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Medical Materiel Craftsman

Volume 1. Essentials

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Material in this volume is reviewed annually for technical accuracy, adequacy, and currency. For SKT purposes the examinee should check the *Weighted Airman Promotion System Catalog* to determine the correct references to study.

CDC 4A171, *Medical Materiel Craftsman*, consists of two volumes. Volume 1 provides you with the essentials that you will need as a medical materiel craftsman. In volume 2, you'll study the more advanced medical materiel operations.

This first volume of CDC 4A171, is concerned with resource management, customer service, Environment of Care, DMLSS administration, funding and customer account management, and Inventory management, and finally miscellaneous functions.

Unit 1 provides information on the roles and responsibilities of the accountable officer, reports of survey, manpower standards, and initial customer training. Unit 2 focuses on various aspects of safety programs and hazardous materiels management. Unit 3 covers DMLSS system and user administration, monitoring and resolving DMLSS communications, and file plans. Unit 4 includes information on funding methods and customer account management. Unit 5 covers storage and distribution, inventory control, excess and commercial returns, and inventory procedures. Finally, unit 6 includes quality assurance, risk management, reports, pending actions, status edits, and acquisitions.

It is extremely important that you get clarification from your trainer, supervisor, or knowledgeable coworkers on information that you do not understand. Please feel free to call the author listed in this volume for assistance. Remember that the only dumb question is the question you needed an answer to, but failed to ask. Take the extra time to answer the self-test questions and unit review exercises. Once again, feel free to call the author if you think a question or area of text should be deleted due to changes in technical references.

A glossary is included for your use.

Code numbers on figures are for preparing agency identification only.

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This volume is valued at 18 hours and 6 points.

NOTE:

In this volume, the subject matter is divided into self-contained units. A unit menu begins each unit, identifying the lesson headings and numbers. After reading the unit menu page and unit introduction, study the section, answer the self-test questions, and compare your answers with those given at the end of the unit. Then complete the unit review exercises.

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Unit 1. Logistics Administration

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CONGRATULATIONS! ENROLLING IN THE MEDICAL MATERIAL 7-LEVEL COURSE signifies that you have reached a pivitol point in your career. In the 5-level CDC you learned basic concepts. Your knowledge has enabled you to become a Medical Materiel Journeyman with an Air Force specialty of 4A15; however, as you increase in rank, your level of responsibility and expectation of skill proficiency has also increased. In this unit, we focus on the roles and responsibilities of the accountable officer, report of survey, manpower management training, initial custodial training, office administration and your role in each. Logistics administration is a large part of your duties as a 4A171, not just for career progression, but to ensure we instill in our troops the desire to do the job properly. If we fail to do so, we will fail to complete the mission.

001. Roles and responsibilities of the accountable officer

All activities within the Air Force have a chain of command or a hierarchy of personnel. Within each and every medical materiel department, the accountable base medical supply officer is at the top of the medical materiel chain. This lesson will give you a brief overview of the accountable base medical supply officer (ABMSO) to include the different roles and levels of responsibility associated with the accountable officer.

Appointment

The ABMSO is appointed in writing by the medical treatment facility (MTF) commander. The appointed ABMSO is, under most circumstances, the medical logistics flight commander (MLFC). If no officers are assigned to the medical logistics flight, another medical service core (MSC) officer assigned to the MTF should be appointed to have oversight of logistics and to function as an interim ABMSO; this is known as dual-hatting. If this is not possible, a waiver needs to be coordinated through your Major Command Surgeon General Administrator (MAJCOM/SGS) and submitted to the Chief, Medical Logistics division (AFMOA/SGAL). This waiver, when approved, will allow a medical materiel senior non-commissioned officer (SNCO) to temporarily act in the official capacity as the ABMSO until a suitable officer can be assigned.

Roles

Simply put, the ABMSO is the focal point for all medical materiel activities. The ABMSO oversees all day-to-day operating stock actions. Meanwhile, they must also oversee their war reserve material (WRM) programs. Additionally, he or she must maintain the MTF’s in-use equipment. Oftentimes, since the ABMSO is also the MLFC; he or she must also provide oversight of the facilities management office and the bio-medical equipment repair section.

Responsibilities

Before we review the responsibilities of the ABMSO, it is important to remind you that as medical materiel specialists we are an extension of the ABMSO. The ABMSO is not expected to take direct actions at the tactical level. That is our job; however, the ABMSO maintains responsibility in ensuring the specified actions are taken as required.

The ABMSO is responsible for maintaining and accounting for all property and financial records for his or her medical stock record account through the use of the Defense Medical Logistics Standard Support (DMLSS) system. The ABMSO is also required to maintain physical accountability of all Air Force Working Capital Fund (AFWCF)/medical dental division (MDD) owned assets, which

includes all operating inventory, WRM inventory, and in-use equipment. He or she will also be the approving authority for the acquisition and issue of all medical supplies and equipment for both medical and non-medical on-base organizations. The ABMSO ensures all AFWCF/MDD materiel is procured and maintained within the DMLSS system. He or she will issue medical materiel to non-medical units only with the approval of the MTF commander (or designated representative). The ABMSO ensures job qualification training is provided to nearby medical logistics personnel who are not assigned to a stock record account (e.g., Air Reserve Component personnel). He or she appoints a noncommissioned officer (NCO) or GS-04 or higher civilian as the MTF linen supply officer when applicable.

The ABMSO ensures appropriate management controls are in place to minimize the occurrences of fraud, negligence, theft, and so forth. These measures include, but are not limited to, the following:

- Completing all inventories within the required timeframes and adjusting records as necessary.
- Maintaining adequate levels of security for stored assets.
- Complying with procurement processes that minimize opportunity for fraud.
- Maintaining auditable financial records to include signed copies of contracts, invoices, inventories, etc.
- Ensuring deficiencies noted during Unit Effectiveness Inspections (UEI), The Joint Commission (TJC), Accreditation Association for Ambulatory Health Care (AAAHC), and other official inspections/assessments have been corrected or a plan for correction has been implemented to address them.
- Validating and adjusting business processes (as necessary) based on recommendations from AFMOA site visit teams and other management assistance visit teams.

In general, the medical logistics accountable officer is financially liable for the items under his or her control and must maintain the storage areas for those supplies. The accountable officer is also responsible for overseeing the integrity of the AFWCF and is monitored by AFMOA/SGAL. Lastly, the accountable officer is charged with ensuring that using activities receive outstanding medical materiel and services support.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

001. Roles and responsibilities of the accountable officer

1. Who appoints the ABMSO in writing?

2. Who is normally appointed as the MLFC?

3. If no MSC officer is available to function as the interim ABMSO, a waiver needs to be coordinated and submitted to which two offices?

