

Process Guideline

4.4. Inventory Transactions

Cashiers| Admin & Clinic staff

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OpenEMR version	4.1	Last update	June 07, 2017	Author(s): X Gonzalez
Steps	Menu	Report	Inventory transaction examples	

Baseline for transaction examples:

- Product: Male condoms
- 5 different Lots
- One Lot expired to be returned
- Stock unevenly distributed
- Product damaged to be destroyed

For transactions select **New** button depending on OpenEMR version

Inventory Management		All Warehouses	<input type="checkbox"/> Show empty lots	<input type="checkbox"/> Show inactive	Refresh
Name	Lot	Clinic	Warehouse	QOH	Expires
C - Condoms Male (Generic)	FP-BAR-01	First Clinic I	Clinic store room	44	18/03/2017
	FP-BAR-03	First Clinic I	Clinic store room	2	02/09/2017
	FP-BAR-04	First Clinic I	Clinic store room	116866	02/09/2017
	FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
	FP-BAR-05	Delmas Clinic	Delmas	89895	02/09/2017
	FP-BAR-06	First Clinic I	Clinic store room	5	02/09/2017

1 Purchase / Receipt

- Purchase/Receipt
- Return
- Transfer
- Adjustment
- Consumption
- Edit Only

Printed report

Date: 2017-06-09

Transaction Type: Purchase/Receipt

Lot Number: FP-BAR-02

Manufacturer: Sico

Expiration: 2019-06-30

Vendor: Schering Plough

Warehouse: Cashier cabinet1

On Hand: 0

Quantity: 1000

Total Cost: 90

Comments: Increase cashier c

Transaction completed: 1,000 condoms purchased, and allocated to Cashier Cabinet 1 in First Clinic 1

C - Condoms Male (Generic)	FP-BAR-01	First Clinic I	Clinic store room	44	18/03/2017
	FP-BAR-03	First Clinic I	Clinic store room	2	02/09/2017
	FP-BAR-04	First Clinic I	Clinic store room	116866	02/09/2017
	FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
	FP-BAR-05	Delmas Clinic	Delmas	89895	02/09/2017
	FP-BAR-06	First Clinic I	Clinic store room	5	02/09/2017
	FP-BAR-02	First Clinic I	Cashier cabinet1	1000	30/06/2019

2 Return

- Purchase/Receipt
- Return
- Transfer
- Adjustment
- Consumption
- Edit Only

Printed

Date: 2017-06-09

Transaction Type: Return

Lot Number: FP-BAR-01

Expiration: 2017-03-18

Warehouse: Clinic store room

On Hand: 44

Quantity: 44

Total Cost: 4

Comments: Expired product return to vendor

Transaction completed: 44 expired condoms returned to vendor. Lot removed from inventory

FP-BAR-03	First Clinic I	Clinic store room	2	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	116866	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89895	02/09/2017
FP-BAR-06	First Clinic I	Clinic store room	5	02/09/2017
FP-BAR-02	First Clinic I	Cashier cabinet1	1000	30/06/2019

3 Transfer

- Return
- Purchase/Receipt
- Return
- Transfer
- Adjustment
- Consumption
- Edit Only

Printed report

Date: 2017-06-09

Transaction Type: Transfer

Source Lot: FP-BAR-04 / Clinic store room

Destination Warehouse: Clinic store room

On Hand: 2

Quantity: 998

Comments: Replenishment via transfer

Transaction completed: 998 condoms transferred from Lot FP-BAR-04 to FP-BAR-03 (same exp. date)

FP-BAR-03	First Clinic I	Clinic store room	1000	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	115868	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89895	02/09/2017
FP-BAR-06	First Clinic I	Clinic store room	5	02/09/2017
FP-BAR-02	First Clinic I	Cashier cabinet1	1000	30/06/2019

4 Adjustment

- Adjustment
- Purchase/Receipt
- Return
- Transfer
- Adjustment
- Consumption
- Edit Only

Printed

Date: 2017-06-09

Transaction Type: Adjustment

Lot Number: FP-BAR-06

Expiration: 2017-09-02

Warehouse: Clinic store room

On Hand: 5

Quantity: 495

Comments: Physical inventory adjustment

Transaction completed: 495 condoms added as adjustment to match physical inventory data (5 on Hand + 395 adjustment = 500)

FP-BAR-03	First Clinic I	Clinic store room	1000	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	115868	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89895	02/09/2017
FP-BAR-06	First Clinic I	Clinic store room	500	02/09/2017
FP-BAR-02	First Clinic I	Cashier cabinet1	1000	30/06/2019

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5 Consumption

Printed

Transaction completed: 895 condoms reduced from Lot FP-BAR-05 for internal consumption in campaign (89895-895 = 89000)

Purchase/Receipt
Return
Transfer
Adjustment
Consumption
Edit Only

Date: 2017-06-09 

Transaction Type: Consumption

Lot Number: FP-BAR-05

Expiration: 2017-09-02

Warehouse: Delmas

On Hand: 89895

Quantity: 895

Comments: Youth program campaign

FP-BAR-03	First Clinic I	Clinic store room	1000	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	115868	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89000	02/09/2017
FP-BAR-06	First Clinic I	Clinic store room	500	02/09/2017
FP-BAR-02	First Clinic I	Cashier cabinet1	1000	30/06/2019

6 Edit Only

Printed report


Transaction completed: Expiration date of Lot FP-BAR-02 edited

Purchase/Receipt
Return
Transfer
Adjustment
Consumption
Edit Only

Transaction Type: Edit Only

Lot Number: FP-BAR-02

Manufacturer: Sico

Expiration: 2017-09-02 

Vendor: Schering Plough

Warehouse: Cashier cabinet1

On Hand: 1000

FP-BAR-02	First Clinic I	Cashier cabinet1	1000	02/09/2017
FP-BAR-03	First Clinic I	Clinic store room	1000	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	115868	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89000	02/09/2017
FP-BAR-06	First Clinic I	Clinic store room	500	02/09/2017

7 Destroy

Destroy window

Transaction completed: Lot FP-BAR-06 destroyed by incineration

Destroy...

Lot Number: FP-BAR-06

Manufacturer:

Quantity On Hand: 500

Expiration Date: 2017-09-02

Date Destroyed: 2017-06-09 

Method of Destruction: Incineration

Witness: Admin Director

Notes: Product damaged

FP-BAR-02	First Clinic I	Cashier cabinet1	1000	02/09/2017
FP-BAR-03	First Clinic I	Clinic store room	1000	02/09/2017
FP-BAR-04	First Clinic I	Clinic store room	115868	02/09/2017
FP-BAR-04	Delmas Clinic	Cashier No. 2	80301	02/09/2017
FP-BAR-05	Delmas Clinic	Delmas	89000	02/09/2017
FP-OAC-24	First Clinic I	Clinic store room	17	30/11/2014

Purpose

To describe key Lot Transactions in OpenEMR

Process description

Lot transactions in OpenEMR include Purchases/Receipt (to increase stock), Return (decrease stock by devolution), Transfer (decrease source lot and increase destination stock), Adjustment (increase or decrease stock), Consumption (decrease stock) or Edit to correct errors.

Pre-conditions

Lots must be created and verified before attempting transactions, and a physical record of the transaction must be created by printing the transaction report, and filed appropriately.

Observations

Stock and expiration dates should be verified periodically through physical inventory practices.