

Using Inventory Management

09/09/2024 3:23 pm EDT

DrChrono includes an inventory management system to manage your inventory. Additionally, you can create custom vaccines, products, and services.

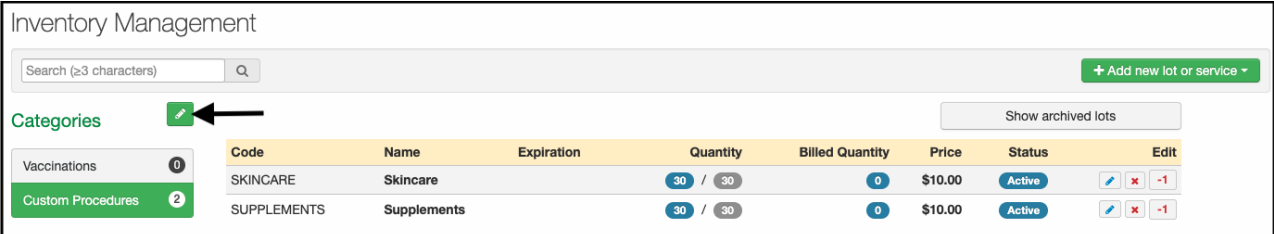
To Access Inventory Management:

1. Select **Inventory Management** under the **Clinical** menu, or click [here](#) to take you there.

From here you can Import your custom procedures, add a new product, and add/edit new categories.

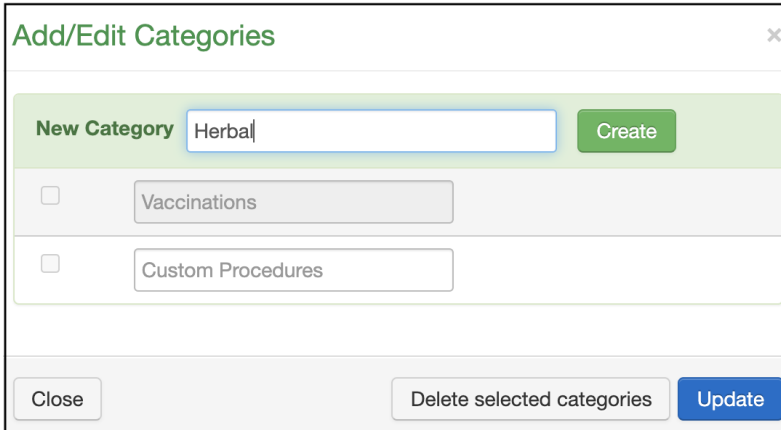
Creating and Editing Categories:

1. Click the pencil icon



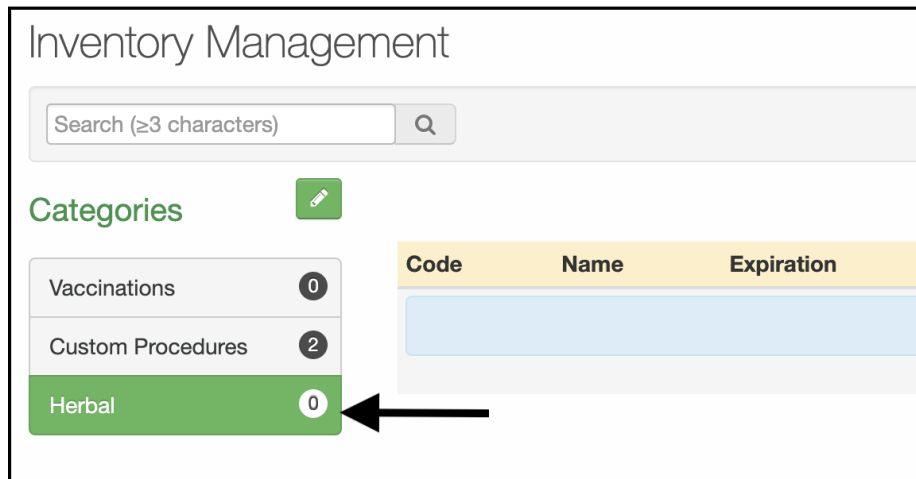
The screenshot shows the 'Inventory Management' interface. At the top, there is a search bar and a '+ Add new lot or service' button. Below the search bar, the 'Categories' section is highlighted with a green background and a pencil icon. A black arrow points to this pencil icon. To the right of the pencil icon is a 'Show archived lots' button. Below the 'Categories' header is a table with the following columns: Code, Name, Expiration, Quantity, Billed Quantity, Price, Status, and Edit. The table contains two rows: 'SKINCARE' with 'Skincare' as the name, and 'SUPPLEMENTS' with 'Supplements' as the name. Both rows show a quantity of 30 / 30, a billed quantity of 0, a price of \$10.00, and a status of 'Active'. The 'Edit' column for each row contains a pencil icon, a red 'x' icon, and a '-1' icon.

2. You will see a pop-up window in the middle of the screen, fill out the given fields and click **Create**.



The screenshot shows a pop-up window titled 'Add/Edit Categories'. At the top right, there is a close button (X). Below the title, there is a 'New Category' section with a text input field containing 'Herbal' and a green 'Create' button. Below this, there are two checkboxes with corresponding text input fields: 'Vaccinations' and 'Custom Procedures'. At the bottom of the window, there are three buttons: 'Close', 'Delete selected categories', and 'Update'.

