

Item master Maintenance Procedure

Strategy Statement

These guidelines applies to AUB campus and AUBMC personnel who are responsible for the Inventory system and who need to understand the operating environment, security, and control requirements

. The Maintenance policy presents information on the item master system. It is written for personnel who are responsible for the maintenance of the system and who need to understand the operating environment, security, and control requirements

Introduction

The American University of Beirut and its Medical Center owns and uses an extensive portfolio of items in delivering its services to the staff of the university and the hospital .This document provides a policy and management framework to ensure that these items are maintained appropriately to support the University's strategic objectives. The deterioration of the item master list due to lack of maintenance can lead to future financial and system functional burdens and affect the delivery of fast service and accurate information.

Objectives:

The procedure objective is to present information on Maintenance of the item master list. It is written for personnel who are responsible for the maintenance of the system and who need to understand the operating environment, security, and control requirements.

- To clarify maintenance responsibilities for the components of the item master
- To specify the minimum requirements of maintenance
- To ensure that the item master list is properly maintained
- To ensure that the system performs effectively and efficiently throughout the different departments

Scope and responsibilities:

The Material Management Department (MMD) is the sole provider of safeguarding the University and Hospital item master.

MMD along with Purchasing are responsible for acting as 'item master owner' in respect of data management and compliance with Oracle and universal standards requirements.

Policy

Maintenance of the master list will be used to achieve the greatest benefit for the University and Hospital community within the constraints of available resources. The master list will be maintained to the best standard possible while meeting the system obligations and the operational needs of the working university. Maintenance is prioritized within MMD and purchasing and will be performed in a timely fashion to comply with Audit and work activity requirements factors.

Maintenance Procedures & Points of Contact for Creating, editing & inactivating new items, categories, packaging units, and other related fields in the item master

Inventory Items:

- 1- Hospital Inventory items to be maintained by the AUBMC Director of Material Management following the best standard for the trade and generic name based on AHFS (American Health Formulary System)) for pharmaceuticals and the US Catalog Handbook of the Department of the Army Supply Bulletin (USC) in the case of other inventory and expense items.
- 2- AUB Campus Inventory items to be maintained by AUB Director of Material Management following the best standard from the (USC) Catalog Handbook of the Department of the Army Supply Bulletin.
- 3- Modifying or adding an item will be common and done cooperatively between MMD Purchasing and end user

Expense non inventory items:

- 1- Hospital expense items to be maintained by the AUBMC Director of Material Management using standardized description and following the best standard for the trade and generic name based on AHFS (American Health Formulary System) the remaining items will fit in the USC.
- 2- AUB Campus expense items to be maintained by the AUB Director of Material Management using standardized description and following the best standard from the USC Catalog Handbook of the Department of the Army Supply Bulletin.

Modifying or adding an item will be common and done cooperatively between MMD, Purchasing and end user

Categories & Sub Categories:

- 1- Hospital Categories to be maintained by the AUBMC Director of Purchasing following the standard of the Pharmacological Class AHFS: American Health Formulary System for analysis by commodity, coordinating with the Comptroller's Office for accounting set up and MMD.
- 2- AUB Campus Categories to be maintained by the AUB director of Purchasing, following the best standard from the USC Catalog Handbook of the Department of the Army Supply Bulletin for analysis by commodity

Modifying or adding a category should be thoroughly studied with the requester and the staff responsible for the maintenance of the Master file

Item Part Number: Use manufacturer part numbers for all items to uniquely identify products.

Item Packaging set up: to be set according to the item packaging and unit of measure 'UOM' provided by the agent or vendor registered in the Ministry of Health or on the dispensing distribution channel or

Description: Use the standardized manufacturer defined description format for better searching and reporting.

Vendor's information: Most of AUBMC's vendors and some of AUB's vendors are agents (the official representative of manufacturer through a contract of this product in Lebanon) or distributors of certain products of a manufacturer. For these vendors, use manufacturer's catalog numbers when available to uniquely identify products and link to vendors when applicable. For other suppliers of AUB, see the purchasing policy

Manufacturers: The manufacturer for each product is registered in the MOH and presented in the official file upon registration for marketing in Lebanon, use manufacture name and catalog number to correctly identify the items regardless of the distribution channel.

Categories: Categorize items to a universal product classification system for analysis by commodity.

Item relationship: Link items to the contract portfolio by manufacturer name and catalog number to gain visibility into sourcing effectiveness and options 'once offered'.

Having this information correctly in the Item Master File allows for accurate comparative analyses, exact product matching on all systems (SMS and Oracle) and provides a better assurance in the ordering and receiving process of the manufacturer's products.

Communication process:

The requester prepares a request for change form for addition of an inventory, expense or consignment item and also category or sub category, the request form should be forwarded to MMD director for processing who will forward to purchasing for new categories approval when applicable.

Pharmaceuticals items: fill the request for a change from following the below procedures:

- 1- For newly introduced items the Chief Pharmacist will define the pharmacological class and all other criteria (e.g. pack strength to be stocked...etc...) after the P&T (pharmacy and therapeutic committee) approval and prepare the Maintenance Form.
- 2- The Purchasing Department will check the consistency of the data during the ordering process to report and correct any discrepancy such as description, category etc.

Maintenance Programs:

Planned System Maintenance

Shall be undertaken annually prior to the Fiscal Year end to inactivate unused or duplicate records. This is necessary to ensure that the SMS complies with Oracle requirements and standards. This must be carried out without exception or delay by MMD (The director or assigned delegate).

Responsive maintenance

Responsive maintenance is defined as a quick action taken to add or edit an item or category. Such maintenance will be undertaken on a continuous basis in order to meet the need to keep the Oracle and SMS Master List current as an when new items are added.

There will always be items and categories because of their importance & their urgent value or nature significance, must be maintained at a higher and faster standard than that prevailing in the University and Hospital.

All responsive maintenance for the item list will be carried out with minimum disruption to the Purchasing activities of the university; a user email request must be recorded on the director of material; Management and Director of Purchasing and also, the Comptroller's Office without exception.

Long Term Maintenance

The purpose of long term maintenance planning is to establish the future Maintenance requirement for the item master list this will allow for the ease in placing requisitions, and to maintain an active items list.

Long term maintenance is defined as work of a non-routine nature generally where items and categories are not in use and/or obsolete also where the manufacturing and catalog numbers are entered when received for existing items.

The responsibility for long term maintenance planning and monitoring rest with the Material Management Group (The director or a signed delegate).

For a quick reference:

Click web link to the policy (link will be provided)

Click web link to all categories, sub categories, items description and definition included in the Master file are spelled out or added by (Link will be provided)

Click web link to the directory of all items on AS400 and Oracle with standard description (Link will be added)