PROSTHETICS INVENTORY PACKAGE (PIP) LESSONS LEARNED

Patch RMPR*3*61

Version 3.0

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Department of Veterans Affairs
VistA Health System Design and Development (HSD&D)
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# PIP Lessons Learned from Patch 61 Test Sites

## Milwaukee (VISN 12) Lessons Learned

<table>
<thead>
<tr>
<th>Ann Olson, Site description</th>
<th>Milwaukee (VISN 12) is the first site to test Patch 61 and worked along side the developers of the system to help design the PIP system and correct any errors.</th>
</tr>
</thead>
</table>
| **Binder Method of Barcode Label Storage** | Milwaukee uses three-ring binders with photo holders that contain four pockets per page to hold barcode labels for different items. Since their inventory rooms are far away from the Purchasing Agent’s location, they bring the labels into the office and organize them into binders. This is one method of utilizing the barcode labels. Each binder can correlate to a Location in your inventory. For instance, you can have a binder for Orthotic Lab, Wheelchairs, satellite patient outpatient clinic, Room C-26, etc. You can include a Table of Contents for each binder of items listed alphabetically. For instance, you might want a category for Ambulatory and list the items:  
  - Cane – Blind #33  
  - Cane – Pistol Grip  
  - Cane – Wood – Tall  
  Each item would also be typed onto a label that would be affixed to a pocket on the plastic photo holders. As items are received into inventory and the barcode labels are printed, you can stuff the sheet of labels into these pockets. |
| **Barcode Labels** | Purchase the 1.5 x 3-inch labels for the Zebra label printer. Do not use glossy or semi-gloss labels as the ink can rub off. Use the flat or matte labels instead. |
| **Use the oldest labels first** | Pay careful attention to the date on the barcode labels. Use the oldest label first when scanning. Make sure that the inventory being assigned correlates to the barcode label date. The oldest item and oldest barcode label should be used first.  
  If a problem exists with scanning a label when doing a Stock Issue, check to make sure that the oldest label (for the oldest stock item) is being used first. If you have multiple Purchasing Agents ordering the same item for different patients from the same inventory location, you may want to check that the oldest item is being entered first. This may take coordinated communication.  
  **Note:** Also make sure the item hasn’t been transferred to a different location after the label was printed. |

*Continued on next page*
Milwaukee (VISN 12) Lessons Learned, Continued

Barcode Labels are not scanning

Milwaukee reported that while scanning a barcode label, the following message displayed “*** The Item scanned is not available, please update your inventory!!!” This message appears even though the item is physically on the shelf.

Prosthetics users should double-check their inventory as to why the label is not being accepted during scanning. One of the possible causes of this message is because the item was transferred. The user may think that the item(s) are still in inventory, but in reality, it’s already gone. Depending on what the user did to that particular item (batch) - transferred, deactivated the location where this item resides, edited the quantity or deletion of a Stock Issue, the label that was printed may not work. This is because our inventory system is date sensitive.

Be careful of the following options when scanning a barcode label:

- From the Stock Issues (SI) menu: Edit/Delete Issue From Stock (ED) option.
- From the Prosthetics Main Menu: Edit 2319 (ED2) option.
- From the NPPD Tools menu: Quick Edit 2319 Record (QED2) option.

Find an Inventory Item

You can print the Current Inventory Balance by Location report to help find the inventory item. This prompt displays: Enter 'ALL' for all Locations or 'RETURN' to select individual Locations. If you enter ALL at this prompt, every location in your Prosthetics Inventory will be covered by the report.

Edit/Delete a Issue from Stock (ED)

Milwaukee had IRM temporarily put a supervisory lock on the Edit/Delete Issue from Stock (ED) option (from the Purchasing (PU) Menu). That way, the Supervisor will know when the PA needs to use this option to return an item, and they can manually make the adjustments in PIP.

The purpose of this was due to returned items required a deletion of the stock issue to the patient. This will now return the item into stock and reset the date entered as the date that it was originally received into PIP.

