Datarithm User Manual

This manual is intended as a guide to the use of the Datarithm application. Last updated on 03/25/2025. For recent updates to take effect, please clear your browser cache by pressing Ctrl+F5.

Non-Disclosure Agreement

This Datarithm User Manual is confidential and has been prepared solely for use in connection with assisting you in your use of Datarithm services. You may not reproduce or distribute this User Manual, in whole or in part, and you may not disclose any of the contents of this User Manual or use any information herein for any purpose other than as a reference for your use of Datarithm services. By accepting delivery of this User Manual, you expressly agree to maintain in confidence the disclosed information contained or incorporated by reference in this User Manual. You may not distribute this User Manual or disclose its contents to anyone, other than persons in your organization, without Datarithm's prior written consent. If such distribution or disclosure is made to other people in your organization, such people will be duly informed of all terms of confidentiality contained herein as if they were the original recipients of this User Manual. No representation is made that there will be no change after that date with respect to Datarithm services.

Table of Contents

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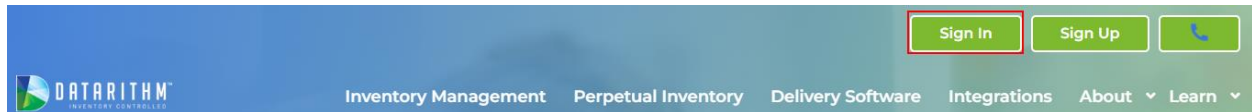
or by accessing the following link directly: https://apps.datarithm.co/

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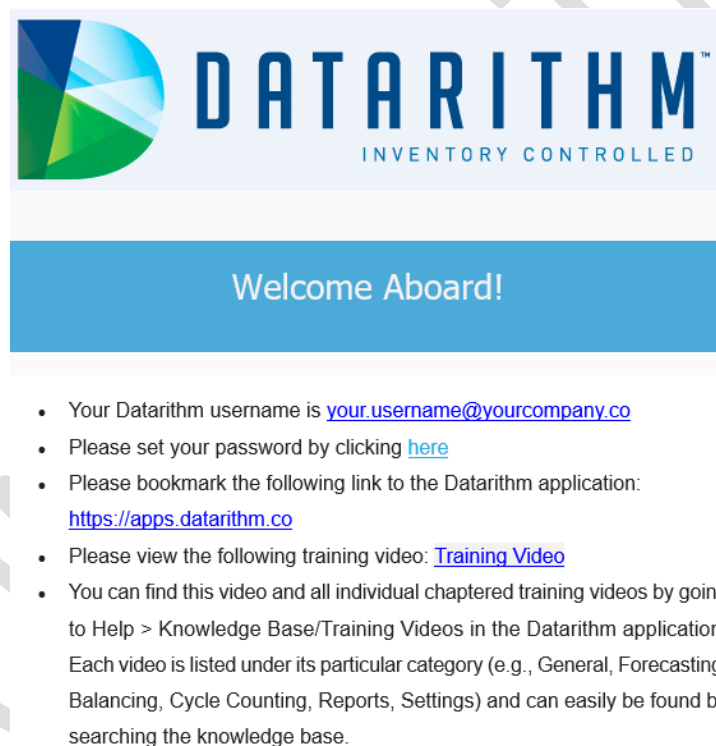
Clicking on this link will bring you to a page where you will be asked to specify (and confirm) a new password. You will then receive confirmation that your password has been established.

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. Alternatively, click on the Change link below your username.
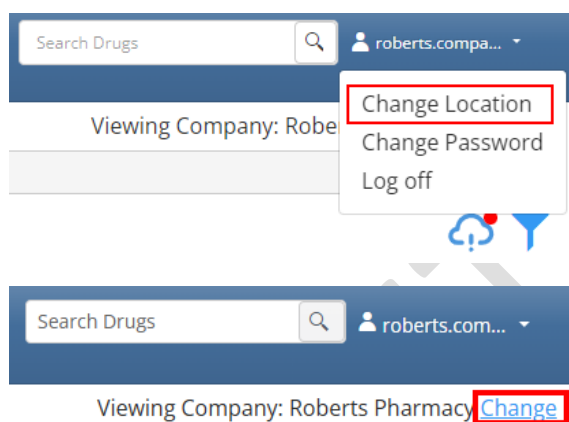
Here you will be able to select any location that your user account has access to by clicking on the Select button. For large organizations with many locations, the Select Location grid can be filtered by pharmacy name and location type. To bookmark a particular pharmacy location, click the bookmark icon (star) to the left of the location. To remove the bookmark for a location, click the bookmark icon (star) to the left of the location. To view only your bookmarked locations, filter the grid on Bookmarked = Yes.

Change Location

Bookmarked	Company Name	Region Name	Pharmacy Name	Location Type	
Yes ○ No ○					
☆	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

roberts.company@datarithm.co

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.
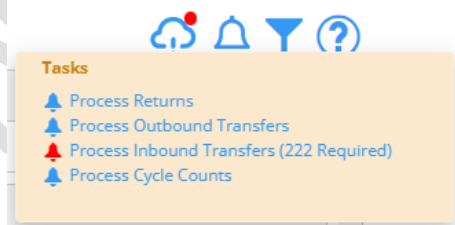
This same area of the application also displays:

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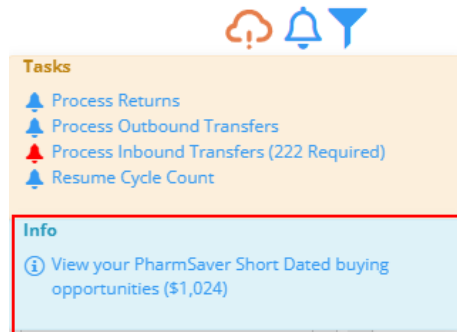
The *Forecast Dashboard* displays an array of Key Performance Indicators ("KPI's") for a more holistic view of the state of your inventory and the changes that have occurred to your inventory over time. If your company has multiple stores you can filter on a particular pharmacy location using the filter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

Forecast Dashboard

Overview

DATARITHM EFFECT		Now	SURPLUS		
Base May-01 2022			**Overstock**		**Dead**
$1,307,133	On Hand -16%	$1,104,135	1,194	Items	985
$418,310	Surplus -24%	$317,685	$131,550	12% Value 17%	$186,406
$1,301,402	Ideal Inventory +25%	$1,623,192	$23,654	Returns	$31,902
16.34	Turns +49%	24.41	$5,355	Transfers	$14,393

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.
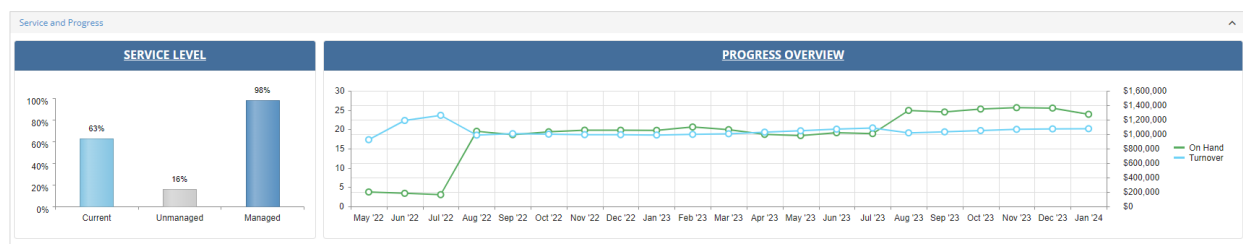
The *Service Level* tile shows three important service levels. The "Current" service level is based upon all replenishment points that currently reside in the pharmacy management system (PMS). The "Unmanaged" service level shows the service level for items that are not being managed by Datarithm, while 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.
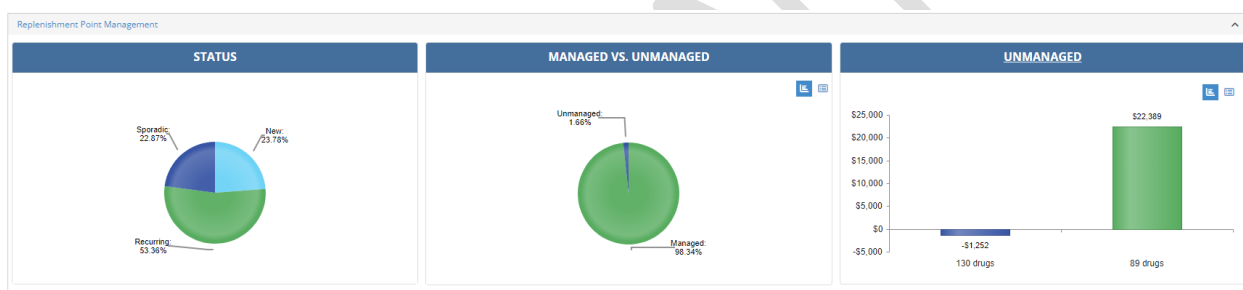
The *Status* tile shows a profile of the customer's inventory when segmented into Recurring, Sporadic and New categories. This is important because Datarithm treats (i.e., forecasts replenishment points, makes balancing recommendations, etc.) each category differently.

