

AIMRX ORDER DETAIL REPORT

Why do we do it?

The AIMRx Order Detail Report is a complete listing of all CVS Warehouse replenished items AIMRx is going to automatically order.

IMPORTANT! If the order did not generate, call the Contact Support Center (1-866-528-7272) immediately.

When do we do it?

The *AIM Rx Order Detail Report* is available first thing in the morning on your store's Warehouse Poll (Order) Day from the Pharmacy Computer System.

How do we do it?

Carefully review the AIMRx Order Detail Report to ensure order accuracy paying special attention to:

- Any item with an unusually high or low order quantity (BOO)
- Items with unusually high or low inventory at store level (BOH)

Using the RF Unit, access *AIM/Rx AIM/ Rx Item Review*. Scan manually key in the 11-digit NDC.

1. Verify that the item's Balance on Hand (BOH) is accurate.
 - If it is not, you must first complete a Cycle Count to correct the discrepancy by doing the following:
 - Press the <X> key to open the Cycle Count partition. Enter the correct quantity in the PKG and UNIT fields (Remember to consider all NDCs for a Warehouse medication when Cycle Counting, including all linked items).
 - For Non-Intuitive items (Syringes, Inhalers, Ampules, Vials, etc), enter the BOH as directed on the RF unit.
 - Press <ENT>
 - Press <C> to complete the BOH change
IMPORTANT: YOU DO NOT NEED TO UPDATE THE BOO. THE SYSTEM AUTOMATICALLY REFORECASTS THE BOO (USING THE TIL AND THE NEW BOH INFORMATION)!
2. If after you correct the BOH and the BOO has reforecasted, you need to increase or decrease the BOO:
 - Key the new BOO and follow any of the remaining prompts.
 - In an effort to control unproductive inventory, you may be prompted with excessive order quantity screens. These screens are in place to allow you to carefully review the order quantity prior to submitting the order.

CII SUGGESTED ORDER REPORT

Why do we do it?

The RxAIM *Weekly Schedule 2 Suggested Order Report* lists suggested order quantities for CII items that have been dispensed by your pharmacy and have a Balance on Hand (BOH) that is less than the Target Inventory Level (TIL). These items will NOT be automatically ordered by AIMRx. CII's must be ordered manually from the Outside Vendor by a Pharmacist with Power of Attorney. CII orders can be placed to the Outside Vendor on any normal business day.

When do we do it?

The RxAIM Weekly Schedule 2 Suggested Order Report will print automatically from the Pharmacy Computer System on Sunday morning. The report may be reprinted as necessary.

How do we do it?

1. Review the list of items and suggested order quantities on the *RxAIM Weekly Schedule 2 Suggested Order Report*.
2. Verify that the item's Balance on Hand (BOH) is accurate.
 - If it is not, you must first complete a Cycle Count to correct the discrepancy so the next CII suggested order report is accurate
3. Complete a DEA222 Form for the items you wish to order and retain the blue copy.
 - **Keep in mind, you should only write the name of the drug you need and should not write an NDC on the DEA 222 form.**
4. Fax the Form to the Outside Vendor and give a copy to the driver.
5. Once the delivery is received, process the items through the Rapid Scan (Rx OV Scan In) RF application.

CYCLE COUNTS

Why do we do it?

Cycle Counting is the process by which you count your inventory at the unit (e.g., tablets, mls, inhaler, via.) level to confirm/correct the amount of medication the system believes is on hand.

When do we do it?

Perform ALL Cycle Counts by 3:30pm local time **DAILY** (so that all BOH corrections are made prior to any order auto completing). Do all System Generated Cycle Counts first prior to completing any Store Initiated Cycle Counts. Perform Store Initiated Cycle Counts on any item you observe to have unusually high or low inventory. Cycle Counts must be done **DAILY** prior to any other noted activity (unless it is the OOS Scan day). Refer to the workflow calendars for more information on the order of completion for AIMRx activities.

- **System Generated Cycle Count:** Created by AIMRx whenever it detects a discrepancy between an item's system Balance on Hand (BOH) and its actual inventory quantity. System Generated Cycle Counts appear automatically in the RF Unit - prompting you to correct the item's BOH
- **Store Initiated Cycle Count:** Should be performed when you notice an item has an unusually high or low inventory quantity. Do not rely on the system to generate sufficient Cycle Counts

How do we do it?

