



## ***Steps for completing a full inventory count:***

### **Preparation:**

1. Correct Inventory Mismatch Catalog (Pioneer steps below)
  - a. Select Ordering tab
  - b. Select Mismatch Catalog
  - c. Sort by Rx
  - d. Correct Rx items if needed
2. Count outstanding IOUs and place in will call bin day before inventory count. (Will give time to order if needed.) Avoid created IOUs day of inventory
3. Close all open invoices (Pioneer steps below)
  - a. Select Ordering tab
  - b. Select Binoculars next to Invoice
  - c. Select Open status
  - d. Review Rx and OTC invoices
4. Organize all shelves and mark unopened bottles or packages with total count of pills or items on outside (if open bottles or packages are counted prior to day of inventory count, bottles or packages must be recounted every time it is used and marked appropriately)
5. Download Pioneer Rx mobile inventory app (Only available for iPhone)

### **Day of Inventory Count:**

1. Complete all prescriptions in the queue day of inventory count (Pioneer steps below)
  - a. Select Workflow tab
  - b. Select Rx Queue
  - c. Check for incomplete prescriptions ie. waiting to print, waiting to fill, unchecked prescriptions, and labels that are not completely reversed
2. Print all waiting to fill prescriptions (Pioneer steps below)
  - a. Select Rx tab
  - b. Select Binoculars next to Rx
  - c. Change transaction status to Waiting to Fill
  - d. Select search
  - e. Add Quantity to your search results
  - f. Expand report view
  - g. Print list

- h. Confirm items on list within order labels
3. Submit daily order to wholesaler
4. Print current inventory list (Pioneer steps below)
  - a. Select Analysis tab
  - b. Select Inventory Validation
  - c. Select current date
  - d. Select Rx for inventory group
  - e. Print list
5. Clear inventory. All above steps must be completed before changing inventory balances to zeros in Pioneer. (Pioneer steps below)
  - a. Select Inventory tab
  - b. Select Inventory Worksheet
  - c. Select Rx for inventory group
  - d. Select filter
  - e. Select Actions
  - f. Reset balances to ZERO
  - g. Select confirm
6. Begin entering inventory counts in Pioneer. To manually enter counts follow the below steps
  - a. Select Inventory tab
  - b. Select Rx Inventory Count
  - c. Enter counts for full bottles and partial quantities
  - d. Select Save
7. To use the Pioneer mobile app to enter inventory counts, follow the below steps
  - a. iPhone must be connected to wifi
  - b. Open application and select store location
  - c. Enter employee Pioneer login information
  - d. Select the Inventory button
  - e. Select Rx group
  - f. Select the camera button
  - g. Scan barcode of bottle or package
  - h. Enter partial and full amounts
  - i. Check periodically to ensure counts are saving
  - j. \*\*\*If counting insulin, pay attention to quantity. Some insulin measurements may be listed by pin or by box\*\*\*

### **Troubleshooting Tips for Pioneer Inventory App:**

It may take a few times of entering the server IP address to get logged in. Keep trying and if problems persist follow the below steps in Pioneer:

1. Select Location
2. Select Employee
3. Type employee name
4. Ensure under the security tab they have permission for web portal users

### **Completion of Inventory Count steps:**

1. Once complete, print the final report from inventory valuation. Compare the initial report and send final numbers to the management office
2. Create a new recommended order and make sure that nothing says zero that you know you have (these will be the things that got missed or the scanner didn't catch.) There will be a gap between what your order points are and what you actually have on the shelf after counting. This is the BEST time to look over your order points for your drugs and remove what you don't need on your shelves. If not it will continue to pop up on each order even if you have an equivalent NDC.

Remove an order point by following the below steps:

- a. Right click the drug on the recommended order
- b. Drop down the options and select never (if you do this it will remove the order point so make sure you are positive of the change.)
- c. Correct your order baskets by going into each drug and subtracting what you are ordering from the balance on hand (make sure you pick the correct NDC!)