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 customers 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 Group*s.

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.

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. With the cursor in the *Drug Identifier* field, the user can also scan either the UPC barcode or the QR code (GS1 data matrix) to enter the drug identifier. 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. To edit an Order Alert from the calendar view, double click on the alert.

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

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.
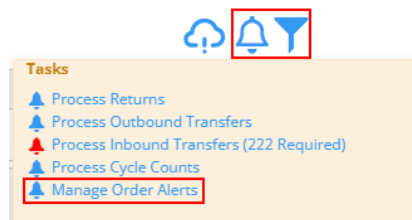
When viewing an item with a pending order alert within the Inventory Details page (described later in this document), an order alert indicator will be displayed.
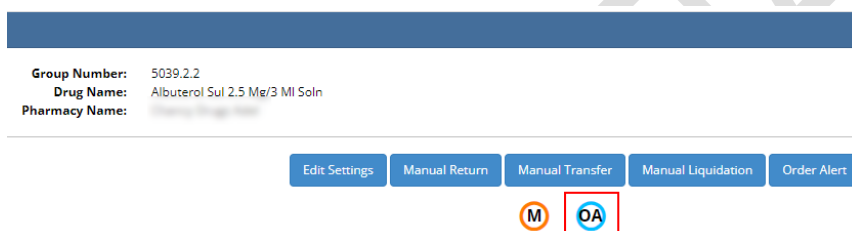
Note that pending Order Alerts with an Alert Date of *today* or earlier will be emailed daily as a report to the email address(es) associated with that pharmacy in Datarithm.

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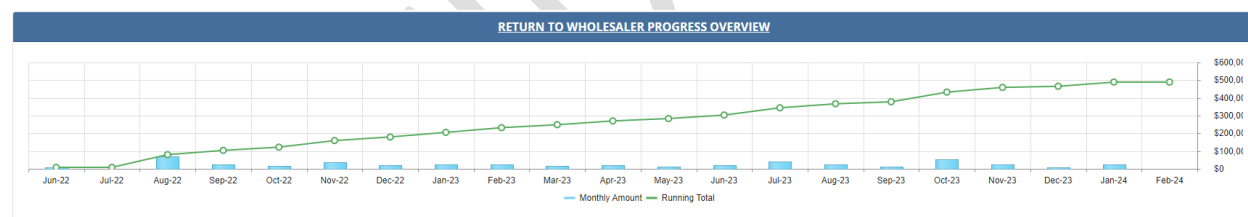
Return to Wholesaler Progress Overview illustrates the "Monthly Amount" of dollars in inventory that has been recouped by returning the inventory to the wholesaler and the total amount of dollars in inventory ("Running Total") that has been saved since the customer onboarded with Datarithm. Click on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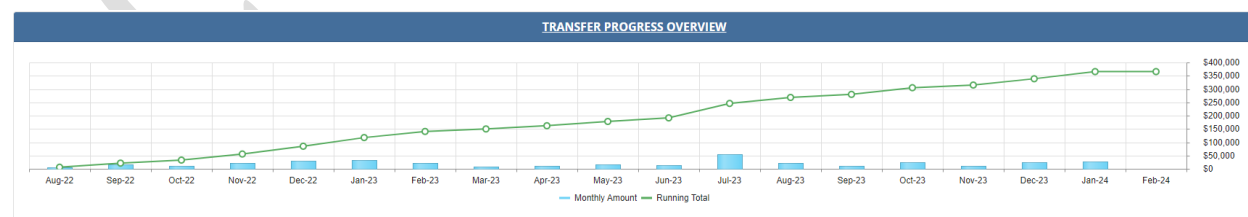
Transfer Progress Overview illustrates the "Monthly Amount" of dollars in inventory that has been transferred to another pharmacy and the total amount of dollars in inventory ("Running Total") that has

been transferred since the customer onboarded with Datarithm. Click on the tile title to navigate to the corresponding Transfer Summary Report.
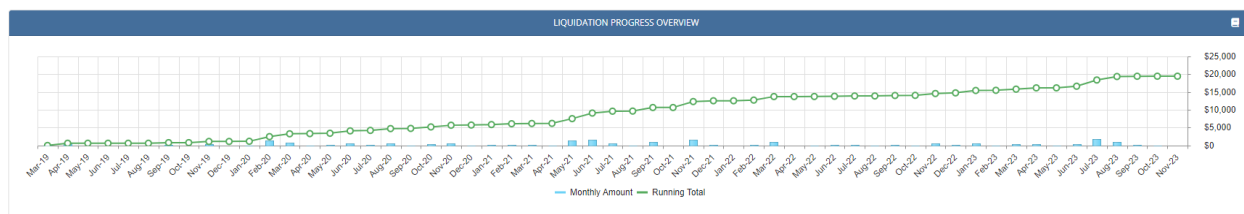
Liquidation Progress Overview illustrates the "Monthly Amount" of dollars in inventory that has been saved via liquidation and the total amount of dollars in inventory ("Running Total") that has been saved since the customer onboarded with Datarithm. Click on the title title to navigate to the corresponding 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.
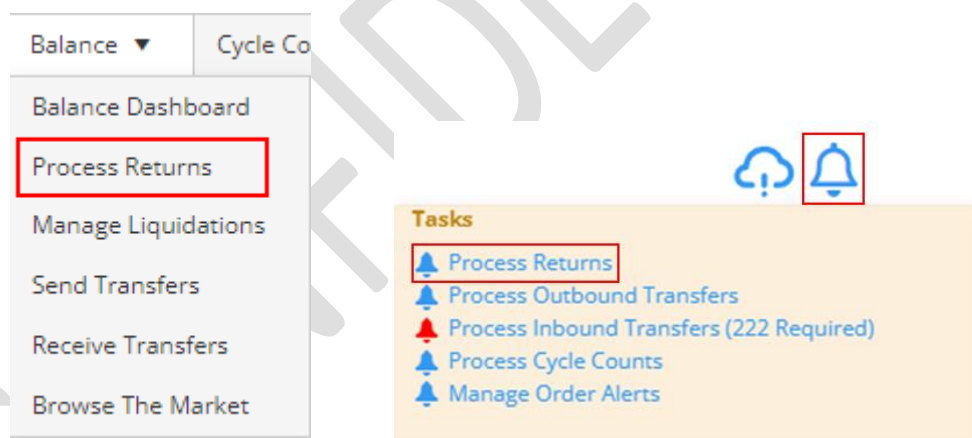
Return to Wholesaler - Standard

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

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
68682-0271-45	Hc Butyrate Oin 0.1%	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			

Total Items: 23
Total Recommended Extended Cost: $2,388.95

Step 1 of 4

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

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

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.

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.

