



NURSING LEVEL III

NTQF III

LEARNING GUIDE #50

Unit of Competence : Undertake Routine inventory
Maintenance

Module Title : Undertaking Routine inventory
Maintenance

LG Code : HLT NUR3 M10 LO2-LG48

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LO2. Prepare order lists and forward stock



This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Completing Inventory list of stock requirements
- Recording stock requirements in order book
- Authorization for order
- Forwarding order
- Inventory list based on stock

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, upon completion of this Learning Guide, you will be able to:

- Completing accurately Inventory list of stock requirements .
- Recording Stock requirements in order book using correct order number from catalogue.
- Authorization for order is obtained from supervisor.
- Forwarding Order is to appropriate department.
- Updating Inventory list is based on stock usage and inventory changes

Learning Instructions:

- 1, Read the specific objectives of this Learning Guide.
- 2, Follow the instructions described in number 3 to 7.
- 3, Read the information written in the “Information Sheets ”. Try to understand what are being discussed. Ask you teacher for assistance if you have hard time understanding them.
- 4, Accomplish the “Self-checks ” in page 4,9,15,20,. And reference at page 22
- 5, Ask from your teacher the key to correction (key answers) or you can request your teacher to correct your work. (You are to get the key answer only after you finished answering the Self-check.



6, If you earned a satisfactory evaluation proceed to “Information Sheet 3”. However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activities.

7, Submit your accomplished Self-check. This will form part of your training portfolio. Reference on page 22.

Information Sheet-1	Completing Inventory list of stock requirements
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2.1, Completing Inventory list of stock requirements

Management of Re-Ordering

What do you need to know to manage the supplies at your health facility?



HOW TO PREPARE THE STOCK



HOW TO ORGANISE SUPPLIES



HOW TO KEEP RECORDS



HOW TO ORDER SUPPLIES BASED ON PAST CONSUMPTION

..... **HOW TO SCALE UP**



HOW TO RECEIVE SUPPLIES

TO PREPARE A STORE AT YOUR HEALTH FACILITY



Note: Satisfactory rating - 3 points

Unsatisfactory - below 3 points

Answer Sheet

Score = _____

Rating: _____

Name: _____ **Date:** _____

Answer

1,



2.2. Recording stock requirements in order book

What Is an Order Book?

An order book is an electronic list of buy and sell orders for a specific security or financial instrument organized by [price level](#). An order book lists the number of shares being bid or offered at each price point, or market depth. It also identifies the market participants behind the buy and sell orders, though some choose to remain anonymous.

Order books are used by almost every exchange for various assets including stocks, bonds, currencies, and even cryptocurrencies like Bitcoin. Although they generally contain the same information, the set up may be slightly different, depending on the source. Buy and sell information may appear on the top and bottom, or on the left and right side of the screen.

These lists are not only useful for traders, but they also help improve market transparency because they provide information: how many shares are available, the price, and who wants to initiate the transaction.

The term order book can also be used to describe a log of orders a company receives from its customer base.

Understanding Order Books

The order book helps traders make more informed trading decisions. They can see which brokerages are buying or selling the stock, and determine whether market action is being driven by [retail investors](#) or by institutions. The order book also shows order imbalances that may provide clues to a stock's direction in the very short term. For instance, a massive imbalance of buy orders versus sell orders may indicate a move higher in the stock due to buying pressure.

The order book also helps pinpoint a stock's potential support and resistance levels. A cluster of large buy orders at a specific price may indicate a level of support, while an abundance of sell orders at or near one price may suggest an area of resistance.

An order book is dynamic and constantly updated in real time throughout the day. Exchanges such as Nasdaq refer to it as the "continuous book." Orders that specify execution only at market open or market close are maintained separately. These are known as the "opening (order) book" and "closing (order) book" respectively.



At the Nasdaq market open, the opening book and continuous book are consolidated to create a single opening price. A similar process is followed when the market closes when the closing book and continuous book are consolidated to generate a single closing price.

A Closer Look Into Order Books

There are typically three parts to an order book: buy orders, sell orders, and order history. The book is often accompanied by a [candlestick chart](#), which provides useful information about the current and past state of the market.

The buy orders contain all the information about the buyers in the market including all the bids, the amount they wish to purchase, and the ask price. Sell orders resemble buy orders. Market order histories show all the transactions that have taken place in the past.

The top of the book is where you'll find the highest bid and lowest ask prices. These point to the predominant market and price that need to get an order executed.

The order book, however, does not show “dark pools”—batches of hidden orders maintained by large players who do not want their trading intentions known to others. The presence of dark pools reduces the utility of the order book to some extent since there is no way of knowing whether the orders shown on the book are representative of true supply and demand for the stock.

- An order book is an electronic list of buy and sell orders for a security or other instrument organized by price level.
- Order books are used by almost every exchange for various assets like stocks, bonds, currencies, and even cryptocurrencies.
- These lists help improve market transparency as they provide information on price, availability, depth of trade, and who initiates transactions.
- There are three parts to an order book: buy orders, sell orders, and order history.
- Example of an Order Book

Order books continue to collate an increasing amount of information for traders for a fee. Nasdaq's TotalView claims to provide more market information than any other book—displaying more than 20 times the liquidity of its legacy [Level 2](#) market depth product.