4. The ABMSO is required to maintain physical accountability for what type of assets?

5. The ABMSO is the approving authority for the acquisition and issue of all medical supplies and equipment for which two on-base organization types?

6. Whose approval is required before the ABMSO may issue medical materiel to non-medical units?

7. What are the grade requirements for appointment as the MTF linen supply officer?

8. The ABMSO ensures appropriate management controls are in place to minimize the occurrences of which inappropriate actions?

002. Report of survey

Financial liability against an individual(s) is assessed only after an official investigation is conducted specifically for the purpose of determining the facts and the circumstances related to the loss, damage, or destruction of the property. In this lesson you will learn about the report of survey (ROS) process.

Pecuniary liability

Before you learn the methods of liability relief, you need to recall the definition of pecuniary liability and how it impacts this process. The word *pecuniary* means *pertaining to or consisting of money*. The word *liability* means *obligation*. Therefore, a *pecuniary liability* is a *monetary obligation*. Pecuniary liability applies to all persons having property responsibility. It means you may have to financially reimburse the government for loss, damage, or destruction of government property caused by your negligence, willful misconduct, or deliberate unauthorized use. Pecuniary liability may be the responsibility of one person or of several people involved in a given case.

Relief from liability

According to Air Force Instruction (AFI) 23–111, *Management of Government Property in the Possession of the Air Force*, any one of the following three categories of evidence can be used by commanders to relieve individuals of custodial responsibility:

1. Documents or electronic/computer records, such as the Custodial Actions List, Custodian Receipt/Location List, an approved AF Form 601, Equipment Action Request, or other appropriate documents showing turn-in or transfer of an item to another property custodian.
2. Approved reports that provide for disposition of, or relief from, responsibilities for items that have become unusable due to damage, loss, deterioration, obsolescence, or destruction.
3. Approved inventory adjustment, or other prescribed document, to adjust losses incidental to normal day-to-day operations.

If the evidence to relieve an individual(s) of custodial responsibility is not available, the next step is to initiate a ROS. The initial documentation is used by medical logistics to justify the removal of missing equipment items from DMLSS accountability records; you do not need to wait for the ROS to be closed-out before adjusting the DMLSS records.

Report of survey process

If property is lost, destroyed, or damaged by means other than fair wear and tear, obtaining relief from property responsibility can be costly to the person charged with the custodial responsibility. This process usually begins with a ROS, which is an in-depth investigation performed by a designated survey officer. The ROS is documented on a DD Form 200, Financial Liability Investigation of Property Loss. There are four general purposes of a ROS:

1. Research and investigate the cause of loss, damage, or destruction of property and determine if it was attributable to an individual’s negligence or abuse.

2. Assess monetary liability against individuals who have lost, damaged, or destroyed government property or relieve them from liability if there is no evidence of negligence, willful misconduct, or deliberate unauthorized use of the property.
3. Provide documentation that can be used to support the adjustment of accountable records.
4. Provide commanders with case histories that enable them to take corrective action to prevent recurrence of the incident.

There are two primary categories of items that require ROS documentation—supply system stocks and property record items.

Supply system stocks

Supply system stocks are those inventories that are maintained by a stock record account, in which stock actions and balances are required to be recorded. Within medical materiel, documentation is kept for each supply item that enters and exits your account through the use of DMLSS.

Property record items

Property record items include all Air Force (AF) accountable property other than supply system stocks. This category is broad and includes several types of properties. The following categories are most common to the 4A1X1 career field:

- Military real property such as land, buildings, structures, utility systems, and improvements includes equipment (e.g., heating systems) that are attached to and made part of buildings and structures, but not movable. It also includes installed equipment, (e.g., elevators, lavatories, plumbing, and electrical systems). Machine tools and production equipment are not included under this category.
- Military personal property such as accountable property of any kind, except real property (as defined above), supply system stocks, and tools used or capable of use in the manufacture of supplies or in the performance of services for any administrative or general plant purposes.
- Excess, surplus, and foreign excess personal property such as personal property on which disposal action has been initiated by the Department of Defense (DOD) component. It may have come from your supply system inventories or from equipment in use. In either case, accountability is dropped at the time of transfer from owning agency to the property disposal agency.

Mandatory ROS

AFI 41–209, *Medical Logistics Support*, lists the conditions for mandatory ROS that are most common to the medical materiel career field. Investigation is required for all items meeting the following criteria:

Mandatory Reports of Survey	
Dollar Value	**Type of Item or Condition**
Over $50,000	Total inventory adjustments.
Over $16,000	Individual items from Operating, WRM, or Medical Counter-Chemical, Biological, Radiological, and Nuclear (MC-CBRN) supplies
Any value	Equipment inventory Controlled items. As directed by MTF commander, Squadron commander, Inventory adjustment approval authority, or MLFC.

When a loss or theft of controlled substances is determined, the MLFC immediately prepares Drug Enforcement Administration (DEA) Form 106, Report of Theft or Loss of Controlled Drugs, and submits it to the nearest DEA regional office. The incidence is also reported to the local Office of Special Investigations (OSI). For further information, refer to AFI 41–209, *Medical Logistics Support*, Chapter 5.

ROS procedures

When property is lost, damaged, or destroyed by an individual or an organization, the first step is for the organization with accountability for the property to initiate a ROS. Under the ROS process, the unit commander, or in some cases an appointing authority, will appoint an investigating officer who will determine the facts in the case. The investigating officer must be "disinterested", having no interest in the custodianship, care, accountability, or safekeeping of the property. Furthermore, when appointed as investigating officer, completing the investigation becomes a primary duty, and the officer is relieved of other duties or assignments that would interfere with the investigation. The investigating officer (the term "officer" applies to anyone appointed to investigate the case), at a minimum, will answer what, how, where, when, who was involved, and was there any evidence of negligence, misconduct, or deliberate unauthorized use or disposition of the property. The investigating officer, based on the facts, makes findings and recommendations on the issue of liability of the person(s) involved.

The next step is to refer the ROS to the accountable officer so that the property or supply records can be adjusted. Note that this action is not affected by the action the approving or appellate authority takes; therefore, the accountable records are adjusted as soon as possible.