1. Go to *AIM/RX AIM/ RX CYCLE COUNT* in the RF Unit.
 - o Select Option 1 - New
2. Locate all quantities for the medication displayed on the RF Screen, including items:
 - o On the pharmacy shelves (including overstock areas)
 - o In automated dispensing units
 - o At the fill stations
 - o Pulled out not yet processed for return (e.g., damages, outdates, etc.)

Remember: The NDC of linked (non-preferred) package sizes and manufacturers are counted under the preferred NDC (**ODS = W**). For items with multiple package sizes, enter the combined BOH in the **UNITS** field to reduce the risk of BOH drift.

3. Key in the number of whole packages in the **PKG** field, and press **<ENTER>**.
4. Key in the number of units in partial packages in the **UNIT** field and press **<ENTER>**.
NOTE: Some drugs will prompt you for the number packages only (e.g. Inhalers, Prefilled syringes, & Vials).
5. Press **<C>** to complete the Cycle Count.
6. Repeat steps 3-5 until all Cycle Counts are completed.

DIABETIC TEST STRIPS

Why do we do it?

In an effort to ensure BOH accuracy, the diabetic test strips department (category 44 – minor 04), are replenished by AIMRx applications.

When do we do it?

When completing Inventory Management AIMRx workflow, include the Diabetic Test Strips to ensure accurate replenishment.

How do we do it?

- Warehouse Ordering – Diabetic test strips will appear at the beginning of every warehouse order.
 - BOH and BOO quantities **must** be reviewed to ensure accurate order placement.
 - All BOH adjustments **must** be completed using the *Rx Item Review* application in AIM Rx.
- Out of Stock Scans – Diabetic test strips **must** also be included in the AIM Rx weekly out of stock activity.
 - The front store will not be maintaining the BOH and workflow on these items.

NOTE: AIM workflow and item maintenance for testing meters and lancets will remain a front store responsibility.

DROP SHIPMENTS

Why do we do it?

New items, when introduced to the market place, are drop shipped from various sources (the manufacturer, our wholesalers, etc) to our store in order to meet the demands of our customers. AIMRx has no visibility to these items until you Cycle Count them into your inventory.

When do we do it?

Drop shipments happen about 12 times a year.

How do we do it?

- Review RxNet regularly for updates on new products
 - Merchandising notifies stores of new launches and drop ship dates approximately 1-2 days prior to shipment via email
- When the delivery is received, process the items through the **Rapid Scan (Rx OV Scan In)** RF application to update the BOH. Because the delivery is outside AIMRx, this is the only way the BOH will update.
- Create shelf labels for new products
- Stock the product(s) on the shelf in the correct location.
- File the invoice

ITEM NOT ON FILE

Why do we do it?

When scanning items in *Rx Item Review*, you may encounter a message indicating the item is "Not on File." This means that the NDC must be manually keyed in or that the product information is not in your controller (the information, however, may be in the central system).

When do we do it?

As needed.

How do we do it?

If you receive an "Item NOF" message in the Rx Item Review screen on the RF Unit:

1. Press <ENTER> at the "Not on File" prompt.
2. Manually key in the 11-digit NDC number, press <ENTER>.
 - o If the item is still "Not on File", see the **NOTE** below
3. Place a blank shelf label with the current date and NDC # on the shelf in front of the item to indicate a label has been requested.
 - o If the product "information" is on file centrally, it will be sent to the store within 24-72 hours. Once the item information has been downloaded, simply scan the item and press the <L> key to request a shelf label
4. Print new labels once a week and affix them to the shelf in front of the appropriate items.

NOTE: Some items are simply Not on File, even centrally, because they have not been dispensed within the last two years. For these items:

- Place a label noting the NDC and current date in front of the item. Once the item is dispensed, the NDC information will be sent to your store within 24-72 hours.

LINKED ITEMS

Why do we do it?

