

Inventory Technician Survival Guide

Hello fellow Inventory Techs! I am documenting this to spare new (and old) hires some of the frustration I felt when I first started here. As with any new endeavor, it can sometimes feel like there are a lot of expectations with painfully little explanation of how to fulfill those expectations. First off, you have an email account and are expected to check it daily for updates and announcements. That means finding time in your schedule to check it at one of the many computer kiosks around the hospital — as long as nobody is using one, it's fair game. You also have shared drive space you can save files to and access anywhere on the network.

The ERP System

Workday is the ERP system Supply Chain uses to manage and order hospital inventory. It's web-based — open it from the hospital intranet once you're on the network, or bookmark the login page.

You interact with Workday through the search bar at the top, using a peculiar set of system prompts. Do your fingers a favor and save these prompts so you don't have to retype them every time.

Prompts saved as **Favorites** display alphabetically. Prompts saved as **Shortcuts** live in the navigation toolbar and can be sorted however you like.

Favorites

Favorites display as **Tasks** and **Views**. Save them under your Personal items in the sidebar by editing the menu.

Tasks

- **Create Ad Hoc Location Labels** — cart location labels.
- **Par Location Labels** — labels for specific items on the cart. Probably the most-used prompt of the bunch. Make new individual labels! Or get crazy and print every label tied to a par location!
- **Create Ad Hoc Par Count** — order product directly from the computer, no phone/scanner needed.
- **Create Receipt** — check packages into received inventory.
- **Create Requisition** — must have a cost center code.
- **Maintain Par Location** — add or remove items from a location, change par levels, reorder points, etc.
- **Request Non-Catalog Items** — must have a cost center code.
- **Search Catalog** — restricts your search to the contracted supplier catalog.

Views

- **View Par Location**
- **Find Requisitions** — shows your recent requisition requests.

Shortcuts

Any of the above prompts can be saved as a Shortcut in the site navigation toggle. Shortcuts can be reordered, with a limit of 10.

Other Thoughts

On Par...

Par — the quantity you should have on hand — is a recommendation, not a mandate. As a general rule, aim for three days' worth of supplies: think of stocking up for a long weekend.

Some supplies only live on your server cart and in the room servers — they don't exist in the main supply room. Think IV tubing, blood tubing, isolation gowns, insulin needles, urinals. Maintain par counts on these no matter

what; there are no backups elsewhere on the floor.

Out of Date —

“Out Date,” the bane of every Inventory Tech, is a necessary evil, and watching for expired supplies is thankless work. Check near the end of each month and note what’s expiring soon. Some techs track out-dates in spreadsheets, others use sticky notes — find what works for you. Common short-dated items include saline flush syringes, specimen collection kits, and IV fluids.

Tips and Tricks

- Save the nice plastic bags as makeshift trash bags or to organize overstock. Remember: corrugated cardboard is enemy Number One!
- Not sure what something is and no time to look it up? Order the minimum amount.
- Stock the server by pattern recognition (a coworker’s “4,4,2,4”) and/or by touch and feel. Always start at the same spot so you don’t skip bins. Don’t forget the stethoscopes!
- Stocking the server is part art, part science. You *will* run out of something and need backup — no shame in asking for help, just don’t make it a habit.
- If you “borrow” supplies from another floor, tell that floor’s tech — or order extra to pay them back.
- Each floor has a whiteboard showing nurse assignments and the charge nurse. The charge nurse can answer urgent questions; your floor manager is also a resource. Get their blessing before big or expensive par changes.

How Do I...?

How do I find a product’s internal number?

Every product has a unique internal number in the ERP. Enter the manufacturer reference number in the search bar — the internal number appears in the results. Expand your search categories if results are thin.

How do I add an item to a par location?

Type “Maintain Par Location” in the search bar, select the location, scroll to the table, and click “+”. Enter the item’s product number and complete the required tabs: replenishment quantities, replenishment sources, and item information/accounting. After a few tries it’s second nature.

How do I change the par quantity?

Type “Maintain Par Location” in the search bar, select the location, find the item in the table, change the quantity, and click Save.

How do I find where an item lives on my floor?

Enter the product number in the search bar, select the item, then go to Inventory > Par Locations to see every location it’s stocked.