

Datarithm User Manual



This manual is intended as a guide to the use of the Datarithm application. Last updated on 07/25/2024. For recent updates to take effect, please clear your browser cache by pressing Ctrl+F5.

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Table of Contents

Introduction	9
About Us	9
Interfaces	9
Application access.....	10
Application Access	10
Logging Into Datarithm	10
Changing Location.....	10
Account Settings	12
Change Password.....	12
Forgotten Password.....	12
Account Locked Due To Non-Use	12
Forecast.....	13
Forecast Dashboard	13
Manage Generic Groups	16
Order Alerts.....	17
Balance.....	20
Balance Dashboard	20
Returns.....	21
Return to Wholesaler - Standard	21
Return to Wholesaler - Expedited.....	24
Liquidations.....	25
Transfers	26
Send Transfers.....	26
Receive Transfers	29
Request Transfers	31
Cycle Count	34
Expedited Cycle Count	34
Standard Cycle Count.....	35
Pause Cycle Count.....	37
Resume Cycle Count	38
Reports.....	39
Inventory List	41

Custom Reports.....	41
Create Custom Reports.....	42
Manage Custom Reports	44
Balancing Reports	44
Balancing Archive.....	44
Ineligible for Return Report	45
Excluded from Transfer Report.....	45
Datarithm Restrictions	46
Restrictions Summary	46
Manual Ordering.....	46
Inactive.....	46
Do Not Manage	46
Do Not Return	47
Do Not Transfer.....	47
Buffer Report	48
Critical Inventory Report.....	48
Dispensing Reports	48
Dispense Type Report	48
Brand/Generic Dispensing Report	49
Generic Groups	49
Generic Group Summary Report.....	49
Equivalent Ordering Summary Report.....	49
Inventory Reports	50
Inventory with Negative on Hand Report.....	50
Surplus Inventory Report	50
Dormant Inventory Report.....	50
Controlled Inventory Report	50
Suspicious Ordering Report	50
Dead But Increasing On Hand Report	51
High Cost Low Usage Report.....	51
60 and 90 Day Fill Pattern Report	51
Package Discrepancies Report	51
Omni Report.....	52

Omni Detail Report	52
Order Alerts Report.....	52
Time to Burn Down Summary Report.....	52
Reduction Through Sales Report	52
Order Alternatives.....	52
Generically Equivalent Alternatives Report	52
Optimal Order Quantity Report	53
PharmSaver Short Date Opportunities Report	53
Performance Reports	54
Progress Report.....	54
Forecast Summary Report	55
Balance Summary Report.....	55
Return Summary Report	55
Return Completed Detail Report	56
Return Pending Detail Report	56
Transfer Summary Report.....	56
Transfer Completed Detail Report.....	56
Transfer Discrepancy Detail Report	57
Transfer Completed Accounting Report	57
Transfer Pending Detail Report.....	58
Liquidation Summary Report	58
Liquidation Completed Detail Report	58
Liquidation Pending Detail Report.....	58
Cycle Count Summary Report	58
Cycle Count Adherence Report.....	59
Cycle Count Completed Report.....	60
Ranking Reports	60
Top N Report.....	60
Rank Report.....	61
Replenishment Point Reports	61
Replenishment Point Increases Report.....	61
Replenishment Point Decreases Report	62
Unmanaged Inventory Report	62

Replenishment Point Update Summary Report.....	63
Replenishment Point Updates Report	63
Updates Retrieval Report.....	63
Stock Out Reports	63
Stock Out Summary Report	63
Stock Out Detail Report	64
System Reports	64
Data Interface Report	64
System User and Pharmacy Report.....	65
Unusual Usage	65
Unusually High Usage Report	65
Unusually Low Usage Report	65
Inventory Details.....	66
Upper Tables	66
Usage Info	69
Usage History Graph	70
Additional Information.....	70
Group Details	70
Replenishment Point Updates	70
Inventory Level.....	70
Dispensing.....	70
Stock Outs	71
Returns.....	71
Transfers	71
Liquidations.....	71
Cycle Counts.....	71
Actions	71
Edit Settings	71
Manual Return	74
Manual Transfer.....	74
Manual Liquidation	76
Order Alert	77
Settings.....	78

Menu Settings	78
Cycle Count Settings	79
Pause/Resume Cycle Counting	81
Service Level Slider.....	82
Application Settings	83
General.....	85
Cycle Count	86
Usage Exclusions	87
Datarithm Updates.....	87
Generic Equivalency Grouping.....	89
Ranking.....	89
Safety Stock Days Supply	89
Stocking Rules	89
Sporadic Item Multiplier	90
High Water Mark.....	90
Pharmacy	91
Wholesaler	91
Trending	92
Inventory Costs	92
Unusual usage.....	93
Surplus.....	93
Inventory Balancing	93
Liquidation	95
Help.....	96
Knowledge Base.....	96
Contact Support.....	97
User Manual.....	97
Glossary.....	98
Acquisition Cost	98
Usage.....	98
Calculated Forecast Quantity (Forecast Usage).....	98
Current Max/OQ	98
Current Min/OP	98

Current Turns	98
Current Units on Hand	98
DEA Class/Drug Schedule	98
Drug Identifier	98
Drug Name	98
Extended Cost	98
Forecast Average On Hand	98
Forecast Average On Hand (\$)	98
Forecast Daily Usage	99
Forecast Daily Usage (\$)	99
Forecast Formula	99
Forecast Max/OQ	99
Forecast Min/OP	99
Forecast Turns	99
Generic Equivalency Code (GEC)	99
Generic Indicator	99
Liquidation	99
Liquidation Recommendation Quantity	99
Maximum Days Supply to Buy	99
Months Since Last Usage	99
Months Without Usage	99
New (Usage Pattern)	99
Order Cycle Period	100
Order Lead Time	100
Over/Under Stocked	100
Over/Under Stocked (\$)	100
Package Cost	100
Package Size	100
Planned Excess	100
Quantity Found	100
Quantity to Expect	100
Rank by Cost	100
Rank by Frequency	100

Rank by Quantity..... 100

Receiving Pharmacy 100

Recurring (Usage Pattern)..... 101

Replenishment Points 101

Return Recommendation Quantity..... 101

Rounded SOQ..... 101

Safety Stock..... 101

Standard Order Quantity (SOQ)..... 101

Sporadic (Usage Pattern) 101

Strength 101

Transfer Recommendation Quantity 101

Typical Daily Dispense Quantity (TDDQ)..... 101

Usage Pattern..... 101

Datarithm User Manual

Introduction

About Us

Datarithm develops highly specialized software and systems that help pharmacies streamline tasks, reduce stock, recover inventory dollars, and improve customer service. We provide pharmacies with value driven inventory control software designed to optimize drug inventories.

Founded in 2005 as RxNetServices, Datarithm pioneered store-to-store inventory transfers. In 2011, RxNetServices was renamed Datarithm to better reflect our growing range of innovative services, including the automation of inventory forecasting and cycle counting.

- ✓ Our Forecasting feature performs an in-depth analysis of historical transaction data, selects, and deploys the “best-fit” lowest error algorithm to precisely forecast future demand, and optimizes reorder points and reorder quantities.
- ✓ Our Balancing feature reveals positions of overstocking and makes automated recommendations for returns to wholesaler and “cold-to-hot” store-to-store transfers.
- ✓ Our configurable Cycle Counting feature ensures precise on-hand counts and alerts of potential drug diversion.

By optimizing inventory through Datarithm, pharmacies of all sizes will:

- ✓ Centrally manage their prescription drug inventories with precision and consistency across their enterprise.
- ✓ Right-size inventories through the reduction of over-stocks and improve customer service levels through the reduction of out-of-stocks.
- ✓ Optimize inventories through forecasting and balancing and speed the time to benefit by quickly converting inventory to cash.
- ✓ Reduce expenses, improve profits, and raise liquidity.

Interfaces

Datarithm integrates seamlessly with major pharmacy management software.

- ✓ Datarithm provides a comprehensive suite of products that addresses a pharmacy’s needs today as well as its challenges tomorrow.
- ✓ Datarithm leverages your existing technology – no need to upgrade your present hardware/software infrastructure.
- ✓ Datarithm extends your current pharmacy management system to provide precise control of a pharmacy’s most valuable asset – your prescription drug inventory.

Application access

Application Access

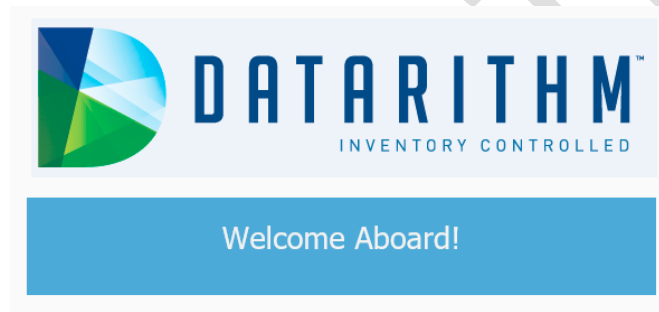
The Datarithm application is accessible through your web browser (e.g., Google Chrome, Mozilla Firefox, Microsoft Edge, Safari) either by clicking on the Sign In button from our website: <http://datarithm.co/>



or by accessing the following link directly: <https://apps.datarithm.co/>

Logging Into Datarithm

Once your company has been set up within Datarithm and your organization's user accounts have been created, each new user will receive a welcome email from Datarithm instructing them to set their account password.



Please set your password by clicking [here](#)



Datarithm®, LLC, 7037 Fly Road, East Syracuse, NY 13057, (877) 273 - 5112

Clicking on this link will bring you to a page where you will be asked to specify (and confirm) a new password. You will then receive confirmation that your password has been established.

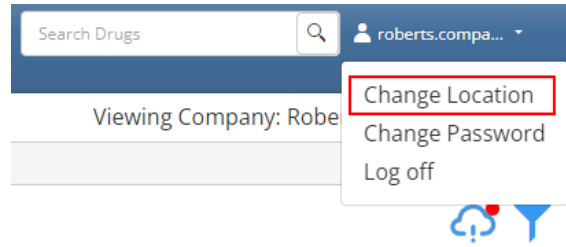
Welcome Aboard Confirmation.

Your password has been set. Please [click here to log in](#)

Changing Location

In Datarithm, company-level and region-level users can perform a variety of management tasks such as reporting and system configuration. Pharmacy-level users can perform location-specific tasks such as returns, transfers and cycle counting. Company-level and region-level users can perform these tasks as well using the Change Location feature to indicate at which location these tasks are being performed.

To change location, click on your username at the top right corner of the page and select Change Location.

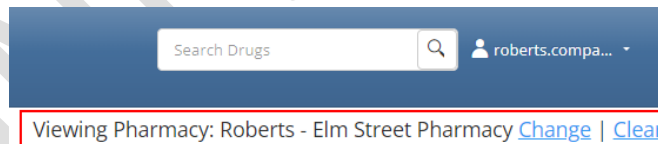


Here you will be able to select any location that your user account has access to by clicking on the Select button. For large organizations with many locations, the Select Location grid can be filtered by pharmacy name and location type.

Company Name	Region Name	Pharmacy Name	Location Type	
Roberts Pharmacy			Company	Select
Roberts Pharmacy	Region Roberts Pharmacy		Region	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Childress Pharmacy	Pharmacy	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Elm Street Pharmacy	Pharmacy	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Grand Island Pharmacy	Pharmacy	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Lakeside Pharmacy	Pharmacy	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Summit Pharmacy	Pharmacy	Select
Roberts Pharmacy	Region Roberts Pharmacy	Roberts - Wilmington Pharmacy	Pharmacy	Select

1 - 8 of 8 items

Once selected, the location will be displayed at the top right corner of the page. To change to another location, click "Change". To return to your default/assigned location, click "Clear".



Account Settings

Change Password

To change your password, click on your username at the top right corner of the page and select Change Password. You will be redirected to the page where you can change your password. A confirmation message will be displayed indicating that the password has been successfully changed.

Forgotten Password

If you have forgotten your password, click on the “Forgot Password” link on the login page, enter your user account email address (username), and an email will be sent to you with a link that will allow you to reset your password.

Log In.
Please enter your email and password.

Email

Password

Log In

Remember Me [Forgot Password](#)

If you encounter any difficulties when attempting to login to Datarithm, contact support@datarithm.co.

Account Locked Due To Non-Use

When you receive an email from Datarithm with the subject “Your Datarithm account has been locked”, it means that, due to non-use, your Datarithm account has been locked. Please note that in such cases, you must contact your company’s management. They should then email support@datarithm.co to open a support ticket with Datarithm Support to request that your account be unlocked.

Forecast

Forecast Dashboard

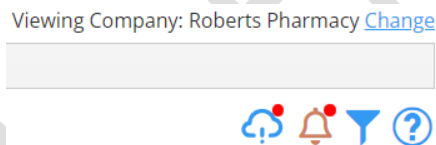
Following login, users arrive at the *Forecast Dashboard*.

Users can navigate to other areas of the Datarithm system via the tabs located across the top of every page:

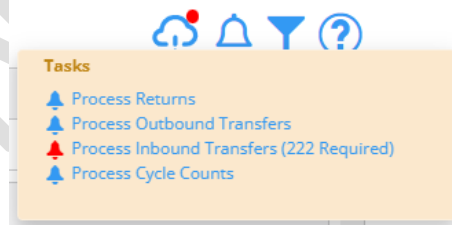
- ✓ The *Balance* tab will bring users to the *Balance Dashboard* and the various balancing tasks.
- ✓ The *Cycle Count* tab provides access to the Cycle Count Wizard.
- ✓ The *Reports* tab reveals various system reports.
- ✓ The *Settings* tab provides users with the ability to change various system settings.
- ✓ The *Help* tab provides users with direct access to Datarithm's Knowledge Base, Datarithm Support, and this Datarithm User Manual.

Note that users have access to various portions of the application depending upon the type of user account that is used. For example, a company-level user will have access to the Settings tab, but not the Cycle Count tab, while a Pharmacy Level user will have access to the various Balancing task menu items and the Cycle Count tab, but will not have access to the Settings tab.

Navigation to various tasks is also available via the Notification icon (alarm bell) in the top right corner of the application.



A glowing orange Notification icon with a red dot indicates that there are pending tasks requiring completion. Clicking the Notification icon will display links to complete these pending tasks.

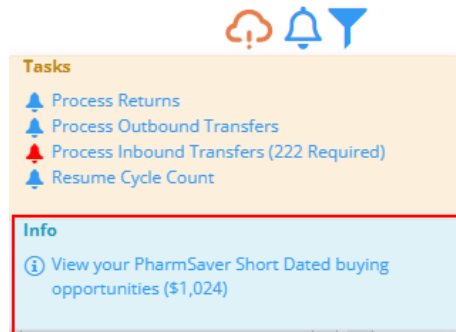


This same area of the application also displays:

- Cloud icon: Provides a link to the Data Interface Report (described in detail in the Reports section of this document). The Data Interface Report displays audit information related to the delivery of data by your Pharmacy Management System (PMS) to Datarithm, the last time Datarithm forecasted your inventory, and the last time your PMS retrieved updates provided by Datarithm. A glowing orange Cloud icon with a red dot indicates that there is an issue with the data interface between your PMS and Datarithm.
- Filter icon: Clicking this icon reveals a filter panel which allows the user to filter the current page based on page-appropriate fields. The filter panel is available on most but not all pages.

- Question Mark icon: Clicking the question mark icon will open the *Datarithm User Manual* (also available under the Help menu) and automatically navigate to the section of the user manual that relates to the page/functionality currently being viewed. This context-sensitive help provides guidance on dashboards, task wizards, reports, and all features within Datarithm.

US-based users will also notice a blue section within the Notification panel which provides direct access to PharmSaver’s inventory offerings, including deeply discounted short-date buying opportunities. Clicking this link takes the user to the PharmSaver Short Date Opportunities Report. This report is described in greater detail later in this manual.



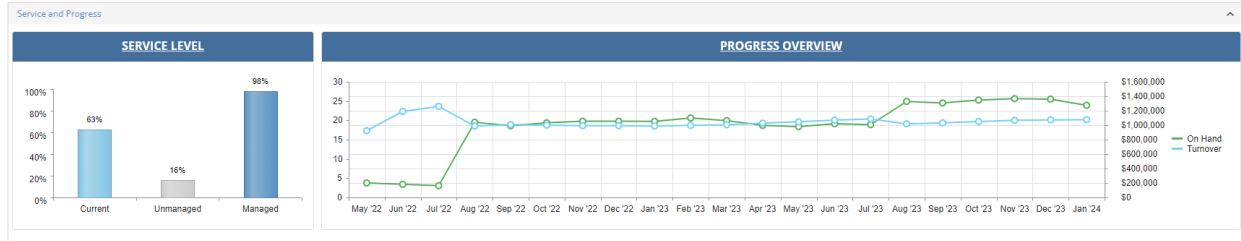
The *Forecast Dashboard* displays an array of Key Performance Indicators ("KPI's") for a more holistic view of the state of your inventory and the changes that have occurred to your inventory over time. If your company has multiple stores you can filter on a particular pharmacy location using the filter icon described above.

Forecast Dashboard

DATARITHM EFFECT				SURPLUS		
Base May-22		Now Jan-24		Overstock		Dead
\$1,307,133	On Hand -15%	\$1,112,257	940	Items	779	
\$418,310	Surplus -40%	\$248,910	\$115,625	10% Value 12%		\$133,285
\$1,301,402	Ideal Inventory +27%	\$1,654,788	\$8,006	Returns		\$16,760
16.34	Turns +23%	20.17	\$3,102	Transfers		\$9,003

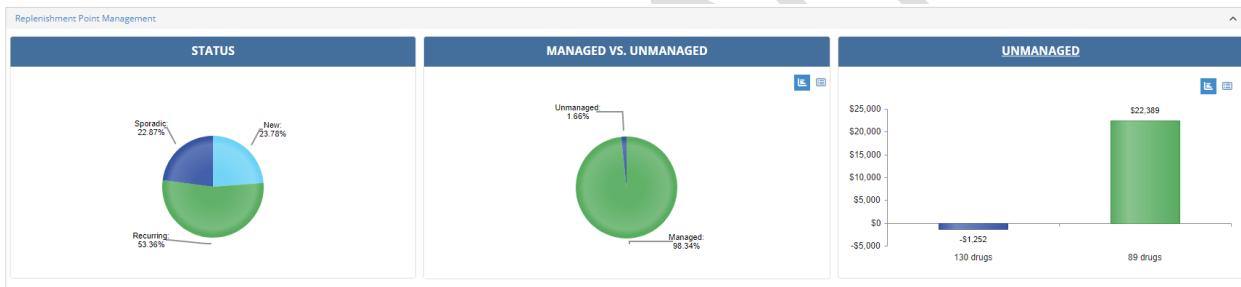
The *Datarithm Effect* tile illustrates how the customer’s inventory has changed since starting with Datarithm. “Base” reflects the customer’s inventory profile at the time the customer first onboarded with Datarithm. “Now” reflects the customer’s current inventory profile. For customers with multiple locations where Datarithm "start" dates were staggered over time, the displayed "Base" date will reflect the starting date for the first location.

The *Surplus* tile provides several valuable metrics related to the customer’s current surplus inventory (i.e., on hand amounts that are above and beyond what is expected based upon replenishment points and perpetual inventory best practices) as well as the subset of surplus inventory that is considered either “Overstock” (items that are in surplus but not “Dead”) or “Dead” (items with 4 or more months of no usage). Click on the tile headers (Surplus, Overstock, or Dead) to navigate to the Surplus Inventory Report filtered on the selected surplus type.



The *Service Level* tile shows three important service levels. The "Current" service level is based upon all replenishment points that currently reside in the pharmacy management system (PMS). The "Unmanaged" service level shows the service level for items that are not being managed by Datarithm, while the "Managed" service level shows the same metric for items that are being managed by Datarithm. Click on the chart to navigate to the Service Level Slider where replenishment point increases and corresponding service levels are managed.

The *Progress Overview* tile illustrates how On Hand (\$) and Inventory Turnover (turns) have changed since the customer onboarded with Datarithm. Click on the chart to navigate to the corresponding Progress Report.



The *Status* tile shows a profile of the customer's inventory when segmented into Recurring, Sporadic and New categories. This is important because Datarithm treats (i.e., forecasts replenishment points, makes balancing recommendations, etc.) each category differently.

The *Managed vs. Unmanaged* tile illustrates the portions of the customer's inventory for which replenishment points are managed by Datarithm and not managed by Datarithm. The user can flip from a chart view to a text view by clicking the icons in the top right of the card.

The *Unmanaged* tile displays the number of items that Datarithm would like to increase or decrease replenishment points on for items that Datarithm *is not managing* (Do Not Manage is true). The corresponding aggregate dollar impact for those changes is also displayed. The user can flip from a chart view to a text view by clicking the icons in the top right of the card. Click on the tile title to navigate to the Do Not Manage Report for details.

Manage Generic Groups

TODO

Note: The Manage Generic Groups function has not yet been implemented in Datarithm V3.0.

Depending upon the customer's pharmacy management system (PMS), generic items may be automatically grouped in Datarithm based on generic equivalency codes (GPI, GCN, GSN). For items that are further coded or flagged as being "Unit-of-Use" or "Unit-Dose" (if your Pharmacy Management System provides these data points), Datarithm groups these items according to package size and provides item-specific forecasting and item-specific replenishment points (*Min/Max* or *OP/OQ*).

Datarithm manages generic groups by aggregating the dispensing histories for all items in a group and sending the calculated replenishment points to the Pharmacy Management System for the preferred item in the group. **Pharmacy employees are encouraged to establish which item in a group is the preferred by keeping positive replenishment points on only one item in the group.** By default, Datarithm will only send replenishment points to the preferred item with the positive *Min/OP* value in the group. However, if the group contains more than one item with a positive *Min/OP* value, Datarithm will **not** send any replenishment points for that group because Datarithm does not know which one is to be treated as the preferred. When this is the case, Datarithm will display the entire group in the Grouped Items table on the Manage Generic Groups page until the pharmacy staff reviews the group and indicates to Datarithm what the preferred item is.

If two or more items within a group have a positive replenishment point, Datarithm will choose the item with the most recent usage as the preferred item. If there are multiple items within a group that have the same recent dispensing history, Datarithm will consider the item with the highest quantity on-hand to be the preferred item.

Datarithm understands that there are certain circumstances where stores need to stock more than one generic equivalent. There are two scenarios where stocking more than a single item in a group is desired or required:

- ✓ When a patient specifies a certain manufacturer
- ✓ When two or more pack sizes must be stocked

When either of these two scenarios exist for a group, the item(s) that need to be additionally stocked should be ungrouped in Datarithm, leaving a single item with positive replenishment points in the remaining group. This item will then be treated as the preferred item for that group. To remove an item from a group, use the Ungroup button located on the left side of each row in the *Grouped Items* table:

If the two scenarios mentioned above do not apply to items that have positive replenishment points in a group listed in the *Grouped Items* table, one item was likely the previous preferred but was not updated properly after a substitution by a wholesaler. Normally, the new preferred item would get the positive replenishment points and the old item would have been zeroed out in the PMS. If the indicated changes to the replenishment points were not performed when the substitution or change occurred, Datarithm will display the group in the *Grouped Items* table. If it is determined that an old preferred item has

retained a positive replenishment point, simply to set a replenishment point to zero (or -1) for the old preferred item directly in the PMS (do not ungroup the item). With this correction made inside the PMS, Datarithm will recognize which item is the preferred and will send the optimized replenishment points for that item. The group will then be removed from the *Grouped Items* table.

Due to the way generic items and equivalent ordering is managed in PioneerRx, Liberty and DRX, Datarithm's Manage Generic Group function is not necessary for customers that use these vendors.

The *Manage Generic Groups* function can be accessed from the *Forecast* tab -> *Manage Generic Groups*.

When there are groups that need to be reviewed by the pharmacy staff, the function will also be available via the Notification icon (alarm bell) in the top right corner of the application.

A list of all the items of any group where more than one item in the group has a positive *Min/OP* will be displayed in the *Grouped Items* table. Ungrouping an item from the *Grouped Items* table will instruct Datarithm about your wish to continue carrying that item in your inventory. The groups are distinguished by alternating color bands. Generic groups can be searched by Drug Identifier or Drug Name.

As soon as an item is ungrouped, it will be displayed in the *Ungrouped Items* table and Datarithm will calculate replenishment point values for that singular item:

After ungrouping an item, the user should review the calculated replenishment points (*Forecast OP/OQ* or *Min/Max*) because, even though the pharmacy has elected to carry the item, the usage history may indicate that the item should not be stocked sufficiently. If this is the case, the user should temporarily block Datarithm replenishment points and set desired replenishment points in the PMS.

Datarithm recommends that pharmacy staff review the *Ungrouped Items* table periodically to determine whether the ungrouped items should be left as they are or if they should be returned to their original generic group. Ungrouped items can be returned to their original group at any time by first ensuring that the *OP/Min* are set to zero in the Pharmacy Management System and then clicking the *Group* button under the *Actions* column of the *Ungrouped Items* table.

Order Alerts

The *Order Alerts* function allows users to establish an inventory replenishment alert for a specified item(s) on a specified date and, to further specify the quantity to order, the wholesaler to order it from, and its recurrence (if applicable). This function is particularly helpful for managing the replenishment of expensive items for a single or discreet number of patients.

To set up and view order alerts, go to *Forecast > Order Alerts*

Existing order alerts can be viewed in a familiar calendar view or within a grid view. In the calendar view, create a new order alert by double-clicking on the date for which you would like to set the alert. In the grid view, click on the Add Alert button. Taking either of these actions will bring up the Edit Alert dialog box.

Edit Alert

Alert Identifier: 12789453

Drugs

Drug Identifier ↓	Drug Name	Quantity	Wholesaler	Current On Hand	
00169-41-30-13	Ozempic 1 Mg Dose Pen (3 MI)	3.00	MCK	12.00	✕ Delete

Alert Date: 1/15/2024

Recurrence: None

Save Cancel

Specify the Alert Identifier (e.g., patient number, script number, patient birthday, etc.). Add drugs to the alert by clicking the Add Drug button and entering the Drug Identifier in the *Drug Identifier* field. Optionally set the Quantity and Wholesaler. Note that multiple drugs can be added to the same order alert. Select a date for the *Alert Date* (Datarithm suggests 4 to 7 days in advance of the expected fill date). Recurring order alerts can also be created by specifying the Recurrence (e.g., 21, 28, 30, 60, 84 or 90 days). Then click Save.

The order alert will then be displayed within both the calendar and grid views.

Alerts



Review Alerts

Calendar Grid

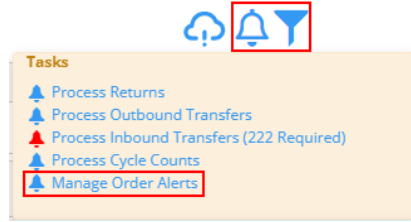
+ Add Alert + Expand All - Collapse All

Alert Identifier	Alert Date ↑	Alert Status	Created By	Completed By	Repeat	
12784569	1/15/2024	Pending	Roberts Company		None	✓ ✎ 🗑️

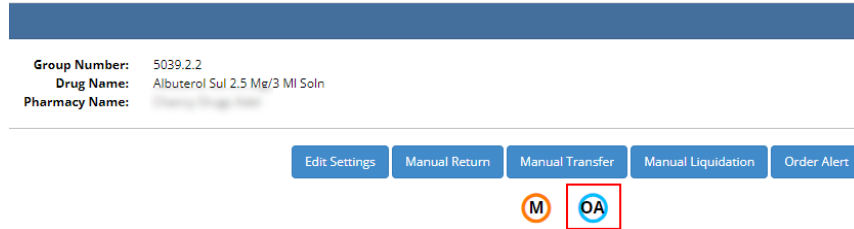
Drug Identifier ↓	Drug Name	Quantity	Wholesaler	Current On Hand
00169-4130-13	Ozempic 1 Mg Dose Pen (3 MI)	3.00	MCK	12.00

From the grid view, order alerts can be marked as *Completed* (check mark icon), *Edited* (pencil icon), *Repeated* for another date (copy icon), or *Deleted* (trash can icon).

On the alert date established, a notification will be displayed in the notifications list informing pharmacy-level users about the need to act upon the alert. Order alerts can be filtered in either view based on status (pending, completed or all) and drug name or drug identifier. To filter, click on the filter icon in the top right corner of the page.



When viewing an item with a pending order alert within the Inventory Details page (described later in this document), an order alert indicator will be displayed.



Note that pending Order Alerts with an Alert Date of *today* or earlier will be emailed daily as a report to the email address(es) associated with that pharmacy in Datarithm.

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Balance

The *Balance* function within Datarithm provides Return (to wholesaler) and Transfer (to locations within the same company) recommendations for items that are in surplus. Additionally, Datarithm allows you to execute “manual” Returns, “manual” Transfers, and “manual” Liquidations for items that may not be in surplus.

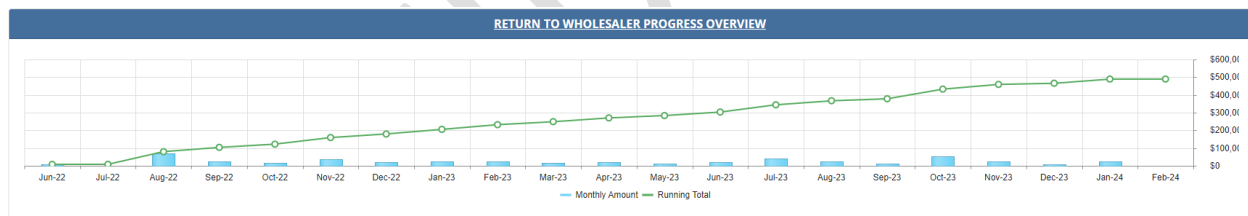
Balance Dashboard

The *Balance Dashboard* is accessed by clicking on the *Balance* tab. As with most pages in the application, the balance dashboard can be filtered on a particular region or pharmacy by clicking on the filter icon in the top right corner of the page.