AIMRx links non-preferred Outside Vendor items to the preferred CVS Warehouse item for inventory and replenishment purposes and combines the individual NDCs' dispensing histories and BOHs under the preferred Warehouse NDC.

When do we do it?

The BOH for all non-preferred (or linked) NDCs is combined under the Warehouse preferred NDC (ODS = W). If you scan a non-preferred NDC that is linked to a Warehouse preferred item, the RF Unit displays the message: "Non-preferred item, Linked to: _____" (linked NDC). Press the <ENT> key to move to the warehouse preferred item.

NOTE: Items that are available through the Outside Vendor only (ODS = V) are not linked. BOH quantities for these items are NDC-specific.

How do we do it?

How to Manage Balance on Hand for Linked Items

1. On the RF Unit, go to: *AIM / Rx AIM / Rx Cycle Count*
2. Cycle Count the entire "family" of products by scanning the Warehouse preferred NDC label.
 - o Include all manufacturers and package sizes (linked items)
 - o Count at the pill level (Units), DO NOT enter PKG quantities (in case there are multiple package sizes)
3. Remove the coding label for all linked (non-preferred) NDCs.
 - o Handwrite labels for any Warehouse non-preferred item that needs to be maintained for a customer (write "L" for linked on the label and order manually from the OV)
4. Place all linked items on the shelf next to the preferred item so that all medication is in the same place.
5. Scan an item as Out of Stock **ONLY** IF there is absolutely none of the medication in the store (if the preferred and linked items are ALL out of stock). Do NOT scan the Warehouse preferred product as out if there are linked items on the shelf.
6. If you need to place an OV order for a Warehouse preferred item, Cycle Count the item as well to validate that the BOH is correct so that AIM will order it for you next time.

NEW/DISCO ITEMS

Why do we do it?

New medications are periodically introduced to your pharmacy as other medications are discontinued. These changes are described in the New and Discontinued Item Reports. These reports auto-print in the pharmacy as part of End of Day and must be acted upon to maintain an accurate and up-to-date inventory.

When do we do it?

- New and Discontinued Item Reports are available on Wednesday morning on Rx2000
- Process all listings within 2 weeks of receipt

How do we do it?

New Items

1. Retrieve New Item Report from the Pharmacy Computer System.
2. Identify any items which you may need.
3. Generate a shelf label for the item.
4. Sign the report and file appropriately – retain for 6 months.
5. Check the item's BOO on your next regular order.
 - o AIMRx will not replenish the product until it has been dispensed and the SOH drops below TIL.
 - o Customer demand may need to be manually ordered until TIL builds

Discontinued Items:

1. Retrieve Discontinued Item Report from the Pharmacy Computer System.
2. Identify any items that you still need.
3. From the RE Unit, access *AIM/Rx AIM/ Rx Item Review* and scan the shelf label for the item.
 - o Verify that delivery source (ODS) is listed as "V" (vendor)
4. Print a shelf label for the item that you still need for current dispensing.
5. Cross out the shelf label for any items that will no longer be carried.
 - o Remove tag once product is depleted
6. Sign the report and file appropriately – retain for 6 months.

OUT OF STOCK SCAN

Why do we do it?

Out of Stock Scans are performed to identify Balance on Hand (BOH) discrepancies that must be corrected so the next AIMRx-generated order will be more accurate. Accurate BOH results in accurate orders.

When do we do it?

Out of Stock Scans should be completed the day before your CVS Warehouse Poll (Order) Day. There are exceptions to this rule. Stores that have a Delivery Day the day before Poll (Order) Day need to complete the OOS Scans two days prior to Poll (Order) Day. Refer to the chart below to determine the most appropriate day to perform OOS Scans.

| Once A Week Locations | | |
|-----------------------|-----------|---------------|
| POLL | DELIVERY | SCAN OUTS ON: |
| FRIDAY | THURSDAY | WEDNESDAY |
| THURSDAY | WEDNESDAY | TUESDAY |

| Twice A Week Locations | | | |
|------------------------|-----------|-----------|---------------|
| EXAMPLE | POLL | DELIVERY | SCAN OUTS ON: |
| 1 | MONDAY | WEDNESDAY | TUESDAY |
| | THURSDAY | SUNDAY | |
| 2 | WEDNESDAY | FRIDAY | MONDAY |
| | SATURDAY | TUESDAY | |

How do we do it?