Next, the investigating officer allows the person(s) involved to review the case and provide verbal or written information to refute the findings and recommendations. The ROS is then processed to the appointing authority for assignment of financial responsibility against the individual(s) charged or relieving them from responsibility. If financial responsibility is assessed, then the ROS is referred to the legal office for review. If the investigating officer did not perform a thorough job, the ROS is returned to be reaccomplished.

In some cases, the appointing authority may assign a financial liability officer to re-investigate the case. This is a second investigation and is performed when necessary to reevaluate the initial investigation or because of the complicated nature of the case. In most cases, a financial liability officer should not be required if the investigating officer accomplishes a proper investigation. In unusual cases, the approving authority may appoint a financial liability board to evaluate the findings of the appointing authority and the financial liability officer.

Upon conclusion of these actions, the approving authority reviews the ROS and assigns financial responsibility or relieves the individual(s) of responsibility. At this time the ROS is submitted for acknowledgment by the individual(s) charged who are advised that the ROS action may be appealed to the next level in the chain of command above the person who assigned the financial liability assessment.

Basis for government compensation

Since the ROS is an official report of facts and circumstances supporting the assessment of financial liability for the loss, damage, or destruction of AF property, it serves as the basis for the government's claim for compensation. In the AF, the ROS system is the method used for declaring a claim against military and civilian personnel who have lost, damaged, or destroyed public property in their possession.

Pecuniary liability is generally limited to a maximum of one month's base pay of the person who lost or damaged the property. There is, however, no limit on liability for accountable officers, individuals who damage equipment or individuals who, through negligence or willful misconduct, damage their assigned living quarters.

The unit commander, or accountable officer responsible for the damaged property, initiates the ROS process. If two or more persons are responsible for the loss or destruction, each is held jointly liable. If collection cannot be made from one of the liable parties, the remaining parties are still liable. The AF cannot collect more than the total amount of the loss or damage. The approving authority allocates how much will be collected from each party. Detailed instructions for preparing DD Form 200 are in Air Force Manual (AFMAN) 23–220, *Reports of Survey for Air Force Property*.

AFMAN 23–220 provides guidance for determining when a report is mandatory. If a ROS is not mandatory and the item is valued at $500 or less, and an individual wants to voluntarily pay for property he or she lost, damaged, or destroyed, a ROS is not required. In this situation, use DD Form 362, Statement of Charges/Cash Collection Voucher, or DD Form 1131, Cash Collection Voucher, instead of a ROS for property record items. Payment must be voluntary and not coerced or threatened.

Property not on property records

A ROS may be initiated for items not recorded on accountable records and actions may be taken to obtain reimbursement for any government property lost, damaged, or destroyed regardless of whether or not it is considered to be "accountable" property. This is particularly relevant considering the large number of non-medical items that are not maintained on accountable records. Many items used in the AF are not recorded on accountable records. However, commanders are still responsible for assuring that they are properly maintained and when no longer required or usable, they are turned in to the appropriate property disposal office.

Disciplinary actions

Commanders decide if a case warrants taking disciplinary action under the *Uniform Code of Military Justice (UCMJ).* This is a separate action and not related to the assessment or non-assessment of financial liability. Assessment of financial liability cannot be used instead of, or as a form of disciplinary action. Commanders are encouraged to use administrative actions when assessment of financial liability by ROS is not practical or desirable.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

002. Report of survey

1. What is pecuniary liability?

2. To whom does pecuniary liability apply?

3. List three ways that someone can be relieved of property responsibility.

4. Name the documents or electronic/computer records that can provide relief from property responsibility.

5. What step do you take if the evidence to relieve an individual(s) of custodial responsibility is not available?

6. List four general purposes of a ROS.

7. What are two primary categories of items that require ROS documentation?

8. What category of stocks includes those inventories which required stock actions and balances to be recorded?

9. Real property falls under what category of items?

10. What three conditions require a ROS regardless of the dollar value?

11. Who initiates a ROS when property is lost, damaged, or destroyed by an individual or an organization?

12. What are the requirements for appointment of an investigating officer?

13. To what individual is the ROS referred for adjustment of records?

14. What agency reviews the ROS if financial responsibility is assessed against an individual?

15. What individual reviews the ROS and assigns financial responsibility or relieves the individual(s) of responsibility?

16. In the Air Force, which system is the method used for declaring a claim against military and civilian personnel who have lost, damaged, or destroyed public property in their possession?

17. Generally, what is the pecuniary liability limit for a person who lost or damaged property?

18. Who decides if a case warrants taking disciplinary action under the UCMJ?

003. Manpower management

Effective manpower management is critical to mission accomplishment. The manpower management process systematically identifies the minimum essential manpower required to accomplish approved missions. You need to be familiar with the manpower management system and its roles. The term *manpower* refers to the number of people contributing to or needed for a work force. Manpower is a critical resource required to perform work and includes military personnel, in-service civilian employees, and contract services. The success of your MTF's mission depends, to a great extent, on the people assigned to it. AF units must successfully accomplish their assigned missions using minimum levels of manpower needed to effectively and efficiently execute their missions. As supervisors in the MTF, you must provide the highest quality health care support with the help of your subordinates. If the number of people assigned cannot satisfy patient needs, it becomes increasingly difficult to successfully accomplish the mission. Let's look at the system the AF has for allocating personnel resources and some of the specific responsibilities associated with this program. This lesson gives you the fundamentals of manpower management.

AF manpower program

All budgeted and programmed manpower resources for the total AF (active duty [AD], Air Force Reserve [AFR], and Air National Guard [ANG]) derive from two sources: the DOD Future Years Defense Program (FYDP) and the Air Force and Financial Plan (F&FP). DOD uses elements of the FYDP to budget for and control its resources. The AF uses the F&FP to budget for and control its portion of the DOD overall resources. The AF provides unit commanders, through the commands, with manpower in quantity, grade, and specialty required to accomplish their assigned missions. Manpower is a large part of the annual budget approved by Congress. The AF establishes policies and procedures to define credible manpower requirements, develops defensible budgets, allocates manpower resources to commands, and ensures their efficient use. The AF manpower program is a continuous process of verifying and validating manpower requirements, distributing and redistributing authorizations, and accounting for actual utilization of those authorizations. There are several responsibilities identified in the AF manpower program.

- AF planning and programming for manpower is centralized at Headquarters (HQ) USAF where national security policy is translated into force structure programs.
- Execution is decentralized to MAJCOMs where budget and resource allocation are translated into command programs and units.
- Field commanders, who are ultimately responsible for the mission, manage the resources within the constraints imposed by higher headquarters.
- Within the MTF, the resource management office (RMO) is responsible for managing the manpower program.