While this extra information may not be very significant to the average investor, it may be useful to day traders and experienced market professionals who rely on the order book to make trading decisions.



Self check- 2

Short answer

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page

1, What Is an Order Book?

2, List the three types of order book ?



Note: Satisfactory rating - 3 points

Unsatisfactory - below 3 points

Answer Sheet

Score = _____
Rating: _____

Name: _____ **Date:** _____

Answer

1,

2,

**1.3, Authorization for order****TO ORGANISE MEDICINES AND RELATED SUPPLIES IN YOUR STORE****1. Store similar items together on the shelves.**

- Find the generic name of each medical supply in your store.
- Arrange and label the supplies on the shelves.
- Store all medicines and related medical supplies by using FEFO (FIRST EXPIRY FIRST OUT) procedures.

2. Store medical supplies and other supplies without expiry dates by using FIFO (FIRST IN FIRST OUT) procedures.**3. Remove expired and poor quality items from the store.**

- ❖ **Keep Records Appropriable**
- ❖ **Order Supplies Based On Past Consumption**

**TO ORDER SUPPLIES BASED ON PAST CONSUMPTION**

1. Calculate the average monthly consumption of each item in your store.
2. Determine how often your facility receives deliveries.
3. Determine the refill factor for your facility.
4. Calculate the REFILL LEVEL for each item in your store.
 - a. Calculate the average monthly consumption of an item.
 - b. Know the refill factor for the frequency of deliveries at your facility.
 - c. Multiply the item's average monthly consumption by the refill factor.
5. Determine when and how much to order.
6. Place an order for the supplies needed at your facility.
 - a. Make a written request for supplies.
 - b. Complete your facility's order information accurately.
 - c. Send or deliver your order to the medical supplier

TO PREPARE FOR SCALE UP

1. Determine who at your facility will be involved in the scale up service
2. Determine what non-facility staff will be involved.
3. Determine the details of the scale up.
4. Determine ordering and monitoring procedures.
 - a. Discuss with your team how the supplies will be ordered.
 - b. Make a plan to check stock levels.
5. Contact the intended supplier.
 - a. Explain your facility's plan to scale up a service.
 - b. Keep supplier informed of stock levels.
 - c. Determine when the first supplies will arrive.
6. Prepare your store.
 - a. Remove unnecessary supplies.

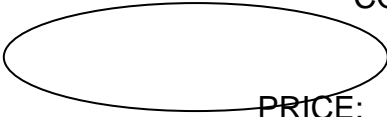


- b. Tidy the store.
- c. Estimate how much additional storage space will be needed.
- d. Determine if additional storage equipment is needed.
- e. Organize where you will put the scale up supplies in your store.

TO ORDER SUPPLIES BASED ON SCALE UP CONDITIONS

1. Know the total anticipated consumption of each product in your store two months from now.
2. Determine how often your facility receives deliveries.
3. Know the refill factor for scale up.
4. Calculate the REFILL LEVEL for scale up supply.
5. Record REFILL LEVEL on stock card for each scale up item.

EXAMPLE: STOCK CARD OF ORDER LIST

ITEM:		CODE NUMBER:					
UNIT + SIZE:						PRICE:	
LEVEL:		REFILL					
DATE	RECEIVED FROM	QUANTITY RECEIVED	ISSUED TO	QUANTITY ISSUED	BALANCE IN STOCK	REMARKS	SIGNATURE



6. Calculate the actual amount of scale up stock needed.
7. Place an order for the scale-up supplies needed at your facility.
 - a. Make a written request for supplies.
 - b. Send or deliver your order to the medical supplier.
8. Monitor stock movement and patient numbers.

**ORDERING FOR SCALE UP
REQUIRES CAREFUL PLANNING AND MONITORING!**

How to Identify and Reconcile Discrepancies

Differences (discrepancies) can be divided into three main categories: documented intentional, undocumented intentional or unintentional.

Documented Intentional discrepancy: prescriber intentionally adds changes or discontinues a medication and this is clearly documented. This is considered the 'best practice' in medication reconciliation.

Undocumented intentional discrepancy: prescriber intentionally adds changes or discontinues a medication but this is not clearly documented in the patient's medical record.

Unintentional discrepancy: prescriber unintentionally changes or omits a medication the patient was taking prior to admission.

In order to determine whether a discrepancy is unintentional or an undocumented intentional, the information should be clarified with the prescriber. The clarification can be done in person, by email/fax or phone. If the discrepancy was intentional, then the proper documentation is required on the chart. If the discrepancy is unintentional, then the prescriber can resolve the discrepancy by writing a new order.