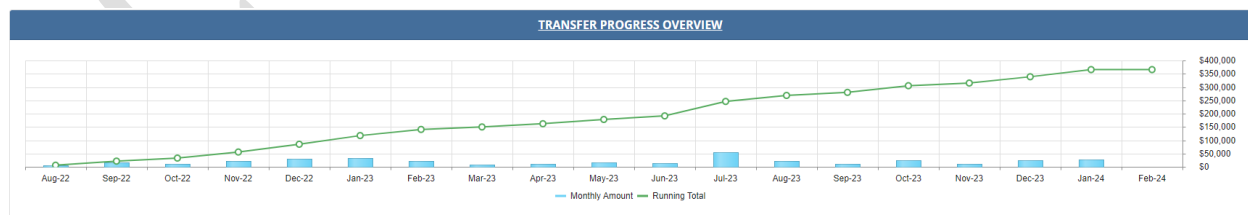
Balance Dashboard

BALANCE OVERVIEW		
Pending		Completed
\$24,766	Return to Wholesaler	\$489,333
\$12,105	Transfer	\$365,595
\$0	Liquidation	\$0
\$212,038	Remaining in Surplus	
\$248,909	Total Surplus	

The *Balance Overview* illustrates a summary of current balancing opportunities as well as a summary of completed balancing tasks. “Pending” reflects the customer’s inventory that is still waiting to be returned or transferred. “Completed” reflects the customer’s completed balancing activity from when they first onboarded with Datarithm. Click on the tile title to navigate to the corresponding Balance Summary Report.

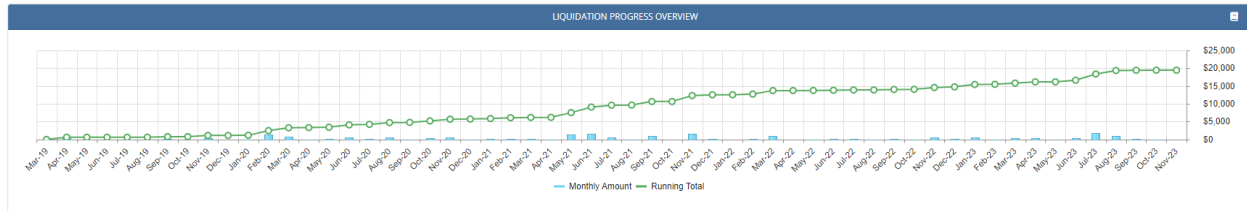


Return to Wholesaler Progress Overview illustrates the “Monthly Amount” of dollars in inventory that has been recouped by returning the inventory to the wholesaler and the total amount of dollars in inventory (“Running Total”) that has been saved since the customer onboarded with Datarithm. Click on the tile title to navigate to the corresponding Return Summary Report.



Transfer Progress Overview illustrates the “Monthly Amount” of dollars in inventory that has been transferred to another pharmacy and the total amount of dollars in inventory (“Running Total”) that has

been transferred since the customer onboarded with Datarithm. Click on the tile title to navigate to the corresponding Transfer Summary Report.

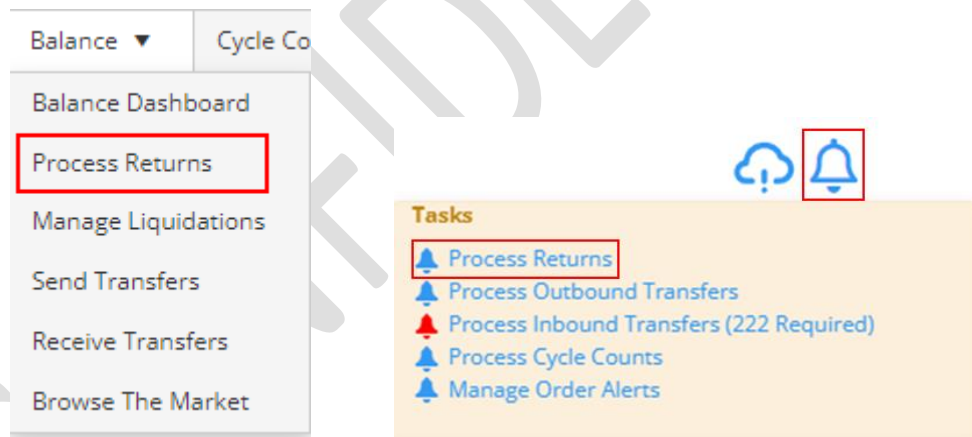


Liquidation Progress Overview illustrates the “Monthly Amount” of dollars in inventory that has been saved via liquidation and the total amount of dollars in inventory (“Running Total”) that has been saved since the customer onboarded with Datarithm. Click on the title to navigate to the corresponding Liquidation Summary Report.

Returns

The *Process Returns* function allows you to process returns to your wholesaler. These returns may be a combination of return recommendations made by Datarithm (items in surplus) and “manual” returns initiated by the user (items not necessarily in surplus). *Company and Region Level users can access this feature by changing their location as described earlier in this document.*

To process returns, go to the *Balance* tab and click on *Process Returns*. Or simply click on *Process Returns* notification task link.



Return to Wholesaler - Standard

Step 1 Review Returns: A grid will display pending returns that should be reviewed for eligibility. The user can specify a batch size. This allows the user to review all pending returns or just a subset of the pending returns if the user is time constrained. Note that smaller batch sizes will still contain the most valuable return recommendations based on Extended Cost. The user can additionally filter on Return Type (i.e., Datarithm recommendations, manual returns, or both) and Drug Schedule (All, C2, or Non-C2). You can export the currently displayed list to PDF (for printing) by clicking on the “Export to PDF” button and add items to the list (create a “manual” return) by clicking on the “Add Manual” button.

Note that line items with a gray background color are recommendations generated by Datarithm. Line items with a light-yellow background color are *Manual Returns* initiated by someone at your location. Review the list of pending returns, pull the eligible items from the stock shelves, and then click on either the “Process Returns” link above the grid or the “Next” button below the grid.

Process Returns



The screenshot shows a four-step process flow: 1. Review Returns, 2. Process Returns (highlighted with a red box), 3. Confirm Returns, and 4. Complete. Below the flow is a 'Review Returns' table with the following data:

Drug Identifier	Drug Name	Forecast Monthly Usage	Item On Hand	Group On Hand	Recommended Quantity	Recommended Extended Cost	Current Min	Months Since Last Usage	Recommended / Created Date	
54092-0383-01	Adderall Xr 10mg	30	187	187	100	\$683.87	-1	1	2/1/2024	
66993-0135-97	Flutic/Vilan 100-25 inh pwdr	60	240	240	60	\$229.00	-1	1	1/20/2024	
69882-0271-45	Hc Butyrate Clin 0.13%	0	45	45	45	\$108.58	-1	9	1/28/2024	
00006-0112-31	Januvia 50mg	120	30	30	30	\$522.63	-1	1	2/1/2024	
00254-3029-02	Lubiprostone Cp 24mcg	60	360	360	60	\$193.21	89	1	1/30/2024	
						\$1,737.29				

Below the table, it shows 'Total Items: 23' and 'Total Recommended Extended Cost: \$2,388.95'. A 'Next' button is visible at the bottom right.

Step 2 Process Returns: For each item listed, click on the “Ineligible” button for any items that cannot be returned. Reasons items may be ineligible include a broken seal, defaced label or some other disqualifying stipulation defined in your wholesaler contract. When an item is marked as ineligible, that item will persist as ineligible for return until the item either falls out of surplus in Datarithm, or enough of the item has been dispensed over time that the original surplus inventory can be presumed to have been depleted from the pharmacy’s physical inventory. At this time, any newly identified surplus will once again be recommended for return. To pre-emptively preclude this item from return recommendations, users should instead apply a “Do Not Return” restriction on this item (in the Inventory Details page, as described later in this document).

At this point, items remaining on the list can be returned. Specify/confirm the quantity that will be returned by entering the number of units in the *Returned Quantity* textboxes. The up/down arrows in the Returned Quantity text boxes can facilitate entering the quantity being returned.

It is **important** to note that, if the number of units recommended for return is higher than the actual number of units in stock or the number of units that you intend to return, you may simply enter the unit quantity that will be returned instead of marking the item as *Ineligible*. If the unit quantity entered is not a full pack multiple, you will receive a validation error and you will be unable to proceed until you correct the error. Note that not all line items need to have a Returned Quantity specified. Only line items with a Returned Quantity specified will be carried through to the next step. Items without a Returned Quantity specified will remain behind for future processing. To proceed, click on either the “Confirm Returns” link above the grid or the “Next” button below the grid.

Process Returns



Review Returns **Process Returns** Confirm Returns Complete

Mark as Ineligible	Drug Identifier	Drug Name	Strength	Package Size	Recommended Quantity	Returned Quantity	Extended Cost	Unit Type
Ineligible	00310-7372-20	Budes/Formot Aer 80-4.5	80 mcg-4.5 mcg/actuation	10.20	10.2	10.20	\$188.38	GM
Ineligible	00597-0153-90	Jardiance 25mg	25 MG	90.00	90	90.00	\$1,708.88	TAB
Ineligible	16729-0454-17	Levothyroxine 137 Mcg Tablet	137	1,000.00	1000	1.00...	\$151.00	EA
Ineligible	70010-0135-05	Potassium Cl Er 20 Meq Tablet		500.00	500	499.00	\$120.61	TAB
Ineligible	00378-2401-01	Trifluoperazine 1 Mg Tablet	1 MG	100.00	100	100.00	\$83.40	TAB

Items Returned: 5
Amount Returned: \$2,252.27

• Quantity must be a multiple of Package Size.

Step 2 of 4 Previous Next

Step 3 Confirm Returns: Review the items and quantities you are about to return and enter Special Instructions if appropriate. To complete the return, check the “Ready to ship these items?” checkbox and then click on the “Finish” button.

Process Returns



Review Returns Process Returns **Confirm Returns** Complete

Drug Identifier	Drug Name	Strength	Recommended Quantity	Returned Quantity	Extended Cost	Unit Type
00310-7372-20	Budes/Formot Aer 80-4.5	80 mcg-4.5 mcg/actuation	10.2	10.2	\$188.38	GM
00597-0153-90	Jardiance 25mg	25 MG	90	90	\$1,708.88	TAB
16729-0454-17	Levothyroxine 137 Mcg Tablet	137	1000	1000	\$151.00	EA
70010-0135-05	Potassium Cl Er 20 Meq Tablet		500	500	\$120.85	TAB
00378-2401-01	Trifluoperazine 1 Mg Tablet	1 MG	100	100	\$83.40	TAB

Items Returned: 5
Amount Returned: \$2,252.51

Enter Special Instructions

Ready to ship these items?

Step 3 of 4 Previous Finish

Step 4 Complete: The packing list will be displayed. This *Packing List* represents Datarithm’s archive of the return details. The packing list can be downloaded/saved by clicking on the download button. It can also be printed by clicking on the print button. Click the “Review Returns” button to return to the pending returns list.

Processing Complete!

Packing List

1 of 2 pages

Automati...

DATARITHM
INVENTORYCONTROLLED.COM

PACKING LIST

Roberts - Elm Street Pharmacy
101 North Main Street
Moultrie, GA 31768

SHIP TO: McKesson

Date: 12/4/2023
Wholesaler Return #: 6871316

6871316

Drug Identifier	Barcode	Drug Name	Strength	Manufacturer	Returned Quantity	Extended Cost
00310-7372-20		Budes/Formot Aer 80-4.5	80 mcg-4.5 mcg/actuation	PRASCO LLC	10.2	\$188.38
00597-0153-90		Jardiance 25mg	25 MG	Boehr Ingel	90	\$1,708.88
16729-0454-17		Levothyroxine 137 Mcg Tablet	137	ACCORD HEA	1000	\$151.00

Step 4 of 4

Review Returns

You should also prepare any documentation required by your wholesaler. For most pharmacy management systems, if the *Enable On Hand Updates for RTW* setting is set to “True” in Datarithm, Datarithm will update the On Hand values in the Pharmacy Management System accordingly.

Return to Wholesaler - Expedited

Expedited RTW (Return to Wholesaler) is available for pharmacies that would like to process returns to their wholesaler but intend to update the on-hand quantities for returned items directly within their Pharmacy Management System because either their PMS does not support automated on-hand adjustments for returns processed within Datarithm, or they simply do not want to process returns inside Datarithm.

On-hand quantity reductions that are entered into the Pharmacy Management System will be recognized by Datarithm and will be removed from the return recommendations list in Datarithm. However, items that are **not** returned (due to ineligibility - seal broken, label defaced, etc.) will remain in the return recommendation list and **not** be considered for potential transfer (for customers with multiple locations). This can be countered by employing *Expedited RTW* which automatically allows items otherwise "trapped" in the return recommendation list to be considered for transfer.

To make a return using the *Expedited RTW* feature, from *Step 1 Review Returns*, select the desired batch size and click on the “Mark All Ineligible” button. Doing so will mark all of the items in the batch as ineligible for return. Those items that are not actually returned to the wholesaler will subsequently be considered for Transfer recommendations.

Process Returns



1 Review Returns 2 Process Returns 3 Confirm Returns 4 Complete

Export to PDF
+ Add Manual
x Mark All Ineligible

Batch Size: 5
Return Type: -- All --

Drug Identifier	Drug Name	Forecast Monthly Usage	Item On Hand	Group On Hand	Recommended Quantity	Recommended Extended Cost	Current Min	Months Since Last Usage	Recommended / Created Date
00378-8270-91	Albuterol Sul 2.5 Mg/3 MI Soln	0	1080	1080	1080	\$51.52	-0.01	5	10/17/2023
43598-0326-75	Ciproflox/Dexameth Otic Susp	0	7.5	7.5	7.5	\$79.88	-1	5	10/16/2023
70710-1123-07	Doxycycline Mono 100mg	0	50	286	50	\$27.36	-1	5	10/17/2023
65862-0767-30	Fesoterodine Er 8 Mg Tablet	0	30	30	30	\$26.27	-1	5	10/16/2023
27241-0006-50	Risperidone 4mg	45	686	705	500	\$56.85	29	1	10/22/2023
						\$241.88			

Total Items: 17
Total Recommended Extended Cost: \$401.68

Step 1 of 4
Next

Liquidations

To process items to be returned to the manufacturer (i.e., liquidations), go to the *Balance* tab and click on *Manage Liquidations*. Note that Datarithm does not currently make liquidation recommendations but does support the creation of “manual” liquidations. The processing of liquidations to the manufacturer is identical to the processing of returns to the wholesaler as described above, with the following exceptions. *Company and Region Level users can access this feature by changing their location as described earlier in this document.*

Datarithm recognizes that users may opt to liquidate unwanted inventory via other channels such as MatchRx (US only) or a sale to a nearby pharmacy. To facilitate the additional avenues of liquidation, *Step 3 Confirm Liquidations* of the Liquidation Wizard provides a dropdown allowing the user to specify the type of recipient (Liquidation Processor, MatchRx, or Other). If the user selects MatchRX or Other, the user will be prompted to provide the name and address of the recipient pharmacy.

Process Liquidations



1 Review Liquidations 2 Process Liquidations 3 Confirm Liquidations 4 Complete

Recipient Type: Other

Company Name
 Address
 Apartments/Suite/Other
 City St Zip

Drug Identifier	Drug Name ↑	Strength	Recommended Quantity	Liquidated Quantity	Extended Cost	Unit Type
00006-0277-31	Januvia 100mg	100 MG	82	82	\$1,436.01	EA
00169-4130-13	Qzempic 1 Mg Dose Pen (3 MI)		12	12	\$3,593.72	ML
80777-0102-93	Spikevax Vaccine 2023-2024 (12yr Up) Syringe		12	12	\$3,108.00	MI

1 - 3 of 3 items

At *Step 4 Complete*, the user is able to view/download/print the Shipping Label in addition to the Packing List.

Review Liquidations

Process Liquidations

Confirm Liquidations

Complete

Processing Complete!

Packing List Shipping Label

Drug Identifier	Barcode	Drug Name	Strength	Manufacturer	Liquidated Quantity	Extended Cost
00006-0277-31		Januvia 100mg	100 MG	MERCK SHARP	82	\$1,436.01
00169-4130-13		Ozempic 1 Mg Dose Pen (3 Ml)		NOVO NORD	12	\$3,593.72

Transfers

Company and Region Level users can access this feature by changing their location as described earlier in this document.

Send Transfers

To transfer items to another pharmacy location (recommended by Datarithm, requested by the other location or manual transfers), select *Send Transfers* from the *Balance* tab, or click on the *Process Outbound Transfers* notification task link.

Balance ▾ Cycle Counts

- Balance Dashboard
- Process Returns
- Manage Liquidations
- Send Transfers**
- Receive Transfers
- Browse The Market

Tasks

- Process Returns
- Process Outbound Transfers**
- Process Inbound Transfers (222 Required)
- Process Cycle Counts
- Manage Order Alerts

Step 1 Review Transfers: Each line represents a batch of transfer recommendations to a particular location. The total number of items as well as their aggregate extended cost (value) is listed. Note that you can filter on Transfer Type (all, recommended by Datarithm, manual transfers, and requested transfers) and Drug Schedule (all, C2, and non-C2). Transfers that contain one or more C2 items will indicate that a completed form 222 (from the receiving pharmacy) is required prior to physically transferring the inventory. You can also add a “manual” transfer to the existing transfer recommendations by clicking on the “Add Manual” button.

Send Transfers



1
Review Transfers

2
Process Transfers

3
Confirm Transfers

4
Complete

+ Add Manual		+ Request Transfer		Transfer Type: -- All --	Drug Schedule: -- All --
Receiving Pharmacy	222 Required	Total Items	Total Extended \$ Amount	Action	
▶ Roberts - Lake Shore Pharmacy	<input checked="" type="checkbox"/>	16	\$1,427.19	View	
▶ Roberts - Main Street Pharmacy	<input checked="" type="checkbox"/>	16	\$730.12	View	
▶ Roberts - North Branch Pharmacy	<input checked="" type="checkbox"/>	14	\$440.40	View	
▶ Roberts - Timberland Pharmacy	<input type="checkbox"/>	15	\$339.19	View	

Click on *View* to display the items for transfer to that specific location. Note that C2 line items will be displayed in red. Items displayed with an orange background were requested by another pharmacy in your organization via a Transfer Request. Items with a light yellow background color are items that have been added via Manual Transfer. You have the option to “Export to PDF” (and print the list). Determine if you have the listed item(s) and have the recommended quantities physically in stock. Click the “Process” button to step into the transfer wizard.

+ Add Manual		+ Request Transfer		Transfer Type: -- All --	Drug Schedule: -- All --																																																																																																																																																																																											
Receiving Pharmacy	222 Required	Total Items	Total Extended \$ Amount	Action																																																																																																																																																																																												
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<div style="display: flex; justify-content: space-between;"> + Export to PDF + Process </div> <table border="1"> <thead> <tr> <th>Drug Identifier</th> <th>Drug Name</th> <th>Drug Schedule</th> <th>Strength</th> <th>Recommended Quantity</th> <th>Recommended Extended Cost</th> <th>Type</th> <th>Current Min</th> <th>Months Since Last Usage</th> <th>Recommended / Created Date</th> <th>Receiver's Forecast Usage</th> </tr> </thead> <tbody> <tr> <td>00173-0697-90</td> <td>Advair Disku Aer 500/50</td> <td>R</td> <td>500-50 MCG</td> <td>60</td> <td>\$497.43</td> <td>EA</td> <td>-1</td> <td>1</td> <td>12/6/2023</td> <td>60.00</td> </tr> <tr> <td>42806-0416-05</td> <td>Bupropion Hcl XI 300 Mg Tablet</td> <td>R</td> <td>300 mg</td> <td>500</td> <td>\$92.10</td> <td>ea</td> <td>119</td> <td>1</td> <td>10/20/2023</td> <td>1,125.00</td> </tr> <tr> <td>57664-0379-88</td> <td>Dexamethylph 10mg</td> <td>2</td> <td>10 MG</td> <td>20</td> <td>\$8.88</td> <td>TAB</td> <td>29</td> <td>1</td> <td>9/29/2023</td> <td>187.50</td> </tr> <tr> <td>16714-0565-01</td> <td>Dexamethylphenidate Er 20 Mg Cp</td> <td>2</td> <td></td> <td>100</td> <td>\$222.69</td> <td>Cap</td> <td>-1</td> <td>12</td> <td>10/1/2023</td> <td>18.50</td> </tr> <tr> <td>66993-0594-02</td> <td>Dextroamp-Amphet Er 5 Mg Cap</td> <td>2</td> <td>5 MG</td> <td>10</td> <td>\$15.14</td> <td>EA</td> <td>-1</td> <td>5</td> <td>10/16/2023</td> <td>60.00</td> </tr> <tr> <td>16728-0456-15</td> <td>Levothyroxine 175 Mcg Tablet</td> <td>R</td> <td>175</td> <td>1</td> <td>\$0.22</td> <td>EA</td> <td>29</td> <td>1</td> <td>10/21/2023</td> <td>105.00</td> </tr> <tr> <td>43547-0353-11</td> <td>Lisinopril 10mg</td> <td>R</td> <td>10 MG</td> <td>900</td> <td>\$18.09</td> <td>EA</td> <td>239</td> <td>1</td> <td>12/6/2023</td> <td>1,702.50</td> </tr> <tr> <td>70010-0491-05</td> <td>Metformin 500mg Er</td> <td>R</td> <td>500</td> <td>1000</td> <td>\$36.90</td> <td>EA</td> <td>239</td> <td>1</td> <td>10/20/2023</td> <td>3,587.14</td> </tr> <tr> <td>68180-0336-07</td> <td>Metformin 500mg Er Osm</td> <td>R</td> <td>500 MG</td> <td>30</td> <td>\$23.74</td> <td>TAB</td> <td>-1</td> <td>5</td> <td>10/22/2023</td> <td>360.00</td> </tr> <tr> <td>00406-0127-01</td> <td>Methylphenid 27mg Er 100</td> <td>2</td> <td>27 MG</td> <td>10</td> <td>\$35.56</td> <td>EA</td> <td>-1</td> <td>1</td> <td>10/13/2023</td> <td>137.50</td> </tr> <tr> <td>69292-0564-01</td> <td>Metolazone 5 Mg Tablet</td> <td>R</td> <td>5 mg</td> <td>100</td> <td>\$74.24</td> <td>EA</td> <td>14</td> <td>1</td> <td>10/19/2023</td> <td>45.00</td> </tr> <tr> <td>61314-0645-11</td> <td>Neo/Poly/Hc Sus 1% Otic</td> <td>R</td> <td>3.5-10K-1</td> <td>10</td> <td>\$28.99</td> <td>ML</td> <td>-1</td> <td>2</td> <td>10/20/2023</td> <td>20.00</td> </tr> <tr> <td>65862-0390-10</td> <td>Ondansetron 4mg Odt</td> <td>R</td> <td>4 MG</td> <td>300</td> <td>\$69.99</td> <td>EA</td> <td>-1</td> <td>1</td> <td>10/21/2023</td> <td>1,927.86</td> </tr> <tr> <td>50742-0505-10</td> <td>Scopolamine 1 Mg/3 Day Patch</td> <td>R</td> <td></td> <td>28</td> <td>\$127.96</td> <td>EA</td> <td>-1</td> <td>1</td> <td>10/20/2023</td> <td>24.50</td> </tr> <tr> <td>16714-0797-01</td> <td>Sumatriptan 50mg</td> <td>R</td> <td>50 mg</td> <td>1</td> <td>\$0.62</td> <td>EA</td> <td>8</td> <td>1</td> <td>10/20/2023</td> <td>67.50</td> </tr> <tr> <td>24510-0115-10</td> <td>Xtampza Er 13.5mg</td> <td>2</td> <td>13.5 MG</td> <td>20</td> <td>\$174.64</td> <td>CAP</td> <td>-1</td> <td>7</td> <td>10/1/2023</td> <td>120.00</td> </tr> </tbody> </table>						Drug Identifier	Drug Name	Drug Schedule	Strength	Recommended Quantity	Recommended Extended Cost	Type	Current Min	Months Since Last Usage	Recommended / Created Date	Receiver's Forecast Usage	00173-0697-90	Advair Disku Aer 500/50	R	500-50 MCG	60	\$497.43	EA	-1	1	12/6/2023	60.00	42806-0416-05	Bupropion Hcl XI 300 Mg Tablet	R	300 mg	500	\$92.10	ea	119	1	10/20/2023	1,125.00	57664-0379-88	Dexamethylph 10mg	2	10 MG	20	\$8.88	TAB	29	1	9/29/2023	187.50	16714-0565-01	Dexamethylphenidate Er 20 Mg Cp	2		100	\$222.69	Cap	-1	12	10/1/2023	18.50	66993-0594-02	Dextroamp-Amphet Er 5 Mg Cap	2	5 MG	10	\$15.14	EA	-1	5	10/16/2023	60.00	16728-0456-15	Levothyroxine 175 Mcg Tablet	R	175	1	\$0.22	EA	29	1	10/21/2023	105.00	43547-0353-11	Lisinopril 10mg	R	10 MG	900	\$18.09	EA	239	1	12/6/2023	1,702.50	70010-0491-05	Metformin 500mg Er	R	500	1000	\$36.90	EA	239	1	10/20/2023	3,587.14	68180-0336-07	Metformin 500mg Er Osm	R	500 MG	30	\$23.74	TAB	-1	5	10/22/2023	360.00	00406-0127-01	Methylphenid 27mg Er 100	2	27 MG	10	\$35.56	EA	-1	1	10/13/2023	137.50	69292-0564-01	Metolazone 5 Mg Tablet	R	5 mg	100	\$74.24	EA	14	1	10/19/2023	45.00	61314-0645-11	Neo/Poly/Hc Sus 1% Otic	R	3.5-10K-1	10	\$28.99	ML	-1	2	10/20/2023	20.00	65862-0390-10	Ondansetron 4mg Odt	R	4 MG	300	\$69.99	EA	-1	1	10/21/2023	1,927.86	50742-0505-10	Scopolamine 1 Mg/3 Day Patch	R		28	\$127.96	EA	-1	1	10/20/2023	24.50	16714-0797-01	Sumatriptan 50mg	R	50 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68180-0336-07	Metformin 500mg Er Osm	R	500 MG	30	\$23.74	TAB	-1	5	10/22/2023	360.00																																																																																																																																																																																						
00406-0127-01	Methylphenid 27mg Er 100	2	27 MG	10	\$35.56	EA	-1	1	10/13/2023	137.50																																																																																																																																																																																						
69292-0564-01	Metolazone 5 Mg Tablet	R	5 mg	100	\$74.24	EA	14	1	10/19/2023	45.00																																																																																																																																																																																						
61314-0645-11	Neo/Poly/Hc Sus 1% Otic	R	3.5-10K-1	10	\$28.99	ML	-1	2	10/20/2023	20.00																																																																																																																																																																																						
65862-0390-10	Ondansetron 4mg Odt	R	4 MG	300	\$69.99	EA	-1	1	10/21/2023	1,927.86																																																																																																																																																																																						
50742-0505-10	Scopolamine 1 Mg/3 Day Patch	R		28	\$127.96	EA	-1	1	10/20/2023	24.50																																																																																																																																																																																						
16714-0797-01	Sumatriptan 50mg	R	50 mg	1	\$0.62	EA	8	1	10/20/2023	67.50																																																																																																																																																																																						
24510-0115-10	Xtampza Er 13.5mg	2	13.5 MG	20	\$174.64	CAP	-1	7	10/1/2023	120.00																																																																																																																																																																																						

Step 2 Process Transfer: If the item cannot be located or you choose not to send the item, click the “Exclude” button to the left of the item. If you choose to transfer the item but the recommended quantity is not accurate, correct it by changing the quantity. Click the “Next” button to move to the next step.



1 Review Transfers

2 Process Transfers to Roberts - Lake Shore Pharmacy

3 Confirm Transfers to Roberts - Lake Shore Pharmacy

4 Complete

Exclude	Drug Identifier	Drug Name	Drug Schedule	Strength	Package Size	Quantity	Extended Cost	Unit	Receiver's Forecast Usage
<input type="checkbox"/>	00173-0697-00	Advair Disku Aer 500/50	R	500-50 MCG	60.00	60.00	\$497.43	EA	60.00
<input type="checkbox"/>	42806-0416-05	Bupropion Hcl XI 300 Mg Tablet	R	300 mg	500.00	500.00	\$92.10	ea	1,125.00
<input type="checkbox"/>	57664-0379-88	Dexamethylph 10mg	2	10 MG	100.00	20.00	\$8.88	TAB	187.50
<input type="checkbox"/>	16714-0565-01	Dexamethylphenidate Er 20 Mg Cp	2		100.00	100.00	\$222.69	Cap	18.50
<input type="checkbox"/>	66993-0594-02	Dextroamp-Amphet Er 5 Mg Cap	2	5 MG	100.00	10.00	\$15.14	EA	60.00
<input type="checkbox"/>	16729-0456-15	Levothyroxine 175 Mcg Tablet	R	175	90.00	1.00	\$0.22	EA	105.00
<input type="checkbox"/>	43547-0353-11	Lisinopril 10mg	R	10 MG	1,000.00	900.00	\$18.09	EA	1,702.50
<input type="checkbox"/>	70010-0491-05	Metformin 500mg Er	R	500	500.00	1.00	\$36.90	EA	3,587.14
<input type="checkbox"/>	68180-0336-07	Metformin 500mg Er Osm	R	500 MG	60.00	30.00	\$23.75	TAB	360.00

Step 3 Confirm Transfer: Review the items and quantities you are about to transfer and enter Special Instructions if appropriate. To complete the transfer, check the confirmation checkbox and then click on the “Finish” button.

Items Transferred: 16
Amount Transferred: \$1,427.19

Enter Special Instructions

By checking this box and clicking Finish, you signify that you will send these items to the receiving pharmacy only upon receipt of the completed Form 222

WARNING: Do not physically ship this Transfer to the receiving pharmacy until the receiving pharmacy has provided the sending pharmacy with a completed Form 222. It is suggested that the sending pharmacy call the receiving pharmacy to explicitly request the completed Form 222.

Step 3 of 4

Previous **Finish**

Step 4 Complete: The packing list and shipping label will be displayed. This *Packing List* represents Datarithm’s archive of the transfer details. The packing list and shipping label can each be downloaded/saved by clicking on the download button. They can also be printed by clicking on the print button. Click the “Review Transfers” button to return to the pending transfer list.

Packing List Shipping Label

1 of 3 pages Automati...

PACKING LIST

INVENTORYCONTROLLED.COM

WARNING: Do not physically ship this Transfer to the receiving pharmacy until the receiving pharmacy has provided the sending pharmacy with a completed Form 222. It is suggested that the sending pharmacy call the receiving pharmacy to explicitly request the completed Form 222.

