Inventory Module Best Practices

The PharmaClik Rx Inventory module allows you to properly monitor inventory for drugs within the PharmaClik Rx Drug file. The following best practices will assist your pharmacy in keeping inventory accurate.

Spot Check Inventory When Filling Prescriptions

When filling or checking a prescription, look at the On Hand amount on the prescription hardcopy against the On Hands on the shelf.

Done daily, this will help to maintain accurate inventory levels. If there is a discrepancy, you can modify the inventory on the spot using the **Adjust** button in the Drug file.

Click here for details on how to manually adjust inventory.

Manage Owe Balances

PharmaClik Rx can help manage owe balances by auto-reconciling inventory. Follow these steps to ensure your inventory is accurate.

1. Ensure Auto-Reconcile is turned on in PharmaClik Rx.
   a. In PharmaClik Rx, select **More** > **Pharmacy** and select the **Inventory** button.
   b. Ensure the checkbox is selected for **Automatically Reconcile Owe Amounts with P.O.**
2. Always fill owe balances as soon as inventory is received.

   Note: If you choose NOT to automatically reconcile owe amounts, you will need to manually adjust them.

Click here for details on how to manually adjust owe amounts.

Set Your Inventory Preferences

PharmaClik Rx Inventory Preferences will help to:

- Prevent large amounts of medication from incorrectly being ordered.
- Automatically place products on the Order Pad when On Hand amounts reach the re-order point.
- Automatically reconcile owe amounts.

Click here for details on how the preferences should be set.

Download and Reconcile Orders

Downloading your McKesson order will allow you to auto-reconcile the order. This will save time by avoiding a manual reconciliation.

This will also produce the Auto-Reconcile Exceptions report.

Click here for details.

Use the Auto-Reconcile Exceptions Report

This report prints when an order is auto-reconciled and lists:

- Products that could not be auto-reconciled from the McKesson invoice file
- Invoice Exceptions and Back-Orders
- Pack Size and DIN substitutions that were reconciled with no changes to re-order parameters

Click here for details on reading and using this report.

Run the Re-Order Analysis Report

The Re-Order Analysis Report utilizes your purchase history to determine inventory stock levels.

This report is helpful for:

1. Existing stores who are new to Inventory.
2. Stores using perpetual inventory and have too much or too little inventory on hand.

Use this report to identify current and suggested re-order points to ensure appropriate inventory levels.

Click here for details on how to run the Re-Order Analysis Report.

This is also a part of the PharmaClik Rx Reports Job Aid. It describes key PharmaClik Rx reports and how to run and read them.