In the opening paragraph, you were given a definition of manpower. Let's now relate it to the AF manpower program. Manpower is the jobs or positions necessary to perform the workload dictated by the mission. Additionally, manpower is a combination of authorizations and personnel. The following terms will help you understand more of this concept.

Manpower authorization

Manpower authorization is a funded manpower requirement with details that define the position in terms of its function, organization, location, skill, grade, and other appropriate characteristics that commands use to extend and strengthen manpower resources to the units.

Manpower determinant

A manpower determinant is a means of quantifying manpower requirements. Determinants may cover a wide variety of methodologies including but not limited to manpower standards, models, and guides.

Manpower data system

The Manpower Data System (MDS) is the official source of manpower authorization data for the active duty AF, ANG, and AFR. The MDS provides authorization data to the personnel data system for recruitment, training, and assignment actions and to wing and unit commanders for peacetime and contingency planning actions.

Management engineering programs

The Management Engineering Programs (MEP) provides the framework for developing Air Force Manpower Standards (AFMS), command-unique manpower standards, and provides products and services to AF functional managers and manpower managers at all organizational levels.

Manpower requirement

A manpower requirement is a statement of the manpower needed to accomplish a job, workload, mission, or program. The AF manpower requirements determination process systematically identifies minimum essential manpower required for the most effective and economical accomplishment of approved missions and functions within organizational and resource constraints. To accomplish this, HQ USAF functional managers get with personnel management to determine the appropriate manpower tool consistent with resources needed to develop the manpower standard; the mix of military, civilian, or contract services; and the required military category (officer or enlisted) and grade. There are two types manpower requirements—funded and unfunded. Funded manpower requirements are those that have been validated and allocated. Unfunded requirements are validated manpower needs but deferred because of budgetary constraints.

Manpower standard

AFMS identifies a work center's man-hours to workload relationship and quantifies manpower requirements. The AF uses manpower standards for the accurate distribution of manpower resources. It is the basic tool used to determine the minimum level of manpower required to support a function. It is a quantitative expression that represents a work center's man-hour requirements in response to varying levels of workload. AFMSs are volumes of independent publications that address independent work centers that are designed with different formats, but the most common is a mathematical model for computing/quantifying requirements to selected workloads. Thus, their purpose is quantifying the minimum essential manpower requirements for the individual work centers. Manpower standards have four key components:

1. Process-oriented description—a full description of processes that are the responsibility of the work center and lists the sections tasks, duties, and responsibilities.
2. Man-hour equation—this is the mathematical formula used to quantify your requirement. In order to obtain accurate information, you will have to input certain variables that are based on the levels of productivity at your MTF.
3. Manpower table—provides grades and skill levels for the number of authorizations determined by applying the formula.
4. Variances—condition that adds to or subtracts from the core workload or impacts the way the work is performed.

NOTE: AFMS 5530 is the standard that specifically applies to manpower for medical logistics.

Work centers

A work center, also known as a functional area, is an organizational section with a unified purpose and identified as a pool of manpower. A functional account code (FAC) identifies the work center. For example, the dental clinic's FAC is 542100; medical logistics' FAC is 553000. Biomedical equipment technicians (BMET) fall under the medical logistics FAC. Each FAC has its own unique AFMS used to determine manning requirements.

Man-hour

A man-hour is a unit of measuring work. It is equivalent to one person working at a normal pace for 60 minutes, two people working at a normal pace for 30 minutes, or a similar combination of people working at a normal pace for a period of time equal to 60 minutes.

Manpower documents

Several documents are available to assist you in managing the manpower program; each requires continuous monitoring to ensure the MTF commander, executive committee, managers, and supervisors have accurate and current information. The primary documents are the AF manpower standard, the unit manpower document (UMD), and the unit personnel management roster (UPMR).

Using a manpower standard

Determining manpower requirements involves the development and use of manpower standards which objectively state manpower requirements as a function of workload. These standards/models objectively state manpower requirements based on population or workload. A review and application of each approved AF manpower standard is performed at least yearly. Standards are developed to cover AF-wide functions, command unique functions, or even single location functions.

Unit manpower document

The UMD is a computer product that lists unit manpower requirements—both funded and unfunded. It is the primary manpower tool for mangers and is a quarterly computer product available to each base. Manpower spaces are shown by functional account with the authorizations displayed over fiscal quarters. Manpower authorizations define each position in terms of its function, organization, location, skill, grade, and other appropriate characteristics that commands use.

The information within the UMD provides a clear picture of the manning positions within an MTF. It illustrates every funded, unfunded, and contracted manpower requirement as validated by the Medical Annual Planning and Programming Guide (MAPPG). The following information explains the various sections within the UMD. As you read the different headings, refer to figure 1–1 and the callouts in the boxes for examples.

Position number

The position number (POS) (1) is a seven-digit number used to identify authorizations against a particular position. For example, under Quality Services, two manpower requirements are needed to accomplish the work. Both are civilian health services management journeyman positions. The position number for the first position is *01674090OJ*. The last two digits (OJ) identify the major command (MAJCOM).

Air Force specialty title and code

The Air Force specialty (AFS) title and code (AFSC) (2) is a numeric code that identifies duties and tasks required to be performed for each position and may include an alpha prefix or suffix. The AFSC title identifies basic groupings of positions requiring similar skills and qualifications.

Unit Manpower Document

M	1	2	3	4	A		C	S	P	S	M			N				6			
A					P	5	E	A	R	C	S			U							
C	POS	AFSC and TITLE	SEI	GRD	RGR	MNT	I	PEC	DTY	C	R	P	I	I	CRK1	CRK2	M	99/1	99/2	99/3	99/4	00/4	01/4	02/4	03/4
	MAC	PAS UNIT		ILC	INSTALLATION					SCC	SUB	PAL2	PAL3	PAL4	CBP	CCP	MET	IDENTITY		PPN	PARENT UNIT			
	0J	7 FCB7 82 MEG GP	8	VNVP	SHEPPARD AFB-WICH JAP					48	F	02	HP		SQ	9U	SQ	IMA		FG18	82 TRG WG			