Roberts Family Pharmacy
Roberts - Elm Street Pharmacy
101 North Main Street
Moultrie, GA 31768
DEA: FC5655468
St. Id:

SHIP TO: Roberts Family Pharmacy
Roberts - Lake Shore Pharmacy
453 Lakes Boulevard
Lake Park, GA 31636
DEA: FL0219558
St. Id:

Date: 12/6/2023
Transfer #: 4613303

4613303

Drug Identifier	Barcode	Name	Drug Schedule	Strength	Manufacturer	Quantity	Ext. Cost
00173-0697-00		Advair Disku Aer 500/50	R	500-50 MCG	GLAXOSMITHKL	60	\$497.43
42806-0416-05		Bupropion Hcl XI 300 Mg	R	300 mg	SLATE RUN	500	\$92.10

Step 4 of 4

Review Transfers

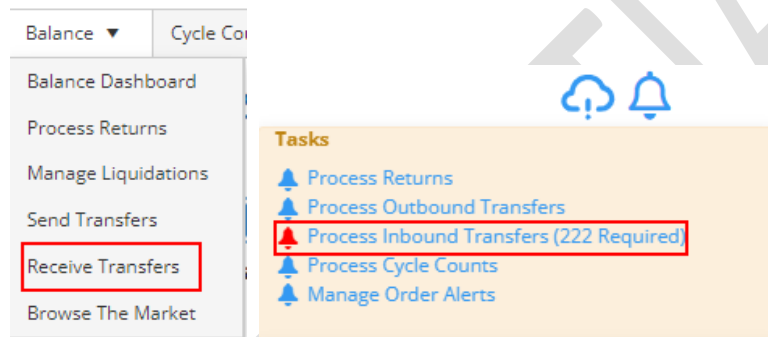
DATARITHM USER MANUAL | Page 28 of 101

The *Packing List* should be placed inside the transport container. The *Shipping Label* should be placed on the outside of the to the transport container. Completing an outbound transfer results in an email notification to staff at both the providing pharmacy and receiving pharmacy. Special instructions related to the completion of Form 222 are included in the emails if applicable.

There is no need to adjust the on-hand quantities for transferred items as Datarithm will do that for you by sending the on-hand updates to the Pharmacy Management System (assuming Datarithm has been properly configured).

Receive Transfers

To receive a transfer from another location or to convey to the providing pharmacy that a Form 222 has been completed to allow for the Transfer of C2 inventory items, go to the *Balance* tab and click on *Receive Transfers* or click on the *Process Inbound Transfers* notification task link.



Step 1 Review Transfers: Provides a view of inbound transfer batches including the providing pharmacy's name, if a Form 222 is required, the transfer number, date the transfer was sent by the providing pharmacy, the total number of line items in the transfer batch, and the total aggregate cost (value) of the transfer.

If staff at the receiving pharmacy simply wishes to communicate that the Form 222 has been completed, they should click the "View" button and then click the "222 Sent" button. Doing so signals to the providing pharmacy (via email) that the Form 222 has been completed and sent.

From	222 Status	Transfer #	Date Sent	Total Items	Total Extended \$ Amount	Action
Roberts - Elm Street Pharmacy	222 Required	4613303	12/6/2023	16	\$2,306.71	View

Drug Identifier	Drug Name	Drug Schedule	Strength	Quantity	Extended Cost	Unit Type
00173-0697-00	Advair Disku Aer 500/50	R	500-50 MCG	60	\$497.43	EA
42806-0416-05	Bupropion Hcl XI 300 Mg Tablet	R	300 mg	500	\$92.10	ea
57664-0379-88	Dexamethylph 10mg	2	10 MG	2000	\$888.40	TAB

Note that inbound transfers that include one or more C2 items will indicate that a Form 222 must be completed by the receiving pharmacy and delivered to the providing pharmacy. Typically, the providing pharmacy will not physically ship the inventory to the receiving pharmacy until the completed Form 222 is received by the providing pharmacy.

If staff at the receiving pharmacy wishes to process an inbound transfer, review the paper *Packing Slip* from the inbound transfer to find the transfer number and then click the “View” button for that transfer. After reviewing the listed items, click the “Process” button.

Receive A Shipment

+ Request Transfer

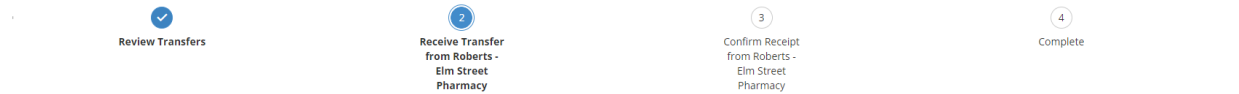
From	222 Status	Transfer #	Date Sent	Total Items	Total Extended \$ Amount	Action
Roberts - Elm Street Pharmacy	222 Sent	4613303	12/6/2023	16	\$2,306.71	View

+ Process

Drug Identifier	Drug Name	Drug Schedule	Strength	Quantity	Extended Cost	Unit Type
00173-0697-00	Advair Disku Aer 500/50	R	500-50 MCG	60	\$497.43	EA
42806-0416-05	Bupropion Hcl XI 300 Mg Tablet	R	300 mg	500	\$92.10	ea
57664-0379-88	Dexmethy/oph 10mg	2	10 MG	2000	\$888.40	TAB
16714-0565-01	Dexmethyphenidate Er 20 Mg Cp	2		100	\$222.69	Cap

Step 2 Receive Transfer: Confirm that the listed items were delivered and modify the quantities as needed. If an item was not delivered, correct the quantity to zero. If a quantity does not match, correct the quantity and click the “Next” button.

Receive Transfers



Receive Transfer from Roberts - Elm Street Pharmacy

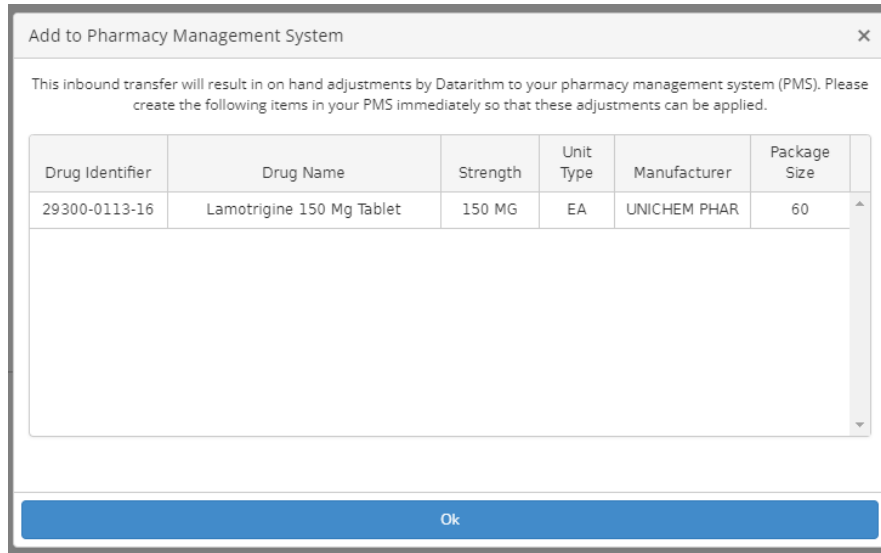
Drug Identifier	Drug Name	Drug Schedule	Strength	Quantity	Unit Type
00173-0697-00	Advair Disku Aer 500/50	R	500-50 MCG	60.00	EA
42806-0416-05	Bupropion Hcl XI 300 Mg Tablet	R	300 mg	500.00	ea
57664-0379-88	Dexmethy/oph 10mg	2	10 MG	2,000...	TAB
16714-0565-01	Dexmethyphenidate Er 20 Mg Cp	2		100.00	Cap

Step 3 Confirm Receipt: Review the items and the quantities received by your pharmacy. If the quantities are correct, check the confirmation checkbox and click the “Finish” button.

Items Received: 16
Amount Received: \$2,306.71

By checking this box and clicking Finish, you signify receiving these items at your pharmacy

If items being received are not already in the formulary of the receiving pharmacy, a message will be displayed asking the user to manually add the drug record to their Pharmacy Management System.



Step 4 Complete: Click the “Review Transfers” button to return to the pending transfer list.

There is no need to adjust the on-hand quantities in the pharmacy management system for transferred items as Datarithm will do that automatically (assuming Datarithm has been properly configured). Completing an inbound transfer results in an email notification to staff at both the providing and receiving pharmacies.

Occasionally, there may be an older transfer, where the sent date is in the distant past and the receiving pharmacy would like to process the inbound transfer *but not have Datarithm adjust the on hand within the PMS*. The *Balancing Archive* report (described elsewhere in this document) can be used to process an inbound transfer without adjusting the on hand within the PMS.

Request Transfers

For chain pharmacies, the *Request Transfer* function gives pharmacy level users the ability to search for items from other locations within the company. *Company and Region Level users can access this feature by changing their location as described earlier in this document*. To request a transfer, go to the *Balance* tab and click on *Request Transfer (Browse the Market)*.

Step 1 Search for Drugs: From the *Request Transfer* page, enter the drug name, NDC (US) or DIN (Canada) that you would like to request into the *Search* box and click on *Search*. You can also filter on Providing Pharmacy as well as Type (All On Hand or Surplus Only). Results based on your search criteria will be displayed in the grid. Items in surplus at the providing location are marked in bold.

Request Transfer



Search Pharmacies for Drugs

Search: Search Clear

Pharmacies requesting a Transfer should attempt to request from a pharmacy with a surplus quantity of the requested item (marked in bold).

Providing Pharmacy: Type:

<input type="checkbox"/>	Drug Identifier	Drug Name ↑	Strength	Manufacturer	Providing Pharmacy	Package Size	Current Units On Hand	Surplus Quantity
<input type="checkbox"/>	43547-0351-50	Lisinopril 2.5mg	2.5 MG	SOLCO HEALTH	Roberts - Lakeside Pharmacy	500	515	0
<input type="checkbox"/>	43547-0351-50	Lisinopril 2.5mg	2.5 MG	SOLCO HEALTH	Roberts - Childress Pharmacy	500	357	0
<input type="checkbox"/>	43547-0351-10	Lisinopril 2.5mg	2.5 MG	SOLCO HEALTH	Roberts - Wilmington Pharmacy	100	173	0
<input checked="" type="checkbox"/>	43547-0351-50	Lisinopril 2.5mg	2.5 MG	SOLCO HEALTH	Roberts - Summit Pharmacy	500	763	27
<input type="checkbox"/>	68180-0512-02	Lisinopril 2.5mg	2.5 MG	LUPIN PHARMA	Roberts - Summit Pharmacy	500	20	27

Check the box(es) for the item(s) you wish to request. You can request multiple items at once by doing additional searches and checking additional checkboxes. Click the “Next” button to proceed with your selected items.

Step 2 Process Request: All requested items will be listed. Specify the Requested Quantity. Note that the user will be notified if the requested amount is likely to cause the providing pharmacy to order the item if transferred. Click the “Next” button to proceed.

Request Transfer



Process Request

Drug Identifier	Drug Name	Strength	Manufacturer	Providing Pharmacy	Package Size	Current Units On Hand	Surplus Quantity	Requested Quantity
16714-0174-03	Atorvastatin 20 Mg Tablet	20MG	NORTHSTAR	Roberts - Lake Shore Pharmacy	1000	3815	1,979.00	<input type="text" value="3.81"/>
43547-0354-11	Lisinopril 20mg	20 mg	Solco Healthcare	Roberts - Lake Shore Pharmacy	1000	1892	56.00	<input type="text" value="30.00"/>

Items per page: 20 | 1 - 2 of 2 items

Requested quantity may cause the providing pharmacy to order the item.

Items Requested: 2

Step 2 of 4

Previous **Next**

Step 3 Confirm Request: Review the items and the quantities being requested. Check the confirmation checkbox and click the “Finish” button.



1
Search for Drugs

2
Process Request

3
Confirm Request

4
Complete

Drug Identifier	Drug Name ↑	Strength	Manufacturer	Providing Pharmacy	Package Size	Current Units On Hand	Surplus Quantity	Requested Quantity
16714-0174-03	Atorvastatin 20 Mg Tablet	20MG	NORTHSTAR	Roberts - Lake Shore Pharmacy	1000	3815	1,979.00	1000
43547-0354-11	Lisinopril 20mg	20 mg	Solco Healthcar	Roberts - Lake Shore Pharmacy	1000	1892	56.00	30

1 - 2 of 2 items

Items Requested: 2

Ready to request these items?

Previous

Finish

Step 3 of 4

Step 4 Complete: Click the “New Request” button if necessary to make an additional request.

As soon as the request has been submitted, staff at both locations will receive an email with details related to the requested item. Users at the providing location(s) will be prompted through their notification task list to process the outbound transfer for delivery back to your store. The pharmacy from which you are ordering items will fulfill your order using the steps described in the Send Transfers section.

Cycle Count

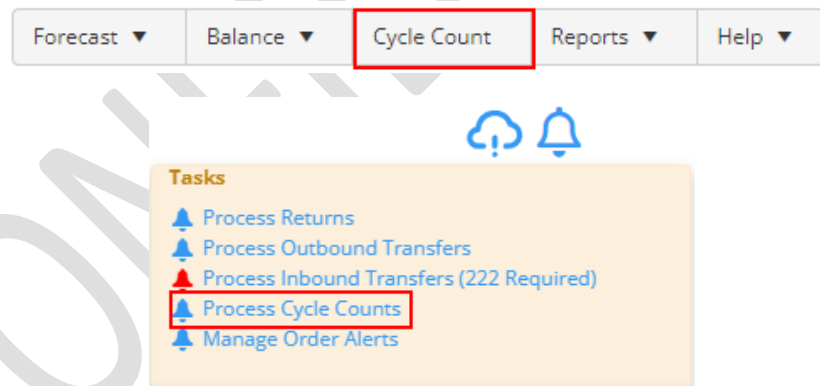
The Cycle Count function acts as a substitute for, or a supplement to, the periodic full physical counting activities. Datarithm's Cycle Count feature involves counting or verifying the on-hand quantity of *small batches* of (selected) items daily. This function is configurable to allow company level users to control the annual counting frequency for various counting categories within Datarithm and to select the days during a week that counts will be assigned. *Company and Region Level users can access this feature by changing their location as described earlier in this document.*

Datarithm supports two cycle counting methods: *Expedited Cycle Count* and *Standard Cycle Count*. Note that a feature called *Blind Cycle Counting* can be employed with either approach. Blind Cycle Counting prevents the user from seeing the "Quantity to Expect" in the cycle count list. The "Quantity to Expect" is the on-hand amount delivered from the pharmacy management system to Datarithm. Blind Cycle Counting can be enabled within Application Settings.

Expedited Cycle Count

The *Expedited Cycle Count* method gives you the ability to use Datarithm's count lists and to enter discrepancy results directly into your pharmacy management system. In most circumstances, this method allows counts to occur throughout the day and involves real time, manual on-hand updates to your PMS. However, it does not allow Datarithm to capture and archive any count discrepancy metrics.

To perform an expedited cycle count, click on the *Cycle Count* tab or click on the *Process Cycle Counts* notification task link.



Step 1 Cycle Count Summary: You will be redirected to the *Cycle Counting* wizard where you will be presented with the number of items in today's cycle count list, the date and time of the most recent count, and the user who performed the most recent count. Click the "Next" button to proceed.

Cycle Counting



Pause Cycle Count

1
Cycle Count
Summary

2
Print List For Cycle
Counting

3
Complete

There are 29 items in today's cycle count list. The last count was performed on 10/20/2023 9:00 AM by [redacted]. Click "Next" to print today's list and then click "Finish" to record that the cycle count has been completed.

Step 1 of 3

Next

Step 2 Print List For Cycle Counting: Click the print button. Then click the "Finish" button to record within Datarithm that the cycle count has been completed. Count all items on the printed list and when a discrepancy is discovered between what is on the shelf and what is recorded in the PMS, make immediate corrective entries in the PMS to correct the on hand values.

Cycle Counting



Pause Cycle Count

✓
Cycle Count
Summary

2
Print List For
Cycle Counting

3
Complete

The screenshot shows the 'Cycle Counting' interface with a table of drug items. The table has columns for Drug Identifier / Barcode, Drug Name, Drug Schedule, Package Size, Strength, Quantity to Expect, Extended Cost, Equivalent On Hand, and Quantity Found. A 'Print' button is highlighted in red in the top right corner of the interface. Below the table, there are 'Previous' and 'Finish' buttons, with 'Finish' also highlighted in red.

Drug Identifier / Barcode	Drug Identifier / Barcode	Drug Name	Drug Schedule	Package Size	Strength	Quantity to Expect	Extended Cost	Equivalent On Hand	Quantity Found
	64380-0834-06	Acetazolamide 250 Mg Tablet	R	100		78	40.0218	166	
70754-0721-11		Acetazolamide 250 Mg Tablet	R	100		88	16.236	166	
	47335-0703-52	Albuterol Sul 2.5 Mg/3 Ml Soln	R	90	2.5 mg/3 mL (0.083 %)	90	5.058	1530	
59762-3722-01		Alprazolam 2 Mg Tablet	4	100	2 MG	0	0	81	
	51672-1300-05	Ammonium Lac Lot 12%	R	225	12 %	0	0	0	

Previous

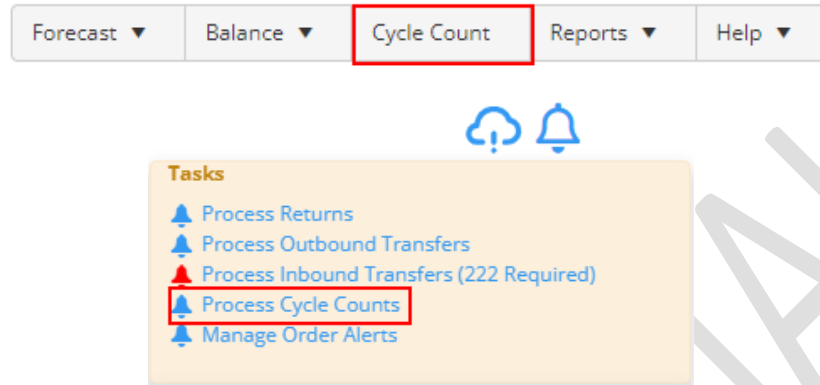
Finish

Standard Cycle Count

The *Standard Cycle Count* method requires that verified on-hand amounts be entered directly into Datarithm. Where this method is utilized, if all counting cannot be completed prior to the beginning of dispensing and the wholesaler delivery, you must account for any fills or deliveries between the time the pharmacy opens and the time you complete the count. For example, if Datarithm expects you to find 100 units of an item, but you find 70 units because there was a 30 unit fill earlier that day, enter 100 into Datarithm. Otherwise, if there was no prior fill, simply enter 70 into Datarithm. Another example is if Datarithm expects you to find 150 units of an item, you find 250 units, yet you know there was 100 units delivered earlier in the day, then it is important to enter 150 units into Datarithm.

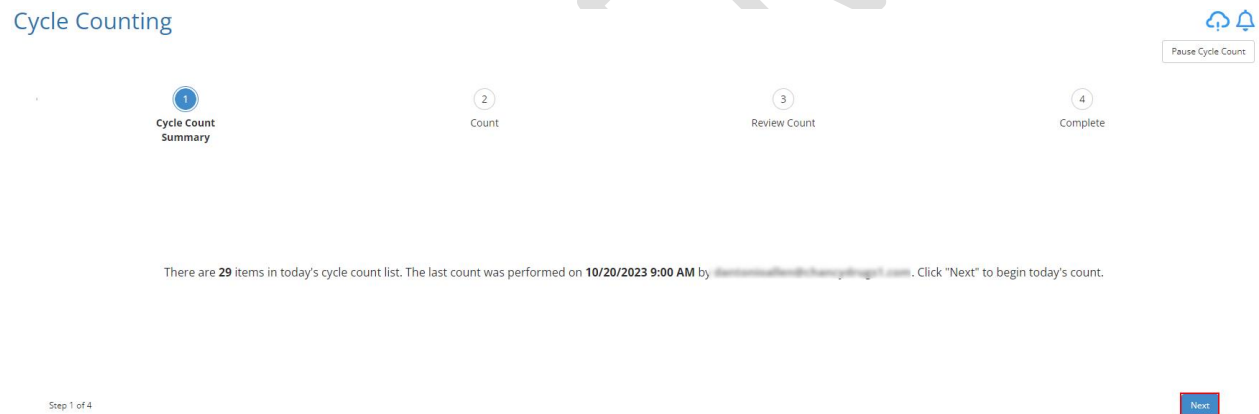
Please note that the *Standard Cycle Count* method is not recommended for users whose pharmacy management system does not support a real-time data interface with Datarithm.

To perform a standard cycle count, click on the *Cycle Count* tab or click on the *Process Cycle Counts* notification task link.



Step 1 Cycle Count Summary: You will be redirected to the *Cycle Counting* wizard where you will be presented with the number of items in today's cycle count list, the date and time of the most recent count, and the user who performed the most recent count. Click the "Next" button to proceed.

Cycle Counting



Step 2 Count: You will be presented with the list of items to be counted. Click the "Export to PDF" button to print the count list (which includes NDC barcode). Once you have physically counted the items on the list, add the verified on-hand counts in the *Quantity Found* field and click *Next*. Note that you can process just a portion of the counting list if necessary

Cycle Counting



Pause Cycle Count

1
Cycle Count
Summary

2
Count

3
Review Count

4
Complete

Export to PDF

Drug Identifier	Drug Name ↑	Package Size	Strength	Quantity to Expect	Extended Cost	Quantity Found
16714-0952-01	Amphet/Dextr 15mg	100		80	\$31.99	80
00406-8885-01	Amphet/Dextr 15mg	100	15 MG	9	\$3.65	10
00781-2368-01	Amphet/Dextr 25mg Er	100	25 MG	69	\$53.81	70
00228-3060-11	Amphetamine 20mg Er Mix Salts	100	20 MG	270	\$205.17	270
00228-3061-11	Amphetamine 30mg Er Mix Salts	100	30 MG	180	\$142.18	180
51991-0073-01	But/Apap/Caf/Cod 50-325-40-30	100	50-325-30	0	\$0.00	0
50458-0587-01	Concerta 54mg	100	54 MG	124	\$1,757.68	124
13107-0035-01	Dextroamphetamine 5mg	100	5 MG	30	\$18.52	

Step 3 Review Count: Review the entries for items that were counted (especially those items with discrepancies) and click the *Finish* button to complete the process.

Cycle Counting



Pause Cycle Count

1
Cycle Count
Summary

2
Count

3
Review Count

4
Complete

Today's count is almost complete. 2 correction(s) will be made. Please click the Finish button to complete the cycle count.

Drug Identifier	Drug Name ↑	Package Size	Strength	Quantity to Expect	Quantity Found
16714-0952-01	Amphet/Dextr 15mg	100		80	80
00406-8885-01	Amphet/Dextr 15mg	100	15 MG	9	10
00781-2368-01	Amphet/Dextr 25mg Er	100	25 MG	69	70
00228-3060-11	Amphetamine 20mg Er Mix Salts	100	20 MG	270	270
00228-3061-11	Amphetamine 30mg Er Mix Salts	100	30 MG	180	180
51991-0073-01	But/Apap/Caf/Cod 50-325-40-30	100	50-325-30	0	0
50458-0587-01	Concerta 54mg	100	54 MG	124	124

Step 3 of 4

Previous Finish

Pause Cycle Count

If for any reason the cycle count function needs to be paused for several days (holiday, staff vacation, etc.), pharmacy level users can do so by clicking on the *Pause Cycle Count* button.

Viewing Pharmacy: Roberts - Elm Street Pharmacy [Change](#) | [Clear](#)



Pause Cycle Count

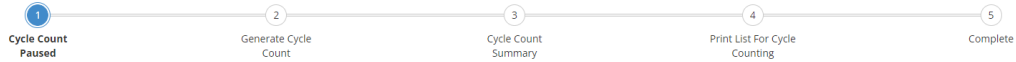
Please note that if staff miss three cumulative days of cycle counts, Datarithm will automatically pause/suspend this function and company level users will be alerted. Note that the number of missed

days that results in cycle count suspension is configurable by a company level user within *Application Settings*.

Resume Cycle Count

To resume paused *Cycle Count* activities, click the *Cycle Count* tab. You will be redirected to the *Cycle Counting* page where you will be informed that either a staff member paused the function or that Datarithm paused the function due to cumulative days of missed counting. To resume the process, click the *Resume Cycle Count* button.

Cycle Counting



Management at your organization or staff at your location has explicitly paused your Cycle Counting activities. The last day that your pharmacy location performed a Cycle Count was on 10/20/2023 9:00 AM. If you would like your Cycle Count activities resumed, please click Resume Cycle Count.

Step 1 of 5

Resume Cycle Count

Counting recommendations will resume on the next scheduled counting day. However, you can generate a list immediately by clicking on the *Generate Cycle Count* button.

Cycle Counting



Pause Cycle Count



There are currently no items to count. The last count was performed on 10/20/2023 9:00 AM by antoniaallen@chancydrugs1.com. If you would like to Cycle Count items, please click Generate Cycle Count.

Step 2 of 5

Generate Cycle Count

After generating the list, please follow the same steps described above.

Reports

The *Reports* section of the Datarithm application contains a variety of report types, including:

- ✓ A general Inventory List
- ✓ Custom reports: Create and manage custom reports.
- ✓ Balancing Reports: Archive of all returns, transfers and liquidations, items marked as ineligible for return and transfer.
- ✓ Restriction Reports: Reports listing items marked as Do Not Manage, Do Not Return, Do Not Transfer and items with the critical inventory flag or buffer(s) applied.
- ✓ Inventory Reports: A collection of reports that display items of interest (e.g. high cost and low usage, suspicious ordering, etc.).
- ✓ Ordering Alternative Reports: List of “cheaper” generic equivalents (lower unit cost or smaller package sizes).
- ✓ Performance Reports: A collection of reports that can be used to view pending balancing recommendations and track balancing and cycle counting task completion.
- ✓ Ranking Reports: Reports that provide insight into the most commonly dispensed items based on cost, quantity, and frequency of dispensing.
- ✓ Replenishment Point Reports: A collection of reports that list pending updates, completed updates, and update success rates.
- ✓ System Reports: Reports that show data interface health, application user accounts, and pharmacy detail.
- ✓ Unusual Usage: Reports that show unusually high or low dispensing volumes (anomalies).

Reports can be viewed by clicking on the *Reports* menu. Note that some of the reports described within this manual may not be available to region level users nor pharmacy level users. Access to reports is controlled by company level users in the *Menu Settings* (described elsewhere in this manual).



Most reports can be filtered on a variety of fields. These filters can be accessed by clicking on the filter icon in the top right corner of the application.



Clicking the filter icon displays the filter panel. The set of available filters depends upon the report being viewed. Columns can also be added and removed from this panel.

✕
Filters

Pharmacy:

Metric:

Report:

Start:

End:

Report:

Columns:

Clear
Apply

Report results can also be filtered by using the filter controls above certain columns in the report. The operator used to apply the filter (e.g., “is equal to”, “contains”, etc.) can be changed by clicking on the filter button to the right of the filter textbox. Most columns in are sortable. Lastly, most reports can be exported to both Excel and CSV.

Export to Excel
Export to CSV

Drug Identifier	Drug Name	Pharmacy	Current Units On Hand	Extended Cost	Surplus Quantity	Surplus Dollars ↓
<input type="text"/>	<input type="text"/>					
80777-0102-93	Spikevax Vaccine 2023-2024 (12yr Up) Syringe	Chancy Drugs Hahira	115.50	\$29,914.50	113.50	\$29,396.50
80777-0102-93	Spikevax Vaccine 2023-2024 (12yr Up) Syringe	Chancy Drugs Valdosta	86.00	\$22,274.00	85.00	\$22,015.00

For reports that contain a Drug Identifier columns (NDC in the US, DIN in Canada), the user can click on the Drug Identifier value to be taken to the *Inventory Details* page for that item.

Inventory List

The *Inventory List* report is the primary report in Datarithm and provides a view into all inventory items within your organization. Searches conducted using the *Search Drugs* textbox at the top of the page target this report.

Note that a wild card character (%) can be used when doing a drug search to refine the results that are returned. For example, searching on “atorvastatin” will return all strengths. But a search on “atorvastatin%40” will only return the 40mg strength. Users can also scan/enter the UPC barcode on a package and search using the UPC value.

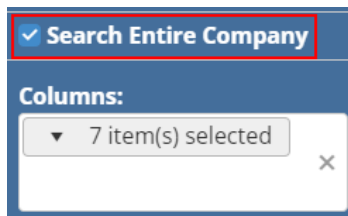
Please note that, when searching for an item that is part of an equivalent (generic) group and it is *not* the preferred generic equivalent, the report will list the preferred item for the group in the search results. Click on the edit button (pencil icon) to change a variety of properties on that inventory item (described in the *Inventory Details* section of this manual). Click on the view button (...) to go to the *Inventory Details* page for that item.

To access this report, go to *Reports* → *Inventory List*.

Pharmacy	Total Inventory Items	Total Extended \$ Amount	Action
Roberts - Elm Street Pharmacy	4	\$370.47	View

Drug Identifier	Drug Name	Strength	Manufacturer	Current On Hand	Extended Cost	Restrictions	Action
16714-0173-03	Atorvastatin 10 Mg Tablet	10MG	NORTHSTAR	1609	\$49.72	Ⓢ	⋮ ✎
16714-0174-03	Atorvastatin 20 Mg Tablet	20MG	NORTHSTAR	1677	\$64.40	Ⓢ	⋮ ✎
16714-0175-03	Atorvastatin 40 Mg Tablet		NORTHSTAR	2418	\$165.87	Ⓢ	⋮ ✎
16714-0176-02	Atorvastatin 80 Mg Tablet		NORTHSTAR	929	\$90.48	Ⓢ	⋮ ✎

Pharmacy level users have a slightly different experience, since the default display will show only their pharmacy location’s inventory. However, pharmacy level users can view the inventory of the entire organization (i.e., across all pharmacy locations) by using the filter panel and selecting “Search Entire Company”.

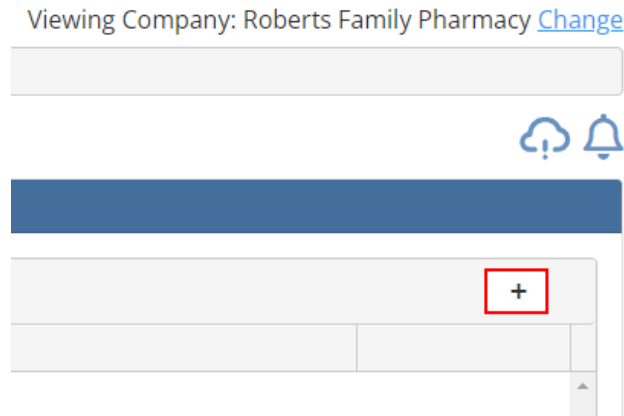


Custom Reports

This feature is only accessible to Company Level user accounts.

