

Process Guideline

9.5.1

Basic Inventory Reports

Admin staff | Clinic staff

OpenEMR version

4.1

Last update

August 02, 2017

Author(s): X Gonzalez Page 1 of 2

Steps

Menu |

Inventory Reports / Examples

Description



Most OpenEMR reports can be

- Submitted to the screen
- Exported to comma separated value (CSV)
- Printed to paper



Baseline data for reporting examples

Name	Act	Drug Code	Form	Size	Unit	Tran	Lot	Clinic	Warehouse	QOH	Expires
C - Jasmin - oral contraceptive	Yes	334455		0		Tran	45	First Clinic I	Clinic store room	10	24/09/2016
							46	First Clinic I	Clinic store room	20	30/01/2018
C - Microgynon (Orals)	Yes	111103	tablet	1		Tran	234123	Delmas Clinic	Delmas	9905	29/04/2016
							234122	First Clinic I	Clinic store room	26	01/04/2018
C - Mirena (IUCD; Hormonal 5 year)	Yes	113302		0		Tran	MIR-100	Delmas Clinic	Delmas	300	16/04/2018
							MIR-101	First Clinic I	Clinic store room	673	01/01/2019
C - Norigynon (Injectable 1 mo.)	Yes			0		Tran	44	First Clinic I	Main Warehouse	100	27/07/2018
							11	First Clinic I	Clinic store room	218	01/08/2018
							11	Delmas Clinic	Delmas	199	01/08/2018

Sample transactions

- 400 units of Mirena purchased
- 118 units of Norigynon transferred from Clinic to Main Warehouse
- 79 units of Noristerat returned
- 83 units of Optinor destroyed

Date: 2017-08-03

Transaction Type: Purchase/Receipt

Lot Number: MIR-103

Manufacturer: Bayer

Expiration: 2020-08-31

Vendor: Unassigned

Warehouse: Delmas

Quantity: 400

Total Cost: 200

Comments: Stock reposition

Save Print Cancel

Date: 2017-08-03

Transaction Type: Transfer

Source Lot: NORIGY-11 / Clinic store room (218)

Destination Warehouse: Main Warehouse

Quantity: 118

Comments: Replenishment via transfer

Save Print Cancel

Date: 2017-08-03

Transaction Type: Return

Lot Number: NOR-01

Expiration: 2016-01-31

Warehouse: Main Warehouse

On Hand: 79

Quantity: 79

Total Cost: 7.90

Comments: Return of expired product for reposition

Save Destroy Print Cancel

Activity

Sample Report: Inventory activity by product in a date range, and exported to comma-separated value format. Select: Select Reports> Inventory> Activity. Press Export to CSV button.

Inventory Activity

	A	B	C	D	E	F	G	H	I	J
Product	Warehouse	Date	Invoice	Issues/Sales	Receipts	Returns	Transfers	Adjustments	Consumptions	
C - Mirena (IUCD; Hormonal 5 year)	Delmas	03/08/2017		0	400	0	0	0	0	0
C - Norigynon (Injectable 1 mo.)	Clinic store room	03/08/2017		0	0	0	-118	0	0	0
C - Norigynon (Injectable 1 mo.)	Main Warehouse	03/08/2017		0	0	0	118	0	0	0
C - Noristerat (Injectable 2 mo.)	Main Warehouse	03/08/2017		0	0	-79	0	0	0	0
C - Optinor (EC)	Clinic store room	03/08/2017	Destroyed	0	0	0	0	-83		
TOTALS				0	400	-79	0	-83		

Inventory Transactions

Date	Transaction	Product	Lot	Warehouse	Invoice	Qty	Amount	Billed	Notes
03/08/2017	Purchase/Receipt	C - Mirena (IUCD; Hormonal 5 year)	MIR-103	Delmas		400	-200.00		Stock reposition
03/08/2017	Transfer	C - Norigynon (Injectable 1 mo.)	NORIGY-11	Clinic store room		-118			Replenishment via transfer
03/08/2017	Transfer	C - Norigynon (Injectable 1 mo.)	NORIGY-11	Main Warehouse		118			Replenishment via transfer
03/08/2017	Return	C - Noristerat (Injectable 2 mo.)	NOR-01	Main Warehouse		-79	7.90		Return of expired product for reposition
Grand Total						8916	-151.60		

List

Sample Report: Inventory showing the result of the above transactions. Select: Select Reports> Inventory> List. Press Submit button.

Inventory List

Name	Relates To	Drug Code	Active	Form	Months Min	Months Max	QOH	Zero Stock Days	Avg Monthly	Stock Months	Reorder Qty	Warnings
C - Mirena (IUCD; Hormonal 5 year)	IPPCFM-4540	113302	Yes		15	0	1373	0			0	
C - Norigynon (Injectable 1 mo.)	IPPCFM-4370		Yes		50	0	517	0			0	
C - Noristerat (Injectable 2 mo.)	IPPCFM-4380	111199	Yes	ampules	25	0	116	0			0	
C - Optinor (EC)	IPPCFM-4620	280008	Yes		100	0	514	0			0	
C - Optinor II	IPPCFM-4620		Yes	tablet	0	0	502	0			0	Lot 1102 has expired
C - Paragard (IUCD; Copper 10 year)	IPPCFM-4540	113301	Yes		15	0	416	0			0	
C - Trindolol	IPPCFM-4360		Yes		25	0	149	0	0.1	1490.0	0	
C - Yasmin (Oral)		111199	Yes	units	0	0	192	0			0	Lot 111 expires in 150 days Lot 112 expires in 150 days
Condom Male		212	Yes	top	10	100	43	0			0	

Note: Alerts with expiration dates by lot are shown in red

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Price List

Sample Report: Detailed product price list exported to PDF format for digital storing or paper printing.