OSC: SG - SURGEON 9 FAC: 510000 - MEDICAL COMMAND 10

0J	00235280J	MED CMDR, NURSE	040C0E	COL	COL	AN	0	00087700B		1		C					1	1	1	1	1	1	1	1
0J	00235210J	HEALTH SERV ADMIN	041A3	COL	COL	AN	0	00087700B		1		C					1	1	1	1	1	1	1	1
0J	00347340J	HLTH SVC MNGT MGR	4A000	CMSGT	CMSGT	AN		00087700B		1		C					1	1	1	1	1	1	1	1
0J	00513600J	INFORMATION JYMN	3A051	CIV	CIV	AN		00087700B	10	1		C					1	1	1	1	1	1	1	1
																Officer		2	2	2	2	2	2	2
					SUMMARY FOR:											Enlisted		1	1	1	1	1	1	1
					OSC: SG - SURGEON											Civilian		1	1	1	1	1	1	1
					FAC: 510000 - MEDICAL COMMAND											TOTAL:		4	4	4	4	4	4	4

OSC: SGHQ - QUALITY SVCS FAC: 511100 - QUALITY SERVICES

0J	01674090J	HLTH SVC MGT JYMN	4A051	CIV	CIV	AN		00087700B	10		C	MQA			1		1	1	1	1	1	1	1	1
0J	01281760J	HLTH SVC MGT JYMN	4A051	CIV	CIV	AN		00087700B	10		C	MQA			1		1	1	1	1	1	1	1	1
																Officer		0	0	0	0	0	0	0	0
					SUMMARY FOR:											Enlisted		0	0	0	0	0	0	0	0
					OSC: SGHQ - QUALITY SVCS											Civilian		2	2	2	2	2	2	2	2
					FAC: 511100 - QUALITY SERVICES											TOTAL:		2	2	2	2	2	2	2	2

OSC: SGHT - EDUCATION & TRNG FAC: 570100 - EDUCATION & TRNG

0J	01105140J	CLIN NURSE-STF DEV	T046N3D	CAPT	MAJOR	AN	0	00087700B				C					1	1	1	1	1	1	1	1
0J	00022460J	EDUCATION & TNG CFT	3S271	TSGT	TSGT	AN		00087700B				C					1	1	1	1	1	1	1	1
0J	01106950J	MEDICAL SERVICE	4N071	TSGT	TSGT	AN		00087700B				C					1	1	1	1	1	1	1	1
0J	03002710J	MEDICAL SERVICE	T4N051	SSGT	SSGT	AN		00086761E				C					1	1	1	1	1	1	1	1
0J	03002720J	MEDICAL SERVICE	T4N051	SRA	SRA	AN		00086761E				C					1	1	1	1	1	1	1	1
																Officer		1	1	1	1	1	1	1	1
					SUMMARY FOR:											Enlisted		4	4	4	4	4	4	4	4
					OSC: SGHT - EDUCATION & TRNG											Civilian		0	0	0	0	0	0	0	0
					FAC: 570100 - EDUCATION & TRNG											TOTAL:		5	5	5	5	5	5	5	5

SI055599002

Figure 1-1. Sample unit manpower document.

Special experience identifier and grade

Special experience identifiers (SEI) and grade (GRD) (3) are listed in AFMAN 36–2108. They identify special experience and training not otherwise reflected in the classification system and they provide a means to achieve greater flexibility in the management of personnel resources. GRD identifies the authorized (funded) military/civilian grade required for the position. Because of several constraints, primarily the budget, the AF and MAJCOMs seldom receive sufficient appropriations to fund all requirements. Due to these constraints, the actual authorized grades reflected on the UMD may not match the required grade called for by manpower standards. On the UMD, military grades (COL, Capt, TSgt) are displayed. Civilian grades are not normally reflected on the UMD; "Civ" is displayed to indicate the position is civilian.

Required grade

The required grade (RGR) (4) shows the military grade that the work center earns according to the manpower standard. The required grade in many instances may not match the authorized grade because of various constraints. If it is a civilian position, "Civ" is indicted.

Program element code

The program element code (PEC) (5) is a six-digit alphanumeric code that represents a subdivision of programmed cost data (e.g., people, equipment, and facilities) related to a weapons system or program. The first five characters are normally numeric (and the sixth is always alphabetic). The first character of the PEC identifies the Major Force Program (MFP). The numerical "8" (87700B) represents training, medical, and other general purpose activities.

Fiscal quarters

Each position on the UMD is displayed over fiscal quarters (6). The fiscal year begins 1 October and ends 30 September. Fiscal quarters are shown in the following table:

Dates	Quarter
1 Oct 31 Dec	First quarter
1 Jan 31 Mar	Second quarter
1 Apr30 Jun	Third quarter
1 Jul30 Sep	Fourth quarter

Examples:

1. "99/1" is the first quarter of fiscal year 1999.
2. "03/4" is the fourth quarter of fiscal year 2003.

MAJCOM code and the personnel accounting symbol

The major command code (MAC) (7) identifies MAJCOMs, separating operating agencies, direct reporting units, and other organizations or sub-organizations. "0J" represents the Air Education and Training Command. Other MAJCOM codes are listed on the following table:

Major Command Codes			
CODE	**MAJCOM**	**CODE**	**MAJCOM**
09	MPC	0R	PACAF
0B	USAFA	1C	ACC
0D	USAFE	IL	AMC
0J	AETC	IM	AFMC
0K	AU	1S	SPACECOM
0M	AF Reserve	34	ANG Bureau

The personnel accounting symbol (PAS) (7) is a sequentially assigned alphanumeric code that represents the organization or unit that a manpower authorization belongs. For example, “FCB7” represents the 82nd Medical Group.

Installation or location indicator

The installation location code (ILC) (8) is a four-character alpha code used to identify the exact location of the unit or installation in geographic coordinates where the manpower is located.

Organizational structure code

The organizational structure code (OSC) (9) is an alphabetic code, between two and seven characters in length that identifies the internal organizational structure of a specific unit. It is used to identify where a group of authorizations belong within the overall organization, and the authorizations designated to accomplish the mission. Fewer characters in the OSC results in a higher echelon placement of that function in the unit. OSCs are useful to determine who reports to whom in the organization.

Functional account code

The FAC (10) is a six-digit code used to identify a particular function down to the basic work center. The first four digits are controlled by HQ United States Air Force (USAF) and describe the organization down to the basic function; the last two digits are controlled by the MAJCOM and are used to identify command-particular work centers. A function is a homogeneous grouping of tasks such as a grouping together of personnel using similar machines and methods of operations usually in a centralized area. Personnel perform work that contributes to the same end product and their duties are similar or closely related. The first digit of the FAC represents the major groups of functions. The functional groups are divided into seven categories to identify the major type of work performed:

1. 1XXX—Command and Command Support.
2. 2XXX—Mission Equipment Maintenance.
3. 3XXX—Mission Equipment Operations.
4. 4XXX—Direct Support.
5. 5XXX—Medical.
6. 6XXX—Research and Development.
7. 7XXX—Activities outside the USAF.

