INVENTORY MANAGEMENT

CLEANING UP INVENTORY

To clean up inventory of monitored products in **Propel Rx**, we recommend generating the **Inactive Inventory** report and actioning the report based on your physical counts.

Generating the Inactive Inventory Report

The **Inactive Inventory** report lists monitored products in **Propel Rx** that haven't been dispensed since a specified date. The date of the last prescription and on hand value appear for each product.

Commu 2300 M	unity Pharmacy (P9946) leadowvale Blvd.							Date: No	v 11, 2022
Mississ	sauga, Ontario L5N 5P9					Not D)ispensed S	Since: Jar	n 01, 2019
Sorted by	: Last Rx Date								
DIN	Drug Name	Strength	Form	Mfr	Description	Pack Size	On Hand :	Supplier	Last Rx Date
DIN 337991	Drug Name APO-ROSUVASTATIN	Strength 20MG	Form TAB	Mfr APX	Description	Pack Size 30.00	On Hand : 20.00	Supplier MDS	Last Rx Date Nov 07, 2018
DIN 337991 029421	Drug Name APO-ROSUVASTATIN TRI-CYCLEN 28	Strength 20MG 645&35MCG	Form TAB TAB	Mfr APX JAN	Description	Pack Size 30.00 28.00	On Hand : 20.00 12.00	Supplier MDS MDS	Last Rx Date Nov 07, 2018 Nov 07, 2018
01N 337991 029421 223562	Drug Name APO-ROSUVASTATIN TRI-CYCLEN 28 PMS-METFORMIN	Strength 20MG 645&35MCG 500MG	Form TAB TAB TAB	Mfr APX JAN PMS	Description	Pack Size 30.00 28.00 100.00	On Hand 20.00 12.00 0.00	Supplier MDS MDS MDS	Last Rx Date Nov 07, 2018 Nov 07, 2018 Nov 13, 2018
01N 337991 029421 223562 916475	Drug Name APO-ROSUVASTATIN TRI-CYCLEN 28 PMS-METFORMIN PERCOCET	Strength 20MG 645&35MCG 500MG 5&325MG	Form TAB TAB TAB TAB	Mfr APX JAN PMS BMS	Description	Pack Size 30.00 28.00 100.00 25.00	On Hand : 20.00 12.00 0.00 50.00	Supplier MDS MDS MDS MDS MDS	Last Rx Date Nov 07, 2018 Nov 07, 2018 Nov 13, 2018 Nov 14, 2018
DIN 2337991 2029421 2223562 916475 2237556	Drug Name APO-ROSUVASTATIN TRI-CYCLEN 28 PMS-METFORMIN PERCOCET EURO-FER	Strength 20MG 645&35MCG 500MG 5&325MG 300MG	Form TAB TAB TAB TAB CAP	Mfr APX JAN PMS BMS SDZ	Description	Pack Size 30.00 28.00 100.00 25.00 30.00	On Hand : 20.00 12.00 0.00 50.00 0.00	Supplier MDS MDS MDS MDS MDS MDS	Last Rx Date Nov 07, 2018 Nov 07, 2018 Nov 13, 2018 Nov 14, 2018 Nov 27, 2018
DIN 337991 029421 223562 916475 237556 246820	Drug Name APO-ROSUVASTATIN TRI-CYCLEN 28 PMS-METFORMIN PERCOCET EURO-FER SANDOZ-METFORMIN FC	Strength 20MG 645&35MCG 500MG 5&325MG 300MG 500MG	Form TAB TAB TAB TAB CAP TAB	Mfr APX JAN PMS BMS SDZ SDZ	Description	Pack Size 30.00 28.00 100.00 25.00 30.00 100.00	On Hand : 20.00 12.00 0.00 50.00 400.00	Supplier MDS MDS MDS MDS MDS MDS MDS	Last Rx Date Nov 07, 2018 Nov 07, 2018 Nov 13, 2018 Nov 14, 2018 Nov 27, 2018 Nov 28, 2018

It is best to generate the **Inactive Inventory** report before each cycle count, so you know which products on the report are still stocked in your pharmacy and adjust on hands accordingly.

Run the Inactive Inventory report spanning back 24 months from when you are checking the inventory.

