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.

<div style="border:1px solid #000; padding:1em;">

Inactive Inventory Report

Community Pharmacy (P9946)   Date: Nov 11, 2022
2300 Meadowvale Blvd.
Mississauga, Ontario L5N 5P9   Not Dispensed Since: Jan 01, 2019

Sorted by: Last Rx Date

DIN	Drug Name	Strength	Form	Mfr	Description	Pack Size	On Hand	Supplier	Last Rx Date
2337991	APO-ROSUVASTATIN	20MG	TAB	APX		30.00	20.00	MDS	Nov 07, 2018
2029421	TRI-CYCLEN 28	645&35MCG	TAB	JAN		28.00	12.00	MDS	Nov 07, 2018
2223562	PMS-METFORMIN	500MG	TAB	PMS		100.00	0.00	MDS	Nov 13, 2018
1916475	PERCOCET	5&325MG	TAB	BMS		25.00	50.00	MDS	Nov 14, 2018
2237556	EURO-FER	300MG	CAP	SDZ		30.00	0.00	MDS	Nov 27, 2018
2246820	SANDOZ-METFORMIN FC	500MG	TAB	SDZ		100.00	400.00	MDS	Nov 28, 2018
628158	APO-AMOXI	50MG/ML	SUS	APX	banana	100.00	0.00	MDS	Dec 03, 2018

</div>

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.

- 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.

- 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 [000] > Reports > Propel Rx Reports. The Reports window appears.

2. Select Inventory > Inventory Reconciliation History Report > Next.
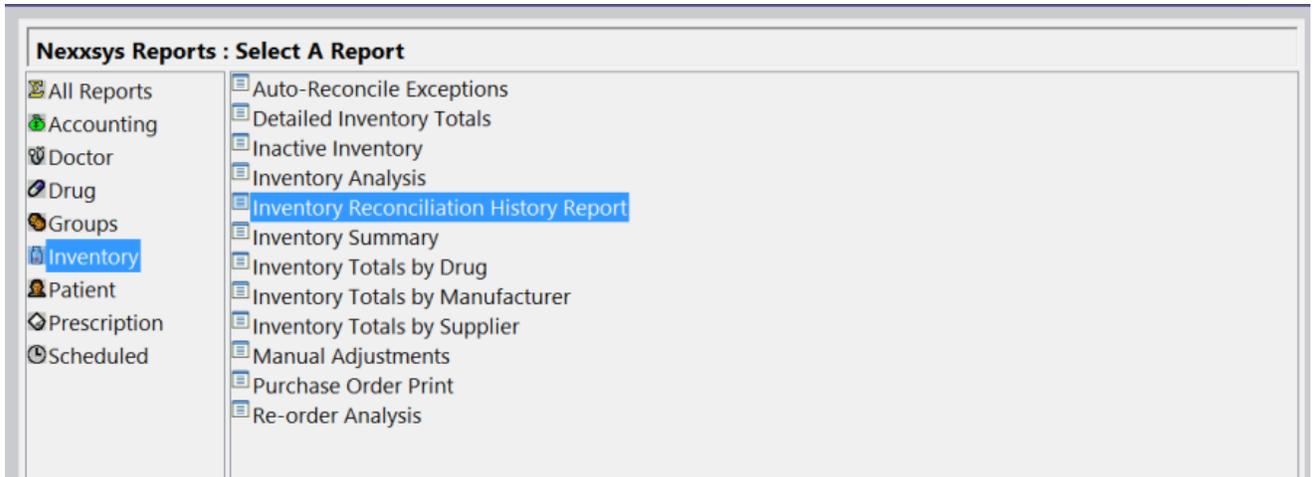
The Inventory Reconciliation History Report window appears.

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.
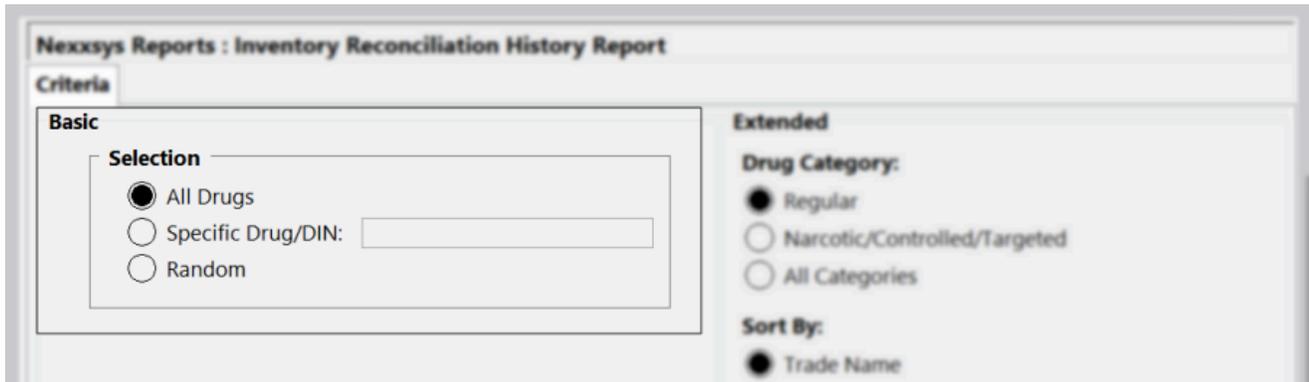
4. In the **Extended** section, select:
   - Drug Category
     - **Regular** - generates the report for regular drugs.
     - **Narcotic/Controlled/Targeted** - generates the report for narcotic drugs, controlled drugs, or targeted substances.
     - **All Categories** - generates the report for regular 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.