	1		2		3		4
	Review Returns		Process Returns		Confirm Returns		Complete

Review Returns

📄 Export to PDF ➕ Add Manual ✕ 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 Ml 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 ☁

	✔		✔		3		4
	Review Liquidations		Process Liquidations		**Confirm Liquidations**		Complete

Confirm Liquidations

Recipient Type: [Other ▼]   Company Name
                                      Address
                                      Apartment/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	Ozempic 1 Mg Dose Pen (3 Ml)		12	12	$3,593.72	ML
80777-0102-93	Spikevax Vaccine 2023-2024 (12yr Up) Syringe		12	12	$3,108.00	Ml

|◀ ◀ [1] ▶ ▶| [20 ▼] items per page   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.

Process Liquidations

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.

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 based 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

Click on V*iew* 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.

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. For items that you intend to transfer at a later date, leave the Transferred Quantity blank. If you choose to transfer the item, enter the Transferred Quantity. Click the "Next" button to move to the next step.

Send Transfers 🔔 ⑦

Step 2 of 4   Previous Next

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: **5**
Amount Transferred: **$452.72**

Enter Special Instructions

This is an outstanding Transfer!

☐ **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.

Step 4 of 4   Review Transfers

The *Packing List* should be placed inside the transport container. The *Shipping Label* should be placed on the outside of 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 configured accordingly).

Cancelling a Transfer

If a Transfer is sent in error, the Transfer can be cancelled by going to the Balancing Archive Report (Reports → Balancing Reports → Balancing Archive), clicking on the Transfers tab, and clicking on the *Cancel Transfer* button. For more information, please see the Balancing Archive Report section in this document.

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.

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.

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

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**

Previous   Finish

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.

Add to Pharmacy Management System					×

This inbound transfer will result in on hand adjustments by Datarithm to your pharmacy management system (PMS). Please create the following items in your PMS immediately so that these adjustments can be applied.

Drug Identifier	Drug Name	Strength	Unit Type	Manufacturer	Package Size
29300-0113-16	Lamotrigine 150 Mg Tablet	150 MG	EA	UNICHEM PHAR	60

Ok

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*. 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 the UPC barcode or the QR code (GS1 Data Matrix) on a package to do a search for that item. 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.

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.

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

Request Transfer

✓ Search for Drugs	✓ Process Request	③ **Confirm Request**	④ Complete

Confirm 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	1000
43547-0354-11	Lisinopril 20mg	20 mg	Solco Healthcar	Roberts - Lake Shore Pharmacy	1000	1892	56.00	30

|◄ ◄ **1** ► ►| 20 ▼ items per page   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.
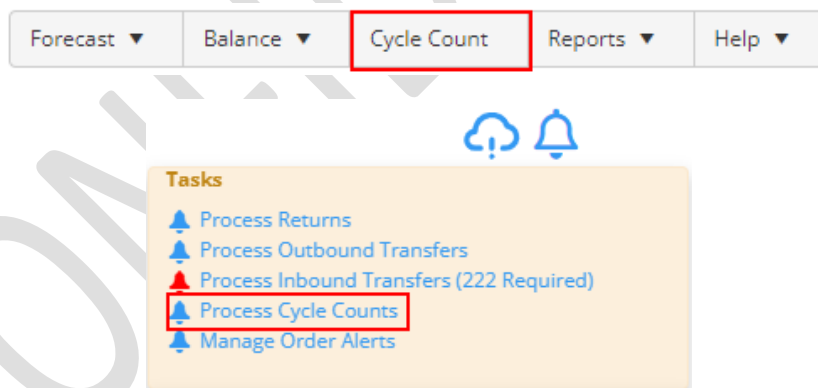
Step 1 Cycle Count Summary: You will be redirected to the *Cycle Counting* wizard where you will be presented with the number of items in today's cycle count list, the date and time of the most recent count, and the user who performed the most recent count. Click the "Next" button to proceed.

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 ~~███████~~. 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**

Cycle Counting

| 1 | of 3 pages |

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	
70756-0721-11	‖‖‖‖‖‖	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.
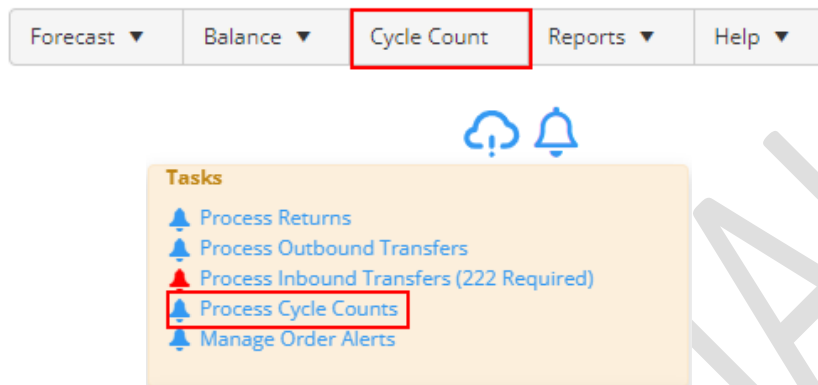
Step 1 Cycle Count Summary: You will be redirected to the *Cycle Counting* wizard where you will be presented with the number of items in today's cycle count list, the date and time of the most recent count, and the user who performed the most recent count. Click the "Next" button to proceed.
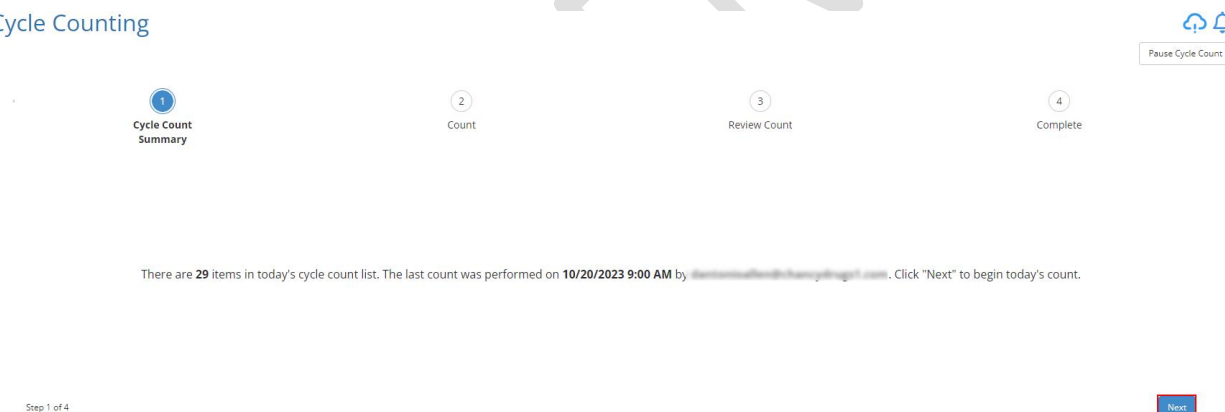
Step 2 Count: You will be presented with the list of items to be counted. Click the "Export to PDF" button to print the count list (which includes NDC barcode). Once you have physically counted the items on the list, add the verified on-hand counts in the *Quantity Found* field and click *Next*. Note that you can process just a portion of the counting list if necessary

Cycle Counting

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.

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.

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

1	2	3	4	5
Cycle Count Paused	Generate Cycle Count	Cycle Count Summary	Print List For Cycle Counting	Complete
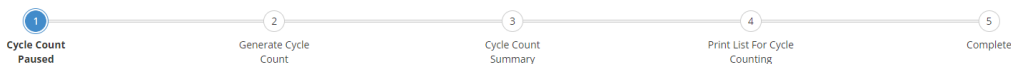
Management at your organization or staff at your location has explicitly paused your Cycle Counting activities. The last day that your pharmacy location performed a Cycle Count was on 10/20/2023 9:00 AM. If you would like your Cycle Count activities resumed, please click Resume Cycle Count.

