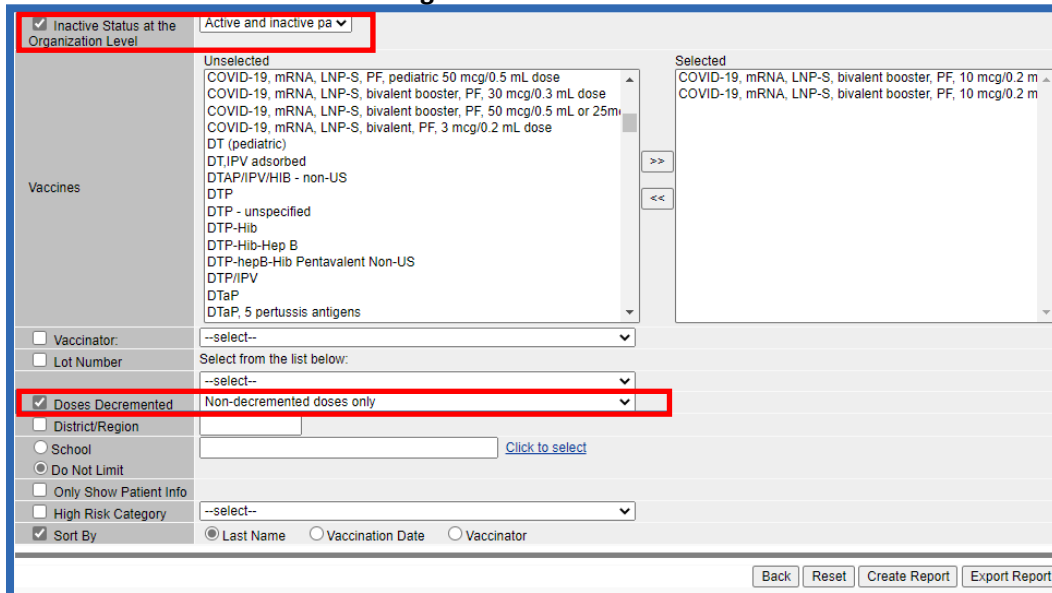## How Can I Troubleshoot Inventory with the Patient Detail Report?

Clinics can run this report when their vaccine counts do not match the inventory on hand in the Immunization Information System (IIS) **Reconciliation** page. The Patient Detail Report can be used as a tool to determine which doses did not decrement properly.

1. Login to the system and click on **Reports** in the left menu.
    a. Click on **Report Module**.
    b. Click on the **Patient Detail Report**; found in the **Patients** section.
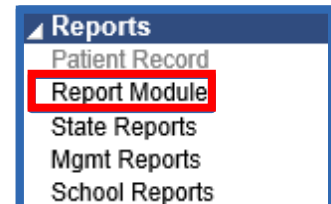
2. Select the report parameters:
    a. Select the **By Service (official vaccination record)** radio button.

        *When running the report **By Service**, deletions and edits will be included.

        *When running the report **By Ownership**, results are limited to patients currently owned by the facility. For more information on patient ownership status, click here.
    b. Enter a **Vaccination Date Range.**
    c. Enter a **Birth Date Range**, if needed.
    d. To include inactive patients, select **Active and inactive patients** from the dropdown menu next to **Inactive Status at the Organization level**.
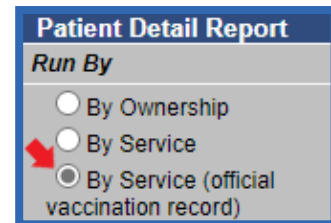
    e. Select the **vaccine** products from the list and/or **lot number** you wish to view in the report.

f. To limit the report to **non-decremented doses only** choose this option from the dropdown menu.

g. On the bottom right of the screen select **Create Report**. To populate a spreadsheet of the data, choose **Export Report.**

h. Review the **Patient Detail Report** to identify which vaccines did NOT decrement from your clinic's inventory. Use the table below to help identify issues and solutions.

Issue: Vaccine given within report date range but entered as historical.	**Solution:** Double check that this vaccine record was an official historical vaccine, and not one administered by your facility during this date range.

Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	VFC Eligible	Facility
6159170	CINNAMON		TEST	01/01/2001			YES	RANIER

Vaccine	Vacc. Date	Dose Size	Mfg. Code	Lot	Funding	VFC Eligible	Historical	Decremented	Vaccinator	Facility	Date VIS Form Given	VIS Publication Date	Reporting Method
DTaP	01/17/2017	Full				YES	Y	N		DANNETTE'S PEDIATRIC CLINIC			Data Entry

Issue: The correct facility was not used for entering the vaccine.	**Solution:** Correct the facility in the patient record. This sometimes happens when an EHR does not have the correct facility (Facility ID) defined for the clinic that's sending data to the IIS. This can also occur when entering data manually into the IIS if the user is not logged in to the appropriate facility.

Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	VFC Eligible	Facility
6159170	CINNAMON		TEST	01/01/2001			YES	RANIER

Vaccine	Vacc. Date	Dose Size	Mfg. Code	Lot	Funding	VFC Eligible	Historical	Decremented	Vaccinator	Facility	Date VIS Form Given	VIS Publication Date	Reporting Method
DTaP	01/17/2017	Full				YES	Y	N		DANNETTE'S PEDIATRIC CLINIC			Data Entry

Issue: Lot number, manufacturer code and/or funding source is missing.	**Solution:** Lot number, manufacturer code and funding source must be correct and present on the patient record. These 3 Items must match between the facility's IIS inventory and HER when transmitting data to the IIS through an interface connection.

Patient ID	First Name	Middle Name	Last Name	Birthday	Guardian F.N.	Phone Number	VFC Eligible	Facility
6159170	CINNAMON		TEST	01/01/2001			YES	RANIER

Vaccine	Vacc. Date	Dose Size	Mfg. Code	Lot	Funding	VFC Eligible	Historical	Decremented	Vaccinator	Facility	Date VIS Form Given	VIS Publication Date	Reporting Method
DTaP	01/17/2017	Full				YES	Y	N		DANNETTE'S PEDIATRIC CLINIC			Data Entry

Issue: There is nothing visibly wrong; however, the record shows up on the patient detail report as not decremented.

Potential Causes: Invalid VFC eligibility status, vaccine given from wrong supply (e.g. private vaccine supply that is not managed in the IIS), dose documented before the clinic receives the vaccine into their IIS Inventory, or funding source is inconsistent with the VFC eligibility status (e.g. VFC status documented as VFC eligible, but funding source is documented as private).

TIP: If a vaccine type or administration date is incorrect, then the record will need to be deleted and re-entered correctly. This information cannot be edited within the record. For vaccinations to decrement from a clinic's inventory, the following variables must be correct and complete: manufacturer, lot number, vaccine type, facility, and funding source.

Questions? Contact the IIS Help Desk at 1-800-325-5599 or WAIISHelpDesk@doh.wa.gov