Before this patch, the item entered back into inventory by deleting the stock issue through the Edit/Delete Issue from Stock (ED) option looked like a new item with a current date when in fact it is an old item, but just a return. This revision to the original date allows the old barcode label to be used when deleting a stock issue.

Continued on next page
The Print 30 Day Average Usage Report (P3) was changed to Print Items Not Issued Within 30-Day (P3). It only prints those items that are GREATER than 30 days and that have never been issued. For items that are issued within 30 days, this data is not needed for this report, and will not be printed.

Below is a sample screen print and sample report with the new format:

SI     Item Detail Report
SH     HCPCS Summary Report
SG     NPPD Group/Line Report
SS     NPPD Group Summary Report
PI     Print Current HCPCS Balance by HCPCS
PL     Print Current Item Balance by Location
PO     Print Order/Receive Item
PS     Print Transaction History
IU     Print Item Usage By Location
WS     Print Stock Work Sheet
BC     Reprint Barcode Label
P3     Print Items Not Issued Within 30-Day
OD     Print Stock On Hand Over Date Range
AL     Print All Barcode in a Location
IP     Print PIP/IFCAP Item Report

Select Inventory Reports Option: P3 Print Items Not Issued Within 30-Day
SITE: Hines Development System://
Enter 'ALL' for all Locations or 'RETURN' to select individual Locations: ALL
DEVICE: HOME// TELNET Right Margin: 80//

Processing report.....

*** PROSTHETICS ITEMS NOT ISSUED WITHIN 30-DAY ***
Run Date: JAN 10, 2003
station: SUPPORT ISC

<table>
<thead>
<tr>
<th>HCPCS</th>
<th>ITEM</th>
<th>SRC</th>
<th>VENDOR</th>
<th>ENTERED</th>
<th>QTY</th>
<th>COST</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>A4254-1</td>
<td>BATTERY FOR GLUCOSE MONITOR</td>
<td>C</td>
<td>ABB</td>
<td>10/23/01</td>
<td>29</td>
<td>45.00</td>
<td>1,305.00</td>
</tr>
<tr>
<td>A4404-3</td>
<td>EYEGLASSES</td>
<td>C</td>
<td>ABBOTT</td>
<td>11/26/02</td>
<td>5</td>
<td>5.00</td>
<td>25.00</td>
</tr>
<tr>
<td>A4404-3</td>
<td>EYEGLASSES</td>
<td>C</td>
<td>HINES S</td>
<td>11/26/02</td>
<td>7</td>
<td>10.00</td>
<td>70.00</td>
</tr>
<tr>
<td>A4565-18</td>
<td>WHEELCHAIR - ELECTRIC</td>
<td>C</td>
<td>ABBOTT</td>
<td>01/30/02</td>
<td>10</td>
<td>100.00</td>
<td>1,000.00</td>
</tr>
<tr>
<td>A4565-18</td>
<td>WHEELCHAIR - ELECTRIC</td>
<td>C</td>
<td>ABBOTT</td>
<td>01/30/02</td>
<td>20</td>
<td>5.00</td>
<td>100.00</td>
</tr>
<tr>
<td>A4565-19</td>
<td>SHOES</td>
<td>C</td>
<td>ABBOTT</td>
<td>02/05/02</td>
<td>3</td>
<td>3.00</td>
<td>9.00</td>
</tr>
<tr>
<td>A4565-19</td>
<td>SHOES</td>
<td>C</td>
<td>ABBOTT</td>
<td>02/05/02</td>
<td>4</td>
<td>4.00</td>
<td>16.00</td>
</tr>
<tr>
<td>B9002-2</td>
<td>WHEELCHAIR-ADULT/HEMI/BL</td>
<td>V</td>
<td>ABBOTT</td>
<td>11/18/02</td>
<td>1</td>
<td>3.00</td>
<td>3.00</td>
</tr>
<tr>
<td>B9002-3</td>
<td>WHEELCHAIR-ADULT/HEMI/BL</td>
<td>C</td>
<td>ABBOTT</td>
<td>11/18/02</td>
<td>1</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td>B9002-4</td>
<td>WHEELCHAIR-ADULT/HEMI/BL</td>
<td>C</td>
<td>ABBOTT</td>
<td>11/18/02</td>
<td>5</td>
<td>10.00</td>
<td>50.00</td>
</tr>
<tr>
<td>B9002-5</td>
<td>WHEELCHAIR-ADULT/HEMI/BL</td>
<td>C</td>
<td>ABBOTT</td>
<td>11/18/02</td>
<td>10</td>
<td>10.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Continued on next page
New prompt: *Unit of Issue*. In the Add Inventory LOCATION or ITEMS (AE), Edit Inventory Items (EI), and Receive Item from Supply, Vendor or Patient options, there was no way of identifying if the item is a single or a pair. It was set up as “Each.” You would have to create two labels for each item in a pair and then divide pricing for each item. Patch 61 added this prompt (which is a list from IFCAP) in the three options listed above.