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

1	2	3	4	5
Cycle Count Paused	Generate Cycle Count	Cycle Count Summary	Print List For Cycle Counting	Complete

There are currently no items to count. The last count was performed on **10/20/2023 9:00 AM** by dantonioallen@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).
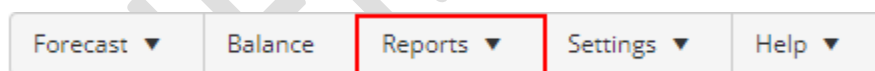
Most reports can be filtered in a variety of fields. These filters can be accessed by clicking on the filter icon in the top right corner of the application.

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.

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. A drug identifier can be manually typed into the Drug Identifier filter textbox, or the value can be entered by scanning the UPC barcode or QR code (GS1 data matrix) on the drug package. Most columns are sortable. Lastly, most reports can be exported to both Excel and CSV.

Drug Identifier	Drug Name	Pharmacy	Current Units On Hand	Extended Cost	Surplus Quantity	Surplus Dollars ↓
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 how there are two views available to company- and region-level users. The "By Pharmacy" view displays the location first and then the drugs in that location. The "By Drug" view displays the drug first and then the location.

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 the UPC barcode or the QR code (GS1 Data Matrix) on a package to do a search for that item.

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 drug identifier, pharmacy name, or 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 - Childress Pharmacy	8	$798.01	View
Roberts - Elm Street Pharmacy	6	$393.79	View
Roberts - Grand Island Pharmacy	4	$472.87	View

Drug Identifier	Drug Name ↑	Strength	Manufacturer	Current On Hand	Extended Cost	Action
16714-0173-03	Atorvastatin 10 Mg Tablet	10MG	NORTHSTAR	2695	$115.08	… ✏
16714-0174-03	Atorvastatin 20 Mg Tablet	20MG	NORTHSTAR	2597	$99.72	… ✏
16714-0175-03	Atorvastatin 40 Mg Tablet		NORTHSTAR	1834	$125.81	… ✏
16714-0176-03	Atorvastatin 80 Mg Tablet	80 MG	NORTHSTAR RX LL	1607	$132.26	… ✏

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".
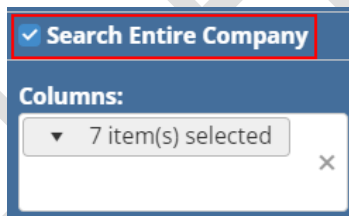
Custom Reports

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.

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

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 "+ in" filter type can be used to create composite filters based on a distinct set of drug identifiers or drug schedules (separated by commas). 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 | Filters |

Filters

| And | Or | ⧉ | ⧉ | + in | ✕ |

Current Units On Hand ▼	Is greater than ▼	0.00 ▲▼	✕
Drug Schedule ▼	Is equal to ▼	3	✕
Pharmacy ▼	Contains ▼	Elm Street	✕

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

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	00409-6562-01	Testost Cyp Inj 200mg/Ml	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 F.s. 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/Ml	1.0000	3	1.00	$18.85

| ⏮ ◀ | 1 ▼ | ▶ ⏭ |

| 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

CUSTOM REPORTS

| | + |

Title	Description	
C3 With Positive On Hand at Elm Street	C3 inventory items with positive On Hand values at Elm Street Pharmacy.	… ✎ 🗑
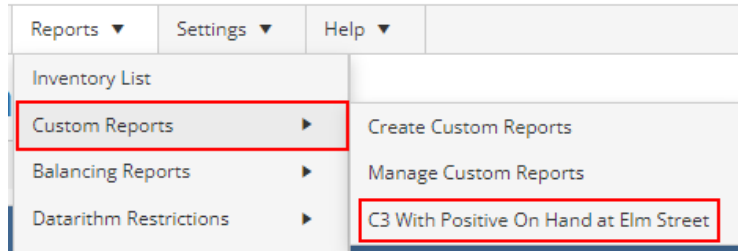
Manage Custom Reports

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

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*.

If there is a recent outbound transfer that you would like to cancel, you can use the cancel button in the Transfer (Sent) History grid to cancel that Transfer. Cancellation sends an email to the sending and receiving pharmacy that the Transfer is no longer being sent (was cancelled by the sending pharmacy).

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.

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*.
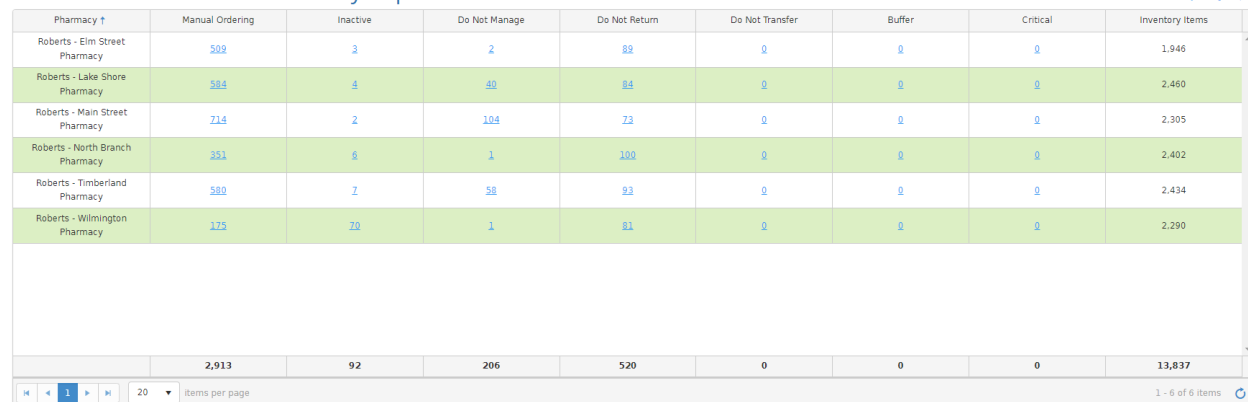
Datarithm Restrictions

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	89	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	70	1	81	0	0	0	2,290
	2,913	92	206	520	0	0	0	13,837

◄◄ ◄ 1 ► ►►	20 ▼ items per page					1 - 6 of 6 items ↻

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	00054-0189-13	BUPREN/NALOX SUB 8-2MG	None	false	300	196	($104.10)	274	$274.27
Manage	21922-0021-07	PERMETHRIN CRE 5%	Equivalent Service (-$)	false	99	60	($8.03)	540	$111.24
Manage	52817-0362-00	METOPROL TAR 100MG	None	false	500	240	($7.85)	55	$1.66
Manage	68382-0093-05	CARVEDILOL 6.25MG	Equivalent Service (-$)	false	300	242	($1.24)	880	$18.74
Manage	69315-0137-01	BENZTROPINE 1MG	Agree - Stock (=$)	false	60	60	$0.00	60	$3.85
Manage	51672-1312-00	MUPIROCIN OIN 2%	Agree - Stock (=$)	false	88	88	$0.00	88	$12.28
Manage	51672-1312-01	MUPIROCIN OIN 2%	Agree - Stock (=$)	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

	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	Levetiracetam 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	27241-0114-05	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 2 3 ▶ ▶| 20 ▼ items per page   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

Month	All Dispenses	Cycle Fill	340B	LTC	Cycle Fill Percent	340B Percent	LTC Percent
Oct-23	29,817	11,233	0	0	37.67 %	0.00 %	0.00 %
Sep-23	38,592	16,112	0	0	41.75 %	0.00 %	0.00 %
Aug-23	37,466	16,102	0	0	42.98 %	0.00 %	0.00 %
Jul-23	34,139	15,941	0	0	46.69 %	0.00 %	0.00 %
Jun-23	38,315	17,502	0	0	45.68 %	0.00 %	0.00 %
May-23	39,909	17,085	0	0	42.81 %	0.00 %	0.00 %
Apr-23	36,758	16,159	0	0	43.96 %	0.00 %	0.00 %
Mar-23	43,032	17,736	0	0	41.22 %	0.00 %	0.00 %
Feb-23	37,022	15,421	0	0	41.65 %	0.00 %	0.00 %
Jan-23	39,938	15,655	0	0	39.20 %	0.00 %	0.00 %

