

# Using OpenEMR Inventory/ Dispensary Module for Non-Pharmaceutical Products

... without Conflicting With NewCrop eRx

## Introduction

OpenEMR's Inventory/ Dispensary module was originally created to serve a standalone practice that carried its own inventory of drug and non- drug products. Fortunately, many or most of the medication- oriented data fields are only used if the product is to be tracked, so they can be used for non- drug products.

OpenEMR's NewCrop eRx interface co-opts several of the Prescription and Medication modules' activities so that when they are selected, NewCrop is automatically invoked. However, that can be worked around using the Charges Panel to order an inventory product for an individual patient.

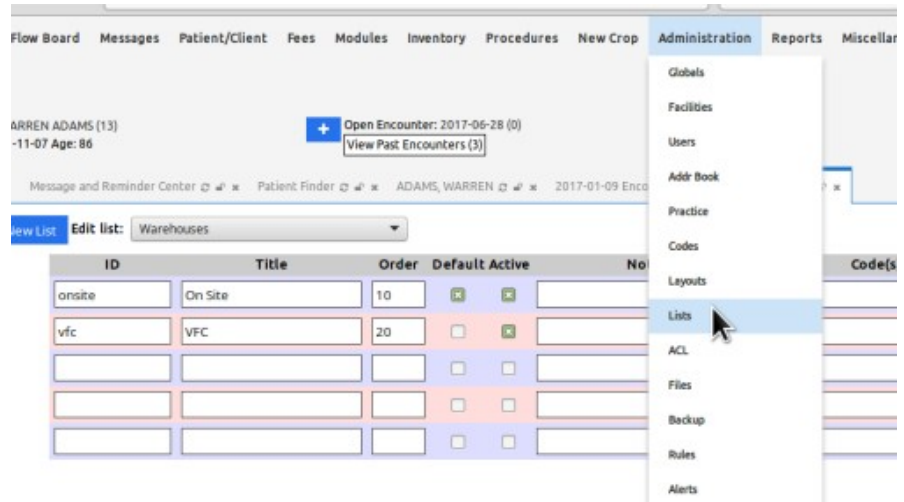
## Preparation/ Prerequisites:

- decide if you will be using a different 'warehouse' for different types of products.

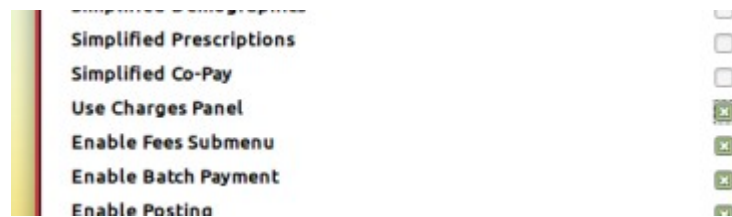
set them up if desired:

- Administration/ Lists - select Warehouses
- enter your desired warehouse name(s).

newPharmDisp-0warehouse



- must have Charges Panel activated  
Admin/ Globals/ Appearance

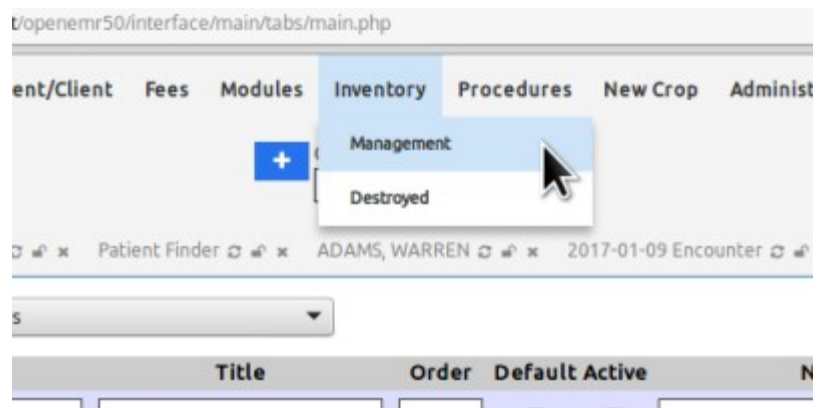


The Inventory workflow is basically:

1. Initially enter one 'lot' of a product into the inventory and enter the product characteristics
2. Tell the Inventory module the 'lot' characteristics (expiration date etc)
3. When the product is entered you write a 'prescription' for that product in the pt's charges panel

## 1. Add a product to the inventory

Menu: Inventory/ Management



Top portion of dialog:  
Many of these values are not required unless you want to track products by them.

