

PROCESS DESCRIPTION - VERSION 4.0 (June 2010)

ROLES: COUNSELLOR / MEDICAL STAFF / ADMIN STAFF PROCESS 4.4.0: MANAGING INVENTORY (PRODUCTS).

| #                  | Step   | Observations  | Menu options or screen information   |                    |                   |                    |                   |                    |               |                    |                    |                |  |
|--------------------|--|---|--|--------------------|-------------------|--------------------|-------------------|--------------------|---------------|--------------------|--------------------|----------------|--|
| 0                  | <p><b>Preliminary steps:</b><br/>The definition of products (contraceptives, medicines and other consumables) is essential to keep track of those that are sold or donated to clients during the visit cycle. Before creating the Inventory Catalogue, you should have a complete product list (see below)</p>   | <p><b>Note:</b> The current version of OpenEMR, has an improved Inventory function, but still can be considered as a basic Supply Management module. Future versions will include full inventory capabilities.</p>  | <p><b>Note:</b> Some of the following inventory functions are available from OpenEMR version 3.1.1.7 onward. Please check with your system admin about system version.</p>   |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 1                  | <p><b>Inventory Catalogue</b></p> <ul style="list-style-type: none"> <li>Name of product / Active status</li> <li>National Drug Code (NDC) / (Used as local MA Code)</li> <li>Form or presentation (tablets, capsule, ml, etc)</li> <li>Pill Size</li> <li>Unit of measure (mg, mg/1cc, mcg, grams, etc)</li> <li>Quantity on Hand (QOH) or stock</li> <li>Expiration date</li> </ul>  |   | <p><b>Note:</b> Name, New (Lot) &amp; Lot Number are links to data entry pages</p>   |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 2                  | <p><b>Adding a Product</b><br/>When you select the Add Product button (located below the Inventory Catalogue, in addition to the fields mentioned above you will be able to enter:</p> <ul style="list-style-type: none"> <li>On Order: Stock in transit</li> <li>Reorder At: Minimum stock level (do not leave blank)</li> <li>Route of administration (mouth, skin, eyes, etc.)</li> <li>CYP Factor (To be obtained from IPPF eIMS:</li> </ul> |   | <p><b>New features</b></p> <ul style="list-style-type: none"> <li><b>Multiple Lot:</b> Managing products in more than one lot for all transactions</li> <li><b>Combining Lots:</b> Allows filling a product order from two or more lots</li> </ul> |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 3                  | <p><b>Mapping a product</b><br/>Similarly to the way services are related to established standard codes, products can be related or mapped to IPPF Codes.</p> <p><b>Example:</b> Nordiol is an oral contraceptive. In the IPPF Framework Oral Contraceptives (Combined Oral Contraceptives and Progestagen-Only Contraceptive) with code 111101999 is chosen.</p>  |   |  |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 4                  | <p><b>Completing product details (Templates - Dosage)</b><br/>Different presentations of the same product (eg. Nordiol) are specified in the Template section.</p> <p>Each row in the Template represents a specific presentation of the same product.</p>   | <p><b>Interval acronyms:</b></p> <table border="1"> <tr> <td>BID twice a day</td> <td>q.4h Every 4 hours</td> </tr> <tr> <td>TID 3 times daily</td> <td>q.5h Every 5 hours</td> </tr> <tr> <td>QID 4 times daily</td> <td>q.6h Every 6 hours</td> </tr> <tr> <td>QD Once a day</td> <td>q.8h Every 8 hours</td> </tr> <tr> <td>q.3h Every 3 hours</td> <td>q.d. Every day</td> </tr> </table> | BID twice a day  | q.4h Every 4 hours | TID 3 times daily | q.5h Every 5 hours | QID 4 times daily | q.6h Every 6 hours | QD Once a day | q.8h Every 8 hours | q.3h Every 3 hours | q.d. Every day |  |
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| 5                  | <p><b>Completing product details(Templates - Price/Tax)</b><br/>Prices and taxes are configurable through Administration &gt; Lists (Price level and Tax Rate) and should represent the range of requirements the clinic has Re: Price lists and Tax Rates.</p>  |   |  |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 6                  | <p><b>Deleting a product</b><br/>This option is intended to delete products that are created by mistake or that have not been used ever. Be careful when deleting data, because historic data should be preserved.</p>   | <p><b>Conditions for deletion should include:</b></p> <ul style="list-style-type: none"> <li>Product should not have stock on hand</li> <li>Disposal and deletion have been properly documented and authorised</li> <li>There is certainty that the product will not be used again in the organisation</li> </ul>   | <p>After pressing Delete, the updated Product Catalogue is displayed.</p>  |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 7                  | <p><b>Adding or Increasing Lots</b><br/>The new version of the Inventory module allows additional data (Vendor / Warehouse), as well as different transaction types: Purchase, Return, Transfer, and Adjustment. Details are provided in Guide 4.4.2 Enhanced Lot Features</p>   |   |  |                    |                   |                    |                   |                    |               |                    |                    |                |  |
| 8                  | <p><b>Destroying lots</b><br/>Within the Add lot option the Destroy button allows the registration of a product lot disposal, due to an error in the quantity on hand, or if the product has been damaged or has expired. The method of destruction, person supervising the disposal and notes are included in the form.</p>   |   |  |                    |                   |                    |                   |                    |               |                    |                    |                |  |