See below for the list of all *Unit of Issue* options.
Milwaukee (VISN 12) Lessons Learned, Continued

**Unit of Issue options**

- JR  JAR
- KG  KILOGRAM
- KM  KILOMETER
- KT  KIT
- LB  POUND
- LG  LENGTH
- LI  LITER
- LT  LOT
- MC  THOUSAND CUBIC FEET
- ME  MEAL
- MG  MILLIGRAM
- ML  MILLILITER
- MM  MILLIMETER
- MO  MONTH
- MR  METER
- MX  THOUSAND
- OT  OUTFIT
- OZ  OUNCE
- PD  PAD
- PG  PACKAGE
- PM  PLATE
- PR  PAR
- PT  PINT
- PZ  PACKET
- QT  QUART
- RA  RATION
- RL  REEL
- RM  REAM
- RO  ROLL
- SA  SACK
- SC  SQUARE CENTIMETER
- SD  SKID
- SE  SET
- SF  SQUARE FOOT
- SH  SHEET
- SK  SKEIN
- SL  SPOOL
- SM  SQUARE METER
- SO  SHOT
- SP  STRIP
- SX  STICK
- SY  SQUARE YARD
- TN  TON
- TO  TROY OUNCE
- TU  TUBE
- UN  UNIT
- VI  VIAL
- WK  WEEK
- YD  YARD
- YR  YEAR

**Print Stock Worksheet**

The **Print Stock Worksheet** report has a *Description* column to identify the item and it was expanded. This report is used to help conduct a physical count. The report was modified so that item description has 60 characters displayed and the remaining columns will display on the next line.

*Continued on next page*
Milwaukee (VISN 12) Lessons Learned, Continued

Source Prompt

You can now edit the Source prompt in the Add Inventory LOCATION or ITEMS (AE) and the Edit Inventory Items (EI) options if it was entered erroneously as V(VA) and it should have been C(Commercial).

Deactivate Location option

When a location is deactivated, all items will be zeroed automatically when using the Deactivate Inventory Location (DE) option.

When an item is zeroed, it will still appear in the reports: Print Current HCPCS Balance by HCPCS (PI) and the Print Current Item Balance by Location (PL). There is no need to manually zero out items with this patch.

Remove/Deactivate an Item option

Also, an old option Remove/Deactivate HCPCS/Item from Inventory (RE) has been re-added to allow the user to Remove or Deactivate an Item from the inventory.

Once an item is removed or deactivated, all balances for that item for a site will be zeroed and the item can't be selected for editing, printing and stock issue.

See sample below:

Remove/Deactivate HCPCS/Item from Inventory screen

AE   Add Inventory LOCATION or ITEMS
EI   Edit Inventory Items
EL   Edit Inventory Location
DE   Deactivate Inventory Location
OI   Order Item from Supply or Vendor
RC   Receive Item from Supply, Vendor or Patient
TR   Transfer Stock Between Locations
UP   Reconcile Item Balance
RE   Remove/Deactivate HCPCS/Item from Inventory
RP   Inventory Reports ...

