EPIC TRAINING

Intro to Inventory Managment
Quick Start Guide

HOUSTON Methodist LEADING MEDICINE

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The Inventory activity

The Inventory activity is your hub for managing pharmacy inventory. To get there, do either of the following:

- In Hyperspace, click **Inventory** on the Hyperspace toolbar.
- In Willow Ambulatory, follow the path Epic button >Inventory.

From the Inventory activity in Hyperspace, you can:

- Adjust par levels
- Perform cycle counts
- Receive shipments
- Review and update inventory balances

If you access the Inventory activity from within Willow Ambulatory, there are fewer available activities, but you can still:

- Adjust par levels
- Perform cycle counts
- Review and update inventory balances
- Receive shipments

How inventory is tracked

Within an inventory location, the system tracks the amount of stock on hand by maintaining balances for each inventory item. An inventory item is a collection of NDCsInventory balances are automatically decreased when prescriptions are filled and medications are wasted and automatically increased when shipments are received.

The following table lays out when manual updates are and aren't needed in Willow Inventory.

Real-world action	Does Epic know?	Manual update needed?
Label printed for dispense	Yes	No
Completing Dispense Prep	Yes	No
Compounding and Repackaging	Yes	No
Expired stock	No	Use Update Balances
Dropped medication on the floor	No	Use Update Balances

Use your barcode scanner

Enter information faster in these Willow Inventory activities by using your barcode scanner and following the corresponding steps.

Activity	Steps to Scan
Update Balances	1. Enter a reason for the balance update in the **Reason** field. 2. Select the **Inventory item** field and scan the NDC. 3. Enter a balance in the **Set balance to** field. 4. Scan the next NDC you want to update. The previous NDC balance is automatically accepted.
Inventory Request	1. From the Inventory activity, select **Create Request**. 2. Select the **Item** field and scan the NDC you want to order.
Receive Shipment	1. Select the shipment you want to receive and click **Act on Selections.** 2. Select **Receive** and scan an NDC from your shipment.
Inventory Item Report	1. Open the Inventory Item Report. 2. Scan the NDC you want to report on.
Cycle Count	1. From the Inventory activity, click **Cycle Count**. 2. Print a counting worksheet and record item balances manually. 3. Scan the NDCs on the worksheet, and enter the updated balance for each into the system.

Cancel an inventory request

You can cancel a submitted request only if it hasn't yet been sent to the supplier or processed by the receiving location.

1. From the Inventory activity for the requesting location, click the **Outgoing Requests** tab.
2. Open the request you want to cancel.
3. Click **Delete Request**, and then click **Delete** to confirm that you want to delete the request.

Inventory as part of dispensing

Outpatient dispensing

When entering or reviewing a new prescription, a warning appears in the Pharmacy to Dispense window if you don't have enough inventory to complete a fill. After you review the fill, the system adds an Insufficient Inventory flag to the prescription. The flag prevents the fill from advancing in the filling process until you receive additional stock. When you receive additional stock, the flag is automatically removed.