- Pre-Work: Complete the following tasks the day before scanning outs to ensure an accurate scan:
 - Straighten all bays
 - Process weekly damages, outdates and any Rx Returns
 - Complete Waiting Bin Returns to Stock
 - Fill automated dispensing units (if applicable)
- On the RF unit, go to: *AIM / RxAIM / Out of Stock Scan*
- Be THOROUGH!! Scan the shelf label for EVERY item that is completely out of stock in your store. Include all Warehouse, OV, and Diabetic Testing Strips.
 - Don't forget to check the safe, refrigerator and the ends of the bays
- Generate and review the OOS Scan report
 - The first section, 'Store Scan' includes the items that you scanned.
 - Validate that a complete and thorough OOS Scan has been completed
 - The second section, 'System BOH=0, Current Day', includes warehouse items that have a TIL, but do not have a BOH and were NOT scanned.
 - Identify opportunities to correct BOH and print labels
- Retain a copy of the report in your AIMRx Binder for a minimum of 8 weeks.
- Complete any System Generated Cycle Counts resulting from your OOS scan using the *Rx Cycle Count* application.

OV SCAN IN – RAPID SCAN

Why do we do it?

Once the order arrives, perform the OV Rapid Scan Procedure below and then put the items away and file the invoice. The BOH will be automatically updated in real time. Once you have completed the OV Rapid Scan, complete all of Pending Inventory prescriptions.

When do we do it?

- Any time a delivery is received from the wholesaler (e.g. Cardinal or McKesson), the item must be processed through the 'Rapid Scan – OV Scan In' RF application to update the BOH.

How do we do it?

On the RF unit, go to: *AIM / RxAIM / Rx OV Scan-In.*

1. Scan each stock bottle received individually.
 - Controlled items (CII - CV) should **also** be checked in piece-by-piece against the invoice
2. When all items have been scanned, exit the application and you are done (there is no completion process)
3. Any scanning errors can be easily corrected by complete a cycle count.

Note: OTC items delivered from the OV will be invoiced separately

- These items should be included in the OV Rapid Scan to update the BOH
 - ↳ The BOH will update on any OTC item that is 'On File' in the system
- The invoice then needs to be given to the Front Store so that they can complete a DSD Summary Receiving to create the IAR line item to match the charge from the vendor

SHELF LABEL MAINTENANCE

Why do we do it?

Shelf label maintenance is a key factor to ensure proper inventory replenishment and an organized pharmacy. Proper labeling increases visibility to your products and makes it easy to perform everyday inventory management activities accurately and efficiently.

When do we do it?

Requesting a label should be done on the RF unit in either the Warehouse Ordering application or the OV Ordering application at any time a label is needed. Shop worn and/or missing labels should be requested on a daily basis with all the requested labels printed from the Manager's office on a weekly basis.

How do we do it?

1. On the RF unit, go to: *AIM / RxAIM / Rx Item Review*
2. Scan the product's bar code or manually key the NDC/Item number
 - a. If the **Not on File** message displays, please refer to the "Items Not on File" button located on the Inventory Management home page to locate steps to resolve this issue.
3. Once the item information is on the screen, press the <L> key to request the label.
4. To print the required labels, go to the Manager's office.
 - a. On the Front Store Controller, access the **Item Management Workbench**.
 - b. Select the **Label/Sign Printing**.
 - c. Select **Rx Labels New Items/BSQ Changes** to print labels.

The full suite of controller applications to help execute shelf label maintenance are:

- **Rx Labels by Item/NDC:** Allows manual entry of any specific item number or NDC
Note: it is quicker and easier to request a label from the RF unit
- **Rx Labels New Items/BSQ Changes:** Contains all labels requested for print from the RF unit and displays all new item records sent from corporate
- **Rx Labels Print All:** Prints all items with a BOH and/or a TIL
- **Rx Labels Print Schedule II:** Print all CII NDC with a BOH and/or a TIL
- **Rx Labels Print OV:** Prints only OV items with a BOH and/or a TIL

STORE SUPPLIES

Why do we do it?