The first and second digits of a function code, when combined, represent the basic function of the major grouping (51XX – Medical Command, 52XX – Hospital or Clinic Services, etc.).

Unit Personnel Management Roster

The UPMR primarily depicts personnel assigned, by name, against manpower authorizations of the work center/functional area. The information it contains matches the manpower authorizations on the UMD. The authorizations on the UPMR stem directly from the UMD. In addition, this document provides commanders with projected accessions, gains, losses, retirements, separations, and rotations from overseas. The commander support staff (CSS), in coordination with the RMO, assigns new personnel to authorized positions based on vacant and/or appropriate position on the UPMR. A manager should review the UPMR monthly, and verify it against the UMD, to ensure personnel are assigned to the correct position numbers, AFSCs, grade authorizations, and SEIs. Any errors are reported to RMO for corrective action.

REMEMBER: The UMD shows “spaces,” and the UPMR shows “faces.”

It is necessary that you take the bull by the horns and master manpower documents and reports so that you will know and understand the process of positions, and how positions for each section play a vital role in the mission of your MTF.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

003. Manpower management

1. What are the two sources for all budgeted and programmed resources for the total Air Force?

2. Where is AF planning and programming for manpower centralized?

3. What office is responsible for managing the manpower program within the MTF?

4. What is a manpower authorization?

5. Which system is the official source of manpower authorization data for active duty Air Force, ANG, and AFR?

6. Define manpower requirement.

7. What are the two types of manpower requirements? How are they different?

8. What information does an Air Force manpower standard provide?

9. How does the Air Force use manpower standards?

10. What level of manpower is determined by a manpower standard?

11. Name the four key components of a manpower standard.

12. What key component of a manpower standard provides grades and skill levels for the number of authorizations?

13. What is a unit of measuring work called?

14. List three documents available to assist you in managing the manpower program.

15. How often are manpower standards reviewed and applied?

16. What document serves as the primary manpower tool for managers?

17. How are manpower authorizations defined on the UMD?

18. What does the position number identify on the UMD?

19. How are civilian positions indicated on the UMD?

20. What is a personnel accounting symbol?

21. What code identifies a particular function down to the basic work center?

22. What information does the UPMR contain?

23. What document provides commanders with projected accessions, gains, losses, retirements, separations, and rotations from overseas?

24. What office assigns new personnel to authorized positions based on vacant and/or appropriate position on the UPMR?

25. How often should a manager review the UPMR and verify it against the UMD?

26. To what office do you report errors on the UPMR for corrective action?

004. Initial custodial training

Each medical logistics account assigns a unique combination of functions to customer service personnel. This varies depending on available manning, location, and operational needs; however, the training of new custodians is normally assigned to the customer service section. The first person a new custodian interacts with could be you. Are you prepared to teach them what they need to know so that they can order their supplies and clearly communicate their needs to you?

Once you have received a signed appointment letter (property or supply) for the new custodian, you may begin to formally train him or her for duty. You may need to tailor the type of training you offer based on the size of your facility and your new custodian appointment frequency. Scheduled mass briefings may be more appropriate at larger facilities while smaller MTFs would be better suited to conducting one-on-one briefings. Whichever type you choose, there are a number of basic items you should cover. These items are not comprehensive; rather they are a general suggestion to guide you in the right direction. Tailor your training to both your unit's mission requirements and local expectations.

DMLSS access

DMLSS is at the core of medical logistics. Therefore, custodians first need to create an account and further understand how to access the program. If the DMLSS client is not installed on the custodian's computer, have him or her put in a work order through your local Medical System's help desk. It may be helpful to also cover custodial privileges in DMLSS. If additional or special access is needed, (e.g., medical counter-chemical, biological, radiological, and nuclear [MC-CBRN] be sure to have an additional *specific appointment letter* signed by the appropriate authority.

DMLSS login procedures are strictly common access card (CAC)-enabled. During this training, it would be prudent to take the time to walk the customer through the process. This involves having a designated DMLSS system administrator (SA) create a unique login for the customer. The customer then needs to access the DMLSS Start Page and assign their user CAC information. Finally, the SA approves the user's CAC-enabled account.

Customer Catalog

Most custodians spend the majority of their DMLSS time in their customer catalog. The customer catalog is where they reorder supplies. Show them how to use the catalog to place resupply orders for both single and multiple line items. Also, train them on functions such as how to search their catalog, review transaction history, add items to their catalog, and update nomenclatures, locations, and item levels.

New Item Requests

This is the second most used screen for most custodians. The new item request (NIR) screen is used to submit a request for a supply item that does not have an existing customer or logistics (LOG) catalog record and/or the item has not previously been approved for purchase. This is where custodians initiate orders for their never-before-purchased items. Explain each field and indicate which ones are mandatory. Walk them through the entire approval process, while explaining processing bottlenecks and processing delays. Encourage them to request NIRs only after thoroughly exhausting all other MTF catalog options. It might be helpful to mention the various preferred sources of supply (SOS) and to let the custodian know local government purchase card (GPC) purchases administratively cost the government three times more than prime vendor (PV) transactions. Therefore, PV is the preferred method of purchase for most items.

Manual replenishment

Show custodians how to place manual orders for single line items. This is an effective means of replenishment provided the custodian already has the item identification (ID) readily available. The item number can be retrieved from the barcode attached to their shelves or from the item itself. If they do not have either, it would be quicker to search their catalog for the item and order it from the customer catalog screen.

Funding

Ordering supplies and knowing one's account balance go hand-in-hand. Therefore, it is important that property custodians know how to check their available fund balance in the Customer Area Inventory Management (CAIM) system using the check available funds screen. Show them how to locate their *Project Center* or *Expense Center*, and how to interpret funding results. Depending on location policies, also explain at what level their funding is loaded. Many locations only load funding as far as the project center; if true, the expense center will always show as negative.

Pending actions

Show the custodian where pending action notifications are posted. During this process, you or a DMLSS security manager (SM) will use the system services (SS) module to assign the custodian the appropriate pending actions. During training, at a minimum, explain the most common CAIM postings applicable to them. The following list of CAIM pending actions is not all inclusive; adjust your training to meet your MTF's unique mission.