(explanations and bottom part of dialog follow)

Name:	TCM Herbs		
Active:	<input checked="" type="checkbox"/>		
Allow:	<input checked="" type="checkbox"/> Multiple Lots <input type="checkbox"/> Combining Lots		
NDC Number:	1010101 (\$20)		
Drug Code:	<input type="text"/>		
On Order:	<input type="text" value="0"/>		
Limits:	Global	On Site	VFC
Min	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Max	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Form:	capsule		
Pill Size:	<input type="text" value="100"/>		
Units:	grams		
Route:	Per Oris		
Relate To:	<input type="text"/>		

**Name** - of product

**Active** - yes

**Allow**

- Multiple lots: if your inventory will contain > 1 lot of this product at a time
- combining lots: if you will track all the lots as one collection instead of separately; will allow filling an order from multiple lots

**NDC number** - optional

- any arbitrary free- text industry product indicator
- is a handy place to indicate the price of each dose
- Max length 20 characters including spaces

**Drug code:** optional - e.g., the CVX code, if applicable

On order: optional - how many lots are on order

Limits: optional - but are used for low inventory notifications.

- per the tool text, "minimum/ maximum reasonable inventory limits", of individual warehouses and all combined (Global).

**\*\* can customize these medication- related lists in Administration/Lists/ -**

**Drug Forms**

**Drug Units**

**Drug Routes**

**Drug Intervals**

**Form** - of the med; eg tabs, suspension, units etc.

**Pill Size** and - **Units**: together designates strength of the med. E.g., 1mg per cc

**Route** of administration

**Relate to** - optional relates the product to any of the installed codesets; e.g., ICD10 or CPT codes

1. click in the text area to bring up a code search dialog.
2. select the installed/ configured codeset/ code this item is related to.

(Bottom part of the  
'add meds' dialog.

The screenshot shows the bottom part of the 'add meds' dialog. It includes the following fields and controls:

- Units:** A dropdown menu currently showing 'grams'.
- Route:** A dropdown menu currently showing 'Per Oris'.
- Relate To:** A text input field.
- Templates:** A table with columns: Name, Schedule, Interval, Qty, Refills, and Standard.

Name	Schedule	Interval	Qty	Refills	Standard
TCM Herbat	1	b.i.d.	5	0	0.25

At the bottom of the dialog are three buttons: 'Save', 'Delete', and 'Cancel'.

**Templates.**

this specifies the different prescriptions in which this product will be ordered.

- Name: of the med/ product
- Schedule: how many of the units entered above, are to be given in this prescription.
- Interval: aka frequency that med will be given in this prescription
- Qty: how many doses in this prescription.
- Refills: in case of childhood immunizations, might want to make it cover how many doses in the whole series so you don't have to keep reordering this med each visit.

- Standard: standard price; must manually enter each price
  - this module does not pull its price from the one entered into the service code entry
- Click 'save'

This completes the first 'Add Drug' entry.

- If interrupted, before this point the product can be reopened by clicking on the drug name. (rectangle below)
- In a normal inventory entry workflow the next panel would appear automatically.
- If interrupted at this point, click on 'New' (oval below) to add the new lot being logged into the PharmDisp.

	Act	NDC	Form	Size	Unit	Lot	Warehouse	QOH	Expires
Gardasil 9	Yes	0006-4119-03	ml	1	mg/toc	New			

Buttons: Add Drug, New

## 2. Next (or resumed) panel: connecting lot info to the product supply

**Lot number** - needed to keep lots separate and track levels and expiration etc

**Manufacturer** - optional

**Vendor**: optional; must be in Address Book, specialty selected as 'Vendor'

**Warehouse**- if have any additional ones configured  
**'on hand'** - read- only display of stock level

**Transactions** - what we're doing to this lot  
 'purchase' from vendor  
 to add to stock

'return' to stock  
 'transfer' to a different warehouse

'distribution' not sure  
 'adjustment' correct  
 inaccurate supply values.