Select Pros Inventory Main Option: RE <Enter> Remove/Deactivate HCPCS/Item from Inventory

SITE: Hines Development System// <Enter> 499

*** Removing/Deactivating HCPCS......

Select HCPCS: BA150 <Enter>

Do you want to Remove/Deactivate ALL Items for this HCPCS? N// Y <Enter> YES
Are you sure you want to Remove/Deactivate ALL ITEMS for HCPCS BA150? N// Y <Enter> YES

*** HCPCS/ITEM BA150-1 has been Removed/Deactivated from PIP...

Continued on next page
Milwaukee (VISN 12) Lessons Learned, Continued

| Physical Count | It is helpful to do a physical count periodically at least monthly during testing. Use the Print Stock Work Sheet (WS) report for the physical count. This report provides the quantity of the item in stock as well as a blank column for the physical count for each item.

**Recommendations for Testing:** It is recommended that a physical count be done monthly for the most active HCPCS codes. Once your system is Live with this patch, then it is also recommended to do an entire physical count quarterly for your site. If a problem arises, it is always helpful to conduct the physical count at that point in time then to wait quarterly, especially on an active HCPCS code. |
# New York (VISN 3) Lessons Learned

**Roxanne Holub**  
- Site description  
  New York (VISN 3) is a multi-site facility. Each site has multiple locations where inventory is located. During the implementation, when printing the **Print Current Item Balance By Location (PL)** report for each site, select the printer option onsite if available.

  Notify the supervisor that the report was sent to their facility. If their printer option is not available, then fax the report to the site. This will need to be done every time the report is printed and reprinted during the implementation and conversion of Patch 61.

**Labeling method**  
VISP 3 affixed the barcode labels to the actual items, except for some smaller items (including canes, crutches, etc.). They did not use the binder method like Milwaukee. The scanners can scan about 25 feet away from the computer. It is highly recommended that this be tested at each facility and for every different brand of scanner!

**Physical Count**  
VISP 3 conducted a physical count before Patch 61 was installed and corrected any discrepancies. With multiple sites, a physical count was also done as discrepancies arose for a particular site.

**Clean up inventory before Patch installation**  
Before you install Patch 61 at your site, you may want to take some time to review your system and clean up old, inaccurate Item data. Run the **Item Detail Report (SI)** for “All HCPCS” with a date range of 365 days.

There may be negative balances for an item (even an item not in stock any longer). The patch will now convert all negative balances to zero during the installation of the patch.

A negative balance may indicate that there is data in the system that is older than 365 days. The negative balance will show up in the **Item Detail Report (SI)** as well as the PIP roll up to have a minus amount. Here is an example of the **Item Detail Report**:

<table>
<thead>
<tr>
<th>HCPC</th>
<th>PSAS/ITEM</th>
<th>COM</th>
<th>STOCK ON-HAND</th>
<th>DAYS ON HAND</th>
<th>VALUE ON-HAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>K0003-6</td>
<td>LIGHTWEIGHT WHE</td>
<td>-20</td>
<td>0</td>
<td></td>
<td>-3,345.66</td>
</tr>
</tbody>
</table>

**For IRM: Move Printer to Production**  
Notify IRM to make sure that the new Zebra Printer device name and terminal type has been moved from the Test/Mirror Account to the Live/Production Account during conversion and installation! If not, this will not allow you to print all the barcode labels over the weekend (on Sunday before the start of the next week for regular service).

*Continued on next page*
New York (VISN 3) Lessons Learned, Continued

Email Notifications (For IRM)

Verify that your IRM has rescheduled the *Inventory Task Balance Check* to run every night after Patch 61 was installed. This option checks all Items in each Prosthetic Location and sends an email (*Prosthetics Inventory Message*) if the balance is below the Reorder Level for an item.

