

Using Inventory Management

Last modified on 11/08/2024 3:44 pm EST

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

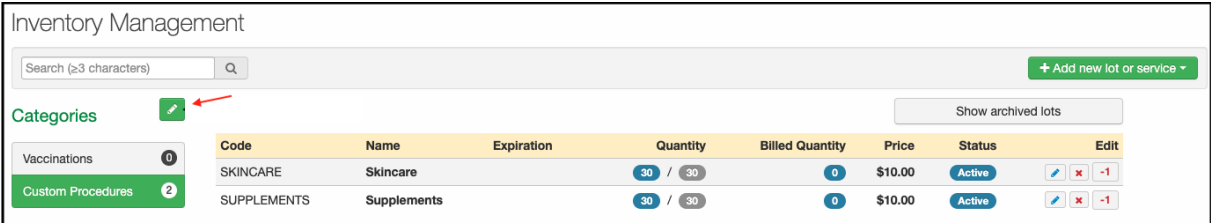
To Access Inventory Management:

1. Select **Clinical > Inventory Management**





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

Creating and Editing Categories:

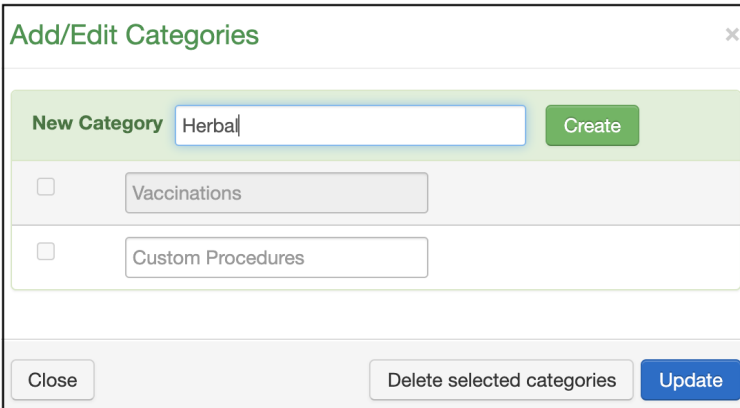
1. Select the pencil icon



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, there is a 'Categories' section with a pencil icon (indicated by a red arrow) and a 'Show archived lots' button. The main part of the interface is a table with the following columns: Code, Name, Expiration, Quantity, Billed Quantity, Price, Status, and Edit. The table contains two rows of data:

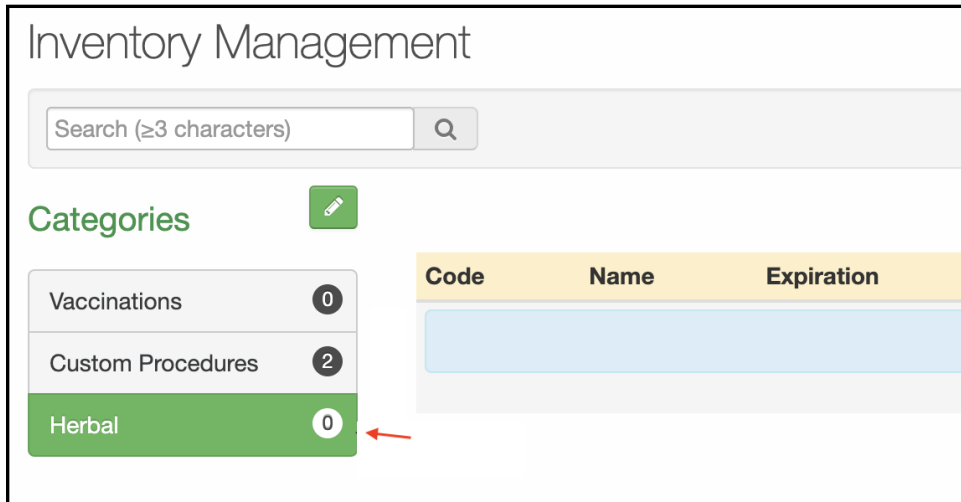
Code	Name	Expiration	Quantity	Billed Quantity	Price	Status	Edit
SKINCARE	Skincare		30 / 30	0	\$10.00	Active	  -1
SUPPLEMENTS	Supplements		30 / 30	0	\$10.00	Active	  -1

2. A pop-up window in the middle of the screen, fill out the given fields and press **Create**.



The screenshot shows the 'Add/Edit Categories' pop-up window. It has a title bar with a close button (X). The main content area has a 'New Category' section with a text input field containing 'Herbal' and a 'Create' button. Below this, there are two radio button options: '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.



