Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Breast Pump Inventory and Tracking Reports

Objectives:

Upon completion of this lesson the user will be able to:

- view and add breast pumps to the "**Breast Pump Inventory**" table;
- change the status of a Lactina or EnDeare pump in the table; and
- view and print the "**Multi-User Pump Tracking**" and "**Breast Pump Inventory**" reports.

Oregon Policies:

♦ 712 Breastfeeding: Breast Pump Ordering, Distribution and Tracking Guidelines

Overview:

The "Breast Pump Inventory" table, "Breast Pump Inventory" report and "Multi-User Pump Tracking" report are used in conjunction with the "Breast Pump Issuance" screen to issue, track and maintain breast pump inventories. Information in the inventory table and reports is automatically updated when breast pump information is entered in the "Breast Pump Issuance" screen. For more information see Chapter 3, Lesson 600 *Breastfeeding Tracking*.

Instruction:

Using the Breast Pump Inventory Table

The starting point for this lesson is:

Operations Management ⇨ Tables ⇨ Breast Pump Inventory Table

Adding a Lactina *or* EnDeare *to the Inventory*

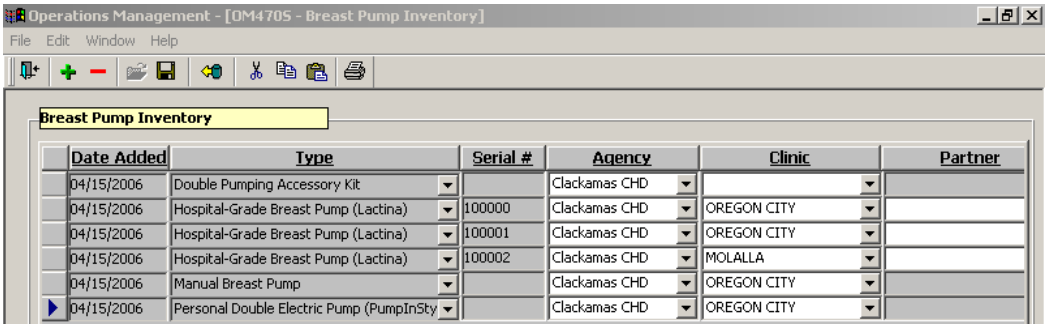

Figure 1: Breast Pump Inventory Table

1. **Click the "Insert" icon to add a row.**

2. **The "Date Added" field defaults to today's date but can be modified.**

3. **In the "Type" field, select "Hospital-Grade Breast Pump (Lactina)" or "Multi-User Breast Pump (Hygeia EnDeare)" from the drop down list.**

4. **Complete the "Serial #" field by typing in the pump's serial number. For EnDeare pumps, include the H in the serial number.**

5. **Complete the "Agency" field by selecting your agency from the drop down list.**

6. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**

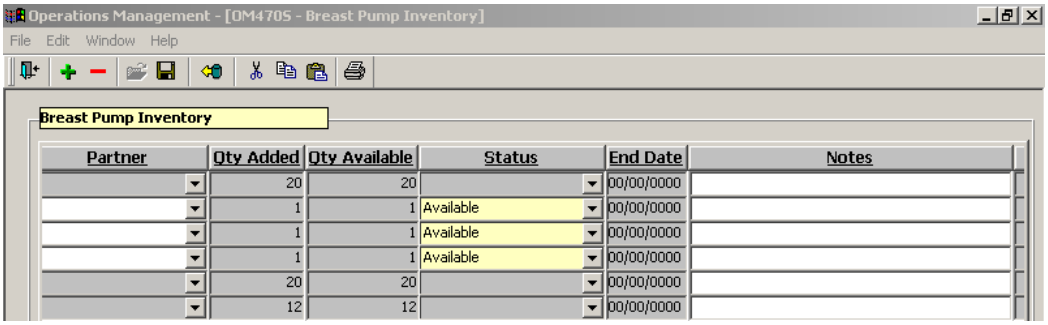

Figure 2: Breast Pump Inventory Table

7. **If needed, complete the "Partner" field by selecting the partner from the drop down list. If the "Agency" field is left blank, the "Partner" field becomes mandatory.**

♫ Note: Portland metro area pump partners and their assigned breast pumps are added to TWIST by the state WIC office and will automatically appear in your inventory. To add *Local* pump partners, contact the state WIC office.

8. **The "Qty Added" field for Lactina and EnDeare pumps is always 1. Type a quantity of "1" in this field.**

9. **Complete the "Status" field by selecting *Available* from the drop down list.**

10. **When *Available* is selected in the "Status" field and "Save" is performed, the "Qty Available" field will be populated with "1".**

11. **If needed, double click in the "Notes" field to enter a free form note.**

♫ NOTE: User can sort this table by **Type**, **Serial #**, **Agency**, **Clinic**, **Partner,** or **Status** by clicking on the appropriate column heading.