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

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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:

Inventory Reconciliation History

Community Pharmacy (P9946)
2300 Meadowvale Blvd.

Mississauga, Ontario L5N 5P9

Date: Dec 12, 2022 11:30:29 AM
Selection: All Drugs
Drug Category: Regular
Sort By: Trade Name
Return Value: # DINs to Include (4)

DIN PkSize	Trade Name Strength UPC	Last Record Date	Last On Hand Count	Plus						Minus								Current Nexxsys On Hand	Actual On Hand
				Reconciled Purchase Orders		STS Transfers In		Manual Adjustment In		Dispense History		Write-off/ Expired/ Returns		STS Transfers Out		Manual Adjustment Out			
				#	Qty	#	Qty	#	Qty	#	Qty	#	Qty	#	Qty	#	Qty		
545015 100	AA-ACETAZOLAMIDE 250MG 77131300011	12-Dec-22	300	0	0	1	100	1	100	1	30	0	0	0	0	0	0	470	
360279 100	AA-CHLORTHALIDONE 50MG 77131300187	12-Dec-22	200	1	200	0	0	0	0	1	14	1	100	0	0	1	25	261	
2414600 100	ABBOTT-TOPIRAMATE 25MG 05532589600	12-Dec-22	100	0	0	0	0	1	100	0	0	0	0	0	0	0	0	200	
2401134 4	ACCEL-ALENDRONATE 70MG 62761800090	12-Dec-22	12	1	8	0	0	0	0	0	0	1	4	1	4	0	0	12	

Total # of DINs: 4   Total # of rows: 4

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Pharmacist Signature: _____

Part 2: Use the Inventory Reconcile Module

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

1. From the **Workbench**, select [000] > **Inventory** > **Reconcile**. The **Reconcile** module opens.
2. In the Search Criteria section, select the Last Reconciliation Report checkbox.

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

Display Options

Drug/DIN/UPC: 2295288/2295296/2295318/2295261

Last Reconciled Date	DIN	Trade Name	Strength	Pack Size	Propel Rx On Hand	Actual On Hand	Variance	ReOrder (PT)	ReOrder (PK)	Rea
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			0		
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	0	
20 Aug 2018 23:59	2295261	APO-ATORVASTATIN	10 mg	100	400			200	2	
20 Aug 2018 23:59	2295261	APO-ATORVASTATIN	10 mg	500	0			0		

SAVE DRAFT   SUBMIT   CLOSE

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

Display Options

Drug/DIN/UPC: 2295288/2295296/2295318/2295261

Last Reconciled Date	DIN	Trade Name	Strength	Pack Size	Propel Rx On Hand	Actual On Hand	Variance	ReOrder (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/DIN/UPC: 2295288/2295296/2295318/2295261

Last Reconciled Date	DIN	Trade Name	Strength	Pack Size	Propel Rx On Hand	Actual On Hand	Variance	ReOrder (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		

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.
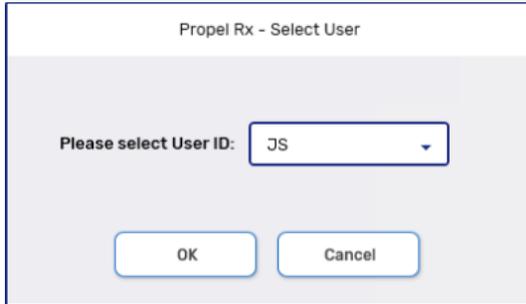
8. Select **OK**. A confirmation window displays to show that the reconciliation was successful.
9. Select Print to print the Reconciliation Summary report.
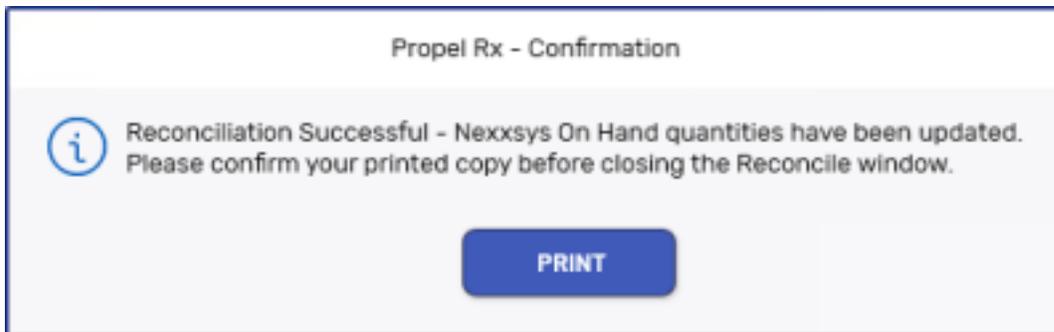
Confirm the Reconciliation Summary report successfully printed. If not, select Print again as the report cannot be retrieved once it is closed.