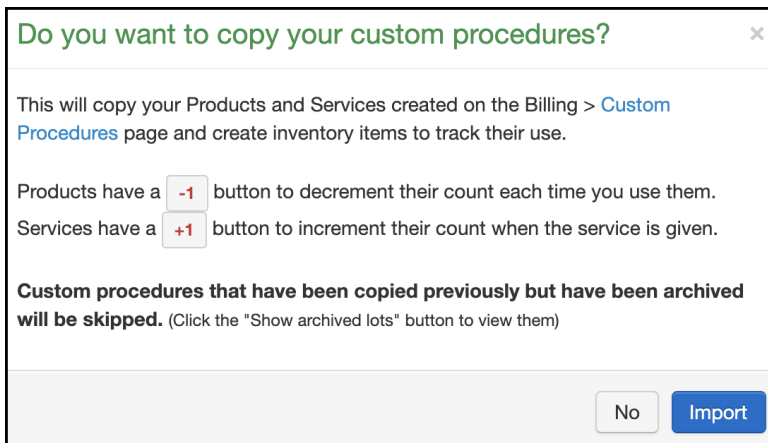
Importing Custom Procedures:

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

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

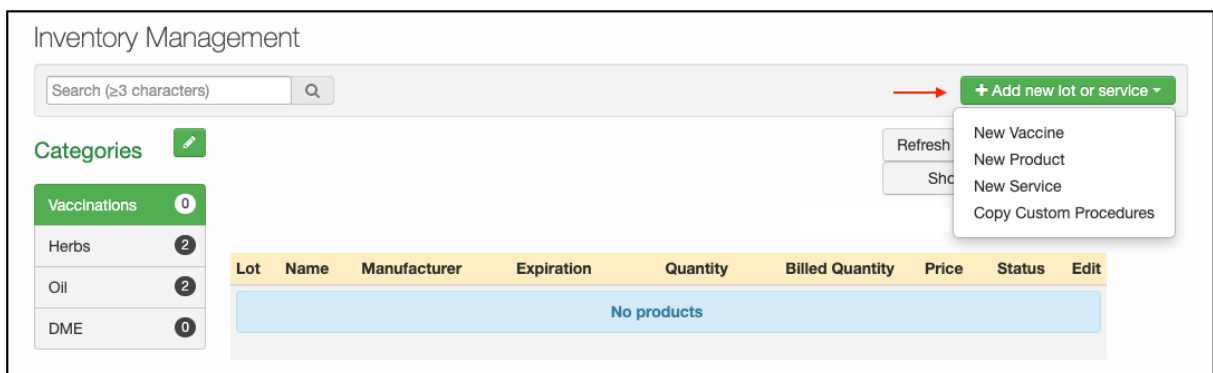


2. The system will prompt you to import the Custom Procedures, click **Import** to continue.



Adding a new vaccine, product, or service:

1. Select **+ Add new log or service** menu and select the option you need.



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

New product ✕

Category * Supplements + New Category

Code * IRON1 🔍

Name * Iron Supplements

Type * Product Service

Expiration MM/DD/YYYY

Note

Sales tax applicable

Price 10

Price with tax 12

Cost 7

Quantity 30

Quantity units Bottles

* 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
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CPT Codes Find CPT Procedure codes

Code	Description	Price (\$)
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HCPCS Codes Find HCPCS Procedure codes

Code	Description	Price (\$)
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NDC Codes Find NDC Codes

NDC Code	Quantity	Units	Line Item
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Custom Codes Find Custom Procedure codes

Code	Description	Price (\$)
IRON1	Iron Supplements	12.00

Quantity: 1

Include note in EDI Billing: Custom NTE EDI Billing Note (a.k.a. HCFA/CMS-1500 Line 19)

Delete Save & Close Save Cancel

Quantity




→ 29 / 30

Show archived lots

Code	Name	Expiration	Quantity	Billed Quantity	Price	Status	Edit
IRON1	Iron Supplements		29 / 30	1	\$10.00	Active	🔍 ✕ -1

Editing a vaccine, service, or product

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

Code	Name	Expiration	Quantity	Billed Quantity	Price	Status	Edit
RON1	Iron Supplements		29 / 30	1	\$10.00	Active	  

1. Select the pencil icon to edit the inventory item information.
 2. Press the red X to archive the item
 3. For products press on the (-1) to subtract from the inventory.
 4. For services press on the (+1) to add to the inventory.
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