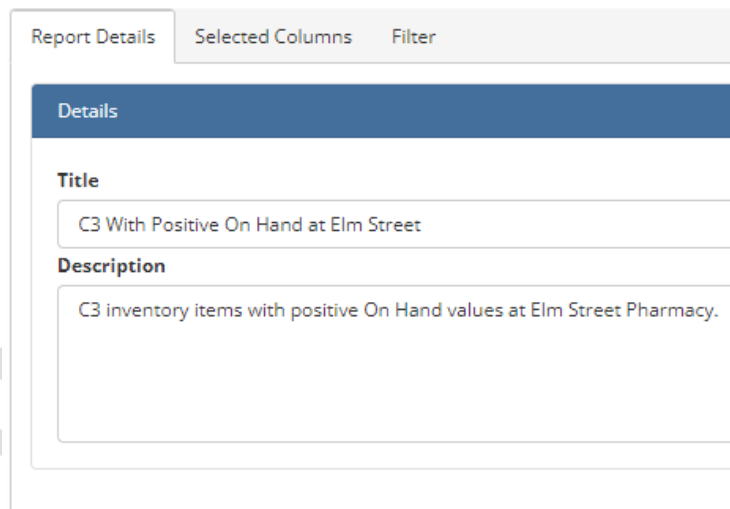
Create Custom Reports

To create a custom report, go to *Reports* → *Custom Reports* → *Create Custom Reports*. Click on the *Add* button.



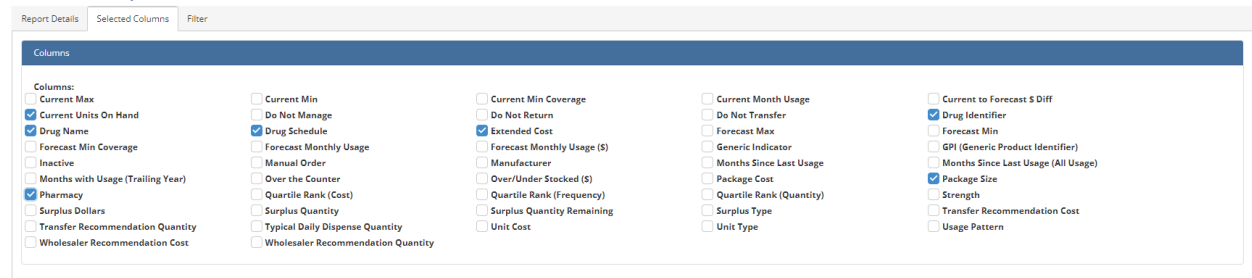
In the *Report Details* tab, provide a *Title* and *Description* for the report.

Custom Reports



In the *Selected Columns* tab, specify the columns to include in the report.

Custom Reports



In the *Filter* tab, add the filter(s) to apply for the report. For each filter:

- ✓ Specify field
- ✓ Specify the operator
- ✓ Specify the value(s) to compare against the field using the selected operator

The filter logic will be described below the filters. Both *And* and *Or* conditions can be used. Filter grouping can be used to define sophisticated filter logic.

Custom Reports

Report Details Selected Columns Filter

Filter

And Or **+** **-** X

Current U... Is greater than 0.00 X

Drug Sch... Is equal to 3 X

Pharmacy Contains Elm Street X

(Drug Schedule Is equal to '3' AND Current Units On Hand Is greater than '0' AND Pharmacy Contains 'Elm Street')

Apply

As you are constructing the custom report, the report is rendered below. Reorder the fields in the report as necessary through simple drag-and-drop. Lastly, click the Save button to save the custom report.

Report Preview

C3 With Positive On Hand at Elm Street

Pharmacy	Drug Identifier	Drug Name	Package Size	Drug Schedule	Current Units On Hand	Extended Cost
Roberts - Elm Street Pharmacy	00406-0484-10	Apap/Codeine 300-30mg	1,000.0000	3	550.00	\$99.00
Roberts - Elm Street Pharmacy	12496-1208-03	Suboxone Mis 8-2mg	30.0000	3	71.00	\$612.14
Roberts - Elm Street Pharmacy	42858-0502-03	Buprenorphine 8 Mg Tablet Sl	30.0000	3	163.00	\$162.95
Roberts - Elm Street Pharmacy	00591-3220-01	But/Apap/Caf/Cod 50-325-40-30	100.0000	3	98.00	\$81.27
Roberts - Elm Street Pharmacy	00406-0485-01	Apap/Codeine 300-60mg	100.0000	3	70.00	\$29.60
Roberts - Elm Street Pharmacy	00409-8562-01	Testost Cyp Inj 200mg/MI	1.0000	3	2.00	\$37.70
Roberts - Elm Street Pharmacy	10702-0077-10	Phendimetrazine 35mg Tab	1,000.0000	3	291.00	\$54.48
Roberts - Elm Street Pharmacy	51293-0640-01	Estrogen-Methyltestos Fs. Tab	100.0000	3	147.00	\$525.50
Roberts - Elm Street Pharmacy	69238-1013-02	Testosterone Gel 1.62% (60 Pumps)	75.0000	3	75.00	\$20.66
Roberts - Elm Street Pharmacy	64380-0152-02	Testosterone 1% (50 Mg/5 G) Pk	150.0000	3	150.00	\$178.70
Roberts - Elm Street Pharmacy	00009-0417-01	Depo-Testost Inj 200mg/MI	1.0000	3	1.00	\$18.85

Cancel Save

Once saved, your custom report will be displayed in the *Custom Reports* grid. The report can be viewed by either clicking on the *View* button (...) in the grid or by going to *Reports* → *Custom Reports* → *<Custom Report Title>*.

Custom Reports



The screenshot shows the 'CUSTOM REPORTS' section of the application. At the top, there is a table with two columns: 'Title' and 'Description'. The first row contains the report 'C3 With Positive On Hand at Elm Street' with the description 'C3 inventory items with positive On Hand values at Elm Street Pharmacy.' To the right of this row are three icons: a menu icon (three dots), an edit icon (pencil), and a delete icon (trash). Below the table is a navigation menu with 'Reports', 'Settings', and 'Help' dropdowns. The 'Reports' dropdown is open, showing 'Inventory List', 'Custom Reports', 'Balancing Reports', and 'Datarithm Restrictions'. The 'Custom Reports' option is highlighted with a red box, and its sub-menu is open, showing 'Create Custom Reports', 'Manage Custom Reports', and 'C3 With Positive On Hand at Elm Street', which is also highlighted with a red box.

Manage Custom Reports

Custom reports can be viewed, edited, and deleted by going to *Reports* → *Custom Reports* → *Manage Custom Reports*.

Custom Reports



This screenshot is similar to the one above, showing the 'CUSTOM REPORTS' table. The 'C3 With Positive On Hand at Elm Street' report is visible. The action icons (menu, edit, delete) are highlighted with a red box.

C3 With Positive On Hand at Elm Street

The screenshot shows the export options for the report. There are two buttons: 'Export to Excel' and 'Export to CSV', both highlighted with a red box. Below the buttons is a text prompt: 'Drag a column header and drop it here to group by that column'. Below that is a table with three columns: 'Pharmacy', 'Drug Identifier', and 'Drug Name'. The table contains two rows of data.

Pharmacy	Drug Identifier	Drug Name
Chancy Drugs Lake Park	00126-0070-61	Prevident Pst 5000 Sen
Chancy Drugs Lake Park	00603-5337-31	Prednisone Pak 5mg

Like canned reports, custom reports can be exported to Excel and .csv.

Balancing Reports

Balancing Archive

The *Balancing Archive* report lists completed balancing tasks (returns, transfers, and liquidations) that have been processed, both inbound and outbound. Click the *View* button to display the *Packing List* (and *Shipping Label* if applicable).

To access the report, go to *Reports* → *Balancing Reports* → *Balancing Archive*.

Returns Transfers Liquidations

Transfer (Send) History

Shipment #	Sender	Recipient	Sent ↓	Received	Items	Extended Cost	View
4615575	Roberts - Elm Street Pharmacy	Roberts - Lake Shore Pharmacy	12/6/2023	12/6/2023	1	\$61.50	...
4613303	Roberts - Elm Street Pharmacy	Roberts - Lake Shore Pharmacy	12/6/2023		16	\$2,306.71	...
4613284	Roberts - Elm Street Pharmacy	Roberts - Wilmington Pharmacy	12/4/2023		5	\$97.32	...
4601358	Roberts - Elm Street Pharmacy	Roberts - North Branch Pharmacy	10/11/2023	10/13/2023	3	\$22.83	...
4601370	Roberts - Elm Street Pharmacy	Roberts - Lake Shore Pharmacy	10/11/2023	10/13/2023	1	\$14.38	...
4601359	Roberts - Elm Street Pharmacy	Roberts - Timberland Pharmacy	10/11/2023	10/12/2023	2	\$42.58	...
4586320	Roberts - Elm Street Pharmacy	Roberts - North Branch Pharmacy	10/10/2023	10/12/2023	2	\$8.98	...
4586314	Roberts - Elm Street Pharmacy	Roberts - Lake Shore Pharmacy	10/10/2023	10/11/2023	6	\$277.57	...
4586325	Roberts - Elm Street Pharmacy	Roberts - Main Street Pharmacy	10/10/2023	10/11/2023	4	\$173.67	...
4597527	Roberts - Elm Street Pharmacy	Roberts - Wilmington Pharmacy	10/10/2023	10/16/2023	1	\$28.90	...

1 - 10 of 127 items

If there is an (older) inbound transfer that you would like to process but you would *not* like Datarithm to adjust the on hand in your PMS (because the on hand in your PMS is presumably correct at this point), you can use the checkmark button in the Transfer (Receive) History grid to mark a transfer as received *without* adjusting the on hand in your PMS.

Transfer (Receive) History

Shipment #	Sender	Recipient	Sent ↓	Received	Items	Extended Cost	View
3987966	Roberts - Elm Street Pharmacy	Roberts - Grand Island Pharmacy	8/30/2022	8/31/2022	1	\$34.40	...
3987953	Roberts - Elm Street Pharmacy	Roberts - Grand Island Pharmacy	8/30/2022		1	\$102.40	...
3987943	Roberts - Elm Street Pharmacy	Roberts - Childress Pharmacy	8/30/2022	9/8/2022	1	\$114.94	...
3987937	Roberts - Elm Street Pharmacy	Roberts - Summit Pharmacy	8/30/2022	8/31/2022	1	\$143.16	...
3987936	Roberts - Elm Street Pharmacy	Roberts - Grand Island Pharmacy	8/30/2022	8/31/2022	1	\$156.13	...
3986796	Roberts - Elm Street Pharmacy	Roberts - Summit Pharmacy	8/29/2022	9/19/2022	1	\$287.11	...
3982534	Roberts - Elm Street Pharmacy	Roberts - Summit Pharmacy	8/25/2022	8/26/2022	1	\$492.78	...
3982500	Roberts - Elm Street Pharmacy	Roberts - Summit Pharmacy	8/25/2022	8/26/2022	1	\$579.70	...
3978608	Roberts - Elm Street Pharmacy	Roberts - Summit Pharmacy	8/25/2022	8/26/2022	1	\$1,049.46	...
3978577	Roberts - Elm Street Pharmacy	Roberts - Lakeside Pharmacy	8/23/2022	9/6/2022	1	\$596.56	...

1081 - 1090 of 1091 items

Mark as received without adjusting on hand within pharmacy system.

Ineligible for Return Report

The *Ineligible for Return Report* lists surplus inventory items that have been marked by users as being ineligible to be returned to the wholesaler. This report shows how long the item has been deemed by Datarithm as having been in surplus, how long since it was marked as ineligible for return, as well as the amount of surplus and the amount that has been recommended for Transfer (if possible). Datarithm customers might use this report to find alternative ways of divesting this inventory. Clicking the *Eligible* button allows the surplus item to once again be considered for return to wholesaler.

To access the report, go to *Reports* → *Balancing Reports* → *Ineligible for Return Report*.

Excluded from Transfer Report

For customers with multiple locations, The *Excluded from Transfer Report* lists that were recommended for transfer but were marked by staff at the pharmacy as ineligible for transfer. Clicking the *Eligible* button allows the surplus item to once again be considered for transfer.

To access the report, go to *Reports* → *Balancing Reports* → *Excluded from Transfer Report*.

Datarithm Restrictions

Restrictions Summary

The *Restrictions Summary Report* displays the count of each restriction type for each pharmacy location. Restrictions are limitations on Datarithm’s ability to fully manage an inventory item. The various restriction types include Manual Ordering, Inactive, Do Not Manage (DNM), Do Not Return (DNR), Do Not Transfer (DNT), Buffers, and Critical Inventory. More information regarding each of these restriction types can be found in the *Inventory Details* section of this document. As a best practice, fewer restrictions are generally better. Each metric value in the report can be clicked to navigate to the underlying detailed restriction report. For example, the Do Not Manage value can be clicked to navigate to the Do Not Manage report pre-filtered on the respective pharmacy.

To access this report, go to Reports → Datarithm Restrictions → Restrictions Summary.

Datarithm Restrictions Summary Report

Pharmacy	Manual Ordering	Inactive	Do Not Manage	Do Not Return	Do Not Transfer	Buffer	Critical	Inventory Items
Roberts - Elm Street Pharmacy	509	3	2	88	0	0	0	1,946
Roberts - Lake Shore Pharmacy	584	4	40	84	0	0	0	2,460
Roberts - Main Street Pharmacy	714	2	104	73	0	0	0	2,305
Roberts - North Branch Pharmacy	351	6	1	100	0	0	0	2,402
Roberts - Timberland Pharmacy	580	7	58	93	0	0	0	2,434
Roberts - Wilmington Pharmacy	175	20	1	81	0	0	0	2,290
	2,913	92	206	520	0	0	0	13,837

Manual Ordering

The *Manual Ordering Report* displays items that are flagged in the pharmacy management system (PMS) for manual ordering. Because these items are flagged for manual ordering, they are excluded from automated, perpetual ordering. Consequently, Datarithm’s forecast replenishment points are *not* applicable to these types of items and Datarithm refrains from attempting to update these items in the PMS.

To access this report, go to Reports → Datarithm Restrictions → Manual Ordering.

Inactive

The *Inactive Report* displays items that are flagged in the pharmacy management system (PMS) as *inactive*. An inactive status in the pharmacy management system may mean different things depending upon how this attribute is used in the PMS.

To access this report, go to Reports → Datarithm Restrictions → Inactive.

Do Not Manage

The *Do Not Manage Report* provides a listing of all inventory items for which Datarithm is not currently managing the replenishment points because the pharmacy staff “blocked” Datarithm and has retained the responsibility for ongoing management of the replenishment points directly in the pharmacy management system (PMS).

Notes:

1. Pharmacies that are *not* using PioneerRx control Do Not Manage settings within Datarithm. This is done from the *Inventory Details* page (*Edit Settings*) described later in this document.
2. Pharmacies that *are* using PioneerRx manage this setting within PioneerRx by unchecking “Allow System to Change Reorder Points” for the item.

To access the report, go to *Reports* → *Datarithm Restrictions* → *Do Not Manage*.

Pharmacies that are *not* using PioneerRx have the ability to return management over replenishment points on particular items by clicking on the *Manage* button. The “Recommendation” column indicates why the removal of the Do Not Manage would be beneficial. The underlying reason for reconsideration of “blocks” is that dispensing patterns can change over time and if system users have not kept up with appropriate reorder point adjustments, items can become overstocked or exposed to stockouts. In addition, filter functionality allows a user to focus on several reasons why removal of Do Not Manage may be appropriate as well as indications of the dollar impact of removing the DNM condition:

- Agreement: Datarithm replenishment points match those established by the store users.
- Reduce Inventory: Dispensing decreased. Previously established replenishment points have gone unchanged, are causing overstocking, and are blocking possible balancing recommendations (returns, transfers) by Datarithm.
- Improve Service: Dispensing has increased. Previously established replenishment points have gone unchanged and service levels are adversely affected (stockouts).

Do Not Manage Report

	Drug Identifier	Drug Name	Recommendati...	Manual Order	Current OP	Forecast OP	Current to Forecast \$ Diff †	Current On Hand	Extended Cost
Manage	67457-0887-99	MEDROXYPR AC INJ 150MG/ML	Equivalent Service (-\$)	false	8	2	(\$185.28)	8	\$247.04
Manage	00054-0188-13	BUPRENALOX SUB 8-2MG	None	false	300	196	(\$104.10)	274	\$274.27
Manage	21922-0021-97	PERMETHRIN CRE 5%	Equivalent Service (-\$)	false	99	60	(\$8.03)	540	\$111.24
Manage	52817-0362-00	METOPROLOL TAR 100MG	None	false	500	240	(\$7.85)	55	\$1.66
Manage	68382-0092-05	CARVEDILOL 6.25MG	Equivalent Service (-\$)	false	300	242	(\$1.24)	880	\$18.74
Manage	69315-0137-01	BENZTROPINE 1MG	Agree - Stock (= \$)	false	60	60	\$0.00	60	\$3.85
Manage	51672-1312-00	MUPIROCIIN OIN 2%	Agree - Stock (= \$)	false	88	88	\$0.00	88	\$12.28
Manage	51672-1312-01	MUPIROCIIN OIN 2%	Agree - Stock (= \$)	false	15	15	\$0.00	98	\$20.84
							\$21,677.41		\$4,731.40

Do Not Return

The *Do Not Return Report* provides a listing of all inventory items that Datarithm is not currently evaluating for return to wholesaler recommendations. Making return recommendations was previously restricted by a user (see the *Inventory Details* section in this document). This can be restored by clicking the Remove DNR button for the line item in the report. Datarithm will then begin evaluating this item nightly for possible return opportunities.

To access the report, go to *Reports* → *Datarithm Restrictions* → *Do Not Return*.

Do Not Transfer

The *Do Not Transfer Report* provides a listing of all inventory items that Datarithm is not currently evaluating for store-to-store transfer recommendations (in or out of any location that has engaged this

function). Making transfer recommendations was previously restricted by a user (see the *Inventory Details* section in this document). Refrigerated items may be prime candidates for this type of restriction.

To access the report, go to *Reports* → *Datarithm Restrictions* → *Do Not Transfer*.

Buffer Report

The *Buffer Report* provides a listing of all inventory items where a buffer has been applied to the *Min/OP* and/or the *Max/OQ* calculated by Datarithm. These buffered values will be applied to the customer’s pharmacy management system. The buffer(s) can be removed by clicking the *Remove Buff* button. The *Recommendation* filter in the filter panel can be used to focus on reasons why the user may want to consider removing the buffer.

To access the report, go to *Reports* → *Datarithm Restrictions* → *Buffer Report*.

Buffer Report 🔄 📄

Export to Excel Export to CSV

	Drug Identifier	Drug Name	Remove Buffer Reason	Min Buffer	Max Buffer	Extended Cost ↓	Current Min Coverage	Current Min	Forecast Min Coverage	Forecast Min	Modified On	Modified By
Remove Buff	00173-0859-10	Breo Ellipta 100-25mcg/Inh Aepb	None	-60	0	\$145.85	0.00 %	-1	100.00 %	59	05/06/2022	
Remove Buff	16714-0408-03	Larin 1/20 1-20mg-Mcg Tabs	Low Service Level	-42	0	\$89.36	87.50 %	20	87.50 %	20	05/06/2022	
Remove Buff	16714-0310-01	Levetracetam 1,000 Mg Tablet	Low Service Level	-60	0	\$72.16	92.30 %	119	92.30 %	119	05/06/2022	
Remove Buff	63304-0721-90	Diltiazem Hcl Er Coated Be 300 Cp24	None	-60	0	\$55.73	100.00 %	29	100.00 %	29	05/06/2022	
Remove Buff	27261-0114-05	Tadalafil 20 Mg Tablet	Low Service Level	-20	0	\$45.28	45.45 %	19	45.45 %	19	05/06/2022	
Remove Buff	16714-0407-01	Larin 1.5/30 1.5-30mg-Mcg Tabs	Low Service Level	-63	0	\$43.96	83.33 %	20	83.33 %	20	05/07/2022	
Remove Buff	16714-0484-01	Divalproex Sodium Er 250mg Tb24	Low Service Level	-60	0	\$43.91	66.66 %	89	66.66 %	89	05/06/2022	
Remove Buff	29300-0355-10	Tramadol Hcl 50 Mg Tablet	Low Service Level	-316	0	\$26.12	61.81 %	89	50.90 %	87	05/06/2022	

1 - 20 of 43 items

Critical Inventory Report

The *Critical Inventory Report* provides a listing of all inventory items flagged as *Critical Inventory*. The *Critical Inventory* flag can be removed at any time by clicking a *Drug Identifier* to display the *Inventory Details* page, click on *Edit Settings* and uncheck the box for *This item is Critical Inventory*.

To access the report, go to *Reports* → *Datarithm Restrictions* → *Critical Inventory*.

Dispensing Reports

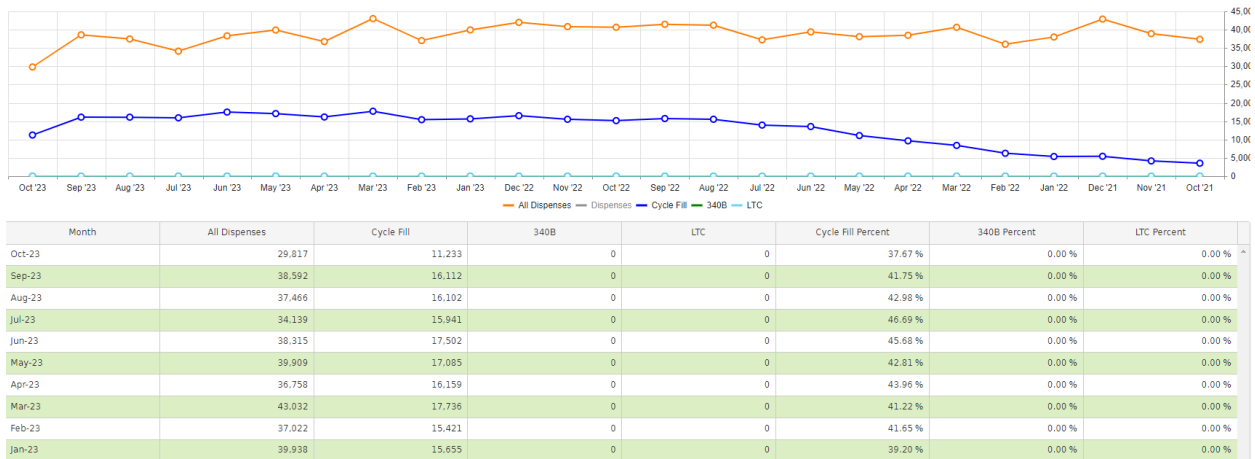
Dispense Type Report

The *Dispense Type Report* shows how a customer is trending with regards to various types of dispensing. A customer may find that they are doing more or less dispensing of a certain type over time. Dispense types include:

- ✓ Cycle Fill (also known as “med-synch”, or “synch fill”)
- ✓ 340B
- ✓ Long Term Care (LTC)

To access the report, go to *Reports* → *Dispensing Reports* → *Dispense Type Report*.

Dispense Type Report

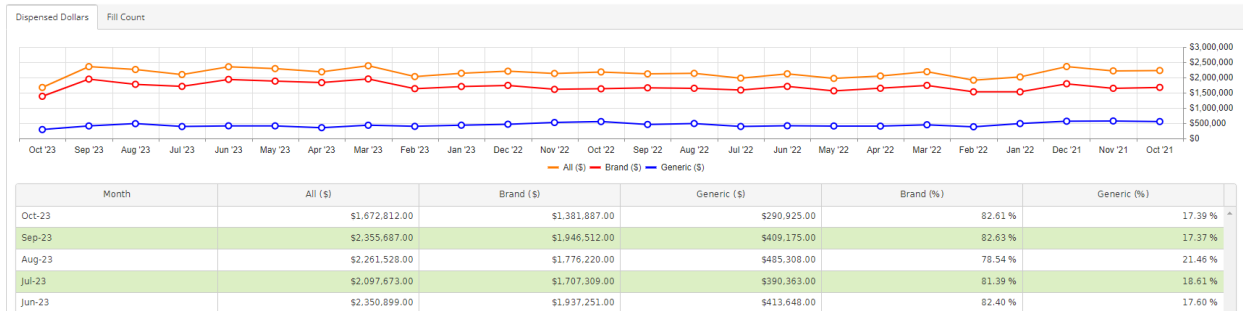


Brand/Generic Dispensing Report

The *Brand/Generic Dispensing Report* shows how a customer is trending with regards to dispensing brand (expensive) vs. generic (inexpensive) inventory items. A customer may find that they are doing more or less dispensing of a certain type over time.

To access the report, go to Reports → Dispensing Reports → Brand/Generic Dispensing Report.

Brand/Generic Dispensing Report



Generic Groups

Generic Group Summary Report

The *Generic Group Summary Report* shows how many generic groups (equivalent ordering groups) have two or more NDCs with a positive order point in the PMS. This condition is problematic as it prevents Datarithm from updating the order point in the PMS.

To access the report, go to Reports → Generic Groups → Generic Group Summary Report.

Equivalent Ordering Summary Report

The *Equivalent Ordering Summary Report* shows how well a customer has adopted the equivalent ordering features within their PMS. In general, generic oral solids should be configured (in the PMS) for equivalent ordering, and generic non-oral solids should be configured (in the PMS) for equivalent ordering with package size.

To access the report, go to Reports → Generic Groups → Equivalent Ordering Summary Report.

Inventory Reports

Inventory with Negative on Hand Report

The *Inventory with Negative on Hand Report* displays all drug records that have negative current on-hand values. Several fields are included to show the actual on-hand amount for each distinct drug, as well as the overall amount for the generic equivalency group, and the net on hand.

To access the report, go to *Reports* → *Inventory Reports* → *Inventory with Negative On Hand Report*.

Surplus Inventory Report

The *Surplus Inventory Report* displays all inventory items that are deemed by Datarithm to be in surplus. If there is more on-hand than would be expected based upon the replenishment points and general notions of perpetual inventory, then the item is considered to be in surplus. Surplus can be categorized as either “overstock” (item is being dispensed but there is still too much on hand) and “dead” (item has not been dispensed in 4+ months).

To access the report, go to *Reports* → *Inventory Reports* → *Surplus Inventory Report*.

Dormant Inventory Report

The *Dormant Inventory Report* displays actively dispensed inventory items (that are not in Surplus), where non-preferred members have a positive On Hand but no dispensing within the past 4 months. Effectively, this report will reveal "dormant inventory" so that it can be dispensed before expiration.

To access the report, go to *Reports* → *Inventory Reports* → *Dormant Inventory Report*.

Controlled Inventory Report

The *Controlled Inventory Report* provides details related to controlled inventory items. In the US, these are items that are classified as C2, C3, C4 and C5. In Canada, these are items classified as N, G or T. Use the filter panel to filter this report on brand or generic items, as well as drug schedule. Equivalent inventory items (i.e. those that share the same GPI or GCN) are banded together with the same background color so that generic equivalents and their chemically equivalent brands can be viewed together.

To access the report, go to *Reports* → *Inventory Reports* → *Controlled Inventory Report*.

Suspicious Ordering Report

The *Suspicious Ordering Report* provides details related to items that are possibly being ordered and stocked in a suspicious fashion. These items are currently stocked at levels that exceed expectations based on the replenishment points in the pharmacy management system. The report focuses on controlled substances (C2 - C5 in the US and N, G & T in Canada) and expensive items. Controlled substances are always shown in this report (regardless of the acquisition cost of the suspicious quantity) while non-controlled substances are included if the acquisition cost of the suspicious quantity (i.e. the *Suspicious Dollars*) is greater than the *Suspicious Dollar Threshold* specified in the filter panel. The report is sorted by default on *Suspicious Dollars* (descending).

Items listed in this report should be considered for “spot” inventory counts to reveal potential diversion. If potential diversion is not at issue, correcting manual overstocking practices can assist in achieving goals for inventory reduction.

Note: Some listed items may have experienced usage decline, causing replenishment point reductions which then characterized on-hand quantities as potentially suspicious.

To access the report, go to *Reports* → *Inventory Reports* → *Suspicious Ordering Report*.

Suspicious Ordering Report



Drug Identifier	Drug Name	Do Not Manage	Drug Schedule	Current Units On Hand	Suspicious Quantity	Suspicious Dollars ↓	Current Min	Current Max	Forecast Min	Forecast Max
57599-0800-00	Freestyle Libre 2 Sensor	false	R	80.00	78.00	\$4,808.70	1.00	2.00	1.00	2.00
72603-0129-01	Icosapent Ethyl 1 Gram Capsule	false	R	1,578.00	1,099.00	\$2,025.90	-1.00	0.00	359.00	360.00
66993-0605-36	Etonogestrel Mis Ethy Est	false	R	25.00	15.00	\$1,688.20	1.00	2.00	1.00	2.00

Dead But Increasing On Hand Report

The *Dead But Increasing On Hand Report* displays “dead” inventory items (no dispensing in 4+ months) that have On Hand amounts that have trended upwards during that same period. This report can be used to initiate investigation into why additional inventory is being acquired for dead items.

To access the report, go to *Reports* → *Inventory Reports* → *Dead But Increasing On Hand Report*.

High Cost Low Usage Report

The *High Cost/Low Usage Report* is designed to highlight expensive inventory items with relatively low dispense frequencies. These inventory items are often good candidates to not stock, but instead use Datarithm’s *Order Alert* functionality or a similar date-triggered replenishment mechanism in your pharmacy management system (PMS) to order the item just prior to the scheduled patient refill. By default, the report is sorted by Package Cost in descending order. “Hits” represents the number of fills in each of those months. The filter panel allows you to filter on package cost and brand/generic.

To access the report, go to *Reports* → *Inventory Reports* → *High Cost Low Usage Report*.

60 and 90 Day Fill Pattern Report

The 60 and 90 Day Fill Patterns Report displays inventory items that are being dispensed every 60 or 90 days. These items, depending upon cost, should be considered as candidates for Order Alerts. By default, the report is sorted by Package Cost in descending order. The filter panel allows you to filter on fill pattern, package cost and brand/generic.

To access the report, go to *Reports* → *Inventory Reports* → 60 and 90 Day Fill Patterns Report.

Package Discrepancies Report

The Package Discrepancies Report displays items where the package cost at a specific pharmacy differs from the package cost observed at other locations across the company. Using the *Cost Discrepancy Threshold* in the filter panel, you can define your discrepancy tolerance level (%) – where discrepancies are equal to or above the percentage threshold selected. The lower the *Cost Discrepancy Threshold*, the larger the number of instances with cost discrepancies, while selecting higher *Cost Discrepancy Thresholds* will return only the most significant discrepancies in package cost.

Please note that this report is only applicable to customers who have two or more locations.

To access the report, go to *Reports* → *Inventory Reports* → *Package Discrepancies Report*.

