Troubleshooting DSHS TWICES Vaccine Inventory

**\*This guide is to help clinic staff when adding, changing, or reconciling immunization inventory for the Texas DSHS TWICES system.**

**Note**: Table of contents is located in the MS Word Navigation system. Turn on Navigation with the following steps:

* Click View from the Menu Tab
* Click the checkbox next to Navigation Pane
* Navigation will display on the left side of your screen.

# The difference between the Change and Add buttons

When working with Vaccine Inventory the most important thing to know is when to use Change and when to use Add.

**Add – Add a new Vaccine/Lot –** when you want to add a completely new vaccine (after you’ve done a lot number search and there is no matching lot listed and are in the Vaccine Inventory Search Results) clicking Add will allow you to ADD A NEW VACCINE/LOT to the Inventory.

**Add – Add a new Transaction –** when you want to add a completely new transaction to a currently existing vaccine. Please note that this includes ADDING NEW STOCK or REMOVING STOCK from inventory (including transferring stock to a different clinic, or recording lost or broke doses).

**Change –** You ONLY use this option if you need to MAKE CHANGES TO AN **EXISTING** TRANSACTION. If you entered the wrong transaction date, transaction type or original quantity you can do it here. If you are removing stock because you lost or broke doses or transferring stock to a different clinic, DO NOT use change. Change is used only rarely and only for very specific circumstances. This is where a large majority of inventory mistakes are made.

# Wrong lot number issue

**Lot Number Errors –** many issues are caused by entering the wrong lot number. TWICES does not allow users to change the lot number of a vaccine. Instead two processes below are combined to fix the error and make your Vaccine Inventory reflect reality. How to do this is covered in the section below titled [Wrong Lot Number Fix](#_Wrong_Lot_Number).

# Repairs – Vaccine Inventory Lot Master Repairs

## Change funding, age, expiration, Manuf or NDC in order to repair a Vaccine:

**Starting at the TWICES MAIN MENU**

1. Click Vaccine Inventory
2. Click Search

You are now at the Vaccine Inventory Search

1. Type in the Lot number or do a search to find the Vaccine you need to change

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Here you can make changes to the following:

Pedi/Adol or Adult

Funding Source

Expiration Date

Manufacturer

National Drug Code

# Repairs – Transaction Repairs

## Change Transaction Date, Transaction Type or Quantity:

**NOTE: DO NOT DO THIS TO ADD OR REMOVE VACCINE; THIS IS ONLY TO CHANGE THE QUANTITY OF THAT PARTICULAR TRANSACTION.**

**Continue from the instructions above:**

1. Find and click on the row of the Transaction you need to change

Row turns blue

1. Click Change

This is telling TWICES to change information about that Transaction

1. Enter the data you wish to change
2. Click Save

You are now at the Vaccine Inventory Master

1. Check your change (example Lot Quantity) it should now reflect your desired adjustment

# Vaccine Lot Updates

## Add a Transaction

**These instructions are to add or remove stock from an existing Vaccine Inventory Item (for example if you received stock from TDH or had an accident and lost a dose).**

**Starting at the TWICES MAIN MENU**

1. Click Vaccine Inventory
2. Click Search

You are now at the Vaccine Inventory Search

1. Type in the Lot number or do a search to find the Vaccine you need to change

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Click Add

This is telling TWICES to ADD a new Transaction

1. Use the down arrow next to *Transaction type* and select appropriate Transaction description

Note that if you choose *doses lost/gained* or *mass screening* the *reason* field will become active. Use the down arrow next to *Reason* to choose an appropriate description.

Note that choosing *Receipt from TDH* or *Transfer to TDH site* will activate the *Transfer Clinic* field. Use the down arrow next to the *Transfer Clinic* field and choose an appropriate description.

Also note that choosing *Receipt from NON-TDH* or *Transfer to NON-TDH site* transaction type will activate the *or Provider field*. Type in an appropriate description.

1. Enter the quantity you want to add or subtract

Be sure, if you are subtracting doses to put a – (negative mark) before the number.