Actioning the Inactive Inventory Report

Products that appear on the **Inactive Inventory** report have not been recently dispensed, and if they have no inventory, need to be edited so they do not show in the **Inventory Reconciliation Module.**

• If the product is no longer stocked in your pharmacy, reset the inventory in the Drug Folder and then deselect the Monitor checkbox.

nv #	Size	Description	Min Disp Quantity	Allocated On Hand (Units)	Allocated On Hand (Packs)	On Order	Owe Amount	Acq Cost	Price Code	Default	Moni	2	Add
- Main	100			300	3	0	0		C -		~		Remove
- Main	500			0	0	0	0		C -	~			Reset
													Order

- If the product is stocked in your pharmacy, evaluate if you want to continue tracking inventory for the product in **Propel Rx**.
 - If <u>yes</u>, perform a manual adjustment if needed to ensure the on hand is correct.
 - If <u>no</u>, reset the inventory in the Drug Folder and then deselect the Monitor checkbox.

nv #	Size	Description	Min Disp Quantity	On Hand (Units)	On Hand (Packs)	On Order	Owe Amount	Acq Cost	Price Code	Default	Moni	2 L	Add
- Main	100			300	3	o	o		c -		✓		Remove
- Main	500			0	0	o	0		C -	~		- L	Reset
													Order
													Z

• Remember to save the **Drug Folder** once you are done making changes with it.

Inventory Reconciliation History Report

The **Inventory Reconciliation History** report can be used to perform routine cycle counts by generating a list of DINs to perform physical counts for. The report can be used in combination with the **Reconcile** module to update **Actual on Hand** values.

Part 1: Run the Inventory Reconciliation History Report

To run the Inventory Reconciliation History report:

 1. From the Workbench, select
 > Reports > Propel Rx Reports. The Reports window appears.

2. Select Inventory > Inventory Reconciliation History Report > Next.

Nexxsys Report	ts : Select A Report
BAll Reports	Auto-Reconcile Exceptions
Accounting	Detailed Inventory Totals
W Doctor	Inactive Inventory
	Inventory Analysis
Groups	Inventory Reconciliation History Report
Groups	Inventory Summary
in inventory	Inventory Totals by Drug
2 Patient	Inventory Totals by Manufacturer
Prescription	Inventory Totals by Supplier
Scheduled	Manual Adjustments
	Purchase Order Print
	Re-order Analysis

The Inventory Reconciliation History Report window appears.

- 3. In the **Basic** section, select one of the following options:
 - **All Drugs** drugs that have an *Actual on Hand*, a balance owing or had movement since the last reconciliation.
 - **Specific Drug/DIN** multiple drugs can be entered and separated by a forward slash (/).
 - **Random** drugs that have an *Actual on Hand*, a balance owing, or had movement since the last reconciliation and have not been reconciled in the last 14 days.

Jasic	Extended
Selection All Drugs Specific Drug/DIN:	Drug Category: Regular Narrotic Controlled/Targeted
Random	All Categories

- 4. In the **Extended** section, select:
 - Drug Category
 - **Regular** generates the report for regular drugs.
 - Narcotic/Controlled/Targeted generates the report for narcotic drugs, controlled drugs, or targeted substances.
 - All Categories generates the report for regular and narcotic/controlled/targeted drugs.
 - Sort By
 - **Trade Name** sorts the drugs on the report alphabetically by trade name.
 - Rx Volume (Script Count) sorts the drugs on the report by prescription volume in descending order.
 - Highest Unit Cost sorts the drugs on the report from highest to lowest Acq Cost.

- Oldest Reconciliation Date sorts the drugs on the report from the oldest to most recent Last Reconciled Date.
- Return Value
 - **Percent of Total Eligible** generates the report for the specified percentage of eligible drugs according to the Criteria and Extended Criteria. The default percentage is 25%.
 - **# DINs to Include** generates the report for the specified number of eligible drugs according to the Criteria and Extended Criteria. The default value is 10.

riteria	
Basic	Extended
Selection	Drug Category:
All Drugs	Regular
Specific Drug/DIN:	Narcotic/Controlled/Targeted
O Random	All Categories
	Sort By:
	Trade Name

Use t	the criteria:
0	Drug Category
	Regular - or Narcotic for quarterly cycle counts
0	Sort By
	Trade Name
0	Return Value
	Percent of Total Eligible - use 10% for each month

5. Select Print. The Inventory Reconciliation History report is generated and prints. Alternatively, the report can stain on the screen and reconciliation can be done on the computer without printing the report.