**Note:** Make sure that IRM has a list of people who should be in the RMPR INVENTORY mail group to receive this email.

**PIP Item and IFCAP Item Link**

The new **Print PIP/IFCAP Item** Report shows all PIP items with the corresponding IFCAP item. This report helps users verify which PIP item is linked to the IFCAP Item. Whatever IFCAP Item is linked to PIP is the one being used during the Stock Issue. (The Stock Issue doesn't ask for the IFCAP Item now.)

During the installation of this patch, if an IFCAP Item code is not linked to a Stock Issue record (a 2319 transaction), the conversion to the new files will put a blank in the **IFCAP Item** field (see sample below) in the new **Print PIP/IFCAP Item** Report. This is due to a missing link or pointer to the IFCAP ITEM. Errors that you may receive running reports can be due to this.

After you review the report of all missing IFCAP Item links, edit your inventory and enter the IFCAP Item for all PIP Items that are blank. Once all the PIP Items are linked to an IFCAP Item, all reports should run with no blanks.

**Continued on next page**
New York (VISN 3) Lessons Learned, Continued

New Label option
This patch provides an option to print all barcode labels for ALL items for ONE Location in a specified Station. The purpose of this is to request a massive print of all items with one command. The new option is a report option called Print ALL Barcode in a Location (AL).

Barcode label printing tips
If you use the new option, Print All Barcode in a Location (AL), your printer may skip or overprint a label at times. Verify the labels for all information in case a barcode or just a description is printed. You can use the Reprint Barcode Label (BC) option to print a second label.

If the labels are not put exactly in the printer properly, the printer can start printing in the middle of the label cutting off the item’s description and or printing on two labels - either one unusable. Also, the labels can get wrapped in the printer roller causing a label jam. To be sure the barcode printer is ready for printing, do a FORM FEED. This way the start of the printout will always be at the top of the label.

Note: Sometimes, at the end of the barcode label, all the digits for the date are not printed due to limited space. With this patch, it now prints the last two digits of the year - instead of 12/23/2002, it prints 12/23/02.

Reorder level and Prosthetics Inventory Message (email)
If a Reorder Level is entered for an item, and the stock on hand falls below this number, a Prosthetics Inventory Message (email) is generated. This email lists the site, location, item, HCPCS, Reorder Level, and balance. This is a nightly job that is run and checks on the Reorder Level before generating the email message.

Below is a sample:

Subj: PROSTHETICS INVENTORY MESSAGE [#79931] 12/28/02@06:00  14 lines
From: POSTMASTER  In "IN" basket.  Page 1  *New*
Run Date: DEC 28, 2002
This is a notification from the Prosthetics Department......

The current balance for the following item(s) is/are below the reorder level:

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
<th>Item</th>
<th>HCPCS</th>
<th>Reorder Lvl</th>
<th>Bal</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUPP</td>
<td>HN</td>
<td>EYEGLASSES</td>
<td>A4254-3</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>SUPP</td>
<td>HNC</td>
<td>ULTRALIGHTWEIGHT WHEELCHAIR</td>
<td>K0005-2</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>****</td>
<td>Quantity = 10 has been ordered for item..ULTRALIGHTWEIGHT WHEELCHAIR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RN</td>
<td>on DEC 18, 2002</td>
<td>TAIL CLOSURES/COMMERCIAL</td>
<td>A4369-1</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Thank You!!!
PROSTHETICS DEPARTMENT

Note: See next page on Vendor prompt and how the Reorder Level can affect the Inventory Message (email).
Searching by HCPCS or Description for Items

When editing item(s), receiving item(s) or reconciling an order, you will be prompted with the **HCPCS** prompt before the **Location** prompt with Patch 61. It will be helpful to either know the HCPCS code or the HCPCS description to search for an item. The more exact the HCPCS code or detailed the description you enter, the shorter the list of options displays from which to select one.