Omni Report

The *Omni Report* makes available all the pertinent data points related to your inventory items (often times equivalent groups). Use the column selector in the filter panel to select data points that are the most relevant for your scrutiny or de-select to remove data points initially displayed by default.

To access the reports, go to *Reports* → *Inventory Reports* → *Omni Report*.

Omni Detail Report

The *Omni Detail Report* makes available all the pertinent data points related to each individual NDC within a customer's formulary (whereas the Omni Report, described above, aggregates NDCs according to GPI). Users can filter on brand/generic as well as drug schedule.

To access the reports, go to *Reports* → *Inventory Reports* → *Omni Detail Report*.

Order Alerts Report

The *Order Alerts Report* displays all Order Alerts created by the customer within Datarithm. Users have the option of filtering by location, alert status (pending, completed, or all), and alert date. Order Alerts are intended to be used to alert pharmacy staff when expensive items should be ordered so that pharmacies can achieve "just in time" procurement for expensive items just prior to patient dispensing, instead of keeping costly inventory in stock for lengthy periods of time (see the *Order Alerts* section in this document).

To access the reports, go to *Reports* → *Inventory Reports* → *Order Alert Report*.

Time to Burn Down Summary Report

The *Time to Burn Down Summary Report* provides estimated timeframes for inventory reduction through *Sales*, *Returns*, *Transfers*, and *Liquidations*.

To access the report, go to *Reports* → *Inventory Reduction Details* → *Time to Burn Down Summary Report*.

Reduction Through Sales Report

The *Reduction Through Sales Report* displays details of all items aggregated in the *Sales* column of the *Time to Burn Down Summary Report*.

Sorting by the *Sell Down \$* column in descending order ranks the inventory by the dollar value of its expected inventory reduction. The *Sell Down Days* column displays the timeframe expected to reduce the on-hand level produced by the *Forecast Min/OP* and *Forecast Max/OQ*.

To access the report, go to *Reports* → *Inventory Reduction Details* → *Reduction Through Sales Report*.

Order Alternatives

Generically Equivalent Alternatives Report

The *Generically Equivalent Alternatives Report* shows ordering alternatives (different manufacturers, different package sizes, etc.) that reduce planned excess and/or unit cost, and thus overall inventory investment. By default, the report is presented *Investment Difference \$* descending. The report can be filtered on brand/generic.

The main drivers of this report are the consideration of smaller pack sizes that are more appropriate based on historical dispensing levels, and of using items with lower unit costs. In the group listed below, using a 60-pack instead of the 500-pack could lower the inventory investment level by \$739.61. Please note that all costs are based on data provided to Datarithm by the Pharmacy Management System.

To access the report, go to *Reports* → *Ordering Alternatives* → *Generically Equivalent Alternatives*.

Generically Equivalent Alternatives Report



Drug Identifier	Drug Name	Manufacturer	Package Size	Package Cost	Unit Cost	1 Week Forecast Usage	Investment (\$)	Investment Difference (\$)
59762-0800-06	Tolterodine Tartrate 2 Mg Tab	GREENSTONE	500.00	\$777.05	\$1.55	30.00	\$777.05	
33342-0099-09	Tolterodine 2mg	MACLEODS PHA	60.00	\$37.44	\$0.62	30.00	\$37.44	\$739.61

Optimal Order Quantity Report

The Optimal Order Quantity Report displays inventory items where the preferred item's package size is greater than what is likely to be dispensed during the selected Replenishment Term (e.g., 1 week, 2 weeks, etc.). In other words, this report highlights items where the package size that is currently being ordered is unnecessarily large. The report can be filtered by brand vs. generic (or both) and replenishment term. The purpose of this report is to allow the customer to review items that could possibly be ordered using a smaller package size (and thus reducing the customer's overall inventory level).

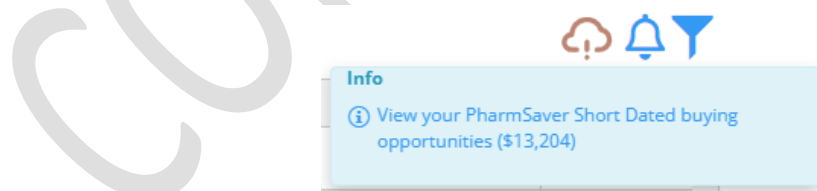
To access the report, go to *Reports* → *Ordering Alternatives* → *Optimal Order Quantity Report*.

PharmSaver Short Date Opportunities Report

The *PharmSaver Short Date Opportunities Report* displays short-dated purchasing opportunities available through PharmSaver.

PharmSaver is a service that helps pharmacies reduce inventory purchasing costs by connecting pharmacies with independent wholesalers. Wholesalers compete for your business by offering you short-dated inventory purchasing opportunities at substantial discount over your primary wholesaler.

To get started with PharmSaver, click on the Notification icon in the top right corner of the page and then click on the PharmSaver link.



This link will be displayed when there are "Short Date" purchasing opportunities available within PharmSaver that match the drugs (and generic equivalents) that are actively dispensed at your location(s). The aggregate savings opportunity is calculated (using PharmSaver's Short Date pricing and Datarithm's forecast usage) and displayed as part of the link.

The report displays line-item detail related to short-dated buying opportunities. Among the various data points available in the report are a comparison of unit cost (customer's unit cost through their primary wholesaler vs. PharmSaver's unit cost) as well as a calculation of savings by item based upon a

recommended purchase quantity (that is derived from Datarithm’s forecast usage, existing On Hand, and the item’s expiration date). Customers wishing to purchase these short-dated items from PharmSaver can do so by clicking on the PharmSaver logo above the report or by visiting <https://www.pharmsaver.net/>. Once there, select New Pharmacy on the PharmSaver site (note that PharmSaver is a free service).

PharmSaver Short Date Opportunities Report



Pharmacy	Drug Identifier	Drug Name	Package Size	Unit Cost	PharmSaver Unit Cost	Profit per Unit	Profit per Package	Forecast Monthly Usage	Recommended Quantity (Packages)	Profit at Recommended Quantity	Lot Expiration Date
Roberts - North Branch Pharmacy	00591-2465-01	Desmopressin Acetate 0.2 MG TABS (100)	100.00	\$0.85	\$0.19	\$0.66	\$66.03	102.86	8	\$528.24	5/1/2024
Roberts - Timberland Pharmacy	00472-0400-30	Clobetasol Propionate 0.05% CREA (30)	30.00	\$0.46	\$0.10	\$0.36	\$10.89	150.00	48	\$522.67	5/1/2024
Roberts - Main Street Pharmacy	00781-2824-31	FLUoxetine HCl 40 MG CAPS (30)	30.00	\$0.07	\$0.00	\$0.07	\$2.13	731.50	224	\$476.90	5/1/2024
Roberts - Lake Shore Pharmacy	00093-7271-05	Pioglitazone HCl 15 MG TABS (500)	500.00	\$0.14	\$0.04	\$0.10	\$49.01	470.50	9	\$441.09	5/1/2024
Roberts - Timberland Pharmacy	00781-2824-31	FLUoxetine HCl 40 MG CAPS (30)	30.00	\$0.07	\$0.00	\$0.06	\$1.94	713.14	218	\$422.92	5/1/2024
Roberts - Lake Shore Pharmacy	16571-0202-11	Diclofenac Sodium 50 MG TBEC (1000)	1,000.00	\$0.10	\$0.03	\$0.08	\$79.31	534.06	5	\$396.55	5/1/2024
Roberts - Lake Shore Pharmacy	00781-2824-31	FLUoxetine HCl 40 MG CAPS (30)	30.00	\$0.07	\$0.00	\$0.06	\$1.94	641.00	198	\$384.12	5/1/2024
Roberts - North Branch Pharmacy	00781-2824-31	FLUoxetine HCl 40 MG CAPS (30)	30.00	\$0.07	\$0.00	\$0.06	\$1.94	628.86	183	\$355.02	5/1/2024
										\$12,252.90	

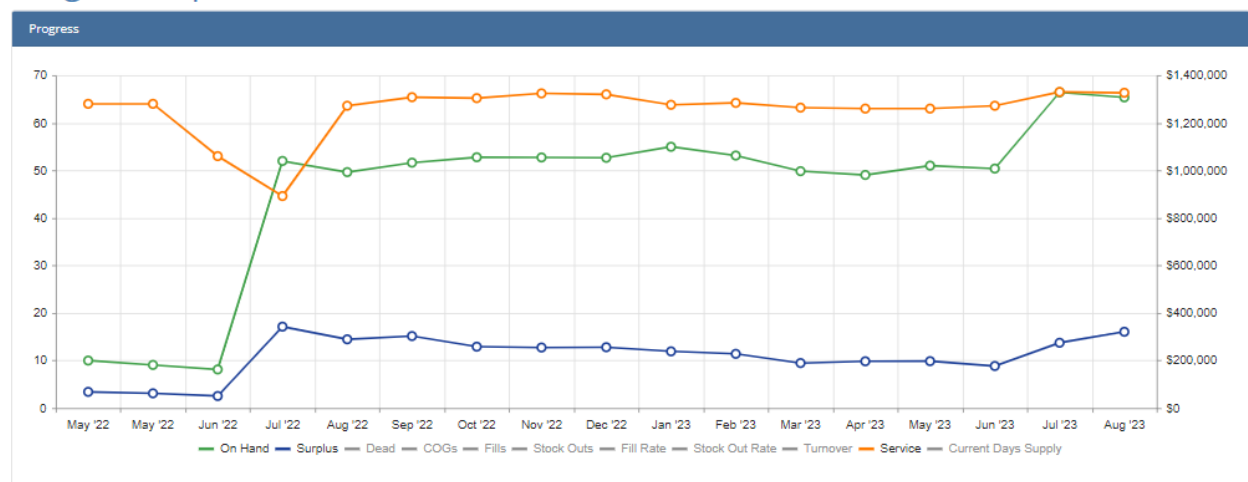
Performance Reports

Progress Report

The *Progress Report* provides an overall view of your inventory evolution since you began using Datarithm. The report tracks various measurements of inventory health and balancing operations over time via the *Forecasting, Balancing* and *Cycle Counting* sections.

To access the report, go to *Reports* → *Performance Reports* → *Progress Report*.

Progress Report



Forecast												
Export to Excel Export to CSV												
Date ↑	Locations	Current On Hand	Total Surplus	Dead Inventory	Cost Of Goods Sold	Fills	Stock Outs	Fill Rate	Stock Out Rate	Turnover	Service Level	Current Days Supply
May 11, 2022	1	\$199,907	\$68,203	\$42,721	\$359,672	7,219	0	100%	0%	17.32	64%	0.00
May 31, 2022	1	\$181,424	\$61,999	\$47,029	\$332,628	6,970	208	97.1%	2.9%	22.30	64%	39.83
Jun 30, 2022	1	\$162,492	\$50,659	\$39,123	\$374,246	7,617	605	92.64%	7.36%	23.64	53%	46.10
Jul 31, 2022	5	\$1,039,723	\$342,551	\$215,890	\$1,461,985	30,298	637	97.94%	2.06%	18.51	44.6%	25.21
Aug 31, 2022	5	\$992,699	\$289,334	\$196,451	\$1,570,584	33,755	1,873	94.74%	5.26%	18.88	63.6%	57.14
Sep 30, 2022	5	\$1,032,563	\$302,943	\$189,171	\$1,560,579	33,894	2,317	93.6%	6.4%	18.75	65.4%	55.15
Oct 31, 2022	5	\$1,055,351	\$258,298	\$181,388	\$1,545,239	33,484	2,099	94.1%	5.9%	18.62	65.2%	42.81
Nov 30, 2022	5	\$1,054,441	\$254,785	\$173,119	\$1,578,557	33,678	1,833	94.84%	5.16%	18.61	66.2%	44.82
Dec 31, 2022	5	\$1,052,988	\$255,961	\$177,390	\$1,640,640	34,477	1,772	95.11%	4.89%	18.53	66%	43.62
Jan 31, 2023	5	\$1,099,379	\$238,589	\$149,517	\$1,685,965	32,922	1,837	94.72%	5.28%	18.69	63.8%	43.60

Balance			
Activity	Completed This Month	Completed This Quarter	Completed Since Start
Returns	\$2,253	\$48,205	\$426,588
Transfers	\$2,670	\$18,778	\$298,740
Liquidations	\$8,138	\$8,138	\$8,138

Cycle Count		
Counted This Month	Counted This Quarter	Counted Since Start
0 (0) 0.00 %	3,215 (0) 0.00 %	46,255 (0) 0.00 %

Forecast Summary Report

The *Forecast Summary Report* provides the same forecast related metrics as the Progress Report but does so by listing these metrics for each pharmacy location within the customer’s organization, allowing the user to compare performance across all locations.

To access the report, go to *Reports* → *Performance Reports* → *Forecast Summary Report*.

Balance Summary Report

The Balance Summary Report provides a summary (by pharmacy) of the dollar value of items sent out of your location(s) through returns, transfers, and liquidations. This report can be filtered by *Start* and *End* dates.

To access the report, go to *Reports* → *Performance Reports* → *Balance Summary*.

Return Summary Report

The *Return Summary Report* provides a summary of pending and completed wholesaler returns for all your pharmacy locations. This report can be filtered by *Start* and *End* dates.

For customers with multiple locations, click on the column headers to rank-order the performance for each location, thus providing store-to-store comparison.

To access the report, go to *Reports* → *Performance Reports* → *Return Summary*.

Return Summary Report



Pharmacy	Pending			Completed			
	Items to Return	Extended Cost	Avg Time (Days) ↓	Items Returned	Extended Cost	Avg Time (Days)	Most Recent
Roberts - Timberland Pharmacy	134	\$19,644.98	85.20	380	\$116,446.72	35.21	10/16/2023
Roberts - Wilmington Pharmacy	111	\$10,524.94	77.70	111	\$31,613.74	13.47	10/16/2023
Roberts - North Branch Pharmacy	76	\$8,013.14	65.28	437	\$106,822.85	16.73	10/10/2023
Roberts - Main Street Pharmacy	39	\$5,334.34	53.96	288	\$54,163.66	11.47	10/12/2023
Roberts - Elm Street Pharmacy	17	\$401.68	51.38	374	\$57,272.95	7.23	12/4/2023
Roberts - Lake Shore Pharmacy	4	\$124.90	49.00	341	\$60,267.61	16.11	10/19/2023
	381	\$42,043.98	Avg: 63.75	1,931	\$426,587.51	Avg: 16.70	

Return Completed Detail Report

The *Return Completed Detail Report* provides line item detail on completed wholesaler returns. The report can be filtered on *Start* and *End* dates and you can navigate to the associated *Packing List* by clicking on the Return Number.

To access the report, go to *Reports* → *Performance Reports* → *Return Completed*.

Return Pending Detail Report

The *Return Pending Detail Report* provides additional details on items that have been recommended for wholesaler returns but that have not yet been processed.

To access the report, go to *Reports* → *Performance Reports* → *Return Pending*.

Transfer Summary Report

The *Transfer Summary Report* provides a summary of all the pending and completed transfers between your locations. This report can be filtered by *Start* and *End* dates.

For customers with multiple locations, click on the column headers to rank-order the performance for each location, thus providing store-to-store comparison.

To access the report, go to *Reports* → *Performance Reports* → *Transfer Summary*.

Transfer Completed Detail Report

The *Transfer Completed Detail Report* provides line item detail on completed transfers. The report can be filtered on *Start* and *End* dates, *Providing* and *Receiving Pharmacies*, *Brand/Generic* and *Drug Schedule*. You can navigate to the associated *Packing List* by clicking on the Transfer Number in the report.

For those items that have been received within Datarithm by the receiving pharmacy, this report will also display acquisition cost and extended cost at the receiving pharmacy. The *Extended Cost (Accounting)* field reflects unit cost at the sending pharmacy *times* the units received at receiving pharmacy.

To access the report, go to *Reports* → *Performance Reports* → *Transfer Completed*.

Transfer Completed Report



Transfer Number	Providing Pharmacy	Receiving Pharmacy	Drug Identifier	Drug Name	Units (Sent)	Extended Cost (Sent)	Date Sent ↓	Date Received
4615578	Roberts - Lake Shore Pharmacy	Roberts - Elm Street Pharmacy	00781-2145-05	Ampicillin 500 Mg Capsule	284.00	\$160.23	12/6/2023	12/6/2023
4615577	Roberts - Lake Shore Pharmacy	Roberts - Elm Street Pharmacy	00555-0483-02	Amlor/Hctz 5-50	50.00	\$36.31	12/6/2023	12/6/2023
4615576	Roberts - Lake Shore Pharmacy	Roberts - Elm Street Pharmacy	16714-0632-01	Alendronate 35mg	20.00	\$8.00	12/6/2023	12/6/2023
4615575	Roberts - Elm Street Pharmacy	Roberts - Lake Shore Pharmacy	59651-0026-75	Amoxicillin-Pot Clavulanate	75.00	\$61.50	12/6/2023	12/6/2023

Transfer Discrepancy Detail Report

The *Transfer Discrepancy Detail Report* provides details on items that have been both sent and received as part of the transfer process, and that resulted in a discrepancy between the sent and received amounts.

To access the report, go to *Reports* → *Performance Reports* → *Transfer Discrepancy*.

Transfer Completed Accounting Report

The *Transfer Completed Accounting Report* provides a summarization of net amount (dollars) owed between pharmacy locations for customers with multiple pharmacies that have executed Transfers. For customers with multiple locations that are processing Transfers within Datarithm, this report will help to answer the question: “Who owes how much (\$) to whom for a particular date range?” The report can be filtered on *Pharmacy*, *Start* and *End* date, *Brand/Generic* and *Drug Schedule*. The report will display the net amounts for all locations involved in a Transfer that completed (received) those Transfers within the selected date range. Note that rebate percentages can be specified in *Application Settings* that will be applied to this report to reflect the true cost basis for transferred inventory. See the *Wholesaler* section in *Application Settings* to learn how to specify these rebate values.

To access the report, go to *Reports* → *Performance Reports* → *Transfer Completed Accounting*.

Transfer Completed Accounting Report



The Brand and Generic Rebate Percentages can be specified in Application Settings in the Wholesaler section.

Brand Rebate: 0 %
Generic Rebate: 0 %

Pharmacy 1	Pharmacy 2	Pharmacy 1 Sent Pharmacy 2	Pharmacy 2 Sent Pharmacy 1	Pharmacy 2 Owes Pharmacy 1 ↓
Roberts - Timberland Pharmacy	Roberts - Lake Shore Pharmacy	\$3,798.41	\$290.28	\$3,508.13
Roberts - Wilmington Pharmacy	Roberts - Elm Street Pharmacy	\$2,332.48	\$282.54	\$2,049.94
Roberts - North Branch Pharmacy	Roberts - Main Street Pharmacy	\$1,524.83	\$0.00	\$1,524.83
Roberts - Wilmington Pharmacy	Roberts - North Branch Pharmacy	\$1,825.83	\$539.11	\$1,286.72
Roberts - Lake Shore Pharmacy	Roberts - North Branch Pharmacy	\$1,281.79	\$0.00	\$1,281.79
Roberts - Wilmington Pharmacy	Roberts - Lake Shore Pharmacy	\$1,042.87	\$0.00	\$1,042.87
Roberts - Timberland Pharmacy	Roberts - North Branch Pharmacy	\$1,339.09	\$304.20	\$1,034.89
Roberts - Lake Shore Pharmacy	Roberts - Main Street Pharmacy	\$449.45	\$0.00	\$449.45
Roberts - Wilmington Pharmacy	Roberts - Timberland Pharmacy	\$377.25	\$27.39	\$349.86
Roberts - Main Street Pharmacy	Roberts - Timberland Pharmacy	\$594.58	\$344.13	\$250.45
Roberts - Elm Street Pharmacy	Roberts - Main Street Pharmacy	\$173.67	\$0.00	\$173.67
Roberts - Main Street Pharmacy	Roberts - Wilmington Pharmacy	\$158.23	\$24.38	\$133.85
Roberts - North Branch Pharmacy	Roberts - Elm Street Pharmacy	\$148.09	\$31.81	\$116.28
Roberts - Timberland Pharmacy	Roberts - Elm Street Pharmacy	\$123.55	\$42.58	\$80.97
Roberts - Lake Shore Pharmacy	Roberts - Elm Street Pharmacy	\$438.00	\$391.72	\$46.28
				\$13,329.98

Note:

- The date filters are applied to the date that the item was received by the receiving pharmacy (within Datarithm). The date that the Transfer was sent by the providing pharmacy is irrelevant to this report.

- The Transfer must be processed as received in Datarithm to be included within this report (Transfers that are in-route but not yet received within Datarithm are excluded from this report).
- The cost basis used for all calculations is the sending location's cost.
- Rebate percentages as set in Application Settings are applied to the cost basis.
- The quantity (units) used for all calculations is the receiving location's confirmed quantity.

Transfer Pending Detail Report

The *Transfer Pending Detail Report* provides additional details on items that have been recommended for transfer but have not yet been processed.

To access the report, go to *Reports* → *Performance Reports* → *Transfer Pending*.

Liquidation Summary Report

The *Liquidation Summary Report* provides a summary of pending and completed liquidations (via returns company, reverse distributor, or some other means). This report can be filtered by *Start* and *End* dates.

To access the report, go to *Reports* → *Performance Reports* → *Liquidation Summary*.

Liquidation Completed Detail Report

The *Liquidation Completed Detail Report* provides additional details on items that have been sent out of the pharmacy as part of the liquidation process. This report can be filtered by *Start* and *End* dates. You can navigate to the associated *Packing List* by clicking on the *Liquidation Number* in the report.

To access the report, go to *Reports* → *Performance Reports* → *Liquidation Completed*.

Liquidation Pending Detail Report

The *Liquidation Pending Detail Report* provides additional details on items that have been recommended for liquidation but have not yet been processed.

To access the report, go to *Reports* → *Performance Reports* → *Liquidation Pending*.

Cycle Count Summary Report

The *Cycle Count Summary Report* provides a summary of completed cycle counts by pharmacy. This report can be filtered by *Start* and *End* dates.

Discrepancy details will not be displayed in the report if your company has chosen to use the *Expedited Cycle Count* method in Datarithm. *Avg Time (days)* column represents the time between when a list of items is recommended for counting by Datarithm and when the actual counting takes place. *Count Date* shows the most recent date that a count was performed at each location, and *Status* provides an indication of whether the Cycle Counting feature is enabled, suspended, or paused at each location.

For customers with multiple locations, click on any of the column headers to provide location comparison.

To access the report, go to *Reports* tab → *Performance Reports* → *Cycle Count Summary*.

Cycle Count Summary Report



Pharmacy †	Items in Inventory	Items Counted	Discrepancies	Discrepancies Ratio	Avg Time (days)	Count Date	Status
Roberts - Elm Street Pharmacy	3,643	6,095	0	0 %	0.56	10/20/2023	Active
Roberts - Lake Shore Pharmacy	4,446	7,626	0	0 %	0.29	10/20/2023	Active
Roberts - Main Street Pharmacy	3,827	6,555	0	0 %	0.77	10/19/2023	Active
Roberts - North Branch Pharmacy	4,483	7,723	0	0 %	0.32	10/21/2023	Active
Roberts - Timberland Pharmacy	4,363	7,134	0	0 %	0.83	10/20/2023	Active
Roberts - Wilmington Pharmacy	4,996	1,616	0	0 %	0.39	10/20/2023	Active
	25,758	36,749	0	0 %	0.53		

Items per page: 20 | 1 - 6 of 6 items

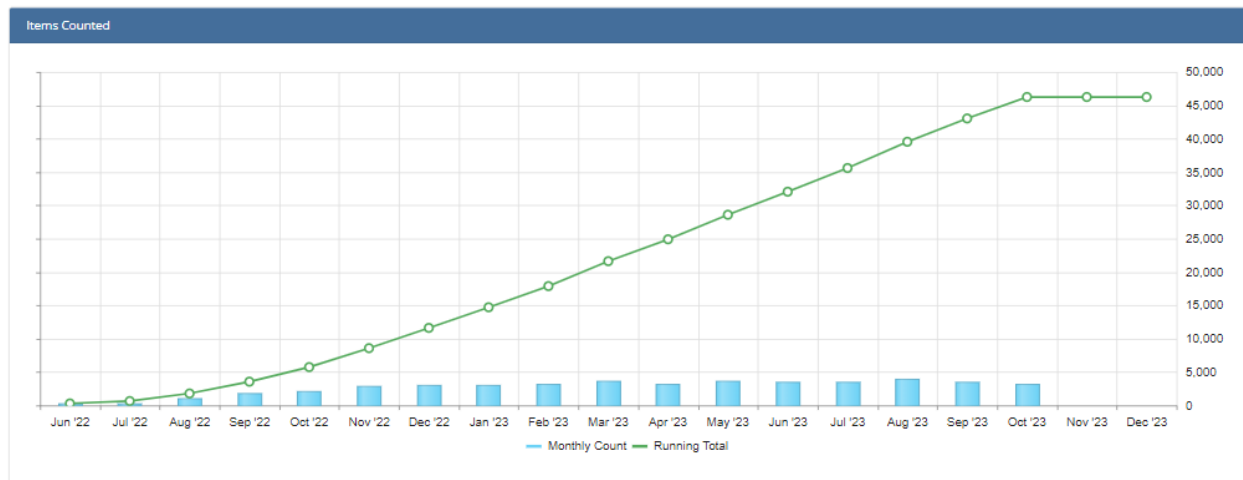
Cycle Count Adherence Report

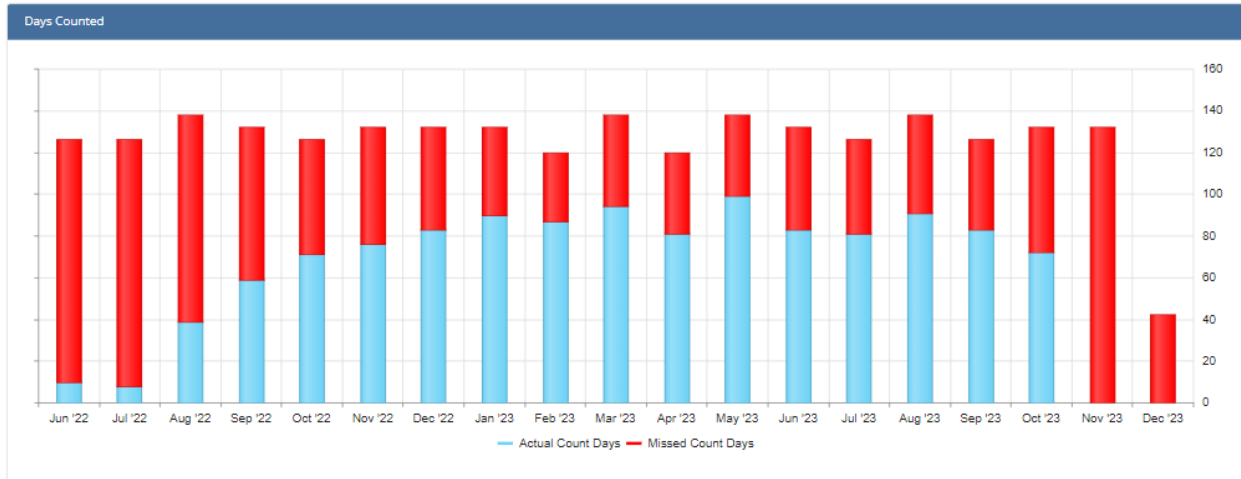
The *Cycle Count Adherence Report* highlights the rate at which each location completes cycle counts (Success Rate) or, conversely, the rate at which it fails to complete counts (Failure Rate). There are also two charts on the page that show item counting progress and actual vs. missed count days. This report can be filtered by *Start* and *End* dates.

For customers with multiple locations, click on any of the column headers to provide location comparison.

To access the report, go to *Reports* → *Performance Reports* → *Cycle Count Adherence Report*.

Cycle Count Adherence Report





Details

Export to Excel Export to CSV

Pharmacy	Configured Count Days	Actual Count Days	Missed Count Days	Success Rate ↓	Failure Rate
Roberts - North Branch Pharmacy	333	302	31	90.69 %	9.31 %
Roberts - Elm Street Pharmacy	342	249	93	72.81 %	27.19 %
Roberts - Lake Shore Pharmacy	397	283	114	71.28 %	28.72 %
Roberts - Main Street Pharmacy	349	247	102	70.77 %	29.23 %
Roberts - Timberland Pharmacy	344	172	172	50 %	50 %
Roberts - Wilmington Pharmacy	84	36	48	42.86 %	57.14 %

1 20 items per page 1 - 6 of 6 items

Cycle Count Completed Report

The *Cycle Count Completed Report* displays item level detail for completed cycle counts. This report can be filtered by *Start* and *End* dates. Note that when *Expedited Cycle Count* method is being used, the unit and dollar discrepancies are not displayed by default in this report.

To access the report, go to *Reports* → *Cycle Counting* → *Cycle Count Completed*.

Ranking Reports

Top N Report

The *Top N Report* displays the top 50, 100, 200 or 500 inventory items based on the selected metric. This list of inventory items can be ranked based upon *frequency* of dispense, *cost* of dispensed items, *quantity* (units) of dispensed items, and forecast (future) monthly usage. The report can be further filtered by *Pharmacy*, *Brand/Generic*, and *Start* and *End* date. The purpose of this report is to allow the customer to see the segment of their inventory that is deserving of additional attention (e.g., placement within a robot, candidates for bulk buying, etc.).

Top N Report



Rank Number ↑	Drug Identifier	Drug Name	Manufacturer	Drug Schedule	Current Units On Hand	Extended Cost	Frequency	Cost	Quantity	Forecast Monthly Usage
1	65862-0560-99	Pantoprazole 40mg	AUROBINDO	R	4,281.00	\$282.43	5,765	\$16,664.55	253,418.00	22,727.50
2	13868-0081-05	Montelukast Sod 10 Mg Tablet	Torrent Ph	R	23,159.00	\$1,421.96	4,194	\$9,721.31	152,264.00	13,611.33
3	00406-0125-01	Hydroco/Apap 10-325mg	MALLINCKRODT	2	4,378.00	\$640.82	4,064	\$54,598.05	374,917.00	43,219.74
4	29300-0398-10	Amlodipine 10 Mg Tab	UNICHEM	R	5,763.00	\$99.80	3,843	\$2,907.62	162,245.00	15,764.87
5	68180-0963-01	Albuterol Hfa 90 Mcg Inhaler	LUPIN	R	1,102.00	\$2,827.86	3,728	\$111,695.81	41,315.50	3,809.18
6	29300-0355-10	Tramadol HCl 50 Mg Tablet	SUN PHARMACEUTICAL/...	4	6,326.00	\$368.01	3,610	\$10,291.39	229,341.00	26,948.91
7	16714-0175-03	Atorvastatin 40 Mg Tablet	NORTHSTAR	R	13,178.00	\$904.01	3,479	\$10,533.17	143,932.00	14,322.33
8	67877-0198-90	Amlodipine 5mg	Ascendiabs	R	8,614.00	\$106.89	3,362	\$1,804.73	146,705.00	13,933.86

Rank Report

The *Rank Report* displays inventory items for a particular Rank or Counting Category. The most frequently dispensed drugs and most expensive drugs will be assigned ranks of A. The least frequently dispensed drugs and cheapest items will be assigned ranks of D. These rankings are then combined to derive a Cycle Counting Category. The frequency with which an item is Cycle Counted is dependent upon the customer's *Cycle Count Settings* (described elsewhere in this document) as well as the inventory item's Cycle Counting Category.