Self check- 4

Multiple choose

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page

1 , Which one of the following is correct about ORDER SUPPLIES BASED ON PAST CONSUMPTION

- A. Calculate the average monthly consumption of each item in your store.
- B. Determine how often your facility receives deliveries.
- C. Determine the refill factor for your facility.
- D. Calculate the REFILL LEVEL for each item in your store.
- E. All of the above

2, One of the following is not correct about ORDER SUPPLIES BASED ON SCALE UP CONDITIONS

- A. Determine how often your facility receives deliveries.
- B. .Know the refill factor for scale up.
- C. .Calculate the REFILL LEVEL for scale up supply.
- D. . Record REFILL LEVEL on stock card for each scale up item
- E. All of the above

3, prescriber intentionally adds changes or discontinues a medication but this is not clearly documented in the patient's medical record is called

- A. **Undocumented intentional discrepancy**
- B. **Documented Intentional discrepancy**
- C. Reconcile Discrepancies
- D. Non of the above



Information Sheet-5	Inventory list based on stock
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2.51. nventory list based on stock

Inventory record and control

Medical stores management

The **stock record card method** is used to record information on the movement of goods in and out of the storage area. Stock cards can also be used to monitor inventory levels and facilitate order initiation. It is probably the optimum method to be used alone.

The most effective system of inventory control is one employing a combination of these methods tailored to meet the institution's needs and available resources.

Medical stores management should assist the movement of supplies from source to user as cheaply and reliably as possible, and without significant wastage or theft. The primary purpose of store is to **receive**, **hold** and **dispatch** stock. This process is controlled by an inventory control system, which may be **manual** or **computer** based, while the primary purpose of inventory control is to manage procurement and stock movements.

INVENTORY CONTROL

Inventory control is the process of managing inventory in order to meet customer demand at the lowest possible cost and with a minimum of investment.

SUCCESSFUL INVENTORY MANAGEMENT

Successful inventory management involves balancing the costs of inventory with the benefits of inventory. Many small business owners fail to appreciate fully the true costs of carrying inventory, which include not only direct costs of storage, insurance and taxes, but also the cost of money tied up in inventory.

This fine line between keeping too much inventory and not enough is not the manager's only concern.

Others include:

- ✓ Maintaining a wide assortment of stock -- but not spreading the rapidly moving ones too thin;



- ✓ Increasing inventory turnover -- but not sacrificing the service level;
- ✓ Keeping stock low -- but not sacrificing service or performance.
- ✓ Obtaining lower prices by making volume purchases -- but not ending up with slow-moving inventory; and
- ✓ Having an adequate inventory on hand -- but not getting caught with obsolete items.

The degree of success in addressing these concerns is easier to gauge for some than for others. For example, computing the inventory turnover ratio is a simple measure of managerial performance. This value gives a rough guideline by which managers can set goals and evaluate performance, but it must be realized that the turnover rate varies with the function of inventory, the type of business and how the ratio is calculated (whether on sales or cost of goods sold). Average inventory turnover ratios for individual industries can be obtained from trade associations.

The purpose of Inventory control system at the facility level:

- Record the receipt and issuance of stocks;
- Provide appropriate, safe, and secure storage;
- Patients receive drugs promptly;
- Stock outs can be prevented even when deliveries are delayed(Maintain sufficient stock to last between deliveries);
- Prevent expiry of items (Maintenance of an up-to-date inventory control system).
- Supplies can be replenished at scheduled intervals, saving on administrative costs and transport time; (Balance of supply and demand.)
- Maintain stock at the lowest possible cost, and within budget limits;
- Patients have confidence in the facility and seek help when they are ill(Determination of the right level of customer service.)

Problems of poor stock control just like shrinkage:

- A patient's condition may worsen because of the delay in treatment;
- A patient may even die if a life saving drug/item is out of stock;
- Patients may have to make long and expensive journeys to obtain treatment if drugs are not available in rural facilities;



- If supplies availability at the secondary level is better than the primary level, the community will lose confidence in primary health care and seek hospital treatment instead;
- When a drug is out of stock, less suitable alternative may be prescribed;
- Frequent stock outs may establish or re-enforce poor prescribing habits;
- Emergency orders, which are expensive for the purchaser and inconvenient for the supplier, may be required.



Self check- 5	Short answer
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Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page

- 1, list the common SUCCESSFUL INVENTORY MANAGEMENT ways
- 2, list The purpose of Inventory control system at the facility level:
- 3, Write some Problems of poor stock control



Note: Satisfactory rating - 3 points

Unsatisfactory - below 3 points

Answer Sheet

Score = _____
Rating: _____

Name: _____ **Date:** _____

Answer

- 1,
- 2,
- 3,



References

1. World Health Organization and Basics (1998)
Drugs supply management training: Handbook for drug supply management at the first-level health facility. Geneva, WHO
2. John Snow Inc., World Health Organization and United Nations Children's Fund. (2003)
Guidelines for the storage of essential medicines and other health commodities. Arlington, VA.: John Snow Inc./DELIVER.
3. World Health Organization Regional Office for Africa (2004)
Management of drugs at health center level: training manual. Brazzaville, WHO AFRO

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