The **Location** prompt appears later in the process after the **HCPCS** prompt for these options:

- Edit Inventory Item (EI)
- Receive Item from Supply, Vendor or Patient (RC)
- Reconcile Item Balance (UP)

Verify the Vendor prompt

What happened in NY? NY received an email **Prosthetics Inventory Message** showing a need for Blood Pressure Monitors, which wasn’t true as NY had 16 on hand, but it reported only 4. The vendor file showed a vendor, MEDICAL PLACE in **upper case** with a balance of 12 and the same vendor file (but in **lower case**) with a balance of 4 (see below). This is below the **ReOrder Level**, which triggered the email.

```
<table>
<thead>
<tr>
<th>HCPCS</th>
<th>Item</th>
<th>Vendor</th>
<th>ReOrder Lvl</th>
<th>Bal</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>A4670-4</td>
<td>BLOOD PRESSURE MO C</td>
<td>14080S</td>
<td>MEDICAL</td>
<td>5 EA</td>
<td>12</td>
<td>31.94</td>
</tr>
<tr>
<td>A4670-4</td>
<td>BLOOD PRESSURE MO C</td>
<td>14080S</td>
<td>Medical</td>
<td>5 EA</td>
<td>4</td>
<td>31.94</td>
</tr>
</tbody>
</table>
```

Now with Patch 61, this email message will be sent based on the **HCPCS/Item/Location** fields and combine the totals and ignore different formats for the same vendor in the **Vendor** field. This **Vendor** field (originated from IFCAP) has many duplicate entries for the SAME vendor (same address, but different identifier number potentially from multiple users entering the same vendor in different formats).

**Note:** After the patch installation, check that the Reorder Levels are there for your items. NY had to re-enter the Reorder Levels for each item. (This was a time-consuming job for multi-site facilities.) Log a NOIS first before re-entering missing info.

Multi-Sites

Because NY couldn’t distinguish the label from one site to another, the Site name was added next to the Vendor and Location on the barcode label.

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**Continued on next page**
New York (VISN 3) Lessons Learned, Continued

**Scanner Tip**
Hold the barcode scanner about 4-6 inches away from the barcode label. It may not be able to read the label if it is held too close.

**Install Time**
The installation took 20 minutes in NY (for nine sites), but the conversion took 8 hours. Keep this in mind when planning your installation timeframe at your site. It depends on the size of your PIP list at your site for how long the conversion will run.

*Note:* It is recommended that this be done on a Saturday. See sample schedule below.

**Sample Schedule**
Here’s a possible schedule for your implementation:

<table>
<thead>
<tr>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
<th>Monday</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Print PL Report</td>
<td>• IRM to Install Patch 61 into Production</td>
<td>• Print the PL Report</td>
<td>• Use PIP in Production</td>
</tr>
<tr>
<td>• Physical Count</td>
<td></td>
<td>• Compare reports</td>
<td></td>
</tr>
<tr>
<td>• Edit (if necessary)</td>
<td></td>
<td>• Print All Barcode Labels</td>
<td></td>
</tr>
<tr>
<td>• Print PL Report again</td>
<td></td>
<td>• Organize Barcode Labels for items</td>
<td></td>
</tr>
</tbody>
</table>
**Columbia, SC (VISN 7) Lessons Learned**

| **Jim Wilcoxson**  
| **Columbia, SC**  
| **Recommendation** | VISN 7’s recommendation is to make sure each site has the complete Patch 61 package loaded in the Test Account. Make sure that IRM has completed all the steps from the Implementation Guide including the conversion.  

The most significant problem encountered by the majority of the stations was working in the Test account and then trying to manually build data into the Production account when the conversion did not run.  

**Lesson Learned**  
| **The lessons learned in VISN 7 is:**  

If after installation there is no inventory data, then the conversion part of the installation did not run. Do NOT do any work in the account including loading data into PIP until the conversion has been restarted and completed.  

**Issuing Stock**  
| Once the installation has taken place and the patch is in use, make sure the Prosthetics staff issues the stock with the oldest date first.  

**Barcode labels**  
| Another recommendation is to assure that when creating the labels, make sure to use the correct HCPC code for the item as well as the correct PSAS item.  

In VISN 7, there is one designated inventory person who handles this and he is the only person other than the supervisor who has the key for loading inventory items, etc. This assures a more accurate entry and maintenance of the system.  