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:
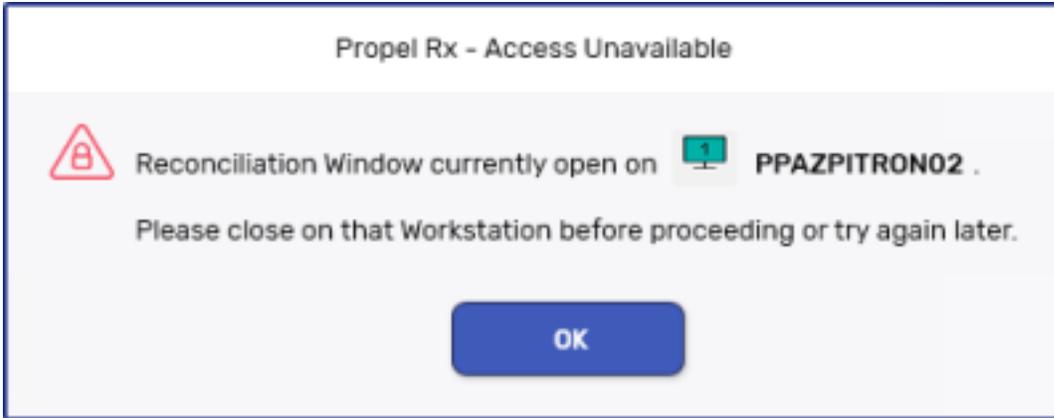
- If the **Reconcile** module is open on a workstation or instance, the **Drug Folder** of one of the drugs in the module can only be opened in **READ ONLY Mode** on another workstation or instance. The following prompt appears when attempting to access a **Drug Folder** for a drug in the module:
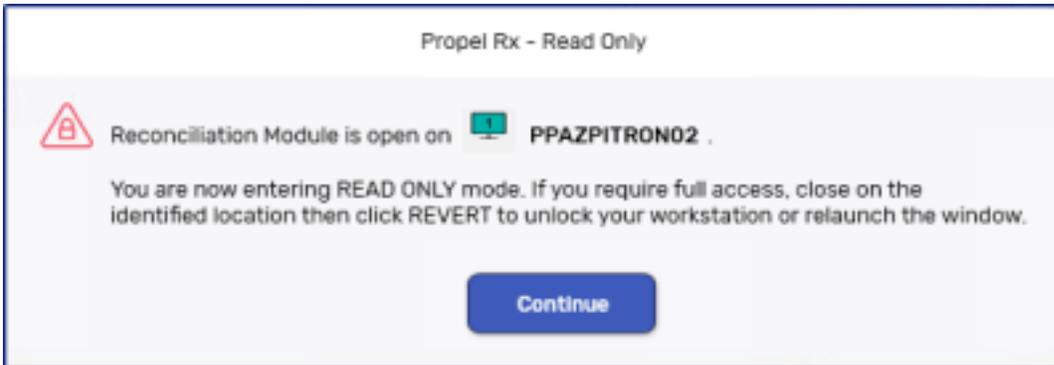
Non-Monitored Products

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.

CYCLOSPORINE 0.05%
RESTASIS OPHT
DIN: 2355655

Form: DROPERETTE
ROA: OPHTHALMIC
Schedule: Schedule I

Formulary:

On Hand: 60
Owe: 0
On Order (Pk): 0

Image Not Available

DIN 2355655	AUXILIARY	ALTERNATIVE	**INVENTORY**	HISTORY	ATTACHMENTS	NOTES

Packs Available - RESTASIS OPHT 0.05% DROPERETTE

Inv #	Size	Description	Allocated On Hand (Units)	Allocated On Hand (Packs)	On Order	Owe Amount	Acq Cost	Price Code	Default	Monitor	
1 - Main	30	OPHT 0.05% 30X0.4ML	60	2	0	0	$3.7057	C	✔	✔	
1 - Main	60	OPHT 0.05% 60X0.4ML	0	0	0	0	$3.7055	C	☐	☐	

Reset

Order

Pack Detail

Pack Size: 30   Actual on Hand: 60

Main UPC: 06988693346

Re-Order Point: -1

Re-Order #Packs: 1

Acq Cost(ut): $3.7057

Alt UPC: 00069886933468

Acq Cost(pk): $111.1710

☑ Do Not Re-Order

☐ POS Product

Code	Supplier Name	Item #	Rank	Price (ut)	Price (pk)	Default	Inv #
MDS	McKesson ON-REX	984211	1	3.7057	111.1710	✔	1

Add

Remove

SEARCH	COUNSEL	ADJUST	SAVE	CLOSE	REVERT