1. Click Save

You are now at the Vaccine Inventory Master

1. Check your Lot Quantity; it should now reflect your new Quantity physically on hand

## Deactivate a Vaccine

**If you are zeroing out a Vaccine and wish to deactivate the Vaccine, you can now do so by following these steps.**

**NOTE: your quantity MUST BE ZERO.**

Starting at the TWICES MAIN MENU

1. Click Vaccine Inventory
2. Click Search

You are now at the Vaccine Inventory Search

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find the Vaccine you need to change

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. At the Vaccine Inventory Master find the check box fields next to **Active?**
2. Click the box to the right of **No:**
3. Click Save
4. Your Vaccine is no longer Active

## Moving Inventory - Detailed

**To move a vaccine from one clinic or inventory group to another clinic or inventory group.**

(Example moving 10 doses of HPV from your ‘public’ clinic to your ‘private’ clinic inventory)

**Step 1. Create a transaction (to subtract the doses) from the inventory you will be removing the vaccine doses from:**

1. Starting at the TWICES MAIN MENU
2. Click Vaccine Inventory
3. Click Search

You are now at the Vaccine Inventory Search

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find the Vaccine you need to change

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Click Add

This is telling TWICES to ADD a new Transaction

You are now at the Vaccine Inventory Transaction menu

1. Use the down arrow next to Transaction Type and choose how you will transfer the Vaccine
2. Enter the quantity you want to subtract (to subtract make sure this is a negative number)
3. Use the down arrow next to Transfer Clinic and choose the clinic/facility you are transferring the vaccines to OR type in Agency name in field next to or Provider
4. Click Save

You are now at the Vaccine Inventory Master

1. Check your Lot Quantity; it should now reflect your desired Quantity
2. Click Save
3. Click Exit
4. Click New Search

**Step 2. Create a transaction (to add the doses) to the inventory you will be adding the vaccine doses to:**

From the Vaccine Inventory Search menu

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find the Vaccine you want to add your doses to

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change **(NOTE: if your lot number/vaccine combination doesn’t display then you need to** [**add a vaccine**](#_Add_a_Vaccine) **not add a transaction.)**

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Click Add

This is telling TWICES to ADD a new Transaction

You are now at the Vaccine Inventory Transaction menu

1. Use the down arrow next to Transaction Type and choose how you received the Vaccine
2. Enter the quantity you want to add
3. Use the down arrow next to Transfer Clinic and choose the clinic/facility you are transferring the vaccines from OR type in Agency name in field next to or Provider
4. Click Save

You are now at the Vaccine Inventory Master

1. Check your Lot Quantity; it should now reflect your desired Quantity
2. Click Save
3. Click Exit

Task Complete

## Wrong Lot Number Fix

## Wrong Vaccine Type Fix

These instructions will show you how to zero out a current lot, and then add it back to inventory. This is the only way to repair an error when a **lot number was entered incorrectly** or the **Wrong Vaccine Type was chosen**. First you remove the wrong lot from inventory, and then you add it back to the inventory, entering in the correct data.

**PLEASE NOTE**: If you have given ANY immunizations recorded using this vaccine lot, you cannot zero out this lot. Please call help desk for further assistance.

**Step 1. Create a transaction (to subtract the doses) from the inventory you will be removing the vaccine doses from:**

**Starting at the TWICES MAIN MENU**

1. Click Vaccine Inventory
2. Click Search

You are now at the Vaccine Inventory Search

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find the Vaccine you need to change

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to change

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Click Add

This is telling TWICES to ADD a new Transaction

You are now at the Vaccine Inventory Transaction menu

1. Use the down arrow next to Transaction Type and choose the appropriate dropdown option

**If you are removing the vaccine because of a lot number error choose doses lost/gained**

1. Enter the quantity you want to subtract

Make sure this is a **negative** number. You want to remove ALL inventory.

1. Click Save

You are now at the Vaccine Inventory Master

1. Check your Lot Quantity; it should now reflect your desired Quantity (0)
2. Click Save
3. Click Exit
4. Click New Search

**Step 2. Create a transaction (to add the doses) to the inventory you will be adding the vaccine doses to:**

**From the Vaccine Inventory Search menu**

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find the Vaccine you want to add your doses too

You are now at the Vaccine Inventory Search Results

1. Find and click on the row of the Vaccine you need to make a transaction for **(NOTE: if your lot number/vaccine combination doesn’t display then you need to** [**add a vaccine**](#_Add_a_Vaccine) **not add a transaction.)**

Row turns blue

1. Click Select

You are now at the Vaccine Inventory Master

1. Click Add

This is telling TWICES to ADD a new Transaction

You are now at the Vaccine Inventory Transaction menu

1. Use the down arrow next to Transaction Type and choose how you received the Vaccine
2. Enter the quantity you want to add
3. Use the down arrow next to Transfer Clinic and choose the clinic/facility you are transferring the vaccines from OR type in Agency name in field next to or Provider
4. Click Save

You are now at the Vaccine Inventory Master

1. Check your Lot Quantity; it should now reflect your desired Quantity
2. Click Save
3. Click Exit

Task Complete

# Add a Vaccine or Lot

## This will add a new vaccine or lot to your inventory.

From the Vaccine Inventory Search menu

1. Use the down arrow next to SiteID to choose the clinic/facility you are searching in
2. Type in the Lot number or do a search to find if the Vaccine you want to add is already in the system.