To access the report, go to *Reports* → *Ranking Reports* → *Rank Report*.

Replenishment Point Reports

Replenishment Point Increases Report

The *Replenishment Point Increases* report displays items that Datarithm seeks an increase in inventory through an increase in replenishment points. The increase is evidenced through the difference between the *Current and Forecast Min/OP*. The dollar impact is displayed as the *Current to Forecast \$ Difference* data point. The *Slider Trigger Position* indicates the position of the *Slider* needed for increases to be allowed to the Pharmacy Management System. You can view the number of inventory items that would be increased if the *Slider* was to be advanced beyond its current position by selecting a desired *Slider* position via the *Slider Position* filter.

- ✓ When the *Current to Forecast \$ Diff* exceeds the *Slider Trigger Position*, Datarithm's forecast replenishment points are blocked from being sent to your Pharmacy Management System by the slider.
- ✓ When the *Current to Forecast \$ Diff* is less than the *Slider Trigger Position* and the current and forecast replenishment points are not the same, either Datarithm has not sent them because updates have not yet been enabled, or replenishment point updates are not being successfully applied in the Pharmacy Management System.
- ✓ Replenishment point updates can be forced into the PMS (regardless of the slider position) by clicking the "Force Update" button.

To access the report, go to *Reports* → *Replenishment Point Reports* → *Replenishment Point Increases Report*.

Replenishment Point Increases Report



	Pharmacy	Drug Identifier	Drug Name	Current Units On Hand	Forecast Monthly Usage	Current Min	Forecast Min	Current to Forecast \$ Diff	Purchase Order Impact (\$)	Usage Pattern	Current Slider Position	Slider Trigger Position
Force Update	Roberts - Elm Street Pharmacy	00574-0508-01	Ferrous Gluc 324mg	0.00	37.50	0.00	29.00	\$4.50	\$5.69	New	\$250.00	\$10.00
Force Update	Roberts - Elm Street Pharmacy	43547-0421-50	Lisinopril-Hydrochlorothiazide 20-12.5 Mg Tab	860.00	927.00	267.00	359.00	\$5.29	\$0.00	Recurring	\$250.00	\$10.00
Force Update	Roberts - Elm Street Pharmacy	50027-0494-41	Spacer Chamber Adult/Child Mask	0.00	1.00	0.00	0.00	\$9.98	\$0.00	Recurring	\$250.00	\$10.00
Force Update	Roberts - Elm Street Pharmacy	00932-1214-00	Jantoven 3 Mg Tablet	90.00	45.00	29.00	119.00	\$21.69	\$24.10	Recurring	\$250.00	\$25.00
Force Update	Roberts - Elm Street Pharmacy	47781-0357-03	Bupren/Nalox Mis 8-2mg	0.00	298.43	89.00	96.00	\$24.38	\$417.96	Recurring	\$250.00	\$25.00

Replenishment Point Decreases Report

The *Replenishment Point Decreases* report displays items that Datarithm seeks to reduce inventory through a reduction in replenishment points. The decrease is evidenced through the difference between the *Current* and *Forecast Min/OP*. The dollar-impact is displayed as the *Current to Forecast \$ Difference* data point.

To access the report, go to *Reports* → *Replenishment Point Reports* → *Replenishment Point Decreases Report*.

Replenishment Point Decreases Report



	Pharmacy	Drug Identifier	Drug Name	Current Units On Hand	Forecast Monthly Usage	Current Min	Forecast Min	Current to Forecast \$ Diff	Purchase Order Impact (\$)	Usage Pattern	Current Slider Position	Slider Trigger Position
	Chancy Drugs Lake Park	00713-0936-81	Colesevelam 625 Mg Tablet	592.00	390.00	719.00	539.00	(\$107.96)	\$0.00	Recurring	\$250.00	\$0.00
	Roberts - Elm Street Pharmacy	24979-0232-01	Potassium Cl Er 20 Meq Tablet	240.00	568.33	239.00	155.00	(\$39.51)	\$0.00	Recurring	\$500.00	\$0.00
	Chancy Drugs Lake Park	00093-0311-05	Loperamide 2mg	232.00	102.88	95.00	79.00	(\$4.83)	\$0.00	Recurring	\$250.00	\$0.00
	Chancy Drugs Adel	43547-0050-03	Tadalafil 10 Mg Tablet	100.00	35.50	29.00	23.00	(\$2.43)	\$0.00	Recurring	\$250.00	\$0.00
	Chancy Drugs Valdosta	69315-0312-28	Procto-Med Hc 2.5% Cream	136.00	56.00	29.99	27.99	(\$0.69)	\$0.00	Recurring	\$500.00	\$0.00

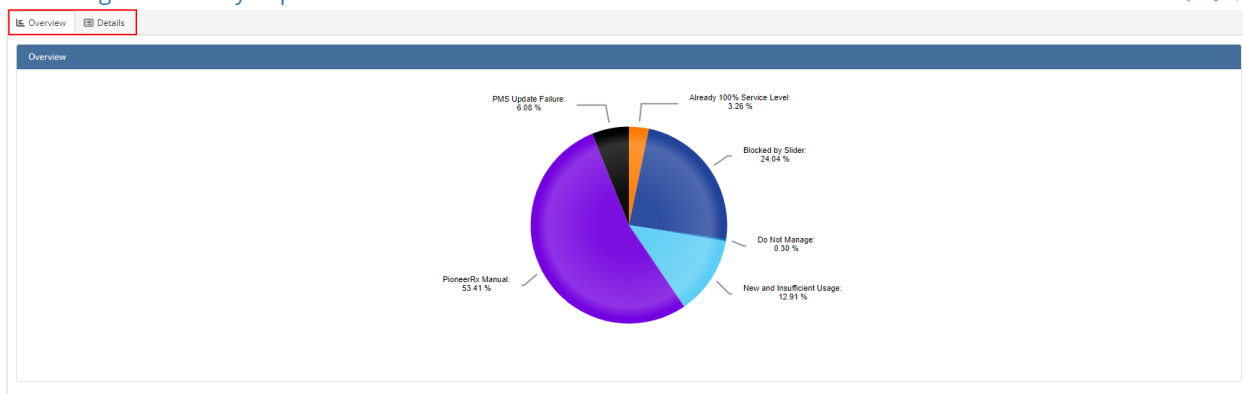
1 - 5 of 5 items

Unmanaged Inventory Report

The *Unmanaged Report* displays inventory items where Replenishment Point updates are not being updated in the PMS for one or more of reasons. The user can toggle between a chart view and table view. The slices of the chart may be clicked to filter the table view on that particular reason. The user can also filter on the *Reason* the items' replenishment points are not being managed

To access the report, go to *Reports* → *Replenishment Point Reports* → *Unmanaged Inventory Report*.

Unmanaged Inventory Report



Unmanaged Inventory Report



Drug Identifier	Drug Name ↑	Package Size	Package Cost	Current Units On Hand	Extended Cost	Current Min	Forecast Min	Current to Forecast \$ Diff	Inactive	Reason
52817-0816-15	Acetic Acid 2% Ear Solution	15.00	\$12.77	0.00	\$0.00	0.00	14.99	\$19.15	false	New and Insufficient Usage
63323-0691-30	Acetylcyst Sol 10%	90.00	\$65.56	120.00	\$87.41	-1.00	29.99	\$54.62	false	New and Insufficient Usage
72578-0002-01	Acyclovir 200 Mg Capsule	100.00	\$14.25	57.00	\$8.12	-1.00	59.00	\$15.53	false	PioneerRx Manual
54092-0291-01	Adderall XR 30mg	100.00	\$680.31	163.00	\$1,108.91	-1.00	29.00	\$537.44	false	Blocked by Slider
00024-5926-05	Admelog 100 Unit/ml Vial	3.00	\$37.52	0.00	\$0.00	-1.00	-0.01	\$0.00	false	PioneerRx Manual
00173-0686-00	Advair Disku Aer 250/50	60.00	\$378.21	0.00	\$0.00	-1.00	59.00	\$561.01	false	Blocked by Slider

Replenishment Point Update Summary Report

The *Replenishment Point Update Summary Report* displays the number of replenishment point updates that were attempted yesterday. Values in the *Successes* column indicate that the replenishment point in the Pharmacy Management System matches what was delivered by Datarithm yesterday (replenishment point update successes). Values in the *Failures* column indicate that the replenishment points in the Pharmacy Management System do not match what was delivered by Datarithm yesterday (replenishment points update failures). Reasons for failures are Pharmacy Management System dependent. Datarithm will continue to send failed updates until they succeed.

To access the report, go to *Reports* → *Inventory Reports* → *Replenishment Point Update Summary*.

Replenishment Point Updates Report

The *Replenishment Point Updates Report* displays the exact values that Datarithm sent as part of the replenishment point updates process for the selected pharmacy and date range. This report can be filtered on *Start* and *End* dates.

To access the report, go to *Reports* → *Inventory Reports* → *Replenishment Point Updates*.

Updates Retrieval Report

The *Updates Retrieval* report assists you in identifying any interruptions between Datarithm and your Pharmacy Management System. The report provides details regarding your Pharmacy Management System's retrieval of updates provided by Datarithm. The updates contain replenishment point updates and/or on-hand updates, depending upon how Datarithm is configured to interact with your Pharmacy Management System.

Created represents the most recent date that Datarithm made updates available for retrieval by your Pharmacy Management System. *Retrieval* represents the date updates were last retrieved by your Pharmacy Management System. *Retrieval Failure Days* represents the number of consecutive days between the *Created* and *Retrieved* dates. The *Replenishment Point Updates Enabled* and *On-Hand Updates Enabled* data points can be added from the *Columns* selector in the filter panel.

To access the report, go to *Reports* → *Replenishment Point Reports* → *Updates Retrieval Report*.

Stock Out Reports

Stock Out Summary Report

The *Stock Out Summary Report* displays an aggregate view into the instances when an item went from having non-negative On Hand (either zero or positive units on hand) to negative On Hand, which is

indicative of a stockout (i.e., an “owe”, “IOU”, etc.). The purpose of this report is to illuminate those items that are most frequently experiencing a stock out. The report shows the items that have experienced a stockout during a particular time frame, and the number of stockouts that occurred. Such items should be considered for:

- ✓ Allowing Datarithm to manage the replenishment point if currently blocked.
- ✓ Applying a Min/OP Buffer or flagging as “Critical Inventory”.
- ✓ Force Forecast Min/OP.

All of the above features can be managed from the *Inventory Details* page described later in this document. This report can be filtered on item *Status* and *Start* and *End* dates.

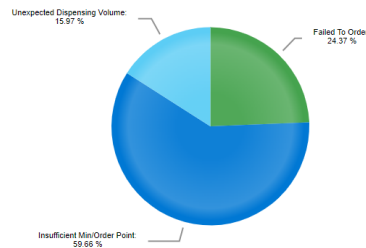
To access the report, go to *Reports* → *Stock Out Reports* → *Stock Out Summary Report*.

Stock Out Detail Report

The *Stock Out Detail Report* displays individual instances when an item went from having non-negative On Hand (either zero or positive units on hand) to negative On Hand, which is indicative of a stock out (i.e., an “owe”, “IOU”, etc.). The purpose of this report is to allow the user to review the detailed stock out events of a particular inventory item during a particular time frame. There is also a chart that characterizes the causes of the displayed stock outs into three categories. This report can be filtered on items *Status*, *Brand/Generic*, *stockout Reason*, *Equivalent On Hand*, and *Start* and *End* date.

To access the report, go to *Reports* → *Stock Out Reports* → *Stock Out Detail Report*.

Stock Out Detail Report



Drug Identifier	Drug Name	Stock Out Date ↓	Previous On Hand	Item On Hand	Group On Hand	Current Min	Forecast Min	Package Size	Reason
08627-0016-01	Dexcom G6 Mis Transmit	10/21/2023	0.00	-1.00	0.00	0.00	0.00	1.00	Unexpected Dispensing Volume
00002-7715-59	Basaglar 100u/MI Kwikpen	10/20/2023	0.00	-15.00	0.00	14.00	44.99	15.00	Failed To Order
42799-0921-01	Bisoprolol-Hydrochlorothiazide 5-6.25 Mg Tab	10/20/2023	65.00	-25.00	0.00	-1.00	89.00	100.00	Insufficient Min/Order Point
51862-0455-04	Clonidine Dis 0.3/24hr	10/20/2023	4.00	-8.00	0.00	-1.00	-1.00	4.00	Unexpected Dispensing Volume
51672-4048-06	Clotrim/Beta Cre Diprop	10/20/2023	0.00	-45.00	0.00	-1.00	44.99	45.00	Insufficient Min/Order Point

System Reports

Data Interface Report

The *Data Interface Report* displays each pharmacy location, along with their pharmacy management system (PMS), most recent data delivery dates, last forecast date, and most recent updates retrieval date. Whenever the dates for any file in this report are red, it means that there was a disruption of the data interface by the PMS. When this happens, certain features in Datarithm (for that location) may be disabled due to potentially inaccurate on hand data.

Please note that Datarithm monitors the delivery of data from your PMS. When these delivery failures occur, Datarithm contacts your PMS vendor to prompt them to correct any data interface issues. However, if these errors persist for several days in a row, Datarithm advises customers to contact their PMS vendor directly.

When the Updates Retrieved is displayed in red for any of your locations, it means that your PMS has failed to retrieve Datarithm’s updates. Datarithm also notifies your PMS vendor after consecutive retrieval failures.

To access the report, click on the cloud icon in the top right corner of the page or go to *Reports* → *System Reports* → *Data Interface Report*.

Data Interface Report

Company	Region	Pharmacy	PMS	NPI	Inventory File	Drug File	Drug Usage File	Last Forecasted	Updates Retrieved
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - Elm Street Pharmacy	PioneerRx	1801931555	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/1/2023 1:45 AM	10/22/2023 6:17 AM
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - Lake Shore Pharmacy	PioneerRx	1508964537	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/1/2023 1:45 AM	10/22/2023 6:02 AM
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - Main Street Pharmacy	PioneerRx	1265437768	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/1/2023 1:45 AM	10/22/2023 6:18 AM
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - North Branch Pharmacy	PioneerRx	1669738605	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/3/2023 1:31 AM	10/22/2023 6:00 AM
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - Timberland Pharmacy	PioneerRx	1144308552	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/1/2023 1:45 AM	10/22/2023 6:01 AM
Roberts Family Pharmacy	Region Roberts Family Pharmacy	Roberts - Wilmington Pharmacy	PioneerRx	1457075731	11/30/2023 12:45 AM	11/30/2023 12:45 AM	10/22/2023 12:17 AM	9/1/2023 1:49 AM	10/22/2023 6:03 AM

System User and Pharmacy Report

The *System User and Pharmacy Report* displays all Datarithm users within the customer’s organization, along with their role, last usage date, and whether their account is locked/enabled. Below that, the *Pharmacy Details Report* provides a list of pharmacy locations for the customer, along with important attributes for each pharmacy location.

To access the report, go to *Reports* → *System Reports* → *System User and Pharmacy Report*.

Unusual Usage

Unusually High Usage Report

The *Unusually High Usage Report* provides you with a list of items where the actual usage for last month was significantly higher than the forecast usage for last month.

To access the report, go to *Reports* → *Unusual Usage* → *Unusually High Usage Report*.

Unusually Low Usage Report

The *Unusually Low Usage Report* provides you with a list of items where the actual usage for last month was significantly lower than the forecast usage for last month.

To access the report, go to *Reports* → *Unusual Usage* → *Unusually Low Usage Report*.

Inventory Details

The *Inventory Details* page displays various item or equivalent/generic group-specific information including current replenishment points (in the PMS), forecast replenishment points (prescribed by Datarithm), various forecasting metrics, current on hand amounts (units and dollars), dispensing history, and a host of other useful values, as well as functionality allowing users to adjust or take over the management of inventory items or groups.

Inventory Details



Overview

Group Number: 29969.2.2	Strength:
Drug Name: Atorvastatin 40 Mg Tablet	Unit Type: TAB
Pharmacy Name: Roberts - Elm Street Pharmacy	Manufacturer: NORTHSTAR

Upper Tables

The tables in the top portion of the *Inventory Details* display the basic characteristics of the item, along with its current replenishment points and Datarithm's forecasted replenishment points. The nomenclature for replenishment points used by your Pharmacy Management System will be used (*Order Point (OP)/Order Quantity (OQ) or Min/Max*).

Details Group Details RP Updates Inventory Level Dispensing Stock Outs Returns Transfers Liquidations Cycle Count

Current Info		Forecast Info	
Current Min:	491.00	Forecast Min:	600.00
Current Max:	492.00	Forecast Max:	601.00
Current Min 4 Month Coverage:	100.00%	Forecast Min 4 Month Coverage:	100.00%
Current Min Days Supply:	4.90	Forecast Min Days Supply:	5.99
Usage Pattern:	Recurring	Forecasted Usage:	2,604.14

Slider Info		On Hand Info	
Current to Forecast \$ Diff:	\$7.48	Current on Hand:	2,418 \$165.87
Slider Position:	\$500.00	Surplus on Hand:	474 \$32.52

Additional Info		Forecast Calculations	
Created On:	8/15/2022	Safety Stock Method:	Days Supply
Last Forecasted:	10/22/2023	Safety Stock:	300.48
Typical Daily Dispense Quantity:	90.00	Lead Time Usage:	100.16
High Water Mark:	360.00	Order Cycle Usage:	200.32
Transactions in 12 Months:	640.00	Line Point:	600.96
Current On Hand Days Supply:	24.14	Forecast Min Buffer:	0.00
Package Size Days Supply:	9.98	Forecast Max Buffer:	0.00
		Forecast Min Adjustment:	None

Clicking the link for [Current Units on Hand](#) displays a table with further details related to the item or equivalent items, including the *Drug Identifier*, *Drug Name*, *On Hand*, *Current Replenishment Points*, *Package Size*, *Unit Cost (Acquisition Cost)* and *Package Cost*. The table will display these data points for each equivalent item in a group.

Details Group Details RP Updates Inventory Level Dispensing Stock Outs Returns Transfers Liquidations Cycle Count

Group Info																
Drug Identifier	Drug Name	On Hand	Min ↓	Max	Package Size	Unit Cost	Package Cost	Extended Cost	Drug Schedule	Generic Code	Generic?	OTC?	Inactive?	Manual Order?	Created On	Orphaned On
16714-0175-03	Atorvastatin 40 Mg Tablet	2,418.00	491.00	492.00	1,000.00	\$0.07	\$68.60	\$165.87	R	29969.2.2	Y	N	N	N	12/2/2022	N/A
16714-0876-03	Atorvastatin 40mg	0.00	0.00	0.00	1,000.00	\$0.07	\$74.50	\$0.00	R	29969.2.2	Y	N	N	N	8/15/2022	N/A
16729-0046-17	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	1,000.00	\$0.18	\$176.50	\$0.00	R	29969.2.2	Y	N	N	N	8/15/2022	N/A
75834-0257-01	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	1,000.00	\$0.10	\$96.90	\$0.00	R	29969.2.2	Y	N	N	N	8/15/2022	N/A
16714-0175-01	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	90.00	\$0.08	\$7.01	\$0.00	R	29969.2.2	Y	N	N	N	10/25/2022	N/A
16714-0876-01	Atorvastatin 40mg	0.00	-1.00	0.00	90.00	\$0.08	\$7.01	\$0.00	R	29969.2.2	Y	N	N	N	8/15/2022	9/23/2023
		2,418.00						\$165.87								

1 - 6 of 6 items

A description of each field is provided below:

- ✓ *Current OP* is the point (measured in units) at which replenishment is triggered. This is the value that currently resides within the customer's PMS.
- ✓ *Current OQ* represents the number of units ordered to replenish the inventory. This is the value that currently resides within the customer's PMS.
- ✓ *Current OP 4 Month Coverage* is an indicator of how well the *Current OP* covered actual dispensing over the trailing 4 months.
- ✓ *Current OP Days Supply* is a measurement of days dispensing that the current OP will support.
- ✓ *Usage Pattern* indicates whether an item is *New*, *Recurring* or *Sporadic* as defined by Datarithm.

- ✓ *Forecast OP* is the value prescribed by Datarithm.
- ✓ *Forecast OQ* is the value prescribed by Datarithm.
- ✓ *Forecast OP 4 Month Coverage* is an indicator of how well the *Forecast OP* would cover actual dispensing over the trailing 4 months.
- ✓ *Forecast OP Days Supply* is a measurement of days dispensing that the forecast OP will support.
- ✓ The *Forecasted Usage* is the estimated dispensing level (in units) for the current month based on the forecast completed at the start of the current month.

- ✓ *Current to Forecast \$ Diff* represents the difference between your current replenishment points and Datarithm's forecast replenishment points, expressed in dollars: When a positive value is displayed, Datarithm is recommending an increase in inventory for the item in the amount displayed. If the displayed dollars exceed the indicated *Slider Position*, Datarithm's forecast replenishment points are blocked from being sent to your Pharmacy Management System. If a negative value (in parentheses) is displayed, Datarithm seeks to decrease the inventory for the item by the amount displayed via a decrease in replenishment points.
- ✓ *Slider Position* represents your current *Slider* threshold, expressed in dollars. If this value is greater than the *Current to Forecast \$ Diff's* value.

- ✓ *Current on Hand* shows the number of units and dollars in inventory for an item or equivalent group of generic items, based on data received from the Pharmacy Management System after the close of business the prior day.
- ✓ *Surplus on Hand* shows the number of units and dollars in surplus inventory for an item or group of generic items. Surplus is defined by Datarithm as the on-hand amount that exceeds current replenishment points. Items that have pending return and/or transfer recommendations associated with the surplus will have green icons indicating that such recommendations exist. Clicking on the icons will show the recommendation details. If a return or transfer recommendations were marked as *Ineligible* during processing, then corresponding red icons will be displayed to indicate that the existing surplus does not have any pending recommendations for this reason. Clicking on the red icons (if present) will take the user to the associated *Ineligible* reports, filtered on this particular inventory item, where eligibility for a return or transfer can be restored.

On Hand Info		
Current on Hand:	2,418	\$165.87
Surplus on Hand: ?	474	\$32.52

On Hand Info		
Current on Hand:	163	\$190.68
Surplus on Hand: ?	163	\$190.68

- ✓ *Created On* is the date that the item first appeared in Datarithm.
- ✓ *Last Forecasted* indicates the last time Datarithm forecasted this item.
- ✓ *Typical Daily Dispense Qty* is the number of units that are typically dispensed for the item on a day that it is dispensed.
- ✓ The *High Water Mark* is the largest daily amount that was dispensed during the past 120 days.
- ✓ *Transactions in 12 Months* is the number of individual patient dispenses that occurred over the prior twelve months and provides a quick indication of the dispensing frequency on this inventory item.
- ✓ *Current On Hand Days Supply* is a measurement of days dispensing that the Current on Hand amount will support.
- ✓ *Package Size Days Supply* is a measurement of days dispensing that the preferred item package size will support.
- ✓ *Safety Stock Method* is the method chosen by Datarithm during forecasting (*Days' Supply* or *Deviation*) that will result in a *Safety Stock* value (units) that provides the ideal service level.
- ✓ *Safety Stock* (units) is either calculated by multiplying the expected daily usage for an item by the number of days maintained in the *Safety Stock Days* system settings or by measuring the statistical deviation. In general, Safety Stock serves to avoid the risk of stock-outs and partial-fills.
- ✓ *Lead Time Usage* (units) represents the expected inventory usage between the time an order is placed and when the order is delivered. *Lead Time Usage* is calculated by multiplying the expected daily usage for an item by the number of days maintained in a system setting (default setting is 1 day).
- ✓ *Order Cycle Usage* (units) represents the expected inventory usage between the last wholesaler delivery for a week (Friday) and the next expected delivery (Monday). *Order Cycle Usage* is calculated by multiplying the expected daily usage for an item by the number of days maintained in a system setting (default setting is 3 days).
- ✓ The *Line Point* is the sum of *Safety Stock*, *Lead Time Usage* and *Order Cycle Usage*. Unless a *Line Point Adjustment* is being deployed (see below), *Line Point* will be used for the *OP/Min* for *Recurring* and *New* dispensing patterned items.
- ✓ *Forecast Min/OP Buffer* value represents the number of units manually added to or subtracted from the *Min/OP* calculated by Datarithm.

- ✓ *Forecast Max/OQ Buffer* value represents the number of units manually added to the *Max/OQ* calculated by Datarithm.
- ✓ *Forecast Min Adjustment* represents the adjustment brought to the *Line Point* when the latter is insufficient in assuring acceptable service levels (fill-rates). If an adjustment has been made, it will be noted in this field and further explained via the tooltip. The available adjustment types are *None*, *Rounded Min Lite*, *Rounded Min*, *High Water Mark*, *Buffer*, and *Critical Inventory*. If the calculated *Line Point* is below the *Typical Daily Dispense Quantity*, the *Line Point* will be rounded up to the *Typical Daily Dispense Quantity* to establish the *OP/Min*. If an individual dispense event within the trailing 120 days exceeds the calculated *Line Point* (this would be the *High-Water Mark* or *HWM*), the *HWM* will be used to establish the *OP/Min*. If an item is marked as *Buffer* or *Critical Inventory*, the item must always be kept in stock and the *Forecast Min/OP* will be buffered or set at the highest quantity dispensed on any single day (*Highest Daily Dispensed Quantity*) within the last 120 days.

Usage Info

The Usage Info table provides two years of dispensing history, smoothed usage, and forecasted usage.

12-months of history are shown by default. Click the “24 Months” button to view 24-months of usage history.

Usage Info													
Usage Details + 24 Months													
Month	Dec-23	Nov-23	Oct-23	Sep-23	Aug-23	Jul-23	Jun-23	May-23	Apr-23	Mar-23	Feb-23	Jan-23	Dec-22
Usage	1,635.00	2,475.00	2,233.00	2,031.00	2,021.00	2,679.00	1,832.00	2,340.00	2,400.00	1,694.00	1,763.00	2,720.00	1,830.00
All Usage	1,635.00	2,475.00	2,233.00	2,031.00	2,021.00	2,679.00	1,832.00	2,340.00	2,400.00	1,694.00	1,763.00	2,720.00	1,830.00
Smoothed Usage	N/A	2,475.00	2,233.00	2,031.00	2,021.00	2,679.00	1,832.00	2,340.00	2,400.00	1,694.00	1,763.00	2,720.00	1,830.00
Forecasted Usage	2,604.14	2,132.00	2,185.50	2,180.50	2,086.00	2,086.00	2,274.25	2,040.00	1,979.00	2,069.00	2,144.00	2,069.33	2,144.00
Current Days Supply	N/A	N/A	N/A	55.70	19.19	16.07	15.36	10.30	13.89	7.62	6.59	9.11	15.16

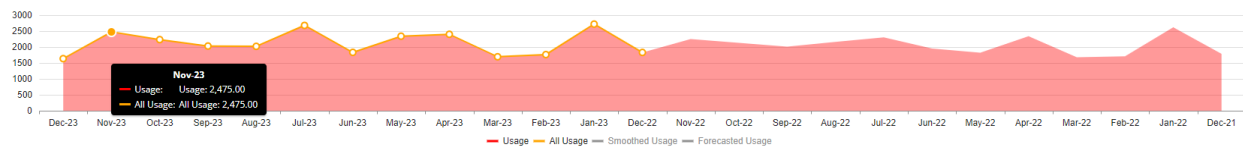
Usage represents the usage as recorded by your Pharmacy Management System every month. There is an option to exclude Cycle Fill, 340B, and/or Long-Term Care dispensing from these figures (see *Application Settings*). *All Usage* represent all dispensing, regardless of dispensing type. The *All Usage* row will only be displayed if the customer has opted to exclude one or more usage types from forecasting. The *Smoothed Usage* value replaces extremely high and extremely low usage values with the three-month moving average usage. Smoothing removes “peaks” and “valleys” from *Usage* and allows for more accurate forecasts by Datarithm. *Forecasted Usage* values are calculated at the end of every month and represent the estimated usage (in units) for the next month.

To view the breakdown of usage across all items in an equivalent group, click the *Usage Details* button.

Drug Identifier	Drug Name	Dec-23	Nov-23	Oct-23	Sep-23	Aug-23	Jul-23	Jun-23	May-23	Apr-23	Mar-23	Feb-23	Jan-23	Dec-22	Nov-22	Oct-22	Sep-22	Aug-22	Jul-22	Jun-22
16714-0175-03	Atorvastatin 40 Mg Tablet	1,635.00	2,475.00	2,233.00	2,031.00	2,021.00	2,619.00	1,406.00	2,340.00	1,200.00	900.00	1,140.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16714-0175-01	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	0.00	0.00	60.00	426.00	0.00	1,200.00	794.00	593.00	1,740.00	240.00	0.00	0.00	0.00	0.00	0.00	0.00
16714-0876-01	Atorvastatin 40mg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16714-0876-03	Atorvastatin 40mg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
16729-0046-17	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
75834-0257-01	Atorvastatin 40 Mg Tablet	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.00	980.00	1,590.00	2,250.00	2,128.00	2,010.00	2,160.00	2,304.00	1,900.00

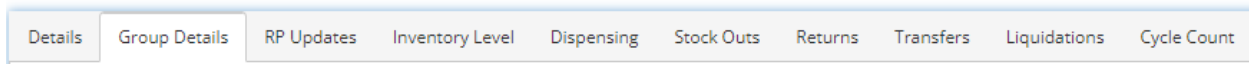
Usage History Graph

The usage history graph is rendered at the bottom of the *Inventory Details* page and provides a graphical view of *Usage*, *All Usage*, *Smoothed Usage* and *Forecasted Usage* for the past 24 months. *Usage* is displayed by default, and *All Usage* is displayed if different than *Usage*. *Smoothed Usage* and *Forecasted Usage* can be added to the chart by clicking on their labels in the chart legend. Hovering your cursor inside the graph displays metric details for each displayed usage type.



