Using Inventory Management

07/24/2024 10:06 pm EDT

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

To Access Inventory Management:

Select **Inventory Management** under the **Clinical** menu, or click here to take you there.

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

Creating and Editing Categories:

1. Click the pencil icon (

).

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

Add/Edit Categories ✕

| New Category | Herbal | Create |

| ☐ | Vaccinations |
| ☐ | Custom Procedures |

| Close | | Delete selected categories | Update |

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

Inventory Management

| Search (≥3 characters) | 🔍 |

Categories ✏️

Vaccinations	0
Custom Procedures	2
Herbal	0

Code	Name	Expiration

⬅️

Importing Custom Procedures:

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

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

New Vaccine
New Product
New Service
Copy Custom Procedures

Inventory Management

| Search (≥3 characters) | 🔍 |

Categories ✏️

Vaccinations	0
Custom Procedures	2
Herbal	0

Show archiv...   + Add new lot or service ▾

New Vaccine
New Product
New Service
Copy Custom Procedures

Code	Name	Expiration	Quantity	Billed Quantity	Price	Sl...
		No products				

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

Do you want to copy your custom procedures?   ✕

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

Products have a   **-1**   button to decrement their count each time you use them.

Services have a   **+1**   button to increment their count when the service is given.

Custom procedures that have been copied previously but have been archived will be skipped.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

       No   Import

Adding a new vaccine, product, or service:

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

New Vaccine

New Product

New Service

Copy Custom Procedures

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

New product

Category *	Supplements [▼] **+ New Category**
Code *	IRON1
Name *	Iron Supplements
Type*	● Product ○ Service
Expiration	MM/DD/YYYY
Note	
	☐ Sales tax applicable
Price	10
Price with tax	12
Cost	7
Quantity	30
Quantity units	Bottles

* required   **Save**

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

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

ICD-10 Codes   Find Diagnosis codes ⬇

#	Code	Description

CPT Codes   Find CPT Procedure codes ⬇

Code	Description	Price ($)

ICD-9 Codes to Convert   Find Diagnosis codes ⬇

#	Code	Description

HCPCS Codes   Find HCPCS Procedure codes ⬇

Code	Description	Price ($)

NDC Codes   Find NDC Codes ⬇

NDC Code	Quantity	Units	Line Item

Custom Codes   Find Custom Procedure codes ⬇

Code	Description	Price ($)	
IRON1	Iron Supplements	12.00	✖
	Quantity:	1 ⬍	

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

Delete   **Save & Close**   **Save**   **Cancel**

Editing a vaccine, service, or product

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

- Click on the pencil icon (

) to edit the inventory item information.
- Click the (

) to archive the item
- For products click on the (

) to subtract from the inventory. For services click on the(

) to add to the inventory.