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

Month	All ($)	Brand ($)	Generic ($)	Brand (%)	Generic (%)
Oct-23	$1,672,812.00	$1,381,887.00	$290,925.00	82.61 %	17.39 %
Sep-23	$2,355,687.00	$1,946,512.00	$409,175.00	82.63 %	17.37 %
Aug-23	$2,261,528.00	$1,776,220.00	$485,308.00	78.54 %	21.46 %
Jul-23	$2,097,673.00	$1,707,309.00	$390,363.00	81.39 %	18.61 %
Jun-23	$2,350,899.00	$1,937,251.00	$413,648.00	82.40 %	17.60 %
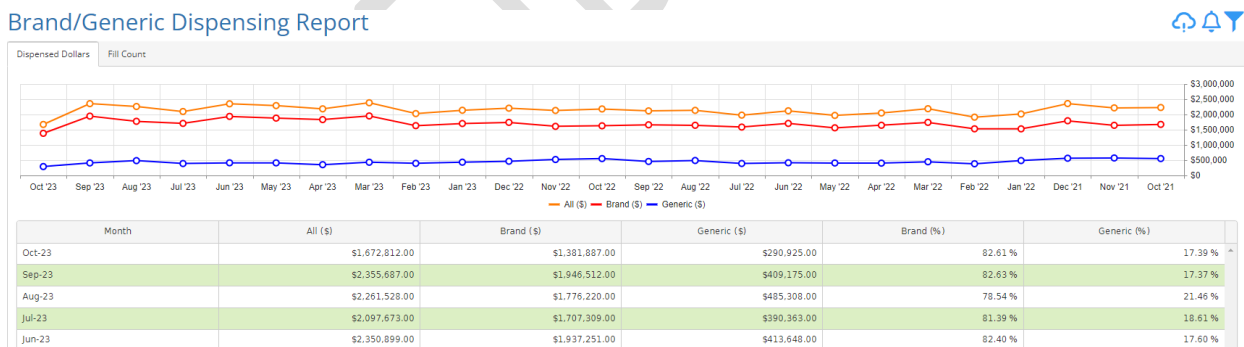
Generic Groups

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

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*.

Inventory Change Report

The *Inventory Change Report* provide a view of the items that have experienced the most significant change in extended cost over a defined period of time. Use the filter panel on the left to define your start and end dates and use the *Alert Status* filter to indicate whether you want to see items that have increased extended cost or decreased extended cost during that time period.

To access the report, go to *Reports → Inventory Reports → Inventory Change 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	Etonogestere 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.

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.*

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*.

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	
33342-0098-09	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.

Info

ⓘ View your PharmSaver Short Dated buying opportunities ($13,204)
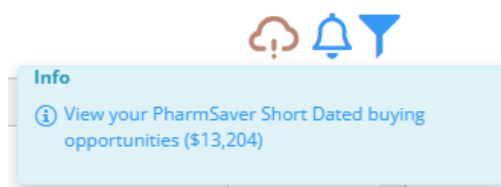
This link will be displayed when there are "Short Date" purchasing opportunities available within PharmSaver that match the drugs (and generic equivalents) that are actively dispensed at your location(s). The aggregate savings opportunity is calculated (using PharmSaver's Short Date pricing and Datarithm's 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	

1 2 3 4 5 ▶ ▶| 20 ▼ items per page   1 - 20 of 93 items

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

Progress
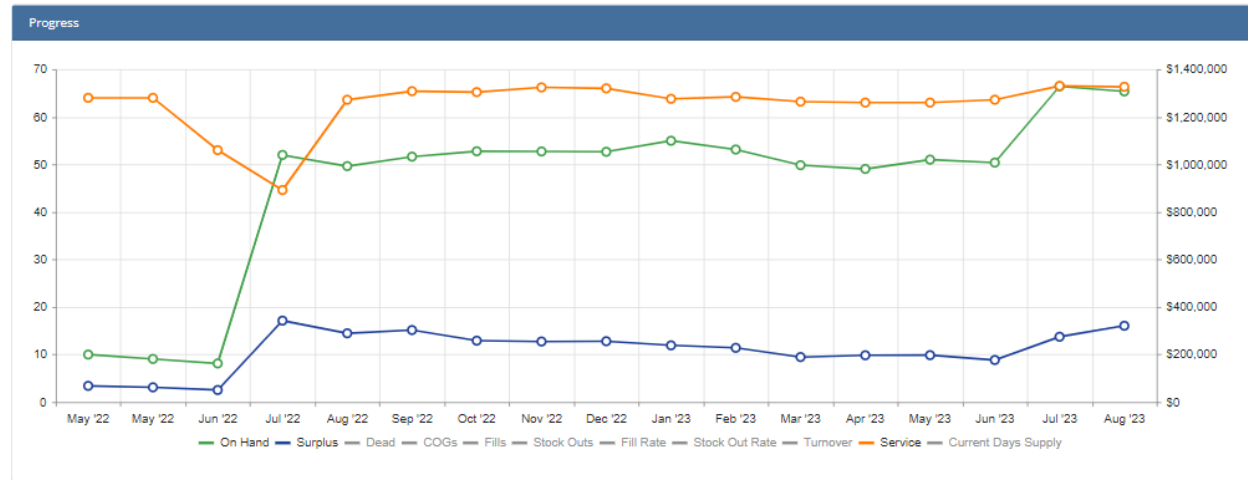
Forecast

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

|◄ ◄ **1** 2 ► ►| 10 ▼   items per page   1 - 10 of 17 items

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	$3,334.34	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*. There are two tabs/grids for this report. One that show transfers sent by the pharmacy and another that shows transfers received by the pharmacy. 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

Completed - Sent | Completed - Received

Export to Excel | Export to CSV

Transfer Number	Providing Pharmacy	Receiving Pharmacy	Drug Identifier	Drug Name	Units (Sent)	Extended Cost (Sent)	Units (Received)	Package Cost (Received)	Extended Cost (Received)	Extended Cost (Accounting)	Date Sent ↓	Date Received
	-- Select Pharm... ▼	-- Select Pharm... ▼										
5234745	Roberts - Childress Pharmacy	Roberts - Summit Pharmacy	68382-0185-01	Glipizide/Metformin 2.5-500mg Tabs	80.00	$37.65		$0.00	$0.00	$0.00	3/3/2025	
5234745	Roberts - Childress Pharmacy	Roberts - Summit Pharmacy	50228-0423-60	Ranolazine 500mg Er	180.00	$86.00		$0.00	$0.00	$0.00	3/3/2025	
5234745	Roberts - Childress Pharmacy	Roberts - Summit Pharmacy	10702-0150-16	Hydrocodone-Homatropine Soln	233.00	$28.08		$0.00	$0.00	$0.00	3/3/2025	
5238388	Roberts - Childress Pharmacy	Roberts - Lakeside Pharmacy	33342-0482-15	Nystatin-Triamcinolone Cream	60.00	$11.68	60.00	$2.92	$11.68	$11.68	3/3/2025	3/3/2025
5238388	Roberts - Childress Pharmacy	Roberts - Lakeside Pharmacy	00713-0552-73	Terconazole 80 Mg Suppository	4.00	$65.13	4.00	$58.42	$77.89	$65.13	3/3/2025	3/3/2025
5234749	Roberts - Childress Pharmacy	Roberts - Wilmington Pharmacy	21922-0017-04	Clobetasol 0.05% Ointment	45.00	$3.75	45.00	$1.88	$5.64	$3.75	3/3/2025	3/3/2025

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

Export to Excel   Export to CSV

20 ▾ items per page   1 - 15 of 15 items

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. Receiving pharmacies can use this report to block (unsent) inbound transfers by clicking on the *Block* button in the Transfer (Receive) Pending grid.