- Replenishment Exceptions**—**Indicates why an item ID failed during the replenishment process.
- Unexecuted Orders—Occurs when a customer does not complete the Build Process Submit (BPS) process after performing a replenishment action.
- Customer Restrictions—Notice indicates when a customer attempts to order an item that currently exists in the customer catalog, however they are not authorized to order the item.
- Item Marked for Deletion—Occurs when an item has been marked for deletion at the MTF/LOG catalog level, and the item is also carried within customer catalog records.
- Quality Assurance (QA) Alerts—Produced as a result of receiving a Medical Materiel Quality Control (MMQC) alert message when there is a likelihood that the customer has had or may still have the item on-hand.
- QA Delinquencies—Produced as a result of a *non-response* to a "QA Alert. Item QTY Required Cust (Supply)" pending action message.

DMLSS generated reports

Show the custodian how to retrieve copies of CAIM reports such as the following:

- Active Due-ins—Provides detailed information on current requisitions.
- Customer Catalog—Used to view a detailed list of items in the customer's catalog.
- Expense Center Fund Summary—Used to view current fund balances.
- Document Register—Used by customers to view all transactions posted against their account on a specific date.
- Transaction History—Allows the customer to access up to 24 months of their account's historical data.

Non-medical supplies

Explain your account's non-medical supply ordering procedures. Show them which office supplies are authorized, how to place an order for routine and urgent items, and how to order non-standardized items, if authorized. If you use a standardized listing or catalog, point those out as well. Finally, if you have a non-medical "country store" with standardized office supply type items stocked, explain the procedures for obtaining items from there.

Property custodian specifics

Train property/equipment custodians on additional items unique to them. Make sure they know that they have the authority to appoint supply custodians to assist them. Provide the necessary documentation or appointment letter template. If applicable, train them on equipment-specific tasks or have a medical equipment management office (MEMO) technician take over this portion of the training. Items should include how to order, transfer, and turn-in equipment. Also, the BMETs are their *only* source for equipment repairs. The custodian should *never* authorize repairs from an external source.

Handouts and local guides

Finally, provide the custodians any local guides or documentation to assist them in their duties. At a minimum, items should include a copy of your Customer Handbook.

Custodians are not expected to know everything there is to know about DMLSS and ordering after your initial training; however, this training is a fundamental building block. Some custodians will have held the same position at other accounts while others may be new to it. Tailor your training to the situation to best help the custodian. Finally, it is highly recommended that each location have a checklist to use while conducting this training. This will ensure that each critical area is covered in detail. The checklist should be signed by both the trainer and trainee and then filed in your customer service folder for inspection purposes.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

004. Initial custodial training

1. What documentation is required before formally beginning custodian training?

2. What type of training would be better suited at smaller MTFs?

3. What type of training might be better suited at larger MTFs?

4. If a custodian needs DMLSS installed, to which office should he or she submit a work order?

5. What is required if a custodian needs additional or special DMLSS access?

6. Which DMLSS window is most frequently used by custodians to reorder supplies?

7. Which DMLSS screen is used by custodians to initiate orders for items never before purchased?

8. Local GPC purchases administratively cost the government three times more than using which SOS type?

9. What is an effective means of single-line item replenishment provided the custodian already has the item ID readily available?

10. Property custodians should know how to check their available fund balance in CAIM using which screen?

11. Which pending action indicates why an item ID failed during the replenishment process?

12. Which pending action is produced as a result of a *non-response* to a "QA Alert Item QTY Required Cust (Supply)" pending action message?

13. Which DMLSS report provides detailed information on current requisitions?

14. Which DMLSS report is used by custodians to view current fund balances?

15. When training property custodians, who should brief on equipment specific actions?

16. At a minimum, custodians should be provided a copy of what local guidance?

005. Office administration/file plan preparation and maintenance

Records are either digital or hard-copy informational documents that are created during day-to-day operations by military, civilian, and contracted Air Force employees for official business. These documents must be safeguarded while also being easily accessible for reasons to include routine research, auditing, and Freedom of Information Act (FOIA) requests. In order for these documents to be easily accessible, systematically label, file, and maintain them in an organized manner.

In the Air Force, economical and efficient records management involves scheduling records for either retention or periodic destruction, while also preserving records that reflect the organization’s functions, policies, decisions, procedures, and essential transactions. These actions help preserve records that protect the legal and financial rights of the government and of individuals whom Air Force actions directly affect. Furthermore, we will continue to offer records of enduring value for permanent preservation in the National Archives. Finally, we ensure prompt and systematic

disposition of records of temporary value, while setting up safeguards against illegal removal, loss, or destruction of all sensitive records.

Air Force employees have three basic obligations regarding records:

- Create records needed to do the business of the agency, record decisions and actions taken, and/or document activities for which they are responsible.
- Manage records by setting up directories, files, and filing materials (in any format) regularly and carefully in a manner that allows safe storage and efficient retrieval when necessary.
- Maintain records in accordance with AFMAN 33–363, *Management of Records,* and dispose of in accordance with the Air Force Records Information Management System (AFRIMS), records disposition schedule (RDS), and related federal regulations and legal requirements.

File plan

A file plan is a roadmap of sorts that lists where specific documents are to be maintained. It is used by all personnel who file documents to ensure the documents are placed where they belong. The file plan can also be used by anyone who needs to search for a specific type of document by indicating where they need to look. The file plan is created, approved, and maintained in AFRIMS which is a mandatory government-owned, web-based tool suite designed to enhance and standardize AF records management and procedures.

Records disposition schedule

The RDS, which is maintained in AFRIMS, is the authoritative source for record dispositions. The RDS contains various tables and rules that list how long different types of documents need to be maintained.

Electronic records management

Electronic records management (ERM) is the digital equivalent of a paper-based filing system.With ERM, the contents of a computer's directory or the sum of its electronic folders may be equated to the traditional file drawer. Each computer data subdirectory or electronic folder is equivalent to a paper file folder. Files in directories or folders are equivalent to individual documents in the physical folders. Directory or folder names are equivalent to file folder labels to identify the broad functional category of the information contained in them. Primary folder names contain filing instructions. Labeling, naming, and filing conventions for e-records should be simple. Promotion of an effective electronic filing system is enhanced by like documents in the same place (on the same labeled disc or in the same directory on a hard drive) to avoid the necessity of rummaging through a drawer full of discs or searching through multiple directories on hard drives to find needed documents.

