

Comparison of Legacy and Crossroads Inventory Tasks

The chart below compares periodic inventory reconciliation tasks in legacy with tasks in Crossroads:

Inventory	Action Required by Local Agency (LA) Staff in Legacy/pre-Crossroads	Action Required by LA Staff after Crossroads Implementation
VOC Forms	Complete quarterly in February, May, August and November by comparing inventory log to physical inventory of VOC forms on hand. Any inconsistencies are documented on the log, along with staff initials and date completed.	<p>A supply of legacy VOC forms must be maintained in case the business continuity plan must be implemented. Continue to complete quarterly inventory of legacy VOC forms for each site in February, May, August and November.</p> <ul style="list-style-type: none"> • Compare inventory log to physical inventory of VOC forms on hand. • Document any inconsistencies on the log, • Enter staff initials and date completed. • Maintain documentation per DHHS Retention Policy.
Pre-printed MFI/CVV	Complete quarterly in February, May, August and November by comparing HSIS inventory report to issuance logs and physical inventory of PFFI/PPCVVs on hand. Any inconsistencies require documentation and/or additional actions, along with staff signature and date completed.	<p>Complete quarterly for each site in February, May, August and November.</p> <ul style="list-style-type: none"> • Navigate to Operations >Reporting > Generate Reports. Select Manual Food Instrument Register. Select the Local Agency and Clinic. • For each physical MFI register on hand, enter the first FI number printed on the register as the Starting Serial Number and the last FI number as the Ending Serial Number. NOTE: The first FI number printed on the register may have already been issued or voided. • Select View Report and a register listing unissued FIs will display. There is no need to print this report. Compare this screen display of unissued FIs to the physical MFI registers and the physical inventory of manual FIs/CVVs on hand. • If not already entered, match or VOID any pending MFI/CVVs by completing required information. Any inconsistencies require documentation and/or additional actions. • On the top left margin of each physical (original) register, enter staff initials and the date inventory was completed. • When all the FIs on a physical MFI register have been issued or voided, quarterly inventory of that register is no longer required. • Maintain documentation per DHHS Retention Policy.

Breastfeeding supplies	Complete quarterly in February, May, August and November by reconciling inventory log for each supply with the physical inventory of each supply on hand.	<p>Complete quarterly for each site in February, May, August and November.</p> <p><i>Use the following procedures until Crossroads inventory reports are available:</i></p> <p><u>For multi-user and pedal pumps,</u></p> <ul style="list-style-type: none"> • Navigate to Operations > Inventory > Search Product Inventory. Select the clinic and Search Type of Serialized. • On the left side of the screen Inventory Search Results (Products) will display the types of pumps in inventory. Print this screen. Scroll down and print additional screens if needed to capture the entire list. • Select a row of each inventory product on the left (type of pump) in order to display on the right all the items (individual pumps) for that product. On the right, sort the display of pumps by state inventory number, then print the screen. Scroll down and print additional screens if needed to capture the entire list. Repeat these steps for each type of pump. • For each type of pump, reconcile the Total on Hand with the physical inventory. Also reconcile the Status (on hand, issued, or maintenance). Any inconsistencies require documentation and/or additional actions. • On the last page of the printed screenshots, enter staff signature and the date inventory was completed. • Maintain documentation per DHHS Retention Policy. <p><u>For breastfeeding supplies and formula,</u></p> <ul style="list-style-type: none"> • Navigate to Operations > Inventory > Search Product Inventory. Select the clinic and Search Type of Non-Serialized. • On the left side of the screen Inventory Search Results (Products) will display the types of breastfeeding supplies and formula in inventory. Print this screen. Scroll down and print additional screens if needed to capture the entire list of products. • For each supply or formula, reconcile the Total on Hand with the physical inventory count. Any inconsistencies require documentation and/or additional actions. • On the last page of the printed screenshots, enter staff signature and the date inventory was completed. • Maintain documentation per DHHS Retention Policy.
Formula	Best practice is to complete inventory quarterly by reconciling issuance/inventory log with the physical inventory of containers on hand.	