Transfer Pending Detail Report

Transfer (Send) Pending **Transfer (Receive) Pending**

Action	Providing Pharmacy	Receiving Pharmacy	Drug Identifier	Drug Name	Units	Extended Cost ↓	Recommendation Date	Time Pending (days)	Current Min	Months Since Last Usage
Block	Roberts - Summit Pharmacy	Roberts - Wilmington Pharmacy	00527-4581-37	Methylphenid 30mg CD	30.00	$81.23	11/20/2024	37.34	29.00	1
Block	Roberts - Grand Island Pharmacy	Roberts - Wilmington Pharmacy	24208-0630-05	Bepotastine 1.5% Eye Drop	5.00	$56.47	12/17/2024	10.34	-0.01	1
Block	Roberts - Lakeside Pharmacy	Roberts - Wilmington Pharmacy	59651-0566-01	Dicloxacillin 500 Mg Capsule	32.00	$41.40	12/16/2024	11.34	-1.00	1
Block	Roberts - Grand Island Pharmacy	Roberts - Wilmington Pharmacy	16714-0063-01	Carbamazepine Er 100 Mg Tablet	91.00	$36.11	12/18/2024	9.34	-1.00	1
					158.00	$215.20		17.09		

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		

|◄ ◄ **1** ► ►| 20 ▼ items per page   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

Days Counted
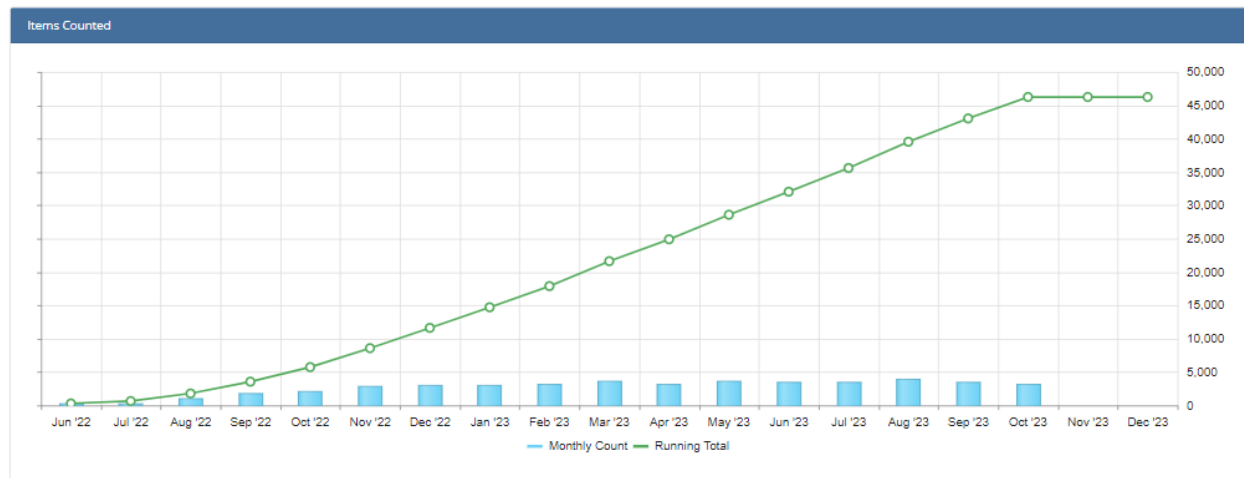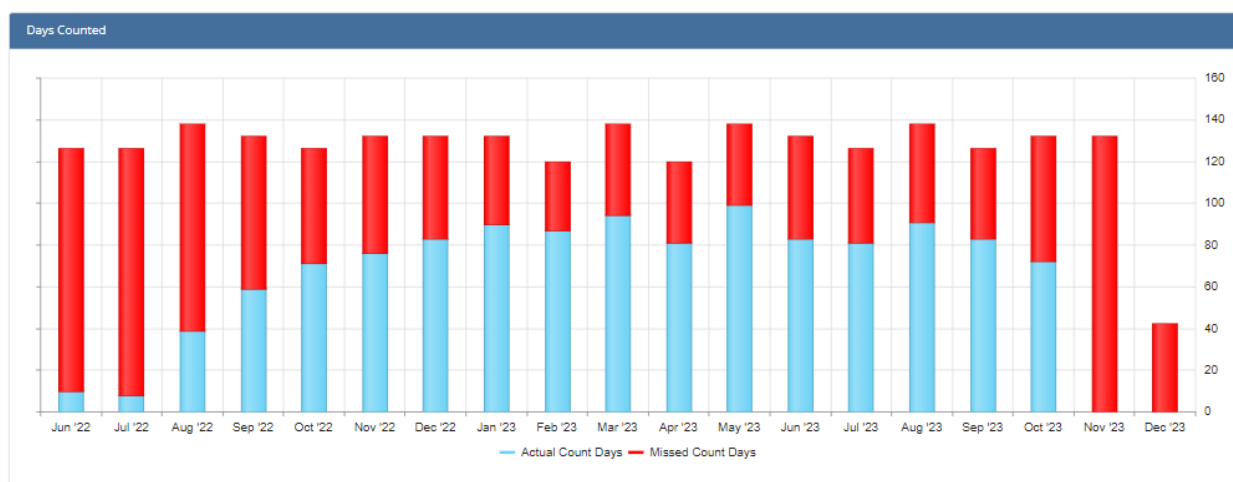
Pharmacy	Configured Count Days	Actual Count Days	Missed Count Days	Success Rate ↓	Failure Rate	Last Count Date	Status
Roberts - Grand Island Pharmacy	670	607	63	90.60 %	9.40 %	3/4/2025	Active
Roberts - Childress Pharmacy	734	603	131	82.15 %	17.85 %	3/4/2025	Active
Roberts - Summit Pharmacy	679	557	122	82.03 %	17.97 %	3/4/2025	Active
Roberts - Wilmington Pharmacy	421	340	81	80.76 %	19.24 %	3/3/2025	Active
Roberts - Lakeside Pharmacy	681	450	231	66.08 %	33.92 %	3/4/2025	Active
Roberts - Elm Street Pharmacy	686	432	254	62.97 %	37.03 %	3/1/2025	Paused

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	13668-0081-05	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	Ascendlabs	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	00832-1214-00	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	102.86	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

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
54092-0391-01	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
00173-0696-00	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
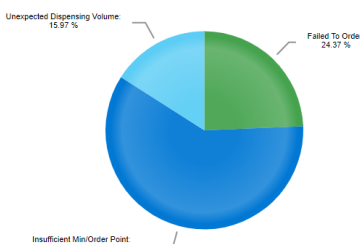
Drug Identifier	Drug Name	Stock Out Date ↓	Previous On Hand	Item On Hand	Group On Hand	Current Min	Forecast Min	Package Size	Reason
08627-0016-01	Dexcom G6 Mis Transmit	10/21/2023	0.00	-1.00	0.00	0.00	0.00	1.00	Unexpected Dispensing Volume
00002-7715-59	Basaglar 100u/Ml Kwikpen	10/20/2023	0.00	-15.00	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 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

1 - 6 of 6 items

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:	29969.1000.0000.2.3	**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

Current Min:	491.00
Current Max:	492.00
Current Min 4 Month Coverage:	100.00%
Current Min Days Supply:	4.90
Usage Pattern:	Recurring

Forecast Info

Forecast Min:	600.00
Forecast Max:	601.00
Forecast Min 4 Month Coverage:	100.00%
Forecast Min Days Supply:	5.99
Forecasted Usage:	2,604.14

Slider Info

Current to Forecast $ Diff:	$7.48
Slider Position:	$500.00

On Hand Info

Current on Hand:	2,418	$165.87
Surplus on Hand:	474	$32.52

Additional Info

Created On:	8/15/2022
Last Forecasted:	10/22/2023
Typical Daily Dispense Quantity:	90.00
High Water Mark:	360.00
Transactions in 12 Months:	640.00
Current On Hand Days Supply:	24.14
Package Size Days Supply:	9.98

Forecast Calculations

Safety Stock Method:	Days' Supply
Safety Stock:	300.48
Lead Time Usage:	100.16
Order Cycle Usage:	200.32
Line Point:	600.96
Forecast Min Buffer:	0.00
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 ► ►| 10 ▼ items per page   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.

✓ *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.

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.

Usage																				×
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	Ju
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.*
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
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
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
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
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	1,9

|◄ ◄ | 1 ▾ | ► ►| ↻

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.
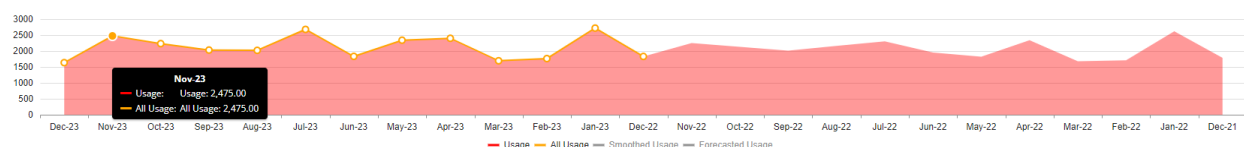
Additional Information

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

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

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). Rows highlighted in yellow indicate days where aggregate dispensing matched the *High Water Mark*.

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 and 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.

Edit Inventory ✕

Datarithm Actions

Action	Yes/No	Expiration Date
Block Datarithm Replenishment Points	☐	[_____ 📅]
Block Datarithm Return Recommendations	☐	[_____ 📅]
Block Datarithm Transfer Recommendations	☐	[_____ 📅]

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
0.0000 ▲▼	[_____ 📅]

Max Buffer

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

Max Buffer	Expiration Date
0.0000 ▲▼	[_____ 📅]

Cancel	**Save**

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				

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. Locations with the greatest difference between forecast (monthly) usage and current on hand will be favored and listed first. 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.

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.

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				

Manual Liquidation

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.

History

The *History* button allows the user to view the history of changes made to the inventory item by using the Edit Settings button.

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.

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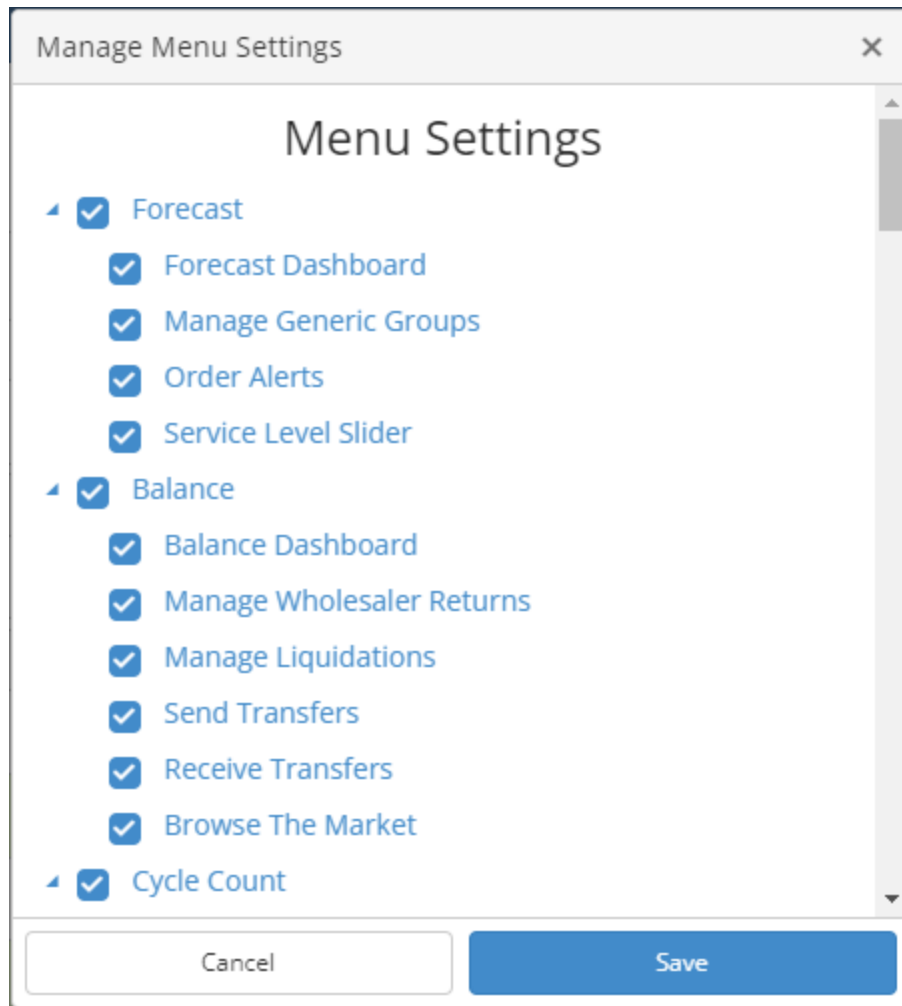
Cycle Count Settings

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

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.

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 section on the *Rank Report* also describes the *Counting Category* concept. *Unranked* items are those that have not been dispensed in the past 2 years. *Restricted* items are C2 items in the US and N, G, and T items in Canada.

The edit button located next to the *User Defined* row gives you the ability to define your own category of items to be counted by clicking it and adding rules. This feature works similarly to the Custom Report feature described earlier in this document. 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.

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

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.

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

[Save] [Resume]

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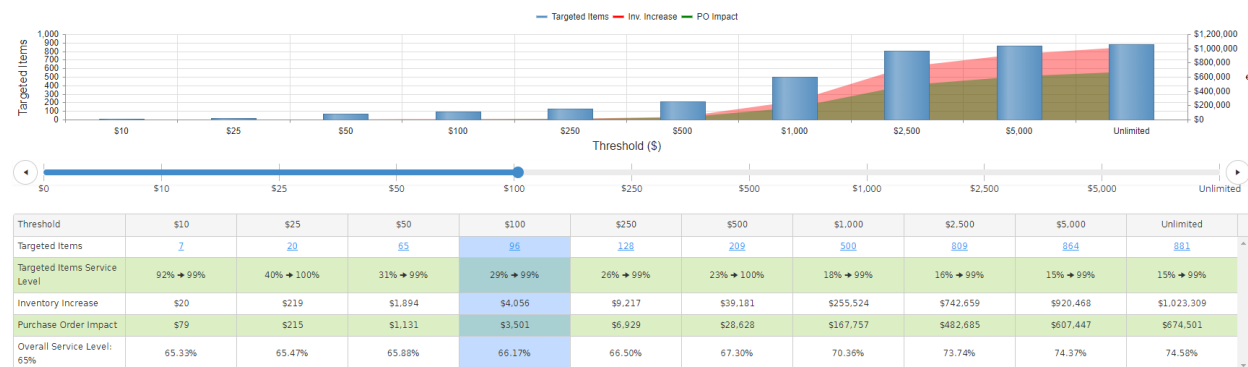
The graph displays in blue the number of items impacted by each position of the *Slider*, in red the increase in average inventory level expressed in dollars associated with each position and in green an approximation of the dollar impact to your next *Purchase Order*. Chart metrics can be added and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

Threshold	$10	$25	$50	$100	$250	$500	$1,000	$2,500	$5,000	Unlimited
Targeted Items	7	20	65	96	128	209	500	809	864	881
Targeted Items Service Level	92% ➔ 99%	40% ➔ 100%	31% ➔ 99%	29% ➔ 99%	26% ➔ 99%	23% ➔ 100%	18% ➔ 99%	16% ➔ 99%	15% ➔ 99%	15% ➔ 99%
Inventory Increase	$20	$219	$1,894	$4,056	$9,217	$39,181	$255,524	$742,659	$920,468	$1,023,309
Purchase Order Impact	$79	$215	$1,131	$3,501	$6,929	$28,628	$167,757	$482,685	$607,447	$674,501
Overall Service Level: 65%	65.33%	65.47%	65.88%	66.17%	66.50%	67.30%	70.36%	73.74%	74.37%	74.58%

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.

