

BALANCE INVENTORY for Transfer Sites

MAKE SURE ALL MCIR DATA IS INPUT

Weekly:

- Print Physical Inventory Report for both VFC and Private
 - Record count on paper
 - In the Inventory screen, click Balance Inventory
 - Enter date of count and click Get Records
 - Enter counts
 - Click Save/Update
 - Wait 2 days for the transfer process to populate the MCIR data from your EMR
 - If differences, find out why
 - Correct information in MCIR (and EMR if necessary)
 - Check to see if your differences column has all zeros
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Monthly (after completing weekly):

- Click Completed (now your Balance date is current)

Your PPOC (Primary Point Of Contact) needs:

- Temp logs
 - Doses Admin Report
 - Ending Inventory Report (same location as Physical Inventory Report)
 - Order (when appropriate)
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Notes from Lee:

I know everyone is pressed for time and it is tempting to put the weekly process off. However, by doing so you actually will be wasting time and increasing your frustration level (and who needs that). Dozens of practices have tried to put off the weekly process, only to discover what a bad idea it is.

If you have questions or need help with freeing up some time, please call me @ 269.373.5194 and I'd be happy to offer my solutions developed from years in management.

Lee