Adding Other Types of Breast Pumps to the Inventory

1. **Click the "Insert" icon to add a row.**

2. **The "Date Issued" field defaults to today's date but can be modified.**

3. **Complete the "Type" field by selecting the appropriate pump type from the drop down list.**

4. **Complete the "Agency" field by selecting your agency from the drop down list.**

5. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**

6. **Complete the "Qty Added" field by typing in the quantity of pumps.**

NOTE: Entering personal pumps is required. Entering manual pumps is recommended but not required.

Changing Multi-User Pump Status (Lactina or EnDeare)

1. **Change the information in the "Status" field by selecting a new status from the drop down list.**

♫ Note: There are 8 pump status types in TWIST. Three status types change automatically when information is entered in the "Breast Pump Issuance" screen. For example, when a Lactina or EnDeare pump is issued, the status changes from *Available* to *Issued* and when a return date is entered the status changes back to *Available.* The status of a Lactina or EnDeare changes to *Under Investigation* when the "Referred to State" field is completed. The other five status types must be manually selected in the "Breast Pump Inventory" table. These status types are *In-House Cleaning* (optional), *Permanently Out of Service*, *Returned to Manufacturer*, *Lost by Agency*, and *Unrecoverable*. The *Lost by Agency* and *Unrecoverable* statuses can only be entered by state office staff.

Viewing the Multi-User Pump Tracking Report

The starting point for this lesson is:

Client Processes ⇨ Outputs ⇨ Reports ⇨ Nutrition Education ⇨ Breastfeeding ⇨ Multi-User Pump Tracking Report

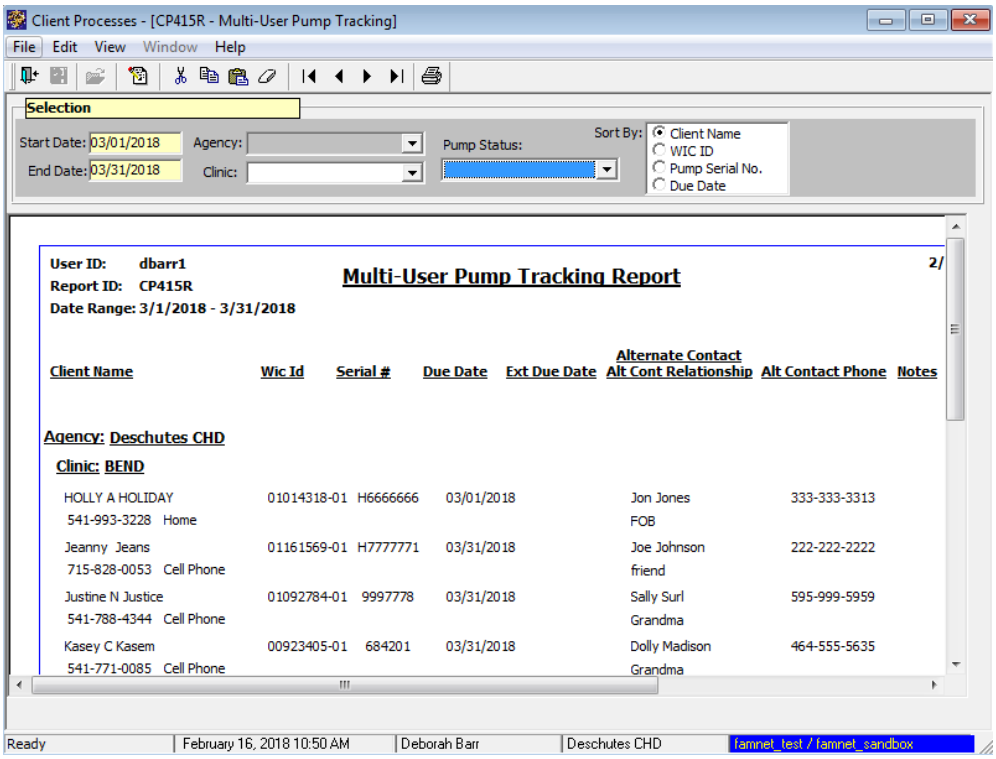

Figure 3: Multi-User Pump Tracking Report

1. **Enter a range of breast pump return due dates in the "Start Date" and "End Date" fields.**

2. **Select a clinic from the drop down list in the "Clinic" field or leave this field blank to run a report for all clinics.**

3. **Select a pump status type in the drop down list in the "Pump Status" field or leave this field blank to run the report for all status types.**

4. **Select a sort preference in the "Sort By" field.**

5. **Click on the "Run" icon to view the report.**

6. **Click on the "Print' icon to print the report.**

Viewing the Breast Pump Inventory Report

The starting point for this lesson is:

Operations Management ⇨ Outputs ⇨ Breast Pump Inventory Report

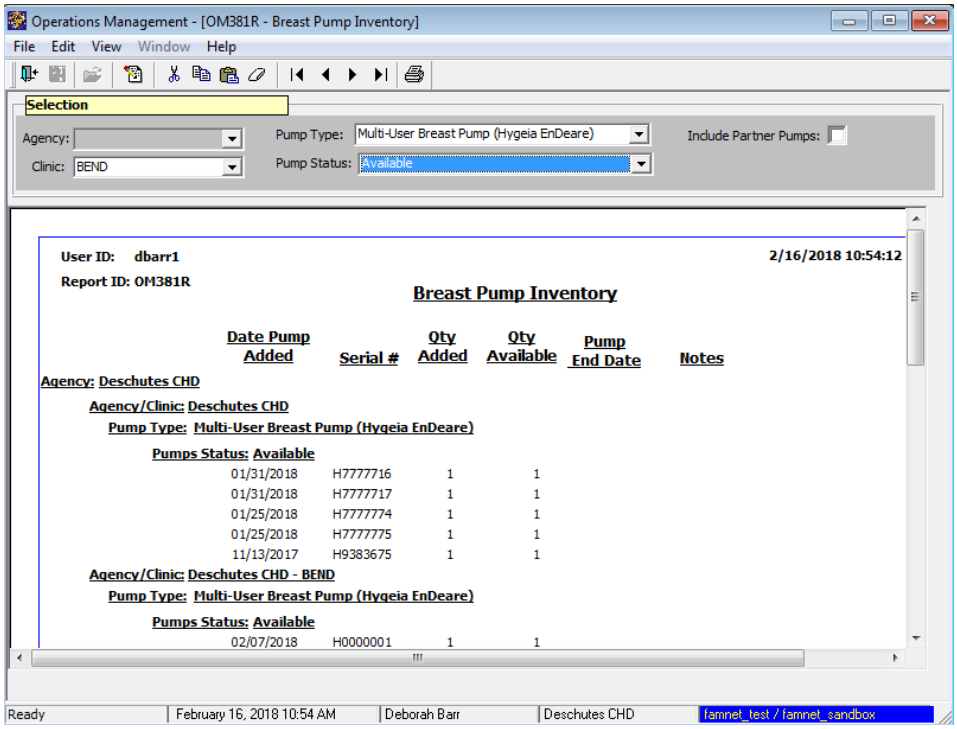

Figure 4: Breast Pump Inventory Report

1. **Enter the "Pump Type" from the drop down menu.**

2. **Select a clinic from the drop down list in the "Clinic" field or leave this field blank to run a report for all clinics.**

3. **Select a pump status type in the drop down list in the "Pump Status" field or leave this field blank to run the report for all status types.**

4. **To include "Partner Pumps" in the report, check the checkbox. These include only the partner pumps from are local agency specific partners.**

5. **Click on the "Run" icon to view the report.**

6. **Click on the "Print' icon to print the report.**

NOTE: The end of this report also shows totals for all pumps.

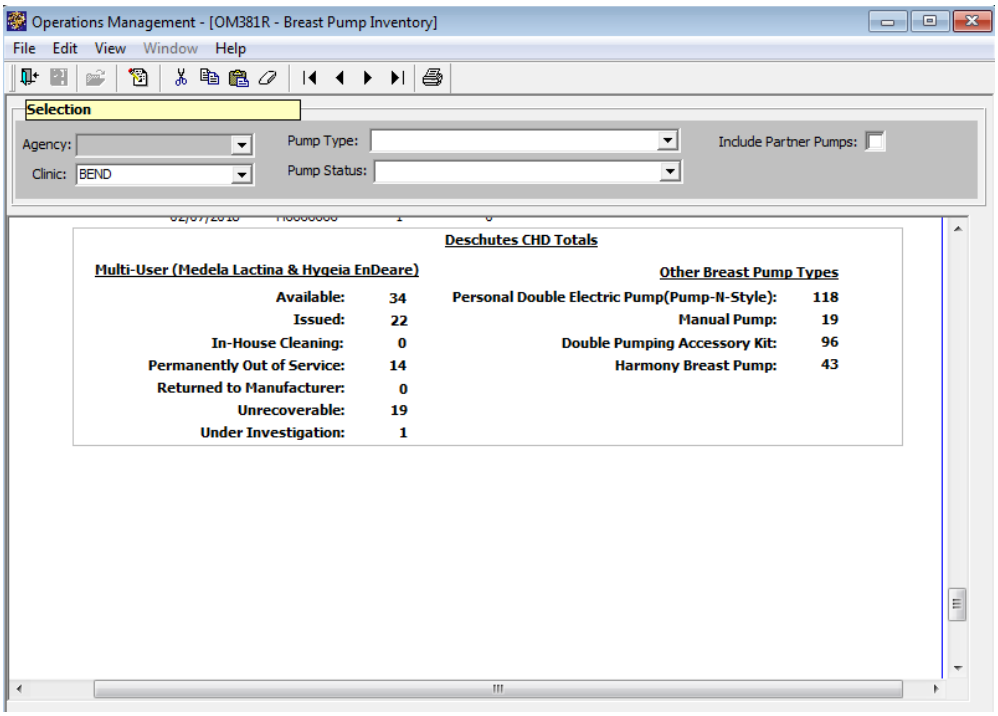

Figure 5: Totals Box in Breast Pump Inventory Report

Notes: