MERLIN
PHARMACY INFORMATION SYSTEM

Inventory Master File
PBS Conversion &
Unit of Measure
Version 4.9

USER
REFERENCE

Table of Contents

1. Inventory Master File

1.1 Inventory Master File - Overview

This guide is not intended to be a replacement for the Inventory Control User Manual, but to complement the manual and provide some tips on how to best manage the file, particularly to be consistent with rules that govern the PBS.

The Inventory Master defines the Internal Units of Issue and the Purchase Units of Measure separately.   The link to the PBS data is through the Drug Code assigned

1.1.1   Rules Imposed by PBS

The base unit of measure of counting in the Inventory Master must be consistent with the unit of measure used by the PBS for the item.   This means that if the quantity is by the tablet in PBS then the base unit in Inventory must also be by tablet – this does not mean that the quantity per pack must be the same.   If the PBS base unit is a manufacturer original pack then the Inventory item must also have a base unit of manufacturer original pack.

Examples	PBS Qty	PBS Base Unit	Inventory Internal Unit/Issue	Inventory Base Unit		Remarks
Amoxycillin 250mg Cap	20	Tab	BOX/C(20)	Tab	☑	Same base unit & pack size
Paracetamol 500mg Tab	300	Tab	BOX/T100)	Tab	☑	PBS qty not same as Inv Qty is OK
Paracetamol 500mg Tab	300	Tab	BOX/T(24)	Tab	☑	Still has common Tab as UOM & stock debit is 12 packs + 12 tabs
Morphine 10mg/mL **200mL** Solution	1	Bottle	BTLE(1)	Bottle	☑	The size of the bottle is included in the strength field
Morphine 10mg/mL Solution	1	Bottle	ML(1)	mL	☒	The qty of 1 entered into the dispense qty will debit 1mL script will be costed at 1mL only.
Hydromorphone 1mg/mL **473mL** Mixture	1	Bottle	BTLE(1)	Bottle	☑	The size of the bottle is included in the strength field
Hydromorphone 1mg/mL **473mL** Mixture	1	Bottle	ML(1)	mL	☒	The qty of 1 entered into the dispense qty will debit 1mL, script will be costed at 1mL only.
Rivaroxaban 10mg Tab(15)	15	tab	BOX/T(15)	Tab	☑	Same base unit & pack size
Rivaroxaban 10mg (Box 30) Tab	1	Box	Box(1)	Tab	☑	The size of the box is included in the strength field
Rivaroxaban 10mg Tab (30)	1	Box	30	Tab	☒	The qty of 1 entered into the dispense qty will debit 1 tablet and script will be costed at 1 tablet only.

1.2 PBS Conversion Method

To dispense an item in a quantity other than the PBS Unit of Measure (UOM), the PBS Conversion Field in the Inventory Master screen can be utilised.

Eg. Morphine 10mg/mL – PBS base unit = 200mL. Dispensed quantity must be 1 (bottle of 200mL)

```
┌──────────────────── Inventory Master ────────────────────┐
  1:Inventory Code ..: MORP9
  2.Generic Code            3.PBS Conv                  4.PBS UOM
  1 MOR5    MORPHINE            0.0050   200??=PBSMaxQty(1)     ml
  2
  6.Generic Name ....: MORPHINE
  7.Strength ........: 10mg/mL (200mL)      8.Form.: MIXTURE
  9.Expense Account .: 17232   ......MORPHINE & DERIVATIVES
  10.Product Group ...: DA      DRUG OF ADDICTIO ┌──── Windows ────┐
  11.Product Type ....: D       DISPENSED       19<Stock Groups>
  12.Internal Issue ..: ML                      20<Purchase Data>29<All>
                       MILILITRES, MILILITRE     21<Site Purch Data>30<All>
  13.Units per Issue .: 200                      22<Substitute Items>
  14.Status ..........: N                        23<Stock Data>
  15.Shelf Life (days):                          24<Trans Enquiry>
  16.Intermediate Prod:                          25<Generic Data>
  17.WorkLoad Category:                          26<Comments>
                                                 27<Tax Codes>
     Last Maintained .: 29/05/2014 13:41 HAI 10  28<Virtual Product>

Enter OPTION, <F1>=help....:_____        (ICF.PRODUCT,M)
<F>=file, <ESC>=exit, <#>=field no
```

To create an Inventory Item that can be dispensed in a quantity other than the PBS UOM:

❖ Create the item as normal with the Units per Issue (Field 13) being the same as the PBS base unit.
❖ In Field 3: PBS Conversion, enter the factor required so that when multiplied by the PBS base unit will equal 1
❖ eg. To reduce the 200mL to 1mL, it must be multiplied by 0.005. This value is the PBS Conversion Factor.
❖ In Field 4: PBS UOM enter the units to be dispensed ie mL

In the Dispensing screen, enter the quantity required in mLs

```
      *NOTE*        PMI 15/07 11:00
                 ┌─PHARMACY - MAIN STORE─┐              25<PBS Online> 26<Profile> 27<PBS Auth> 28<PCEHR>
 1.Pt:      10037 FAKE, TEST             | -- Last Updated --  1         O IBUPROFEN 200mg TB (Nurofen)
 2.PtCat:0        123 LAVENDER ST EAGLEMONT 3070          2         O AMOXYCILLIN 250mg CP (Alphamox)
 3.Ward.:                                 New Item        3         O CALCIUM FOLINATE 50mg/5mL VL (Le
 4.Clin.:MED      DOB 12/03/1978 G-C 304025263K  S/Net : $196.50  4   O OXYCODONE 30mg SUP (Proladone)
   Medical Test CI                        M/care: 32983350113
 5:Rx No:26019    7.Dr:YANNECK, ANITA  8012188  FinCls: PRIV   5 09/10/2015 RALTEGRAVIR 400mg TB (Isentress)
 6:It/Rp:1/0      8.Rx Date:12/10/2015 9.Type:N  Non PBS      6 09/10/2015 ATORVASTATIN 40mg TB (Lipitor)
10.Drug/Stk                                                     9/10/2015 AMOXYCILLIN 250mg CP (Amoxil)
   MORPHINE (ORDINE)                                            9/10/2015 CALCIUM FOLINATE 50mg/5mL VL (Le
   10mg/mL (200mL) MIXTURE                                      9/10/2015 OXYCODONE 30mg SUP (Proladone)
11-Directions                                                  9/10/2015 OXYCODONE 30mg SUP (Proladone)
                                           Item $    6.10       9/10/2015 OXYCODONE 30mg SUP (Proladone)
   **This medicine may cause               Tot $    6.10        9/10/2015 OXYCODONE 30mg SUP (Proladone)
   drowsiness and may increase the         Fund:  UNKF          9/10/2015 AMOXYCILLIN 250mg CP (Alphamox)
   effects of alcohol. If affected do      Cover:               9/10/2015 CALCIUM FOLINATE 50mg/5mL VL (Le
12.Days:30       15.Labs:1     18.Exp:     CMI (avail)          9/10/2015 RALTEGRAVIR 400mg TB (Isentress)
13.Qty.:20.00    16.Bill:Pat.  19.BNo:     Govt $               9/10/2015 RALTEGRAVIR 400mg TB (Isentress)
14 Pts:0         17.Cng:6.10   20<Status> 21<Tax> Cost $ 271.00 8/09/2015 OXYCODONE 30mg SUP (Proladone)
[PBS: Stock: 20.00xml = PBS Qty: 0.1]      Tax $     0.00
Enter OPTION, <F1>=help....:               (PHF.DISP2,M)
-- Options: <F>=file <P>=print </,+,-,=,#>=trade/generic M=menu/help
```

The Conversion Factor converts the quantity dispensed to the fraction of the bottle ie 20mL = 0.1 of the 200mL bottle.

2 Changing Internal & Purchase Pack Sizes

2.1 Create a New Inventory Code or Amend an Existing Item – Pros & Cons

The best option is usually to create a new inventory item and set the existing to a deleted status after setting all purchase orders to Complete of Deleted; removing all commitment from Requisition processing and adjusting out all stock on hand (and dollars). There will be dispensing repeats that the inventory code will need to be changed on dispensing of a repeat and the item may appear on Imprest List that can be changed using the menus options in Imprest List Maintenance.