Lot Number: 2020-1

Manufacturer: SeeNoEvil

Expiration: 2023-04-25

Vendor: Meds R Biz

Warehouse: On Site

On Hand: 0

Transaction: Purchase

Date: 2018-04-25

Quantity: 3

Total Cost: 500

Comments:

Buttons: Save, Cancel

**Date** - of logging in the product lot

**Quantity** - number of packages in the lot.

- If this were pharmaceuticals, it would be, for eg, 5 multidose vials in the lot.
- all the individual dosage information was entered in the 1st step;
- this talks about how many of them are in the lot.

**Total Cost** - of the whole lot (just use numbers)

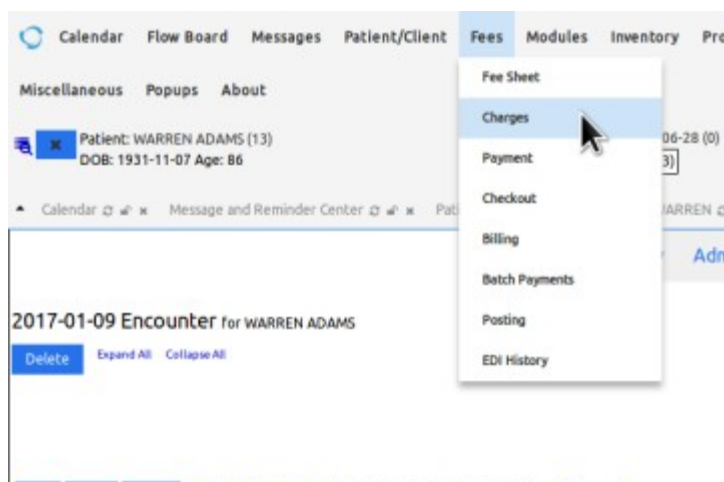
New inventory entry complete  
(pay no attention to the non- matching product names...)

Name	Act	NDC	Form	Size	Unit	New	Lot	Warehouse	QOH	Expires
Gardasil 9	Yes	0006-4119-03	ml	1	mg/1cc	New	G9-10023	VFC	10	2018-02-09

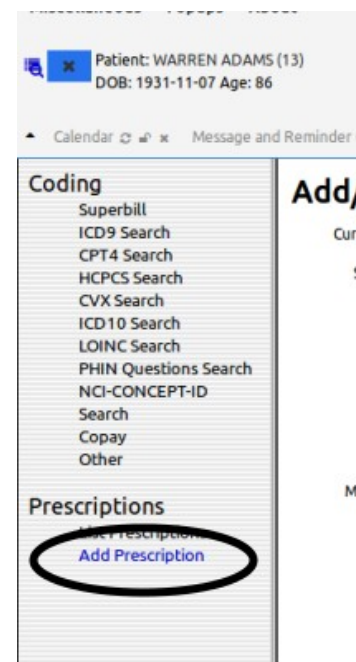
Add Drug

### 3. Writing a 'prescription' for the patient.

1. Open the pt record
2. Open the encounter where the product is ordered.
3. Main menu: Fees/ Charges



4. Add prescription (oval)



5. Enter product in 'drug'
- can simply write a scrip for anything
  - or select from the pharmacy (arrow)

The screenshot shows the 'Add/Edit' medication form in a clinical system. At the top, there are tabs for 'Message and Reminder Center', 'Patient Finder', 'ADAMS, WARREN', and 'Coding'. The 'Add/Edit' title is followed by buttons for 'Save', 'Save and Dispense', and 'Back'. A quantity of '1' is entered in the 'units' field. The form includes fields for 'Starting Date' (April 25, 2018), 'Provider' (Administrator Administrator), 'Drug' (with a search link), 'in-house' (dropdown), 'Quantity' (dropdown), 'Medicine Units' (dropdown), 'Take' (dropdown), 'Refills' (00), '# of tablets' (1), and 'Notes'. A dropdown menu is open for the 'Medicine Units' field, showing 'TCM Herbals [1010101 (\$ .20)]' as the selected option. At the bottom, there is a radio button for 'Add to Medication List' with 'No' selected.

6. the product 'order' is inserted with everything filled out.