Additional Information

A tab strip towards the top of the page provides additional information related to the inventory item being viewed.



Group Details

Displays a table with details related to the item or equivalent items that comprise the group, including the *Drug Identifier*, *Drug Name*, *On Hand*, *Current Replenishment Points*, *Package Size*, *Package Cost*, and *Unit Cost*.

Replenishment Point Updates

The replenishment point updates that have been delivered by Datarithm to your Pharmacy Management System. Includes replenishment points sent, date sent, the targeted drug identifier, and previous replenishment point values.

Inventory Level

The average inventory level (units) for each month over the past 24 months. Displays this data in both tabular and graphical formats.

Dispensing

Dispense/fill history. Date dispensed, units dispensed, specific item dispensed, and applicable fill type characteristics (cycle fill/med-sync, 340B, long-term care).

Stock Outs

Occurrences when On Hand became negative. Displays stock out date, previous on hand (i.e., on hand at close of business the prior day), concluding on hand, equivalent on hand, and the replenishment points at the time of stock out.

Returns

Pending return recommendations and completed returns to the wholesaler.

Transfers

Pending outbound transfer recommendations and completed inbound and outbound transfers.

Liquidations

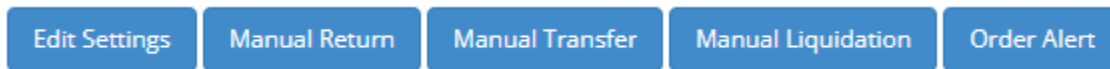
Pending liquidation recommendation and completed liquidations (typically via returns company or reverse distributor).

Cycle Counts

Completed cycle counts.

Actions

Several buttons on the *Inventory Details* page provide the ability to apply restrictions to how Datarithm manages the item, adjust replenishment points, create order alerts, and perform inventory balancing tasks.



Edit Settings

Clicking the *Edit Settings* button displays the *Edit Settings* popup. Within the *Edit Settings* popup, the user can:

- ✓ Set *Restrictions* on Datarithm's ability to manage the inventory item. If any of these restrictions are applied, a related notification icon will appear at the top of the Inventory Details page.
 - *Block Datarithm Replenishment Points*: Check this box if you do not want Datarithm to manage replenishment points for this inventory item. Datarithm's forecasted replenishment points will not be sent back into your pharmacy management system. Please note that if you choose to do this you will have to maintain your desired replenishment points in your pharmacy management system. For PioneerRx users, this restriction is managed within PioneerRx. Set an *Expiration Date* to automatically remove this restriction on that date.
 - *Block Datarithm Return Recommendations*: Check this box if you do not want Datarithm to recommend return to wholesaler recommendations for this inventory item. Set an *Expiration Date* to automatically remove this restriction on that date.
 - *Block Datarithm Transfer Recommendations*: Check this box if you do not want Datarithm to recommend outbound or inbound transfers for this inventory item. Set an *Expiration Date* to automatically remove this restriction on that date.
- ✓ *Force* the forecast replenishment points into the pharmacy management system. Disregards the *Slider* and places Datarithm's forecast replenishment points into your PMS.

- ✓ Apply *Buffers* to the Datarithm's forecast replenishment points. The *Min/OP Buffer* allows you to increase or decrease the *Forecast Min/OP* by adding or subtracting a buffer (number of units) to the *Forecast Min/OP* calculated by Datarithm. The *Max/OQ Buffer* allows you to increase the *Forecast Max/OQ* by adding a buffer (number of units) to the *Max/OQ* calculated by Datarithm. Disregards the *Slider* and places Datarithm's forecast replenishment points into your PMS. Set an *Expiration Date* to automatically remove this buffer on that date.
- ✓ Specify that the item is a *Critical Inventory* item. Marking an item as *Critical Inventory* means that it must always be kept in stock. Marking an item as *Critical Inventory* sets Datarithm's forecast replenishment point to one *Typical Daily Dispense Quantity*, disregards the *Slider*, and places these replenishment points into your PMS.

CONFIDENTIAL

Edit Inventory
✕

Datarithm Actions

Action	Yes/No	Expiration Date
Block Datarithm Replenishment Points	<input type="checkbox"/>	<input type="text" value=""/>
Block Datarithm Return Recommendations	<input type="checkbox"/>	<input type="text" value=""/>
Block Datarithm Transfer Recommendations	<input type="checkbox"/>	<input type="text" value=""/>

Force Forecast Min/Max

Critical Inventory OR Min Buffer

An item may be marked as Critical Inventory or have a Min Buffer applied. Items marked as Critical Inventory will get a Min sufficient to cover that items high water mark quantity (i.e. largest daily amount dispensed during the past 120 days). Items with a buffer will simply be incremented or decremented by that buffer amount. The Forecast Min can be buffered up (units) or down (negative units). Simply insert the desired unit adjustment.

This item is Critical Inventory

Min Buffer Value	Expiration Date
<input type="text" value="0.0000"/>	<input type="text" value=""/>

Max Buffer

The Forecast Max can be adjusted by Buffering it up (positive units). Simply insert the desired unit adjustment.

Max Buffer	Expiration Date
<input type="text" value="0.0000"/>	<input type="text" value=""/>

Note that items with *Restrictions* and/or *Buffers* are listed in their respective restrictions report (see *Reports* section in this document).

Manual Return

The *Manual Return* feature gives users the ability to return an inventory item to their wholesaler, even if the item is not in surplus. Manual adjustment of the replenishment points in the PMS in conjunction with a *Do Not Manage* restriction in Datarithm may be warranted to prevent the item from being ordered following a *Manual Return*.

To initiate a *Manual Return*, click the *Manual Return* button on the *Inventory Details* page. The *Manual Return* popup will be displayed. Use the *Returned Quantity* field to indicate item(s) and quantities that you are returning. Use zeros on line items that will not be returned and click the *Initiate Return* button.

Drug Identifier	Drug Name	On Hand	Package Size	Package Cost	Unit Cost	Returned Quantity
16714-0176-02	Atorvastatin 80 Mg Tablet	929.00	500.00	\$48.70	\$0.10	500.00
16714-0877-01	Atorvastatin 80mg	0.00	90.00	\$27.53	\$0.31	0.00
75834-0258-01	Atorvastatin 80 Mg Tablet	0.00	1,000.00	\$104.50	\$0.10	0.00
16714-0176-01	Atorvastatin 80 Mg Tablet	0.00	90.00	\$13.44	\$0.15	0.00
		929.00				

Navigation: [Back] [Previous] [1] [Next] [Forward] [Refresh]

Buttons: [Cancel] [Initiate Return]

Entering a quantity to return that is larger than the on-hand amount present in Datarithm will display a message advising you of the risk of on-hand dropping below zero. The system will allow you to return these amounts. However, doing so will risk ordering more of the returned item. Specifying a quantity that is *not* a multiple of *Package Size* will prevent you from creating the return recommendation and a validation message will be displayed. If all *Returned Quantities* are zero, you will receive a validation message prompting you to enter a positive quantity for at least one line item in order to proceed with the return.

After clicking the *Initiate Return* button, you will get redirected to the *Returns Wizard*. Instructions on how to process a return via the *Returns Wizard* are covered elsewhere in this document.

Manual Transfer

The *Manual Transfer* feature gives users the ability to transfer an inventory item from one location to another, even if the item is not in surplus.

It is appropriate to process a *Manual Transfer* when:

- ✓ The inventory item is about to go “Dead”. For example, staff at the pharmacy discover that the only patient on the item has passed away, moved, or has indicated they will no longer be needing the medication.
- ✓ There is an emergency need at the receiving location. The location in need of the item should contact the location that has the item in stock and request that they utilize the *Manual Transfer* feature to send the stock as soon as possible. Visibility of inventory at other locations within the organization is available in the *Inventory List* report.

When using the *Manual Transfer* function, manual adjustment of the replenishment points in the PMS in conjunction with a *Do Not Manage* restriction in Datarithm for the providing location may be warranted to prevent the item from being ordered by the providing location following a *Manual Transfer*.

To initiate a *Manual Transfer*, click the *Manual Transfer* button on the *Inventory Details* page. The *Manual Transfer* pop up will be displayed. Specify the *Receiving Pharmacy*. Various metrics will be displayed for each potential receiver to help determine which location is most deserving of receiving the inventory. Fill out the *Quantity to Transfer* field for the line item you are transferring and enter zero on all line items that will *not* be transferred.

Entering a quantity to send that is larger than the on-hand amount present in Datarithm will display a message advising you of the risk of on-hand dropping below zero. The interface will allow you to transfer those quantities. However, you risk ordering more of the item that is being transferred.

If all items are zeroed out, you will receive a validation message prompting you to enter a positive quantity for at least one line item in order to proceed with the transfer. Click the *Initiate Transfer* button.

Manual Transfer

Receiving Pharmacy: Roberts - North Branch Pharmacy

Drug Identifier	Drug Name	On Hand	Package Size	Package Cost	Unit Cost	Quantity to Transfer
16714-0141-01	Aripiprazole 2 Mg Tablet	120.00	30.00	\$5.83	\$0.19	120.00
27241-0051-03	Aripiprazole 2 Mg Tablet	0.00	30.00	\$25.67	\$0.86	0.00
		120.00				

Cancel Initiate Transfer

After clicking the *Initiate Transfer* button, you will get redirected to the *Transfer Wizard*. Instructions on how to process a transfer via the *Transfer Wizard* are covered elsewhere in this document.

Manual Liquidation

The *Manual Liquidation* feature gives users the ability to liquidate an inventory item to the manufacturer or divest it by some other means even if the item is not in surplus. Manual adjustment of the replenishment points in the PMS in conjunction with a *Do Not Manage* restriction in Datarithm may be warranted to prevent the item from being ordered following a *Manual Liquidation*.

To initiate a *Manual Liquidation*, click the *Manual Liquidation* button on the *Inventory Details* page. The *Manual Liquidation* popup will be displayed. Use the *Liquidated Quantity* field to indicate item(s) and quantities that you are liquidating. Use zeros on items that will not be liquidated and click the *Initiate Liquidation* button.

Manual Liquidation

Drug Identifier	Drug Name	On Hand	Package Size	Package Cost	Unit Cost	Liquidated Quantity
68382-0024-10	Atenolol 100mg	282.00	1,000.00	\$59.80	\$0.06	282.00
68382-0024-01	Atenolol 100mg	13.00	100.00	\$6.64	\$0.07	13.00
		295.00				

Navigation: [Previous] [Next] 1 [Refresh]

Buttons: Cancel, **Initiate Liquidation**

Entering a *Liquidated Quantity* that is larger than the on-hand amount present in Datarithm will display a message advising you of the risk of on-hand dropping below zero. The system will allow you to liquidate these amounts. However, doing so will risk ordering more of the liquidated item. If all *Liquidated Quantities* are zero, you will receive a validation message prompting you to enter a positive quantity for at least one line item in order to proceed with the liquidation.

After clicking the *Initiate Liquidation* button, you will get redirected to the *Liquidation Wizard*. Instructions on how to process a liquidation via the *Liquidation Wizard* are covered elsewhere in this document.

Order Alert

The *Order Alert* button allows the user to initiate an *Order Alert* (described in the *Order Alerts* section in this document) from the *Inventory Details* page.

Settings

Menu Settings

Menu Settings give Company Level users the ability to control access to pages, reports, and various features within Datarithm for Region and Pharmacy Level users.

To access *Menu Settings*, go to *Settings* and click on *Menu Settings*. This will take you to the *Location Settings* page.

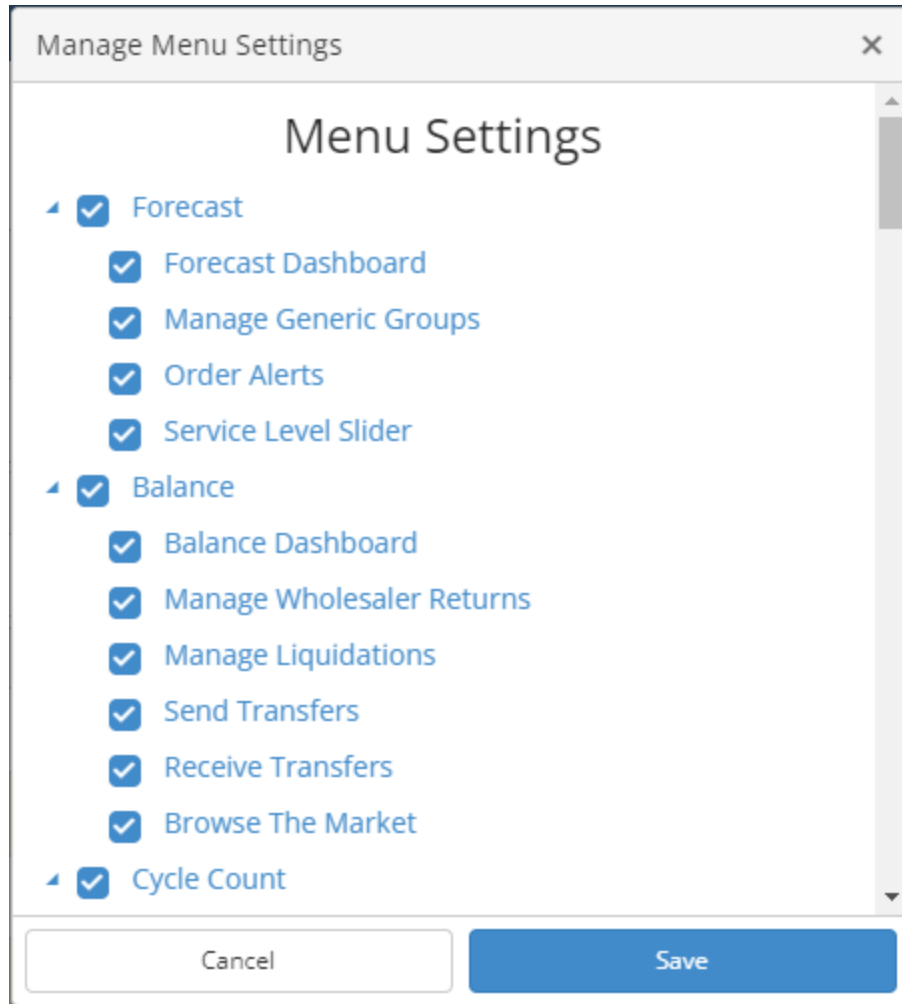
To manage access for region level users, click on the *Edit Region Menu* button. To manage access for pharmacy level users, click on the *Edit Pharmacy Menu* button.

Location Settings

The screenshot shows the 'LOCATION SETTINGS' interface. At the top, there is a search bar with 'Search' and 'Clear' buttons. Below is a tree view showing the hierarchy: Company > Roberts Pharmacy > Region > Region Roberts Pharmacy. A table is displayed below the tree, listing various pharmacies. A tooltip for 'Edit Pharmacy Menu' is visible over the table. The table has the following data:

	Pharmacy Number	Started On	Most Recent Snapshot
Roberts - Childress Pharmacy	1508964537	5/11/2022	6/1/2024
Roberts - Elm Street Pharmacy	1265437768	8/1/2022	6/1/2024
Roberts - Grand Island Pharmacy	1669738605	8/12/2022	6/1/2024
Roberts - Lakeside Pharmacy	1144308552	8/11/2022	6/1/2024
Roberts - Summit Pharmacy	1801931555	8/15/2022	6/1/2024
Roberts - Wilmington Pharmacy	1457075731	8/14/2023	6/1/2024

Select or deselect the pages, reports and features you want your region or pharmacy level users to have access to and click *Save*.



Cycle Count Settings

The *Cycle Count* function acts as a substitute for, or a supplement to, a periodic full physical count by counting or verifying the on-hand quantity of a small *batch* of items daily. This function is configurable to allow company Level users to control the annual counting frequency for various counting categories within Datarithm and to select the days of the week to do the count.

To access the settings for this function, go to *Settings* and click on *Cycle Count Settings*. From the *Cycle Counting Settings* page, select the pharmacy location that you would like to configure. The pharmacy dropdown will list all pharmacies along with their cycle count status (Active, Paused, Suspended, Not Started).

CYCLE COUNT SETTINGS

Company
Roberts Pharmacy

Region
-- All Regions --

Pharmacy
-- All Pharmacies --

Counting Category	Counting Frequency	Action	Weekday
UR	1.00		Sunday
DD	0.00		Monday
CD	0.00		Tuesday
CC/BD	0.00		Wednesday
BC/AD	0.00		Thursday
BB/AC	0.00		Friday
AB	0.00		Saturday
AA	0.00		
RE	0.00		

Save

Pharmacy **Status**

-- All Pharmacies --	
Roberts - Childress Pharmacy	Paused
Roberts - Elm Street Pharmacy	Suspended
Roberts - Grand Island Pharmacy	Active
Roberts - Lakeside Pharmacy	Active
Roberts - Summit Pharmacy	Active
Roberts - Wilmington Pharmacy	Active



In the left grid, you can set a *Counting Frequency* value which marks how many times *per year* the items included in a certain *Counting Category* will be counted.

Counting Category	Item Count	Counting Frequency	Action
UR	458	1.00	
DD	2019	1.00	
CD	955	1.00	
CC/BD	448	2.00	
BC/AD	183	2.00	
BB/AC	79	2.00	
AB	4	2.00	
AA	1	4.00	
RE	376	12.00	
UD	352	4.00	

The *Counting Category* link can be clicked to route the user to the *Rank Report* (described elsewhere in this document) to view the inventory items assigned to that *Counting Category*.

The edit button located next to the *User Defined (UD)* row gives you the ability to define your own category of items to be counted by clicking it and adding rules. As rules are added, edited, or removed, the list of inventory items assigned to the *User Defined* counting category are displayed in the grid below. Click the *Save* button to save the *User Defined* counting category.

User Defined Category

And Or   X

Extended Cost Is greater than 500.00 X

(Extended Cost is greater than '500')

Drug Identifier	Drug Name
00002145780	Mounjaro 15 Mg/0.5 MI Pen
00002247180	Zepbound 10 Mg/0.5 MI Pen
00002318280	Trulicity 4.5 Mg/0.5 MI Pen
00002751001	Humalog Inj 100/ML

Cancel Save

In the grid on the right of the page, specify the days of the week when counting should occur.

Weekday	Counting Day?
Sunday	<input type="checkbox"/>
Monday	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>

Click the *Save* button at the bottom of the page when you have finished editing the counting frequencies and counting days. The approximate number of items that will be assigned for counting on a configured counting day will be displayed.

Current Items To Count Per Day: 42

Based on your selections for Counting Frequency and Counting Days, you will need to count **42** items per day to meet your goals when you click save. In order to change the number of items to count each day, you may:

- Change the Counting Frequency of one or more Counting Categories
- Change the number of Counting Days

Pause/Resume Cycle Counting

Based on the configured counting days, if pharmacy level users miss three cumulative days of cycle counts, Datarithm will automatically *suspend* the *Cycle Count* function. Alternatively, if cycle counting needs to be paused for a location for an unspecified number of days, you can do so by going to *Settings* → *Cycle Count Settings*. From the *Cycle Counting Settings* page, select the store for which you want the function paused and click on the *Pause* button.

Save Pause

Cycle Counting has been paused on 07/23/2024 11:20 PM by roberts.company@datarithm.co. If you would like your Cycle Count activities resumed, please click Resume.

To resume the process, follow the same steps and click the *Resume* button.



Service Level Slider

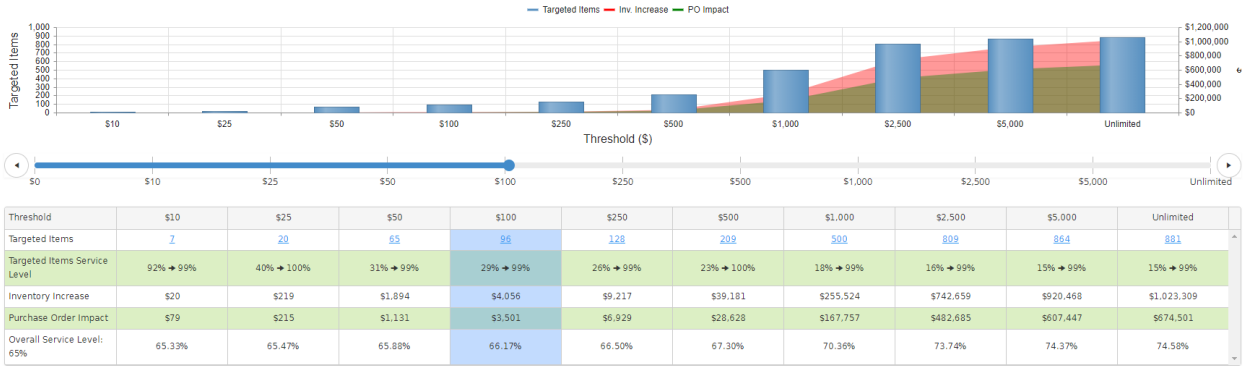
The *Service Level Slider* controls when and how much Datarithm will increase your inventory investment level by sending order point *increases* into your Pharmacy Management System. Company Level users can both view and adjust the *Slider*, while region and pharmacy level users may view the *Slider*.

The graph displays in **blue** the number of items impacted by each position of the *Slider*, in **red** the increase in average inventory level expressed in dollars associated with each position and in **green** an approximation of the dollar impact to your next *Purchase Order*. Chart metrics can be added and removed from the chart by clicking on the metric in the chart legend.

In the grid below the *Slider*, *Targeted Items* represent the number of items impacted by the dollar *Threshold* at the various *Slider* positions. Clicking on a selected number (a link) will redirect you to the *Replenishment Point Increases Report* where Datarithm provides a list of items targeted for increases using the selected *Slider Position*. The *Targeted Items Service Level* indicates the Service Level improvement for items that would receive reorder point increases at the selected *Slider Position*. *Inventory Increase* is the estimated long-term average dollar increase that would occur with a *Slider* advancement to a selected *Slider Position*. The *Purchase Order Impact* approximates the dollar impact to your next purchase order(s) after advancing the *Slider* to a selected position.

The values in the table below the chart mimic the values that can be observed by hovering the cursor over the chart. The *Overall Service Level* indicates the *Service Level* that would be attained for the entire formulary at a selected *Slider Position*. Individual *Slider* settings can be set for each Pharmacy.

Service Level Slider



Detailed Explanation
 With this setting, Datarithm will send only those replenishment point updates where the difference between your current replenishment points (average number of units on hand * unit cost) for that item and Datarithm's replenishment points (average number of units on hand * unit cost) for that same item is less than \$100. In other words, Datarithm will update items in your inventory where you can improve service levels for less than \$100. Targeted Items indicates the number of items impacted by the dollar Threshold - clicking on the Targeted Items number will redirect you to the Replenishment Point Increases Report where you can see which items are targeted for increase. The Targeted Items Service Level data point represents the coverage increase (percentage) for the items that will be affected by the change. Datarithm estimates the resulting increase in inventory of these replenishment point updates will be approximately \$4,056. The number of inventory items that will be impacted is approximately 96. Additionally, based upon the most recent On Hand amounts reported to Datarithm, the approximate additional impact to your next purchase order will be \$3,501.

Save Push changes down to all

Audit Log

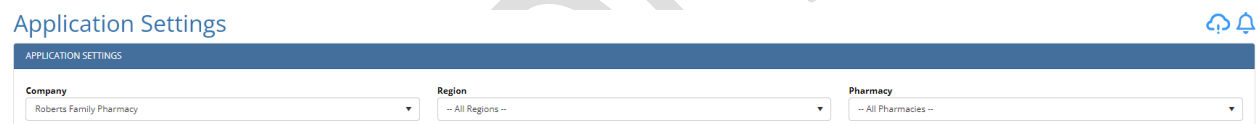
To access the *Slider*, go to *Settings* and click on *Service Level Slider*. If you would like to make changes to the *Slider* position that will be applied to the entire company, simply change the *Slider* setting and click the *Save* button. If you would like to set the *Slider* for a particular pharmacy location, open the filter panel by clicking on the filter icon (in the top right corner of the page), select a pharmacy, and click the *Apply* button. Set the *Slider* to the desired amount and click the *Save* button. Datarithm will send to the Pharmacy Management System only those replenishment point updates where the difference between your current replenishment points for an item and Datarithm's forecasted replenishment points for that item is less than the *Slider* setting. To view the detailed explanation of what each position does and how each move impacts the data points in the grid, click on the *Detailed Explanation* link.

To track the changes made to the *Slider* over time, click the *Audit Log* button. A popup containing audit details will be displayed providing you with information related to the date of the change, location, the user that performed the action and the old and new values.

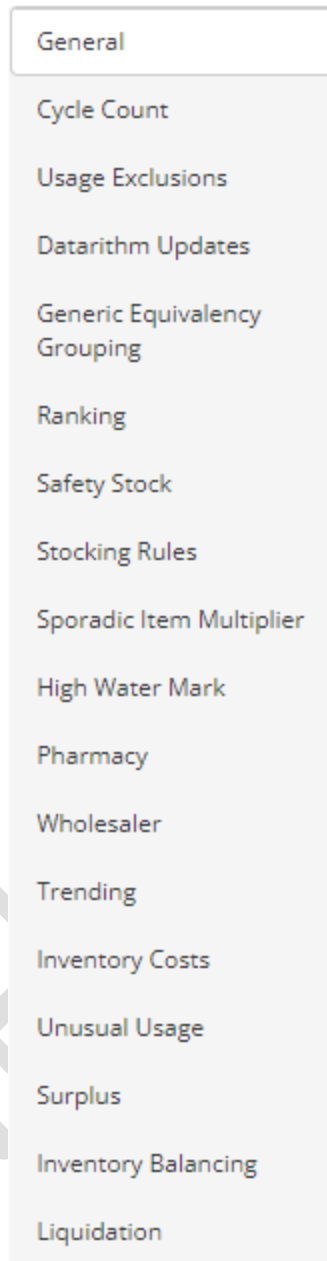
Application Settings

Application Settings are a variety of configurable settings that control many aspects of Datarithm's forecasting behavior, balancing recommendations, and cycle counting list creation. You can apply settings at the company, region, and pharmacy level. Only company level users can access *Applications Settings*. To access *Application Settings*, go to *Settings* and click on *Application Settings*.

At the top of the *Application Settings* page, select the location for which you would like to view or edit settings.




On the left side of the *Application Settings* page, click on the *Application Settings Group* that you would like to view or edit.



After selecting a group, the center of the *Application Settings* page will display a collection of settings related to that group.

- ✓ To edit the setting, click the *Edit* button. Each setting type will have an appropriate edit control (i.e., check box, textbox, dropdown list, etc.) as well as setting-specific validation.
- ✓ To view the change history of the setting, click the *View Change History* button.
- ✓ To view information related to the setting, click the *View Setting Info* button.
- ✓ To delete the setting value and return to the default setting value, click the *Delete* button.

Note that non-default setting values are **bolded**. To view all change history for the location for all settings, click the All Change History button at the top right of the page.

General	Application Setting	Value	Scope	
Cycle Count	Enable On Hand Updates for RTW	True	Company Level	   
Usage Exclusions	Enable On Hand Updates for Transfers	True	Company Level	   
Datarithm Updates	Enable On Hand Updates for RTM	False	System Level	  
Generic Equivalency Grouping	Enable On Hand Updates for Cycle Count	False	System Level	  
Ranking	Enable Replenishment Point Updates from Datarithm	True	Company Level	   
Safety Stock	Enable Replenishment Point Updates on Brand Items	True	System Level	  
Stocking Rules	Enable Replenishment Point Updates on C2 Items	True	System Level	  
Sporadic Item Multiplier	Package Cost Service Level Stretch	0	System Level	  
High Water Mark	Purchase Order Impact Service Level Stretch	0	System Level	  
Pharmacy	Replenishment Point Update Activation Day of Month	1	System Level	  
Wholesaler	Generic Group Auto-Cleanse	True	System Level	  
Trending				
Inventory Costs				

A description of each setting follows.

General

Datarithm Subscription Level

The *Datarithm Subscription Level* setting indicates which type of Datarithm subscription you have opted for. At this time there is only the *Complete* subscription. This *Option Value* should not be changed.

Software Type

The *Software Type* setting indicates the Pharmacy Management System used by your pharmacy. This *Option Value* should not be changed.

PMS is the author of Do Not Manage

The *PMS is the author of Do Not Manage* setting indicates whether your Pharmacy Management System is the system of record for the Do Not Manage flag for inventory items, or if the user can apply the flag within Datarithm.

Auto-Remove Restrictions for Dead Inventory Items

The *Auto-Remove Restrictions for Dead Inventory Items* setting indicates whether restrictions set in Datarithm on individual inventory items (i.e. Do Not Manage) should be removed for items that have been classified as Dead.

Replenishment Trigger (Reach or Breach)

The *Replenishment Trigger (Reach or Breach)* setting instructs Datarithm on the method the Pharmacy Management System uses to determine when an item should be included on the purchase order. *Reach* instructs Datarithm that an item will be placed on the purchase order when the on-hand amount reaches (is equal to) the *Order Point* (or *Min*). *Breach* instructs Datarithm that an item will be placed on the purchase order when the on-hand amount breaches (falls below) the *Order Point* (or *Min*). This setting influences the *Forecast Order Point* (or *Min*) calculated by Datarithm.

Preferred Order Quantity

The *Preferred Order Quantity* setting instructs Datarithm on the preferred method for calculating the *Forecast Order Quantity* (or *Max*). The available options are: *Zero (0)*, *One Unit*, *One Package*, *Non-Rounded SOQ*, *Max = 0* and *Rounded SOQ (Default)*.

If your Pharmacy Management System uses *Order Point/Order Quantity* nomenclature, the *Order Quantity* displayed in Datarithm will match the chosen method. If your PMS uses the *Min/Max*

nomenclature, the *Max* displayed in Datarithm will be the sum of the *Min* and the *Order Quantity* of the chosen method.

Do Not Stock Minimum

The *Do Not Stock Minimum* setting gives you the ability to set the value that should be placed by Datarithm into the Pharmacy Management System's *Min* or *Order Point* field when Datarithm determines through forecasting that the pharmacy should not keep the item in stock.

Do Not Stock Maximum

The *Do Not Stock Maximum* setting gives you the ability to set the value that should be placed by Datarithm into the Pharmacy Management System's *Max* or *Order Quantity* field when Datarithm determines through forecasting that the pharmacy should not keep the item in stock.

Round Min/OP Up

The *Round Min/OP Up* setting provides control over the system suggested *Order Point* (or *Min*) values. The *Default* value is *False*. If the value is set to *True*, the system will round the *Order Point* (or *Min*) up to the next multiple of the *Typical Daily Dispensing Quantity* for the item. Note that setting the *Round Min/OP Up Option Value* to *True* will increase your inventory investment levels.