Application Settings

APPLICATION SETTINGS		
Company	**Region**	**Pharmacy**
Roberts Family Pharmacy ▼	-- All Regions -- ▼	-- All Pharmacies -- ▼

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

General

Cycle Count

Usage Exclusions

Datarithm Updates

Generic Equivalency
Grouping

Ranking

Safety Stock

Stocking Rules

Sporadic Item Multiplier

High Water Mark

Pharmacy

Wholesaler

Trending

Inventory Costs

Unusual Usage

Surplus

Inventory Balancing

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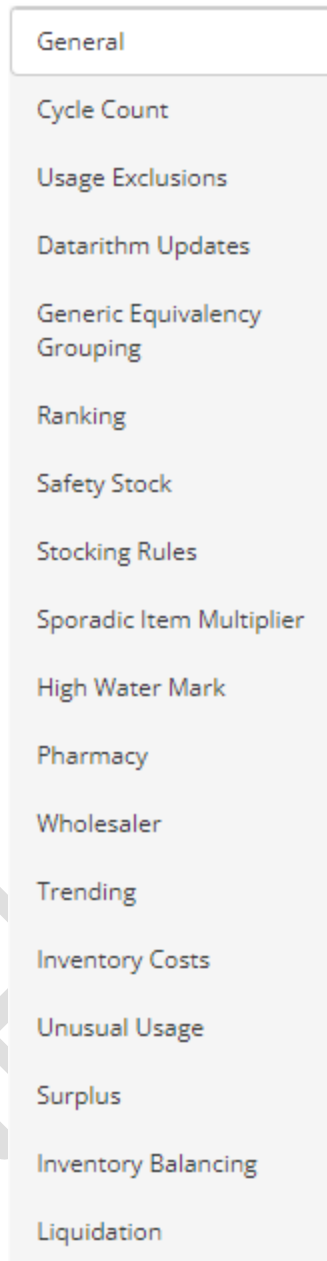
After selecting a group, the center of the *Application Settings* page will display a collection of settings related to that group.

- ✓ 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.

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 Counting

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, have positive current on hand, are recurring or new, and have been dispensed recently 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, that have positive current on hand, are recurring or new, and have been recently dispensed 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).

Safety Stock

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.

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.

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*.

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 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
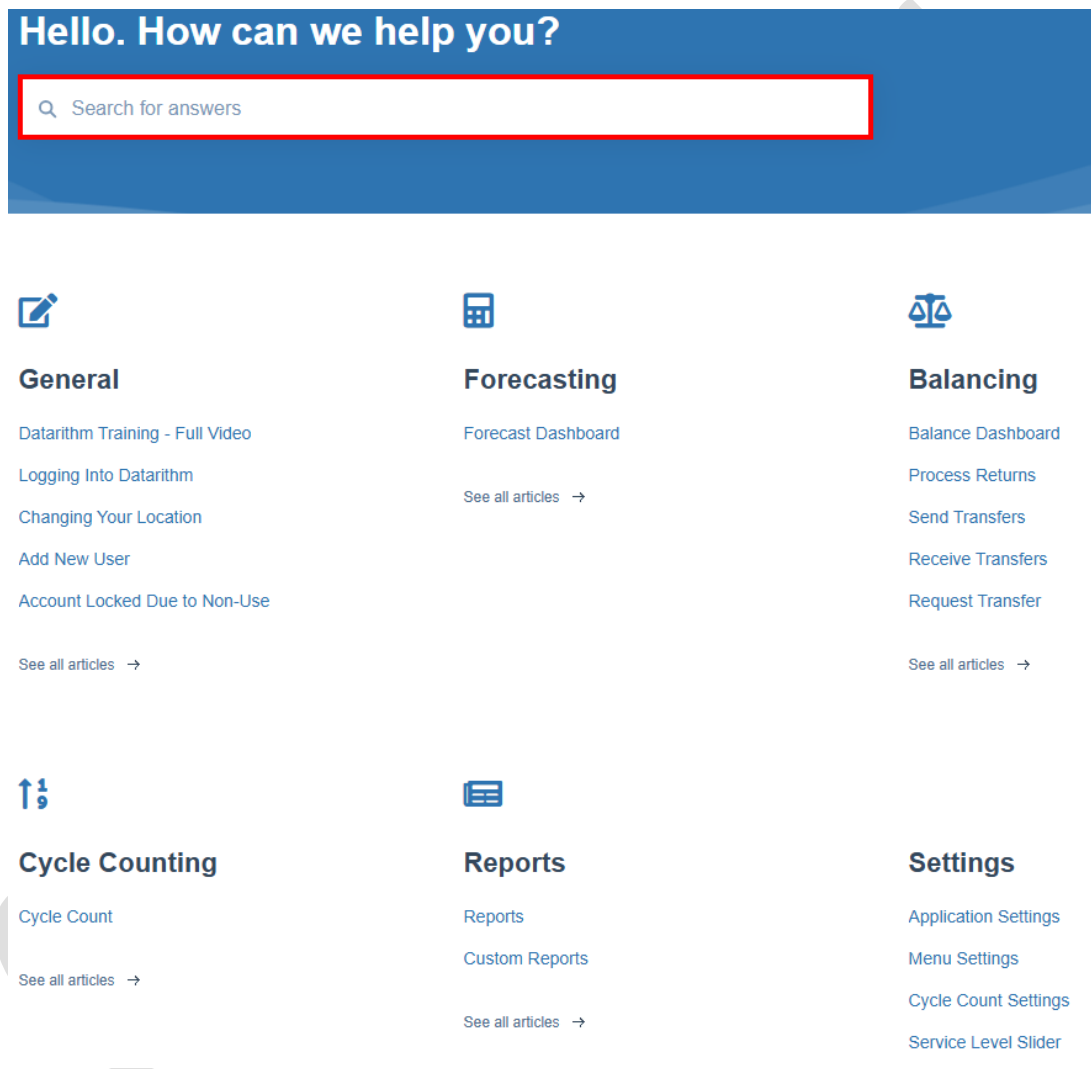
Liquidation Processor

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 access to a variety of training videos and answers frequently asked questions covering several topics. To access the *Knowledge Base*, click on *Knowledge Base/Training Videos* from the *Help* tab.

Hello. How can we help you?

Q Search for answers

General

Datarithm Training - Full Video

Logging Into Datarithm

Changing Your Location

Add New User

Account Locked Due to Non-Use

See all articles →

Forecasting

Forecast Dashboard

See all articles →

Balancing

Balance Dashboard

Process Returns

Send Transfers

Receive Transfers

Request Transfer

See all articles →

Cycle Counting

Cycle Count

See all articles →

Reports

Reports

Custom Reports

See all articles →

Settings

Application Settings

Menu Settings

Cycle Count Settings

Service Level Slider

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*

Email*

Phone number

Company name

Pharmacy/Location

Issue*

Details

Submit

User Manual

This user manual can be found going to *Help* → *User Manuals*.

Support Chatbot

A support chatbot is available within the Datarithm application. Users can search Datarithm's knowledge base for articles and training videos and open support tickets from right within the application. The chatbot can be accessed in 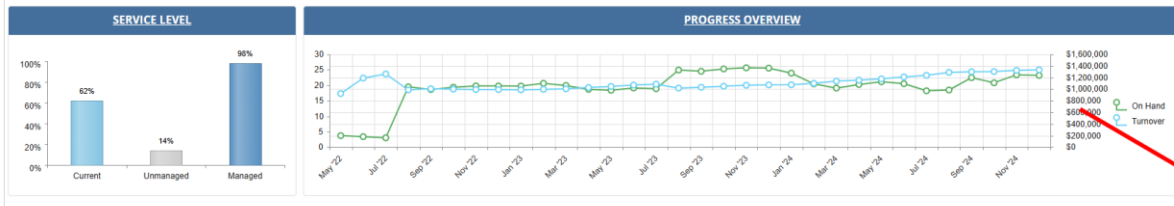the lower right corner of the application.