You are now at the Vaccine Inventory Search Results

1. Search for your lot number/vaccine combination.

**(NOTE: if your lot number/vaccine combination display then you need to** [**add a transaction**](#_Add_a_Transaction) **not add a vaccine/lot.)**

1. Lot number does not display, Click Add

You are now at the Vaccine Inventory Master

1. Click Add

You are now at Add a New Lot

1. Select and enter the appropriate data for your vaccine/lot.

NOTE: complete all fields with \*. Use field Transfer site only if you are Moving Inventory.

1. Click Save

You are now at the Vaccine Inventory Lot Master

1. Review data for accuracy and Click Save
2. Click Exit

Task Complete

# Inventory Reconciliation

You should reconcile your physical inventory with your TWICES inventory monthly. There are a few tips that will help this.

1. Be sure all immunization records are entered and complete BEFORE you begin inventory.
2. Run and print your inventory control reports on the last day of the month (make sure all data entry is finished).
3. Do your physical count as soon as possible after you run your reports.
4. Request staff not to enter any new immunization records or add inventory until your reconciliation is completed.
5. Stress to your staff how important it is to report ANY changes. This includes making adjustments to records with service dates other than the current month or breaking, losing, or otherwise destroying doses.

## Inventory Issues

Even with these guidelines, inventory imbalances do occur.

HelpDesk regularly gets calls from clinics because their physical inventory doesn’t match their TWICES inventory. Often the cause of irregular inventory is due to data entry errors. There are 3 different errors that commonly occur. Below they are discussed in some detail.

First we need to define our inventory terms:

P-Inventory = physical inventory, what you actually have in stock

E-Inventory = electronic inventory, what TWICES says you should have in stock

### The Culprits

#### Data Entry Error

 – It’s very easy to accidentally designate the wrong lot number when recording an immunization to a client. When this happens you usually wind up with two lots of the same vaccine type with off numbers.

#### Late Record Entry

 – Immunization records should be recorded promptly. Remember, vaccine inventory is updated on the fly. If an immunization isn’t recorded in the month that it occurred your inventory will be off. You will have one more dose in the e-inventory than the p-inventory. You will be tempted to enter a doses lost/gained to subtract that -1 dose. Then the next month the record is entered, WITH the service date of the previous month. When that happens your e-inventory shows you lost a dose but does not show how you lost it. This is when HelpDesk gets calls asking for assistance.

#### Doses lost/gained

 - The doses lost/gained feature should only be used for legitimate broken, moved, or traded vaccine doses. Frequently it is misused to reconcile e-inventory but the real cause is left unsolved and the problem becomes more complicated the next month.

### The Scenario

First let’s look at a scenario of inventory that illustrates what I mean:

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Starting Inventory

* physical (p-inventory) and electronic (e-inventory) for Lot A = 10
* physical (p-inventory) and electronic (e-inventory) for Lot B = 10

Example

Activity:

* Client X received an imz with lot A
* Client X imz was accidentally recorded as lot B

E-inventory now shows:

* Lot A = 10
* Lot B = 9

P-inventory now shows:

* Lot A = 9
* Lot B = 10

User does Inventory reconciliation:

* Lot A has a missing dose but no record, user records a doses lost/gained of -1 to balance inventory. E-inventory Balance now reflects p-inventory of 9.
* Lot B has e-inventory of 9 doses and p-inventory has 10 doses – unable to reconcile records.

### The Resolution

Now you know what may be causing your records to be unbalanced, it’s another matter to find out which client record is related to the problem. The following suggestions should be able to help you fix your problem.

#### Find a Late Record Entry

If you use any of the inventory reports like the C33 or Immunization by Lot Number reports you should keep them in a file so you can reference them. Look back to see if you had a month when you were off by one for that particular lot number. Then print new for that previous month and compare the numbers. If they aren’t the same then you have a late record entry.

#### Find a Data Entry Error

Try running an Immunizations by Lot Number Query Report (23) for the vaccine type and the date range your inventory is showing the imbalance. You can then go thru the resulting client records to see if any of them could be inaccurate and fix them.

The report will give you the following information:

Vaccine type

Client name

TWICES ClientID

DOB

Service Date