Supplies are ordered from CVS Distribution Center in order to meet the needs of our customers.

When do we do it?

All Pharmacies should place supply orders on the Pharmacy order (Pol.) day that coincides with the Front Store order day. Doing so will ensure that your supplies arrive on your next warehouse truck.

- If you do not have a Pharmacy order that coincides with a Front Store order, place your supply orders on the pharmacy order day that is closest day prior to the Front Store order.

How do we do it?

On the RF unit, go to: *AIM / RxAIM / Rx Item Review*.

- Scan or enter the item number
 - a. In the BOO field, key the desired order quantity and press <ENTER>

IMPORTANT INFORMATION:

The store supply report will automatically print at 2:30pm on your poll day. The report will contain all supply item successfully ordered in Rx Item Review only. If no store supplies were successfully ordered in Rx Item Review (or if store supplies were ordered incorrectly), the report will be blank.

To reprint the report from RxConnect:

- M1 – Reports Menu
- Option 9 – AIM reports
- Option 5 – RxAIM Pharmacy Supply Order Report

Best Practices:

- Ensure you place your supply order prior to 2pm. Review the "RX Store Supply Order Report" at 2:30pm (local time) and make any required changes before 3pm.
- Keep a minimum of a two week supply on all store supply items at all times
- Use the Workstation Assignment Board to assign the task of ordering supplies to a specific Pharmacy Team Member on Poll (Order) Day. Under the non-workstation activities section, write the following in the space provided: "Place Supply Order". Assign this task to an experienced member of the Pharmacy Team to complete the store's supply order and review the "Store Supply Order Report"
- The area where store supplies are kept should be maintained in a neat and orderly fashion at all times. This will make it easy to detect when supply levels are low

For emergency needs of critical Pharmacy supplies, call Distribution Services at 401-770-5555 prompt # 2.

WAREHOUSE DELIVERIES

Why do we do it?

To update the Balance on Hand (BOH) for the items in your CVS Warehouse Delivery you must check in your delivery, validate the tray count, and apply the billings on Delivery Day immediately after you have finished putting away the delivery. AIMRx recognizes the new quantities as part of your Balance on Hand and does not generate any unnecessary "Exceeds on Hand" pharmacy system messages.

When do we do it?

- Manually apply the warehouse delivery if it is completely put away prior to 3pm using the RF unit.
- If you have not manually applied the delivery, AIMRx will automatically apply at 3pm local time.

How do we do it?

- Check in controlled drugs piece by piece
- Report all overages, shortages and damages to Distribution Services within 48 hours of delivery; 1 700 602 5555 (refer to [Warehouse Mis-picks and Shorts](#) page for details)

Steps to Check in CVS Warehouse Deliveries:

1. Front Store receiver verifies the tray count against invoice field "TRAYS".
 - If the tray count doesn't match the invoice, the receiver checks with other stores on the route in the event that tray(s) were mistakenly delivered to the wrong store.
 - If the tray(s) were delivered to another store, call your Pharmacy Supervisor to arrange for transfer.
 - If missing tray(s) are not recovered, call Distribution Services (1-700-602-5555) to report the problem. If not recovered within 5 business days, your store will be credited.

IMPORTANT: Tray shortages will result in shelf BOH discrepancies until the tray is delivered or the item is Cycle Counted. Inform staff of temporary shortage.

2. Check in the CIII-CV controls piece by piece to ensure that the information on the invoice matches what was included in the delivery.
 - In the event of a discrepancy, contact Distribution Services (1-700-602-5555) and also notify your Pharmacy Supervisor
3. File the invoices.
4. Remove the inventory in the totes and place the stock on the shelves.
 - Rotate stock – place older merchandise at the front of the shelf
 - Place open bottles marked with an "X" at the front of the shelf
 - Create labels for new manufacturers and new items
 - Go to Item Verify Screen and scan or key in the 11-digit NDC
 - Press <L> for label and retrieve from front store controller
5. From the RF Unit, access *AIM/Rx AIM/Apply DC Delivery* and follow the prompts.
6. Select *Apply Rx Billings* and answer YES at the prompt.