Large Planned Excess (\$)

The *Large Planned Excess (\$)* setting has been deprecated and should not be changed.

Show PharmSaver Banner

The *Show PharmSaver Banner* setting controls whether the PharmSaver banner (which shows potential savings and a link to PharmSaver's website) is displayed for users. The banner is displayed by default but can be disabled via this setting.

Import OTC Items

The *Import OTC Items* setting controls whether over the counter (OTC) inventory items are imported into Datarithm. If OTC items are imported into Datarithm, they will be subjected to the same management by Datarithm (forecasting, balancing, cycle counting) as prescription drug items. OTC items are not imported into Datarithm by default.

Cycle Count

Expedited Cycle Count

The *Expedited Cycle Count* setting, when set to *True*, requires that users enter count discrepancies directly into the Pharmacy Management System. If it is set to *False*, it allows users to enter count discrepancies back into Datarithm, which in turn allows Datarithm to track and report on count discrepancies. If set to *True*, on-hand updates should be entered directly into your Pharmacy Management System.

Blind Cycle Count

The *Blind Cycle Count* setting, when set to *True*, prevents the staff performing the cycle count from seeing the *Quantity to Expect* value (i.e. the expected current on hand) delivered to Datarithm from the pharmacy management system. This may produce a more diligent, honest, and purposeful cycle count. The default is false. That is, pharmacy staff are shown the *Quantity to Expect* value on the count list.

Cycle Count Days Missed Before Suspension

The *Cycle Count Days Missed Before Suspension* setting gives users the ability to set the number of missing counting days before the *Cycle Count* function is suspended. Counting days are only those days of the week where counts are scheduled.

Exclude items with no on-hand

The *Exclude items with no on-hand* setting gives you the ability to exclude inventory items with zero on-hand from the *Cycle Count* lists. Please note that turning this option on will exclude all items with a current on-hand quantity of zero, even if those items have been dispensed in recent months.

Usage Exclusions

Exclude Cycle Fill

The *Exclude Cycle Fill* setting, when set to *True*, excludes any usage data associated with cycle fills (“synch”, “med-synch”, “adherence”) from forecasting.

Please note that setting the *Exclude Cycle Fill Option Value* to *True* will require that replenishment for cycle fill purposes be accomplished through manual ordering. Not all Pharmacy Management Systems provide this data point to Datarithm. Thus, not all Datarithm customers can leverage this this feature. Cycle Fill dispensing is included when forecasting by default.

Exclude 340B

The *Exclude 340B* setting, when set to *True*, excludes any usage data associated with 340B dispensing from forecasting. Not all Pharmacy Management Systems provide this data point to Datarithm. Thus, not all Datarithm customers can leverage this this feature. 340B dispensing is included when forecasting by default.

Exclude Long Term Care

The *Exclude Long Term Care* setting, when set to *True*, excludes any usage data associated with LTC dispensing from forecasting. Not all Pharmacy Management Systems provide this data point to Datarithm. Thus, not all Datarithm customers can leverage this this feature. LTC dispensing is included when forecasting by default.

Datarithm Updates

Enable on Hand Updates for RTW:

The *Enable on Hand Updates for RTW* setting, when set to *True*, allows Datarithm to push on-hand updates for items returned to the wholesaler into your Pharmacy Management System.

Enable on Hand Updates for Transfers

The *Enable on Hand Updates for Transfers* setting, when set to *True*, allows Datarithm to push on-hand updates for items transferred to/from other locations into the customer’s Pharmacy Management System.

Enable on Hand Updates for RTM:

The *Enable on Hand Updates for RTM* (return to manufacturer) setting, when set to *True*, allows Datarithm to push on-hand updates for items returned to the manufacturer (liquidated) into your Pharmacy Management System.

Enable on Hand Updates for Cycle Count

The *Enable on Hand Updates for Cycle Count* setting, when set to *True*, allows Datarithm to update on-hand in your PMS (when a discrepancy is found) using the standard/traditional *Cycle Count* function. Please note that, to fully enable this option, you must also have the *Expedited Cycle Count Option Value* set to *False*.

Enable Replenishment Point Updates from Datarithm

The *Enable Replenishment Point Updates from Datarithm* setting, when set to *True*, allows Datarithm to update the replenishment points in your PMS.

Enable Replenishment Point Updates on Brand Items

The *Enable Replenishment Point Updates on Brand Items* setting, when set to *True*, allows Datarithm to update the replenishment points in your PMS for your brand name inventory items (but only if *Enable Replenishment Point Updates from Datarithm* is set to *True*). To restrict replenishment point updates on brand items, change this setting to *False*.

Enable Replenishment Point Updates on C2 Items

The *Enable Replenishment Point Updates on C2 Items* setting, when set to *True*, allows Datarithm to update the replenishment points in your PMS for your C2 inventory items (but only if *Enable Replenishment Point Updates from Datarithm* is set to *True*). To restrict replenishment point updates on C2 items, change this setting to *False*.

Package Cost Service Level Stretch

The *Package Cost Service Level Stretch* setting provides the user with an additional means of allowing replenishment point increases into the customer's PMS and eases the customer's transition to perpetual inventory. When this setting (representing a package cost threshold) is set to a positive value, then inventory items that have a package cost that is less than this setting, and that have positive current on hand, will receive replenishment point increases from Datarithm, regardless of how the *Service Level Slider* is set.

Purchase Order Impact Service Level Stretch

The *Purchase Order Impact Service Level Stretch* setting provides the user with an additional means of allowing replenishment point increases into the customer's PMS and eases the customer's transition to perpetual inventory. When this setting (representing a purchase order impact threshold) is set to a positive value, then inventory items that have a PO impact (i.e. number of units that will be purchased x unit cost) that is less than this setting, and that have positive current on hand, will receive replenishment point increases from Datarithm, regardless of how the *Service Level Slider* is set.

Replenishment Point Update Activation Day of Month

The *Replenishment Point Update Activation Day of Month* setting gives you the ability to choose the day of the month that Datarithm sends the majority of replenishment point updates to your PMS. Datarithm will send the replenishment point updates on the first day of every month by default. However, you can choose another day for receiving the updates from Datarithm, allowing you to review the pending replenishment point updates. Items for which Datarithm will send replenishment point updates to your Pharmacy Management System can be observed and reviewed in the *Replenishment Point Decreases* and *Replenishment Point Increases* reports (described elsewhere in this document).

Generic Equivalency Grouping

By Pack Size

The *Generic Equivalency Grouping by Pack Size* setting has been deprecated and should not be changed.

Ranking

The *Ranking* settings allows you to control both the relative size of each rank in terms of the percentage of a pharmacy's entire inventory, and the way Datarithm reports on the inventory items within each Rank. The *Ranks* in Datarithm are a measure of the velocity with which an inventory item moves through the pharmacy, as measured by cost, quantity (the number of units used), and the number of fills. There are four *Ranks*: *A*, *B*, *C* and *D*, with *A* being a high rank (fast movers and expensive items), and *D* being a low rank (slow movers and inexpensive items). Each *Rank* represents a percentile section of a pharmacy's total inventory, as measured from the top. In other words, *Rank A* is the top xx% of inventory items, and *Rank B* is made up of the inventory items that fall between xx% and yy%, and so on. Each *Rank* is given a *High Percent* and a *Low Percent*.

These values affect the way Datarithm reports on unusual usage within each *Rank*, and how Cycle Counting categories are composed. *Unusual Usage* is defined as falling outside the range described by these two values (*High/Low Percent*). As an example, where the *High Percent* is 300% and *Low Percent* is 50%, any inventory item that has usage greater than 300% of its forecast will be considered to have *Unusually High Usage*, and any item with usage that is less than 50% of its forecasted usage will be considered to have *Unusually Low Usage*.

Safety Stock Days Supply

The *Safety Stock Days Supply* settings give you the ability to control the amount of safety stock to be maintained for all inventory items with the *Recurring* and *New Usage Patterns* (items that can be forecasted). It is often appropriate for items with greater usage to have more safety stock.

Apply Safety Stock Deviations

The *Apply Safety Stock Deviations* setting allows the customer to disable the application of the Deviations Safety Stock method when the Forecast Order Point is calculated, ensuring that the Days Supply method is always used.

Stocking Rules

Minimum number of months within past 12 to stock sporadic items

The *Minimum number of months within past 12 to stock sporadic items* setting is one of two hurdles that control the determination of whether to stock *Sporadic* items. This setting allows you to set the minimum number of months with usage within the past 12 months required to stock a *Sporadic* item.

Please note that *Sporadic* items are defined as items with usage in less than 8 months of the past 12 and, additionally, are not *New*. The *Default* value is 3 months and, for an item to qualify for stocking, it requires that the number of months with usage for a *Sporadic* item over the past 12 months must equal or exceed the set value.

Usage within past "x" days to stock sporadic items

The *Usage within past "x" days to stock sporadic items* setting is one of two hurdles that control the determination of whether to stock *Sporadic* items. This *Option Value* allows you to set the number of days within which a *Sporadic* item must have been dispensed to be stocked.

Please note that *Sporadic* items are defined as items with usage in less than 8 months of the past 12. The *Default* value is 100 days and, for an item to qualify for stocking, it requires that the item must have been used within this number of days.

Usage within past “x” days to stock recurring items

The *Usage within past “x” days to stock recurring items* setting indicates that an item with a *Recurring* or *New* usage pattern must be dispensed in the past “x” number of days in order to be stocked. This setting allows you to set the number of days within which a *Recurring* or *New* item must have been dispensed to be stocked.

The *Default* value is 120 days. Essentially, for any *Recurring* or *New* item that has not been dispensed within the most recent 120 days, the reorder points will be set to the *Do Not Stock* values. Using a value below 120 (days) could negatively impact service levels where 90-day fill patterns are observed.

Sporadic Item Multiplier

The *Sporadic Item Multiplier* settings allow you to control how much, if any, of a *Sporadic* item will be kept in stock. The number of units of a *Sporadic* item to keep in stock is determined by using a combination of how often the item has been dispensed and the acquisition cost of the item. *Sporadic* items are first separated into three categories: Inexpensive (*Sporadic Item Level 1*), moderately expensive (*Sporadic Item Level 2*) and expensive (*Sporadic Item Level 3*).

The limits of these three categories can be defined using the *Max Cost* field. Within each cost-based category these items are further separated into three subcategories based on the number of months within the most recent year during which the item was used. The limits of these subcategories are defined by the *Max Months 1* and *Max Months 2* fields. Each subcategory is assigned a *Multiplier* that dictates how many multiples of the *Typical Daily Dispense Quantity (TDDQ)* should be kept in stock.

Specify values for the *Max Cost*, *Max Months 1*, *Multiplier 1*, *Max Months 2*, *Multiplier 2*, and *Multiplier 3* fields for each category separately.

High Water Mark

The *High Water Mark* mechanism is looking for the highest dispense or the highest daily aggregated dispense that occurred in the last 120 days. It is configured using the following settings.

Recurring High Water Mark Type

The *Recurring High Water Mark Type* setting allows you to choose between two options: *Highest Single Dispense Quantity* or *Highest Daily Dispense Quantity*. The *Highest Single Dispense Quantity* is the largest single patient dispense within the most recent 4 months. The *Highest Daily Dispense Quantity* is the largest daily sum of dispenses within the most recent 4 months. This setting applies to *Recurring* and *New* items.

Sporadic High Water Mark Type

The *Sporadic High Water Mark Cap Multiple* setting allows you to choose between two options: *Highest Single Dispense Quantity* or *Highest Daily Dispense Quantity*. The *Highest Single Dispense Quantity* is the largest single patient dispense within the most recent 4 months. The *Highest Daily Dispense Quantity* is the largest daily sum of dispenses within the most recent 4 months. This setting applies to *Sporadic* items.

High Water Mark Cap Multiple

The *High Water Mark Cap Multiple* setting allows you to limit the influence of the *High Water Mark* by setting a maximum value as measured by a multiple of the *Typical Daily Dispense Quantity (TDDQ)* to prevent Datarithm's forecast from assigning very large replenishment points. In cases where the *High Water Mark* is larger than this cap, the cap itself will be used.

Please note that, to turn the entire *High Water Mark* function off, simply set the *High Water Mark Cap Multiple* to 1. This setting works in concert with the *High Water Mark Dollar Cap* in that whichever of the two results in a lower number of units will be used as the limit.

High Water Mark Dollar Cap

The *High Water Mark Dollar Cap* setting allows you to limit the *High Water Mark* by setting a maximum value (measured in dollars). In cases where the *High Water Mark* is larger than this cap, the cap itself will be used.

Please note that this setting works in concert with the *High Water Mark Cap Multiple* in that whichever of the two results in a lower number of units will be used as the limit.

Pharmacy

Number of Open Days in a Month

The *Number of Open Days in a Month* setting allows you to specify the average number of days per month that your pharmacy is open. This is particularly helpful for customers who are open 5 or fewer days per week. This helps Datarithm to forecast more precisely. The *Default* value for this setting is 26 days per month.

UPS Account

The *UPS Account* setting has been deprecated and should not be changed.

Wholesaler

Default Lead Time Days

The *Default Lead Time Days* setting gives you the ability to specify the typical number of days that pass between the time that an order has been placed with your primary wholesaler and the time that the order is delivered.

Default Order Cycle Days

The *Default Order Cycle Days* setting gives you the ability to specify the typical number of days that pass between placing orders with your primary wholesaler.

Primary Wholesaler

The *Primary Wholesaler* setting gives you the ability to specify the primary wholesaler that supplies your pharmacy.

Brand Rebate Percentage

The *Brand Rebate Percentage* setting gives you the ability to specify the rebate percentage for brand items. This value is applied to the *Transfer Completed Accounting Report* to determine the true cost basis for brand name inventory that is transferred between pharmacy locations within Datarithm.

Generic Rebate Percentage

The *Generic Rebate Percentage* setting gives you the ability to specify the rebate percentage for generic items. This value is applied to the *Transfer Completed Accounting Report* to determine the true cost basis for generic inventory that is transferred between pharmacy locations within Datarithm.

Trending

Historical Trend Limit (%)

The *Historical Trend Limit (%)* setting gives you the ability to limit the impact that calculated historical trends have on the forecasted usage and the resulting forecasted replenishment points by setting a specific value (percentage). With the *Default* value of 25%, the calculated historical trend cannot exceed this value and it is limited to within 75% and 125% of the otherwise forecasted usage.

Pharmacy Collaborative Trend (%)

The *Pharmacy Collaborative Trend (%)* setting gives you the ability to specify a percentage for an anticipated change in demand that is not reflected in the past usage, but that will be reflected in the future forecasted replenishment points.

The *Default* value is zero (%) and can be changed for each location separately. An example of when this setting should have a different value is when a nearby competitor opened or closed a store. A reduction in demand is represented by a value of 75% if the competitor opens a store nearby, or an increase in demand represented by a value of 130% if the competitor closes a store nearby. These values are applied to all the forecasted items.

Inventory Costs

Carry Cost (%)

The *Carry Cost (%)* setting allows you to specify the calculated cost expressed in percentages of maintaining a dollar's worth of inventory in your pharmacy for an entire year. Research studies led by the National Community Pharmacists Association (NCPA) indicate that the typical range for the pharmacy industry is between 20% to 30%. This value is one component used to determine the *Non-Rounded SOQ* order quantity. The *Default* value is 21%.

Cost of Replenishing Inventory (\$)

The *Cost of Replenishing Inventory (\$)* setting allows you to specify the replenishment cost expressed in dollars for the administrative cost of ordering, receiving, and handling one line item on a purchase order. This value is one component used to determine the *Non-Rounded SOQ* order quantity. The *Default* value is \$5.

Maximum Days Supply to Buy

The *Maximum Days Supply to Buy* setting, when using the *Non-Rounded SOQ* order quantity method, gives you the ability to specify the maximum number of days of supply to be bought at one time.

New Status Duration

The *New Status Duration* setting gives you the ability to specify the time elapsing (in number of days) between the moment a new item is added to your inventory and the moment Datarithm no longer considers the inventory item to be *New*.

Unusual usage

Unusually High Usage Percent

The *Unusually High Usage Percent* setting gives you the ability to specify the percentage threshold that determines if an item has had unusually high usage by comparing its actual usage to forecast usage. The *Default* value is 300%. When the actual usage for the month exceeds 300% of the forecasted usage, then the item's usage will be considered unusually high.

Unusually Low Usage Percent

The *Unusually Low Usage Percent* setting gives you the ability to specify the percentage threshold that determines if an item has had unusually low usage by comparing actual usage to forecast usage. The *Default* value is 50%. When the actual usage for the closing month falls below half of the forecasted usage, then the item's usage will be considered unusually low.

Surplus

Surplus Identification Method

The *Surplus Identification Method* setting gives you the ability to specify the method used to calculate surplus, using either current replenishment points in the PMS, Datarithm's forecast replenishment points, or a monthly forecast multiplier.

Monthly Forecast Multiplier:

If "Monthly Forecast Multiplier" is selected as the *Surplus Identification Method*, then the *Monthly Forecast Multiplier* setting can be set to indicate how many multiples of the forecast monthly usage are used to determine surplus.

Percent of Max

The *Percent of Max* setting gives you the ability to specify the inventory level (percent over replenishment points) which determines if an item is in surplus, and if so, by how much. By default, any on hand amount that is over 120% of the *Max* ($OP + OQ$) is considered surplus.

Value Greater Than Max

The *Value Greater Than Max* setting gives you the ability to specify a dollar value over which an item is considered in surplus. By default, any on hand amount that has a value that is greater than \$50 over *Max* ($OP + OQ$) is considered surplus.

Inventory Balancing

Recommend Dead Surplus Only

The *Recommend Dead Surplus Only* setting gives you the ability to instruct Datarithm to only make balancing recommendations for surplus that has been identified as *Dead* (not dispensed in four or more months). The default setting is False (i.e., Datarithm makes balancing recommendations for both *Overstock* and *Dead* inventory).

Days in Surplus Before Return Recommendation

The *Days in Surplus Before Return Recommendation* setting gives you the ability to specify the number of days an item is considered in surplus before Datarithm will recommend it for return to the wholesaler.

Expedited RTW

The *Expedited RTW* setting has been deprecated and should not be changed.

Days Since Dispense Before Return Recommendation

The *Days Since Dispense Before Return Recommendation* setting gives you the ability to specify the number of days since an item's last dispense before Datarithm will recommend it for return to the wholesaler.

Minimum Wholesaler Return Item Value

The *Minimum Wholesaler Return Item Value* setting gives you the ability to specify the minimum dollar value required for an individual item to be recommended for a return to the wholesaler.

Return Recommendations Batch Size

The *Return Recommendations Batch Size* setting has been deprecated and should not be changed.

Allow C2/C3/C4/C5 Returns

For US Datarithm users, the *Allow C2 Returns* setting gives you the ability to allow or prevent the creation of return recommendations for Schedule 2 items to your wholesaler. There is a similar setting for C3, C4 and C5 drug schedule items.

Days in Surplus Before Transfer Recommendation

The *Days in Surplus Before Transfer Recommendation* setting gives you the ability to specify the number of days an item is considered in surplus before Datarithm will recommend it for transfer.

Days Since Dispense Before Transfer Send Recommendation

The *Days Since Dispense Before Transfer Send Recommendation* setting gives you the ability to specify the number of days since an item's last dispense at the sending pharmacy before Datarithm will recommend it for transfer to another location.

Dispense Within Days Before Transfer Receive Recommendation

The *Dispense Within Days Before Transfer Receive Recommendation* setting gives you the ability to specify the number of days that a dispense has to have been made within at the receiving pharmacy before Datarithm will make a transfer recommendation into that pharmacy from another location.

Transfer Exclusion Expiration Days

The *Transfer Exclusion Expiration Days* setting gives you the ability to configure the number of days that a transfer recommendation will be suppressed after a user *Excludes* that recommendation while processing transfers out the pharmacy. After that number of days has transpired, Datarithm will resurface that transfer recommendation if appropriate.

Minimum Transfer Value

The *Minimum Transfer Value* setting gives you the ability to specify the minimum dollar value required for a *batch* of items to be recommended for transfer to another location. and click *Save*:

Minimum Transfer Item Value

The *Minimum Transfer Item Value* setting gives you the ability to specify the minimum dollar value required for an *individual line item* to be recommended for transfer to another location.

Enable Grey Area Transfers

The *Enable Grey Area Transfers* setting elevates transfer activity by allowing receiving stores to be placed into surplus. Ultimately, the surplus inventory will be considered for wholesaler returns (full packs) and/or reduced via normal dispensing at the receiving location. Importantly, the quantity of surplus sent to the receiving store is capped at an amount that would be dispensed (based on historical usage) before Datarithm would recommend a domino-effect outbound transfer.

Require Exact Drug Match

The *Require Exact Drug Match* setting constrains transfer recommendations by only allowing recommendations where the item recommended for transfer is the exact same drug (NDC in the US or DIN in Canada) that is being actively dispensed at the receiving location. Setting this option to *True* will prevent transfer recommendations for generically equivalent items that are not being actively dispensed at the receiving location.

Allow C2/C3/C4/C5 transfers

For US Datarithm users, the *Allow C2 transfers* setting gives you the ability to allow or prevent transfer of Schedule 2 items to another location. There is a similar setting for C3, C4 and C5 drug schedule items. Please note that if this setting is set to *True*, you are required to use the 222 form for transfer of Schedule 2 items.

Allow N/G/T transfers

For Canadian Datarithm users, the *Allow N transfers* setting gives you the ability to allow or prevent transfer of restricted N (narcotic) items to another location. There is a similar setting for G and T drug schedule items.

Days in Surplus Before Liquidation Recommendation

The *Days in Surplus Before Liquidation Recommendation* setting gives you the ability to specify the number of days Datarithm will wait after an item is determined to be surplus until it recommends an item for liquidation.

On Perpetual

The *On Perpetual* setting gives you the ability to indicate whether your pharmacy uses perpetual inventory management (maintain accurate on hands and replenish inventory based upon order point/min). This setting is used to facilitate integration with Datarithm's partners.

Liquidation

Liquidation Processor

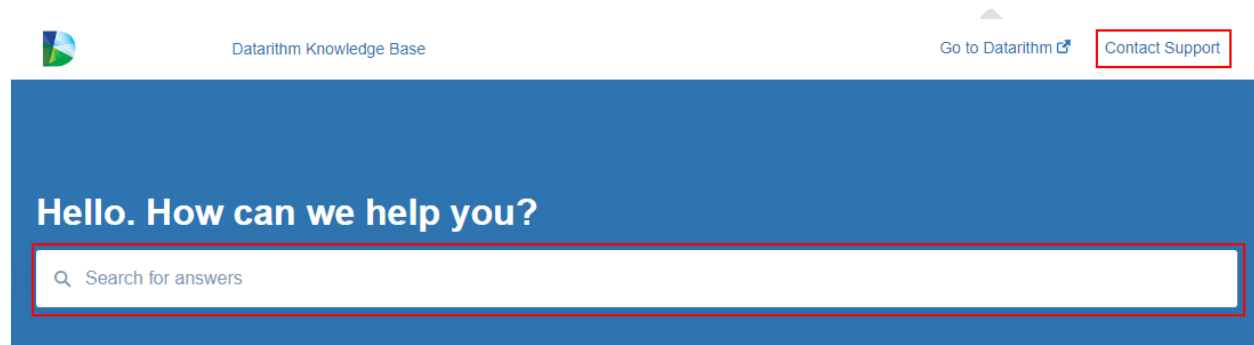
The *Liquidation Processor* setting gives you the ability to specify your reverse distributor/returns management company.

Help

The *Help* menu gives you the ability to quickly access Datarithm's *Knowledge Base*, contact *Datarithm Support*, and view the *Datarithm User Manual* (this document) directly from the Datarithm application.

Knowledge Base

The *Knowledge Base* provides answers to FAQs covering several topics as well as links to training videos. To access the *Knowledge Base*, click on *Knowledge Base* from the *Help* tab. A support ticket can be opened by clicking on the Contact Support link within the *Knowledge Base*.



User Manuals

Datarithm User Manual

See all articles →

Release Notes

Datarithm Release Notes September 2019

Datarithm Release Notes June 2019

See all articles →

General

Frequently Asked Questions (General)

See all articles →

Forecasting

Managing Generic Groups (Video)

See all articles →

Balancing

Frequently Asked Questions (Balancing)

See all articles →

Cycle Counting

Frequently Asked Questions (Cycle Counting)

See all articles →



Contact Support

You can open a support ticket with Datarithm Support by simply clicking on [Help](#) → [Contact Support](#). Doing so will take you to a form where you can submit your question to Datarithm Support.

Contact Support

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Email*	
<input type="text"/>	
Phone number	
<input type="text"/>	
Company name	
<input type="text"/>	
Pharmacy/Location	
<input type="text"/>	
Issue*	
<input type="text"/>	
Details	
<input type="text"/>	
<input type="button" value="Submit"/>	

User Manual

This user manual can be found going to [Help](#) → [User Manuals](#).

Glossary

Acquisition Cost

The cost per unit of an item or the cost of one package of the item.

Usage

The dispensed quantity during the indicated month.

Calculated Forecast Quantity (Forecast Usage)

This value represents the expected usage during the current month.

Current Max/OQ

The maximum stock quantity in the pharmacy management system (PMS).

Current Min/OP

The minimum stock quantity in the PMS. This is often referred to as the Order Point (*OP*) or Reorder Point.

Current Turns

This is the projected number of turns based on the Current Min and Max in the PMS and the usage history of a given inventory item.

Current Units on Hand

This represents the currently available quantity of an item in your inventory. The value is updated nightly via the nightly Inventory file sent by the PMS to Datarithm. The number of units currently in stock for an Inventory Item or generic group.

DEA Class/Drug Schedule

Drugs are classified into five drug schedules, depending upon the drug's acceptable medical use and the drug's abuse or dependency potential. For the US, drug schedules are 1 through 5. In Canada N, G & T are used.

Drug Identifier

The NDC (US) or DIN (Canada) associated with the inventory item.

Drug Name

Contains the name and often the format and strength of the inventory item.

Extended Cost

This represents the unit cost of an item multiplied by the total number of units on hand.

Forecast Average On Hand

This is the estimated average on-hand quantity (measured in units) based on the *Forecast Min/OP* and *Max/OQ* as measured in units.

Forecast Average On Hand (\$)

This is the estimated average on-hand value (measured in dollars) based on the *Forecast Min/OP* and *Max/OQ* and unit cost.

Forecast Daily Usage

This is the estimated average number of units that will be used per day in the current month.

Forecast Daily Usage (\$)

This is the dollar value of the estimated average number of units that will be used per day in the current month.

Forecast Formula

The type of mathematical formula applied to an inventory item in order to determine forecast usage for the current month.

Forecast Max/OQ

Datarithm's prescribed Max/OQ based on historical usage.

Forecast Min/OP

Datarithm's prescribed Min/OP based on historical usage.

Forecast Turns

This is the projected number of turns that can be expected based on the *Forecast Min/OP* and *Max/OQ* and the usage history of a given inventory item.

Generic Equivalency Code (GEC)

The *GEC* is the grouping code provided by the PMS that allows Datarithm to group generically equivalent inventory items. This code may be the *GCN*, *GSN*, or *GPI*, depending on the original source.

Generic Indicator

A flag indicating whether an item is generic or not (brand).

Liquidation

The process of returning inventory to the manufacturer or through some other means, possibly through a Returns Company or Reverse Distributor.

Liquidation Recommendation Quantity

The number of units of a given inventory item that are in surplus and that are recommended for liquidation.

Maximum Days Supply to Buy

This represents a cap on the *Forecast Max/OQ* as measured in *Days Supply*.

Months Since Last Usage

The number of months since an item was last dispensed.

Months Without Usage

This is the number of consecutive (recent) months without usage.

New (Usage Pattern)

Items that appear to have been part of the formulary for 9 or fewer months.

Order Cycle Period

The maximum number of days between placing orders with the wholesaler. As an example, while a pharmacy may send an order every day during the week, the *Order Cycle Period* should be 3 days to allow for the gap between the Friday order and the Monday order.

Order Lead Time

The typical number of days between placing an order and receiving the order. As an example, if a pharmacy can expect to receive an order the day after placing it, this value should be 1.

Over/Under Stocked

The difference (in units) between the *Current on Hand* and the *Forecast Average On Hand*. A positive value indicates that an item is overstocked, and a negative value indicates that an item is understocked.

Over/Under Stocked (\$)

The difference (in dollars) between the *Current on Hand* and the *Forecast Average On Hand*. A positive value indicates that an item is overstocked, and a negative value indicates that an item is understocked.

Package Cost

The cost of one package of an inventory item.

Package Size

The number of units contained in a single package.

Planned Excess

The quantity of a product you must buy above the recommended quantity due to the package size.

Quantity Found

The actual number of units found in your inventory while performing a *Cycle Count*.

Quantity to Expect

The expected number of units of an Inventory item that has been assigned for *Cycle Counting*.

Rank by Cost

Inventory items are ranked within Datarithm based on the volume of each item moving through the store. In this case the volume is measured in terms of cost basis dollars.

Rank by Frequency

Inventory items are ranked within Datarithm based on the volume of each item moving through the store. In this case the volume is measured in terms of the number of dispensing events.

Rank by Quantity

Inventory Items are ranked within Datarithm based on the volume of each item moving through the store. In this case the volume is measured in terms of units.

Receiving Pharmacy

In the context of a *Transfer*, this is the location that will receive items sent from the providing location.

Recurring (Usage Pattern)

Items with dispensing events in 8 or more of the most recent 12 months.

Replenishment Points

This is the pair of values for an inventory item comprised of an *Order Point* and an *Order Quantity*, or a *Min* and a *Max*.

Return Recommendation Quantity

This is the number of units that are recommended for a return to the wholesaler.

Rounded SOQ

The *Rounded SOQ* is the *Standard Order Quantity (SOQ)* rounded up to the nearest package size for the inventory item.

Safety Stock

The number of units added to (included within) the order point to reduce the risk of stock-outs.

Standard Order Quantity (SOQ)

The optimum (unrounded) order quantity that a pharmacy should maintain for an inventory item, given a set costs, demand rate and other variables to minimize inventory maintenance costs.

Sporadic (Usage Pattern)

Inventory items that are not *New* and that have dispensing events in less than 8 of the most recent 12 months. Infrequently dispensed items.

Strength

The strength of a drug expressed in mg/ml/etc.

Transfer Recommendation Quantity

The number of units that are recommended for a transfer to another pharmacy within the company.

Typical Daily Dispense Quantity (TDDQ)

This represents either the median or the mode (whichever is greater) of usage typically dispensed on days when dispensing occurs (expressed in units).

Usage Pattern

Indicates whether an item is *New*, *Recurring* or *Sporadic*.