Pro's	Con's
Correction of Issue to Purchase ratio may correct cost flow from point of purchase through to issues & dispensing costs	Changes to the base unit of measure i.e. Morphine Mixture ML(1) to BTLE(1) have a profound effect on costing, issue qty, dispensing cost etc if not changed correctly
The Barcode Imprest Stickers can still be scanned (although qty/issue is wrong)	Purchase Orders store the relationship between Issue & Purchase at the time of the PO, so all PO's must be set as Completed before any change. This is often not practical as Electronic orders & invoices may still be required to be processed at the Old Units of Measure
Dispensing Copy & Repeats will still copy forward and track against the same inventory code	Requisition in progress must be deleted or fully processed
Changes that are done at the same base unit of measure can be done as the SOH is stored at the base unit of measure E.g. change of Box (50) to Box (25) can be done with correct costing	All current stock must be Adjusted Out of Store to remove all stock and dollar out
	The Average Weighted Cost needs to be manually set prior to Adjusting the stock on hand back into store
	The History of the item from a cost perspective in inventory will be correct but the quantity will be wrong

2.2 How to Change the Base Unit in the Inventory Master.

If you have decided to change an existing Inventory Master item rather that create a new one, follow this procedure.

1. **BEFORE CHANGING**
    a.   Inventory → 2. Enquiries → 2. Stock Data
    b.   Check for All Stores (E.g. PH01, PH02)
        - Field 30<P/Ord Enquiry> - Check for Outstanding Purchase Orders
            If there are still outstanding PO's they must be set to Complete to proceed further. NOTE – they cannot be set back to Active & if goods receipts need to be done a New PO must be created & noted on the Invoice. Do not set the PO to Complete if it is likely that the Goods Receipts will be done via the eCommerce automatic Goods Receipt processing.
        - Field 31<Committed> - Check for Outstanding Imprest Issues
            If there are still outstanding Imprest Issues then these need to be deleted or processed.

2. **ADJUST STOCK OUT OF EACH STORE** (E.g. PH01 & PH02)
    a.   Inventory → 5. Transaction Processing → 3. Adjustment MINUS
    b.   Stock Adjustment MINUS
            Use Adjustment Code COST to identify this type of transaction
            Remarks – "Change base unit of measure"
            Adjust all stock out at old price.

3. **CHANGE BASE UNIT OF INTERNAL ISSUE IN INVENTORY MASTER**
    a. Change Internal Issue descriptive & Change Internal Units per Issue
    b. ALL Purchasing Details MUST also be changed to ensure that the same base unit of measure is used in both Internal and Purchasing details – NOT just Supplier No 1 !!!!
            If changing from mL to Bottle then both the Internal Units must be Btle(1) and the Supplier Details must be Btle(1) – File the Purchasing Data screen and the primary Inventory Master record – re-open the record & check that your changed occurred as you expected.

4. **RESET THE AVERAGE WEIGHTED COST**
    a. The Average Weighted Cost needs to be manually reset for an Adjustment Into Store, as this and the Supplier details are the only known source of the goods.
    b. The zoom "*itemcost*" is the easiest way to navigate to the Stock Item Cost Initialisation Screen.
    c. The Itemcost screen will lock the stock record & halt any other attempt to transact on it.
    d. Reset Field 6. Av.Weigted to the COST FOR THE PACK
    e. Reset Field 7 Latest to the COST FOR THE PACK – this is the latest price paid for the Internal Issue Qty (this may be different from the purchased pack which may be a multiple of the Internal Issue Pack)
    f. The Standard Price should be left at zero.
    g. If retail POS Selling Price/Pack is set, ensure the price is correct (field 15).

5. **ADJUST THE STOCK BACK INTO EACH STORE** (E.g. PH01 PH02)
    a.   Inventory → 5. Transaction Processing → 3. Adjustment PLUS
    b.   Stock Adjustment PLUS
            Use Adjustment Code COST to identify this type of transaction
            Remarks – "Change base unit of measure"
            Adjust all stock back into store – CHECK that the Price is Right!

6. **WARNINGS – DISPENSING SCREEN UOM & DISPENSE LABEL UOM**
    a.   Zoom to "*drugs2*" to navigate to the Drugs – Internal Data screen.
    b.   Check Field 7 - Dispensing UOM. Use a short descriptive that will appear on the dispensing screen next to the Qty field to prompt the correct UOM. E.g. btle, box or ea etc.

This will also print on the label next to the Qty dispensed E.g. 1btle

a.   Check Field 16 - Dispensing Data - This screen has a number of options to restrict Dispensing screen entries –

Field 2. Max Qty Check – set to prevent incorrect entry. E.g. Set to 1 to prevent entry of 200 if correct entry is 1btle of 200mL

Field 8. Display Message – Displays during Directions entry

7.   IMPREST LIST – GLOBAL IMPREST CHANGE / DELETION

a.   Inventory → 3. Imprest Stock → 7. Global Imprest Change/Deletion

b.   The Global Imprest Substitution / Deletion screen provides a means of swapping over the codes and printing new labels for items that appear on imprest lists.