2019"/>

- Clicking the blue man icon to the right of the 'Authorized By' field will auto-populate your name.
- Click 'Create'.
  - Click the 'Links' button and select 'Count Sheet'. Print the Count Sheet.

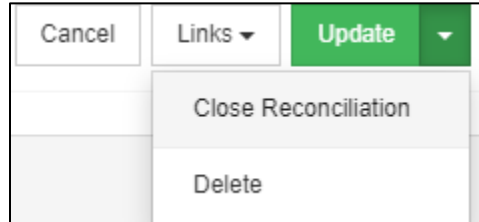
Count Sheet

Vaccine Inventory Reconciliation Worksheet

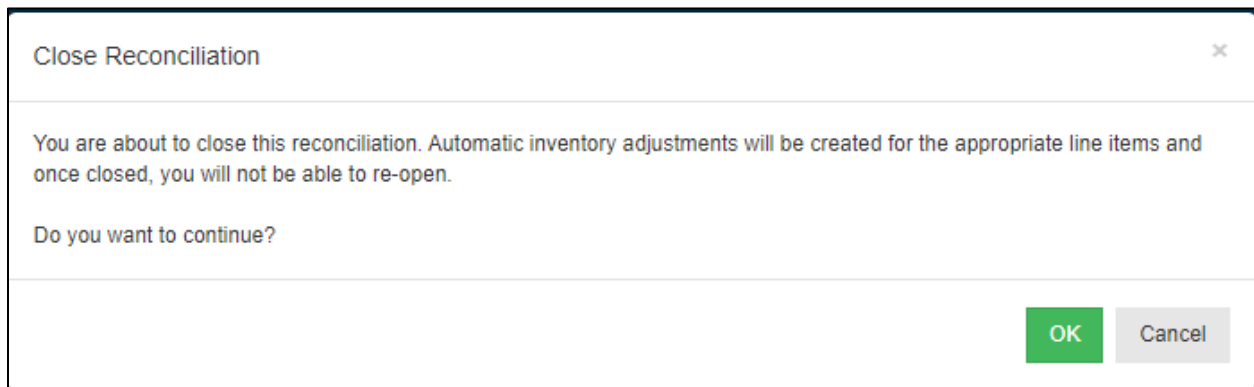
- Count all doses in your physical inventory and write the number of doses counted in the Physical Count column of the Count Sheet.



18. Click 'Update' as you work through the reconciliation, so you don't lose any changes.
19. A green success message is displayed confirming your changes were saved.
20. When all rows have a green checkmark, click the 'Update' dropdown and select 'Close Reconciliation'.



21. A screen will pop up asking if you are sure you would like to close reconciliation.
22. Make sure you are completely done with the page before selecting 'OK'.



23. Once you select OK, the reconciliation page becomes read-only.
24. A green success message is displayed confirming your changes were saved.

Vaccine Inventory Reconciliation ? i Cancel Links

✓ Success Reconciliation closed.

Inventory Location: SUMMER VALLEY PEDIATRICS - REFRIGERATOR

Description: \* RECON TEST Authorized By: BRADY, MARCIA (RN) Status: \* CLOSED

Count Date: \* 11/05/2019 Count Time: \* 11:39 AM Last Count Date/Time: 11/4/2019 12:00:00 PM Last Order Date: MM/DD/YYYY

Inventory by Doses

Description	Summary	Aggregate Administered	Physical Count	Inventory Difference	Acceptable Inv. Difference	Action
State						
1. MCV4P (Menactra) (Menactra (0.5 mL x 5 vials)) PMC • 49281-0589-05 • CDE345 • 12/31/2019	$\Sigma$	-1	2	0	✓	Action