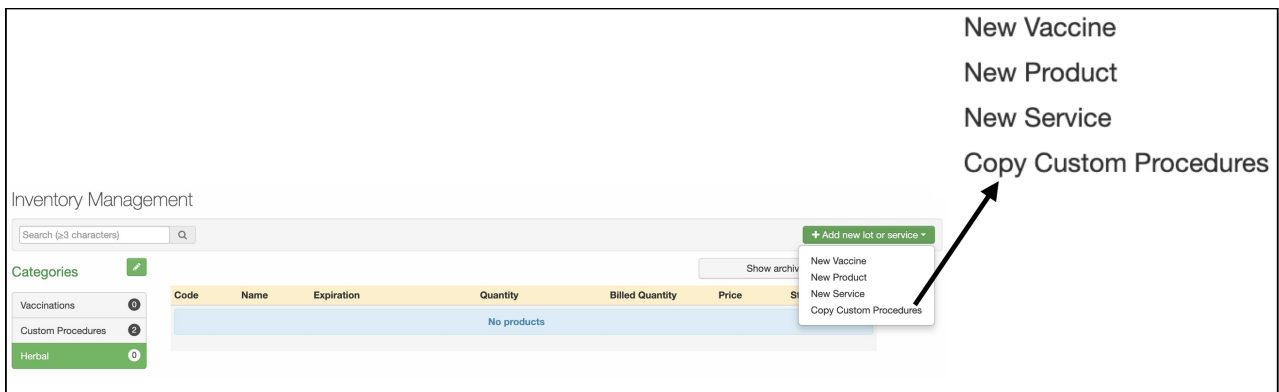
Your newly created category is on the left side of the screen under the categories section.



Importing Custom Procedures:

You can import your custom procedures once you have created them. For information on creating custom procedures, see our article [here](#).

1. Click on + Add new log or service menu and select **Copy Custom Procedures**.



2. The system will prompt you to import the Custom Procedures, click **Import** to continue.

Do you want to copy your custom procedures? ✕

This will copy your Products and Services created on the Billing > [Custom Procedures](#) page and create inventory items to track their use.

Products have a button to decrement their count each time you use them.
 Services have a button to increment their count when the service is given.

Custom procedures that have been copied previously but have been archived will be skipped. (Click the "Show archived lots" button to view them)

Adding a new vaccine, product, or service:

1. Click on the + Add new lot or service menu and select the option you need.

The screenshot shows the 'Inventory Management' page. On the left, there is a 'Categories' sidebar with 'Vaccinations' (1), 'Custom Procedures' (2), and 'Herbal' (0). The main area contains a table with columns: Code, Name, Expiration, Quantity, Billed Quantity, Price, and Status. The table is currently empty, displaying 'No products'. A dropdown menu is open over the table, titled '+ Add new lot or service', with the following options: New Vaccine, New Product, New Service, and Copy Custom Procedures. An arrow points from the text 'New Vaccine, New Product, New Service, Copy Custom Procedures' on the right to the dropdown menu.

2. Fill out the necessary information into the given fields of the window and click **Save** when finished.

New product ✕

Category * + New Category

Code * 📄

Name *

Type* Product Service

Expiration

Note

Sales tax applicable

Price

Price with tax

Cost

Quantity

Quantity units

* required

Save

You will then see your newly created vaccine, service, or product in its respective category. If you choose to enter the quantity amount on hand, the amount will automatically decrease as you sell products by entering the codes on patient appointments.

Claim Billed: \$0.00 Adjustment: \$0.00 Insurer Paid: \$0.00 Patient Paid: \$0.00

ICD-10 Codes Find Diagnosis codes

#	Code	Description

CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)

NDC Codes Find NDC Codes

NDC Code	Quantity	Units	Line Item

HCPCS Codes Find HCPCS Procedure codes

Code	Description	Price (\$)

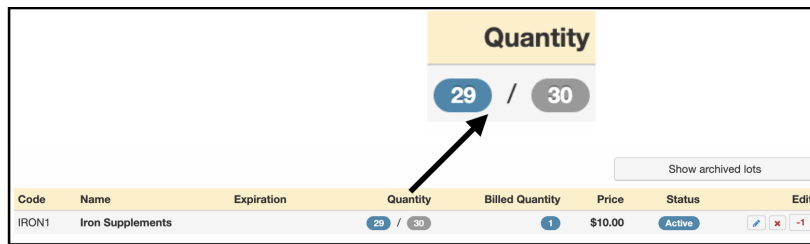
Custom Codes Find Custom Procedure codes

Code	Description	Price (\$)
IRON1	Iron Supplements	12.00

Quantity:

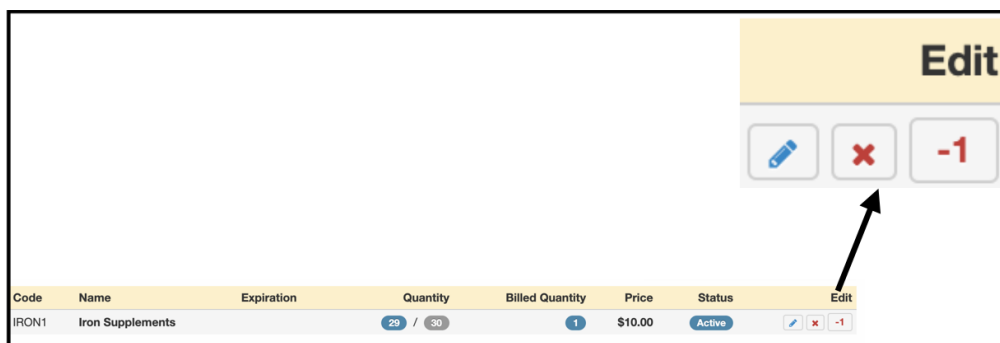
Include note in EDI Billing:

Delete
Save & Close
Save
Cancel



Editing a vaccine, service, or product

To change information associated with the inventory item, click on one of the options to the right of the item you wish to edit.



- Click on the pencil icon to edit the inventory item information.
 - Click the red X to archive the item
 - For products click on the (-1) to subtract from the inventory.
 - For services click on the (+1) to add to the inventory.
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