Inventory Reconciliation History Report Sample:

						Inven	to	ry Rec	0	nciliati	o	n His	to	ry								
Comm 2300 M	unity Pharmad eadowvale Blv	cy (P9946) d.													Dat Sel Dru Sol	te: lect ig (rt B	ion: / Category: I	Dec All D Regi Trad	12, 2022 1 rugs ilar e Name	1:30:29 AN	1	
Mississ	auga, Ontario I	L5N 5P9													Re	turn	Value: #	# DII	Ns to Inclu	de	(4)
DIN PkSize	Trade Name Strength	UPC	Last Recond Date	Last On Hand Count	F	Reconciled Purchase Orders		Plus STS Transfers In		Manual Adjustment In		Dispense History	Τ	Y	Mi Vrite-off/ Expired/ Returns	nus	STS fransfers Out	Τ	Manual Adjustment Out	Curren Nexxsy On Hand	t 5	Actual On Hand
545015 100	AA-ACETAZOLAMI 250MG	DE 77131300011	12-Dec-22	300	# 0	Qty 0	#	Qty 100		# Qity 1 100	1	≠ G	≷ty 30	# 0	Qity 0	# 0	Qt	0	# G	0 ·	\$70	
360279 100	AA-CHLORTHALID 50MG	ONE 77131300187	12-Dec-22	200	1	200	0	0	(0 0	1	1	14	1	100	0		0	1	26 :	261	
2414600 100	ABBOTT-TOPIRAN 25MG	05532589600	12-Dec-22	100	0	0	0	0	1	1 100	(0	0	0	0	0		0	0	0 :	200	
2401134 4	ACCEL-ALENDRO 70MG	62761800090	12-Dec-22	12	1	8	0	0	°	0 0		2	0	1	4	1		4	D	0	12	

Part 2: Use the Inventory Reconcile Module

To use the Reconcile module after generating the Inventory Reconciliation History report:

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- 1. From the **Workbench**, select > **Inventory** > **Reconcile**. The **Reconcile** module opens.
- 2. In the Search Criteria section, select the Last Reconciliation Report checkbox.

learch Criteria	Display Options			Filter			F	Clear
DN								
Drug Name	Last Reconciled Date	DIN	Trade Name	Strength	Size	On Hand	On Hand	Variance
UPC .								
Last Reconciliation Report Date: 12 Aug 2021 11:39:05 AM								
Draft Report Saved								

3. Select Search. The Search Criteria will collapse and results that match the search criteria display.

					Propel Rx	Actual		ReOrder	ReOrder	
Last Reconciled Date	DIN	Trade Name	Strength	Pack Size	On Hand	On Hand	Variance	(PT)	(PK)	
20 Aug 2018 23:59	2295288	APO-ATORVASTATIN	20 mg	90	1,500			1,000	2	
20 Aug 2018 23:59	2295288	APO-ATORVASTATIN	20 mg	100	0			o		
20 Aug 2018 23:59	2295288	APO-ATORVASTATIN	20 mg	500	0			0		
20 Aug 2018 23:59	2295296	APO-ATORVASTATIN	40 mg	90	986			1,000	2	
20 Aug 2018 23:59	2295296	APO-ATORVASTATIN	40 mg	100	0			0		
20 Aug 2018 23:59	2295296	APO-ATORVASTATIN	40 mg	500	0			0		
20 Aug 2018 23:59	2295318	APO-ATORVASTATIN	80 mg	30	0			0		
20 Aug 2018 23:59	2295318	APO-ATORVASTATIN	80 mg	90	0			0		
20 Aug 2018 23:59	2295318	APO-ATORVASTATIN	80 mg	100	0			0		
20 Aug 2018 23:59	2295318	APO-ATORVASTATIN	80 mg	500	0			0		
20 Aug 2018 23:59	2295261	APO-ATORVASTATIN	10 mg	90	0			0	o	
20 Aug 2018 23:59	2295261	APO-ATORVASTATIN	10 mg	100	400			200	2	
	2295261	APO-ATORVASTATIN	10 mg	500	0			o		

4. In the Actual on Hand field, enter the physical count of the drug.

Display Options Drug/DIN/UPC: 2295268	2295296/229	53%/2295261		Filter	Cost					
Last Reconciled Date	DIN	Trado Name	Strength	Pack Size	Propel Rx On Hand	Actual On Hand	Variance	ReCinder (PT)	ReOrder (PK)	Rea
20 Aug 2018 23.59	2295288	APO-ATORVASTATIN	20 mg	90	1,500	2,000	500	1.000	2	
20 Aug 2018 23.59	2295288	APO-ATORVASTATIN	20 mg	100	0			0		

• The **ReOrder (PT)** and **ReOrder (PK)** fields are enabled and can be edited, if required.