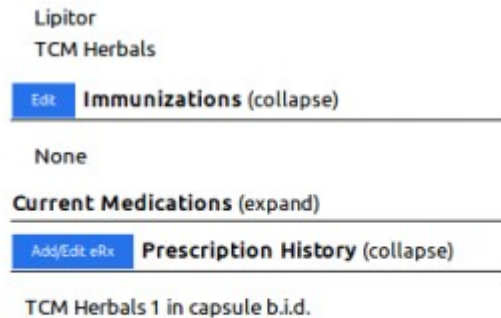
The screenshot shows the 'Add/Edit' medication form with the 'Save and Dispense' button circled. The form is now populated with the following information: 'Starting Date' (April 25, 2018), 'Provider' (Administrator Administrator), 'Drug' (TCM Herbals), 'in-house' (TCM Herbals [1010101 (\$ .20)]), 'Quantity' (5), 'Medicine Units' (100), 'Take' (1 in capsule Per Oris b.i.d.), 'Refills' (00), and '# of tablets' (5). The 'Add to Medication List' radio button is now set to 'Yes'.

7. Click 'Save and Dispense' button at top

- pay no attention to the error message
8. Click red 'x' to close

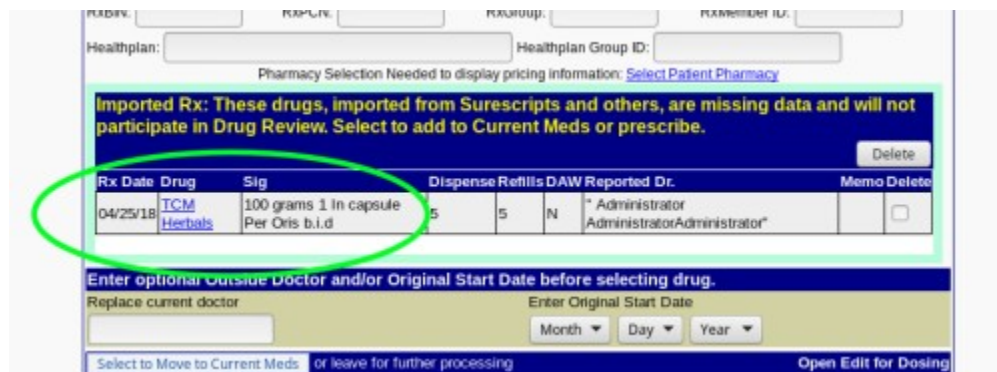


... and there is the product order in the patient's Prescriptions listing



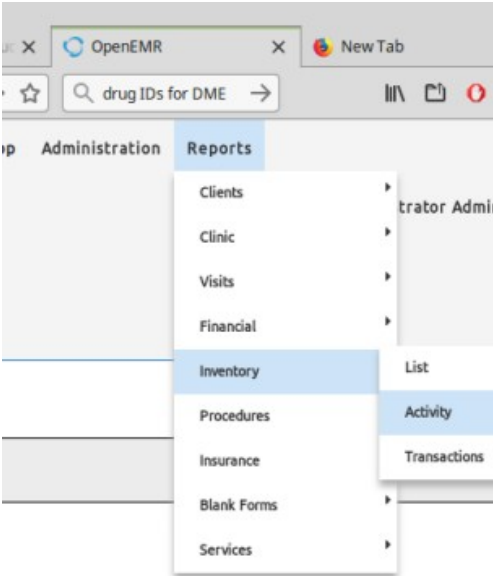
**NOTE:** It will not appear in **Current Medications** widget because that is strictly controlled by NewCrop.

When you go to this patient's NewCrop screen you'll see it was imported but doesn't participate in NCrop's med auditing





OpenEMR also has standardized inventory reports located at 'Main Menu: Reports'



Calendar Message and Reminder Center Patient Finder **Inventory List**

### Inventory List

For the past  days [Submit](#) [Print](#)

Name	NDC	Form	QOH	Reorder	Avg Monthly	Stock Months	Warnings
TCM Herbals	1010101 (\$20)	capsule	3	0			

Inventory Activity

By:  From:  To:  [Submit](#) [Print](#) [CSV Export](#)

For:  Details: ☐

Product	Warehouse	Start	Sales	Distributions	Purchases	Transfers	Adjustments	End
TCM Herbals	On Site	0	0	0	3	0	0	3
Total for TCM Herbals		0	0	0	3	0	0	3
Grand Total		0	0	0	3	0	0	3

Calendar Message and Reminder Center Patient Finder **Inventory Transactions**

### Inventory Transactions

Type:  From:  To:  [Submit](#) [Print](#) [CSV Export](#)

Date	Transaction	Product	Lot	Warehouse	Who	Qty	Amount	Billed	Notes
2018-04-25	Purchase	TCM Herbals	2020-1	On Site		3	-500.00		
Grand Total						3	-500.00		