Select: Select Reports> Inventory> Price List. Press Print button.

Price List

Inventory Price List													
Name	Drug Code	Active	Form	Relate To	Template	Schedule	Sales Units	Basic Units	Refills	Promotion	General	Package	Cash SZF
C - Mirena (IUCD, Hormonal 5 year)	113302	Yes		IPPF:113171999;IPPF2:1132120000000;IPPF2CM:4540	C		1	1	0		100.00		
C - Norginon (Injectable 1 mo.)		Yes		IPPF:111111999;IPPF2:1122120000000;IPPF2CM:4370	C		1	1	0	15.00	20.00		
C - Noristerat (Injectable 2 mo.)	111199	Yes	ampules	IPPF:111112999;IPPF2:1122120000000;IPPF2CM:4380	C		1	1	0	15.00	20.00	5.00	
C - Optinor (EC)	280008	Yes		IPPF:145212310;IPPF2:1151020000000;IPPF2CM:4620	C		1	1	0	8.00	10.00		
C - Optinor II		Yes	tablet	IPPF2CM:4620	Box		1	1	17	15.00	22.00		
C - Planorguard (IUCD, Copper 40 year)	113301	Yes		IPPF:113171999;IPPF2:1132120000000;IPPF2CM:4540	C		1	1	0		60.00		

Baseline data for product destruction example

C - Optinor (EC)	Yes	280008		0	Tran	OPT-100	First Clinic I	Clinic store room	83	01/01/2015
						OPT-101	Delmas Clinic	Delmas	514	08/01/2020

Sample transaction

- 83 of expired Optinor units destroyed
- Steps are shown:

Date: 2017-08-03

Transaction Type: Return

Lot Number: OPT-100

Expiration: 2015-01-01

Warehouse: Clinic store room

On Hand: 83

Quantity: 83

Total Cost: 8.3

Comments: Product expired

Save Destroy Print Cancel

Lot Number: OPT-100

Manufacturer: n/a

Quantity On Hand: 83

Expiration Date: 2015-01-01

Date Destroyed: 2017-08-03

Method of Destruction: Incineration

Witness: Comptroller

Notes: Product expired

Submit Cancel

108.168.183.92 says:

Really destroy this lot?

OK

Cancel

Destroyed

Sample Report: List of destroyed products indicating method, witness and reasons for destruction.

Select: Select Reports> Inventory> Destroyed. Press Submit button

Resulting inventory management list after product destruction

Destroyed Drugs

-- All Facilities --
From: 2017-06-01 To: 2017-08-03 Refresh Print


Drug Name	Drug Code	Lot	Clinic	Warehouse	Qty	Date Destroyed	Method	Witness	Notes
C - Condoms Male (Generic)	123-456-001	FP-BAR-06	First Clinic I	Clinic store room	500	09/06/2017	Incineration	Admin Director	Product expired
C - Optinor (EC)	280008	OPT-100	First Clinic I	Clinic store room	83	03/08/2017	Incineration	Comptroller	Product expired
x - ABBA	1974	1974	First Clinic I	Clinic store room	27	09/06/2017	Incineration	Comptroller	Product expired

Name	Act	Drug Code	Form	Size	Unit	Tran	Lot	Clinic	Warehouse	QOH	Expires
C - Mirena (IUCD, Hormonal 5 year)	Yes	113302		0		Tran	MIR-100	Delmas Clinic	Delmas	300	16/04/2018
							MIR-101	First Clinic I	Clinic store room	673	01/01/2019
							MIR-103	Delmas Clinic	Delmas	400	31/08/2020
C - Norginon (Injectable 1 mo.)	Yes			0		Tran	NORIGY-44	First Clinic I	Main Warehouse	100	27/07/2018
							NORIGY-11	Delmas Clinic	Delmas	199	01/08/2018
							NORIGY-11	First Clinic I	Clinic store room	100	01/08/2018
C - Noristerat (Injectable 2 mo.)	Yes	111199	ampules	0	mg/1cc	Tran	NORIGY-11	First Clinic I	Main Warehouse	118	01/08/2018
							NOR-02	Delmas Clinic	Delmas	18	31/01/2018
							NOR-03	First Clinic I	Clinic store room	98	17/08/2022
C - Optinor (EC)	Yes	280008		0		Tran	OPT-101	Delmas Clinic	Delmas	514	08/01/2020

Purpose

To review basic inventory reports

Process description

Producing **inventory reports** allow clinic managers and staff to prevent stock outs, verify expiration dates, review each type of transaction, document product destruction , as well as to reconcile financial with service data

Pre-conditions

Inventory data has been entered and data quality verified.

Observations

OpenEMR provides multiple reports for revising and cross-checking data. In addition to being displayed onscreen, most reports can be exported to comma-separated value (CSV) format readable with Excel, and to PDF to be stored digitally or printed in paper.