Display Options Drug/DM/UPC: 2215288	2295296/229	53%/2295261		'ther		r	Clear			
Last Reconciled Date	DIN	Trade Name	Strength	Pack Size	Propel Rx On Hand	Actual On Hand	Variance	ReOrder (PT)	ReOrder (PK)	-
20 Aug 2018 23.59	2295288	APO-ATORVASTATIN	20 mg	90	1,500	2.000	500	1,000	2	
20 Aug 2018 23.59	2295288	APO-ATORVASTATIN	20 mg	100	0			0		

- 5. If the **Variance** is negative, the following information must be entered:
 - **Reason** select the appropriate reason from the dropdown.
 - **Comments** add information pertaining to specific reasons (e.g., prescription numbers or return reference numbers).

6. Select Submit.

If there are blank **Actual on Hand** values, when submitted they have a **Reason** of **NOT RECONCILED**. A prompt displays.

7. Select the pharmacist's initials from the dropdown.

Propel Rx - Select User	
Please select User ID: JS 🗸	
OK Cancel	

- 8. Select **OK**. A confirmation window displays to show that the reconciliation was successful.
- 9. Select Print to print the Reconciliation Summary report.

Propel Rx - Confirmation
 Reconciliation Successful - Nexxsys On Hand quantities have been updated. Please confirm your printed copy before closing the Reconcile window.
PRINT

Confirm the Reconciliation Summary report successfully printed. If not, select Print again as the report cannot be retrieved once it is closed.

Reconciliation Summary Report

Once a reconciliation is submitted:

- The Actual on Hand, Re-Order Point and Re-Order # Packs fields are updated in the Drug Folder.
- An entry is written to the Shipment Details window and the Drug FolderHistory tab.

Potential Messages and Prompts

• The **Reconcile** module can only be opened on one workstation or instance at a time. If the **Reconcile** module is already opened on one instance or workstation and is trying to be opened

elsewhere, the following prompt appears:

Propel Rx - Access Unavailable
Reconciliation Window currently open on PPAZPITRONO2 . Please close on that Workstation before proceeding or try again later.
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 If the Reconcile module is open on a workstation or instance, the Drug Folder of one of the drugs in the module can only be opened in READ ONLY Mode on another workstation or instance. The following prompt appears when attempting to access a Drug Folder for a drug in the module:

	Propel Rx - Read Only
A	Reconciliation Module is open on PPAZPITRON02 . You are now entering READ ONLY mode. If you require full access, close on the identified location then click REVERT to unlock your workstation or relaunch the window.
	Continue

Non-Monitored Products

If a reconciled product was previously unmonitored, the drug is updated as follows:

- The **Monitor** checkbox is selected.
- The Re-Order Point is set to -1.
- The Re-Order # Packs is set to 1.
- The **Do Not Re-Order** checkbox is selected.

IN 23554	55	AUXILIARY AL	ERNATIVE	INVENTORY		RSTORY	ATTACH	HENTS.	NO	TES			
Packs Ave	dable - REI	TASIS OPHT 0.05% DRO	EASTIS		_								
inu #	Size	Description	Allocated On Hand (Units)	Allocated On Hand (Packs)	On Order	Owe Amount	Acq Cest	Price Code	Def	fault.	Monitor		Reat
1 - Main	30	OPHT 0.05% 30X0.4M	L 60	2	0	0	\$3.7057	с		~	~		Order
1 - Main	60	OPHT 0.05% 60X0.4P	L 0	0	0	0	\$3,7055	с					G
Pack Defa	30			11gent 60			1						
Pack Deta Tack Size Hain UP Coreson	30 97346		Re-Ord	ler Point			- Acq Costful \$8.7087					~	Do Not Re-Ord
Att UPC	30 0 93346 86933468		Re-Ord -1 Re-Ord 1	ier Point			Acq Cost() \$5.7057 Acq Cost() \$111.1710	0				~	Do Not Re-Ord
Pack Deta Tack Size Hain UPC Coreser Coceres Code	30 C 93346 86933468 Supplier 1	tanse Ran F	Re-Ord -1 Re-Ord 1	ler Point ler #Packs	Price (ut	0	Acq Cost() \$3,7057 Acq Cost() \$111,1710 Price (pl)	0	-	Inc #		~	Do Not Re-Ord
Pack Defa Pack Size Hain UP Correct Coolere MOS	30 0 03346 00933468 Supplier I Hotasson	Kama Ram # Q14-REX 994211	Re-Ord -1 Re-Ord 1	ler Point	Price (ul 3.7057	0	Acq Contfol 53.7057 Acq Contfol 5111 (710 7110 (ph) 111 (710	0	utauti V			~	Do Not Re-Ord