Note: It will take approximately 1 hour for all your Balances on Hand (BOHs) to update. During this time you may still receive "Exceeds On Hand" messages for items that were in your delivery.

WAREHOUSE OVERAGES/SHORTS

Why do we do it?

Occasionally, you may notice that your delivery is over or short items. These products must be processed according to the following procedure for your store to receive proper inventory credit and maintain accurate BOHs.

When do we do it?

- Overage (Miss-Picks): Items not billed on your invoice but received in the order
- Shortage: Items billed on your invoice but not received in the order

How do we do it?

- Report all overages, shortages and damages to Distribution Services (1-700-602-5555) within 24 hours of receipt
- If the tray count doesn't match the invoice, the Store Manager (receiver) checks with other stores on the route in the event that tray(s) were mistakenly delivered to the wrong store
 - If missing tray(s) were delivered to another store, call your Pharmacy Supervisor to arrange for transfer
 - If missing tray(s) are not recovered call Distribution Services (1-700-602-5555) to report the problem. If not recovered within 5 business days, your store will be credited
- Report overages and shortages for each invoice number separately

Steps to Process Overages (Miss-Picks) and Shortages:

1. Call Distribution Services (1-700-602-5555) and report shortage within 24 hours of receipt.
 - Have the Original Invoice on hand when calling
2. Record authorization number on the invoice and file accordingly.
3. Cycle Count the item the following morning to verify the BOH (to ensure all billings have been applied).

For controlled medication -ONLY

- Contact your Pharmacy Supervisor and file the proper DEA paperwork if over/short a controlled medication.

Wednesday for Friday

Important Notes for all schedules:

CYCLE COUNTS: must be done **DAILY** prior to any other noted activity (unless it is the OOS Scan day).

- On OOS Scan day, complete the OOS scan 1st
- Then complete all System Generated Cycle Counts (generated the previous day & from the OOS Scan)

RAPID SCAN: Complete a rapid scan for all OV deliveries to update the BOH.

APPLYING WAREHOUSE DELIVERIES: BOH's will automatically apply at 3pm if the store does not apply the DC billings.

- If the delivery is received and shelved prior to 3 pm, the store should manually apply the delivery in the RF unit.
- If the delivery is not received prior to 3 pm, the store should allow the system to apply the delivery.

OV RETURNS: Designed to alert you to unproductive OV inventory. Process the returns weekly to receive full credit from your wholesaler.

EXECUTION SCORECARD:

- If the Out of Stock Scan is completed as scheduled, you will be compliant for this execution metric.
- Cycle Counts must be reduced to ZERO in the RF unit once every day to be compliant. Once you have completed, there is no need to complete any additional system generated cycle counts until the following day.

| Day | Activity |
|-----------|--|
| Sunday | <ul style="list-style-type: none"> • Cycle Counts • Review the CII Report • Complete Voluntary OV Order • Complete Mandatory OV Order |
| Monday | <ul style="list-style-type: none"> • Cycle Counts • Rapid Scan Receive the OV delivery • Complete Voluntary OV Order • Complete Mandatory OV Order |
| Tuesday | <ul style="list-style-type: none"> • Out Of Stock Scan • Cycle Counts • Rapid Scan Receive the OV delivery • Complete Voluntary OV Order • Complete Mandatory OV Order |
| Wednesday | <ul style="list-style-type: none"> • Cycle Counts • Review the AIMRx Detail report • Rapid Scan Receive the OV delivery • Complete Voluntary OV Order • Complete Mandatory OV Order • Review & Complete OV Returns App. |
| Thursday | <ul style="list-style-type: none"> • Cycle Counts • Rapid Scan Receive the OV delivery • Complete Voluntary OV Order • Complete Mandatory OV Order |
| Friday | <ul style="list-style-type: none"> • Cycle Counts • Rapid Scan Receive the OV delivery • Complete Voluntary OV Order • Complete Mandatory OV Order |
| Saturday | <ul style="list-style-type: none"> • Cycle Counts • Rapid Scan Receive the OV delivery • Apply Warehouse delivery • Complete Voluntary OV Order |
| Sunday | <ul style="list-style-type: none"> • Cycle Counts • Complete Voluntary OV Order |