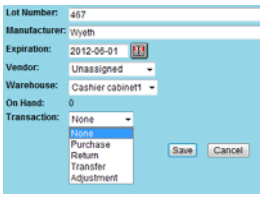
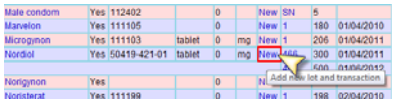
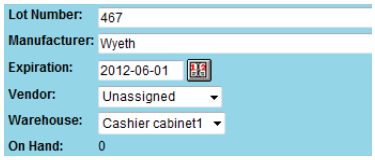
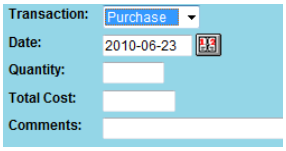
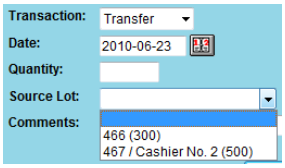
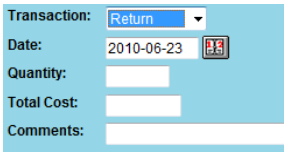
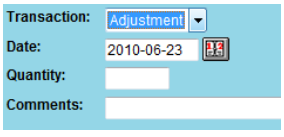
PROCESS DESCRIPTION – VERSION 4.0 (June 2010)

ROLES: COUNSELLOR / MEDICAL STAFF / ADMIN STAFF	PROCESS 4.4.2: ENHANCED INVENTORY LOT FEATURES

#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** In order to manage lots, a product catalogue must first be created (see Guide 4.4.0 Managing Inventory (Products)	The current version of OpenEMR, includes the ability to manage different inventory transaction types: Purchases, Transfers, Adjustments, and Returns.	**Note**: The following inventory functions are available from OpenEMR version 3.1.1.7 onward. Please check with your system admin about system version.
2	**Adding or Increasing Lots** The new version of the Inventory module allows additional data (Vendor / Warehouse), as well as different transaction types: Purchase, Return, Transfer, and Adjustment. Upon selecting the link **New,** an **Add New Lot** window will be displayed		 First select the link **New** for the product you want to modify
3	**Entering Lot header data** •Enter Lot Number (required) •Enter Manufacturer – (recommended) •Enter lot expiration date (required) •Select Vendor from the drop down list (defined in Address Book) •Select warehouse where the transaction is being registered (defined in Administration/List)	•**Lot number in** OpenEMR refer to **Groups** of products related to a warehouse and to an expiration date, and are defined by the clinic. Therefore, the product catalogue may show same Lot Numbers with different Warehouses and/or Expiration Dates •It is highly recommended to define and apply an explicit lot numbering policy	
4	**New Transaction - Purchases** •Select Transaction type: Purchase •Enter Transaction Date (default editable) •Enter quantity • Enter total cost if available (used as a reference only, as it is not currently used in reports) •Last field is a text box for comments •Save transaction in order to update lot quantities in the correspondent warehouse	This transaction type records additions of New lots to the inventory **Note:** If you want to increase the stock of an existing lot, select the **Lot Number** link instead of the **New** link in the Product Catalogue	**Note**: upon selecting the transaction type, additional data entry fields are displayed: 
5	**New Transaction - Transfers** •Select Transaction type: Transfer •Lot Number (not used, se source Lot below) •Warehouse (destination location, required) •Enter transaction Date •Quantity (transferred from source to destination) •Source Lot (Select both **source** lot number and warehouse in drop-down menu. Note that quantities on hand are shown in parenthesis) •Last field is a text box for comments	This transaction type records movements from one warehouse to another **Note:** In this particular transaction type the original Lot Number is irrelevant. Destination Lot Number will be the same as the Source Lot	
6	**New Transaction - Return** •Select Transaction type: Return •Enter transaction date •Enter quantity to be returned •Enter total cost if available (used as a reference only, as it is not currently used in reports) •Last field is a text box for comments	This transaction type is used when an entire lot or some products of it must be returned to the vendor, because expiration Date has reached or the product is damaged	
7	**New Transaction - Adjustment** •Select Transaction type: Return •Enter transaction date •Quantity: Negative amount to reduce QOH, or positive to increase QOH •Last field is a text box for comments	Sometimes Quantity on Hand needs to be adjusted according to some specific criteria or situations, eg., when physical counting of the inventory differs from the quantity registered in the system. In those cases, and adjustment - positive or negative-, is required.