Filing supporting documents

File supporting documents in sequence by type, then Julian date, then serial number. Maintain separate folders or filing areas for each type, block, or sub-block. For example, one folder or drawer for serial number blocks 0001—2999 (receipts) and another for serial blocks 7500—7999 (excess).

Temporary listings

Some DMLSS system output is classified as *temporary* and the distribution instructions for these items are designed to be flexible enough to satisfy local procedures and conditions. Temporary listings can be found in the different report modules and DMLSS inboxes (i.e., the Inventory Management [IM] Status Edits Report). Each of these reports normally requires some sort of DMLSS corrective action. These working-type listings are maintained in a temporary file until corrective actions have been completed and verified or until a new corrected list is received in accordance with AFRIMS T 41–04 R 02.00, Medical Materiel Edit Lists. This process provides managers the option of retaining previous versions of the list containing items being worked or replacing them with a more current list.

Permanent listings

The term *permanent* is used to distinguish listings that must be maintained for a designated period of time. AFRIMS distribution instructions indicate which listings need to be retained in a permanent file. Specific retention periods are addressed in and maintained in accordance with AFRIMS Tables 23–08, 23–20, 23–23, 41–04, and 41–14. For example, the Source Document Control Report (SDCR) is stored within the DMLSS server for all current and previous year actions. AFRIMS reflects this document may be destroyed one year after closeout of the fiscal year (FY) to which it pertains. DMLSS is therefore programmed to automatically purge these documents when the specified time requirements have been met.

Retention of SDCRs and document registers.

After all quality control actions are completed and verified, printed control reports may be discarded; however, current and previous year SDCRs and document registers must be available for review and audit purposes. Since these reports are maintained within the DMLSS server, they are retrievable anytime by accessing the Reports module in either IM or Equipment Management (EM).

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

005. Office administration/file plan preparation and maintenance

1. What is the definition of *records*?

2. What three things must we do to make documents easily accessible?

3. Which regulation tells how records are maintained?

4. Which guidance explains how to dispose of records?

5. What is a file plan?

6. Where is the file plan created, approved, and maintained?

7. The contents of a computer’s directory may be equated to what?

8. What is the sequence to file supporting documents??

9. Where is the SDCR stored?

10. SDCRs and document registers can be retrieved anytime by accessing which IM or EM module?

Answers to Self-Test Questions

001

1 The MTF commander.

2 The ABMSO.

3 (1) MAJCOM/SGS.
(2) AFMOA/SGAL.

4 AFWCF/MDD-owned.

5 Medical and non-medical.

6 MTF commander.

7 NCO or GS-04 or higher civilian.

8 Fraud, negligence, theft, etc.

002

1. A monetary obligation.
2. All persons having property responsibility.
3. (1) Documents or electronic/computer records showing turn-in or transfer of an item to another property custodian.
(2) Approved reports that provide for disposition of, or relief from, responsibilities for items that have become unusable due to damage, loss, deterioration, obsolescence, or destruction.
(3) Approved inventory adjustment for losses incidental to normal day-to-day operations.
4. Custodial Actions List; Custody Receipt Locator List; an approved AF Form 601.
5. Initiate a report of survey.
6. (1) Research and investigate.
(2) Assess monetary liability.
(3) Provide documentation to support adjustments.
(4) Provide commanders with case histories for corrective action.
7. Supply system stocks and property record items.
8. Supply system stocks.
9. Property book.
10. (1) Equipment inventory.
(2) Controlled items.
(3) As directed.
11. The organization that has accountability for the property.
12. Must be “disinterested” and have no interest in the custodianship, care, accountability, or safekeeping of the property.
13. Accountable officer.
14. Legal office.
15. Approving authority.
16. ROS.
17. A maximum of one month’s base pay.
18. Commanders.

003

1. FYDP and F&FP.

2. HQ USAF.
3. RMO.
4. A funded manpower requirement with details that define the position in terms of its function, organization, location, skill, grade, and other appropriate characteristics that commands use to extend and strengthen manpower resources to the units.
5. MDS.
6. A statement of the manpower needed to accomplish a job, workload, mission, or program.
7. Funded and unfunded; funded manpower requirements are those that have been validated and allocated, and unfunded requirements are validated manpower requirements needs but deferred because of budgetary constraints.
8. Identifies a work center's man-hours to workload relationship and quantifies manpower requirements.
9. For the accurate distribution of manpower resources.
10. Minimum required to support a function.
11. (1) Process-oriented description.
    (2) Man-hour equation.
    (3) Manpower table.
    (4) Variances.
12. Manpower table.
13. Man-hour.
14. (1) AF manpower standard.
    (2) Unit Manpower Document.
    (3) Unit Personnel Management Roster.
15. At least yearly.
16. Unit manpower document.
17. In terms of their function, organization, location, skill, grade, and other appropriate characteristics commands use.
18. Identify authorizations against a particular position.
19. CIV is displayed.
20. A sequentially assigned alphanumeric code representing a unit.
21. FAC.
22. Primarily depicts personnel assigned, by name, against manpower authorizations of the work center/functional area.
23. UPMR.
24. CSS.
25. Monthly.
26. RMO.

004

1. Signed appointment letter.
2. One-on-one briefings.
3. Scheduled mass briefings.
4. Medical System's help desk.
5. A specific appointment letter.
6. Customer Catalog.
7. NIR.
8. Prime vendor.
9. Manual replenishment.
10. Check Available Funds.

11. Replenishment Exceptions.
12. QA Delinquencies.
13. Active Due-ins.
14. Expense Center Fund Summary.
15. A MEMO technician.
16. Customer Handbook.

005

1. Digital or hard-copy informational documents that are created during day-to-day operations by military, civilian, and contracted Air Force employees for official business.
2. We must systematically label, file, and maintain them in an organized manner.
3. AFMAN 33–363.
4. RDS located in AFRIMS.
5. A roadmap that lists where specific documents are to be maintained.
6. AFRIMS.
7. The traditional file drawer.
8. By type, then Julian date, then serial number.
9. Within the DMLSS server.
10. Reports.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter. When you have completed all unit review exercises, transfer your answers to the Field-Scoring Answer Sheet.

Do not return your answer sheet to the Air Force Career Development Academy (AFCDA).

1. (001) When no medical service core (MSC) officers are available to assume accountable base medical supply officer (ABMSO) duties, a waiver should be submitted to the
   a. Major command surgeon general.
   b. Chief, Medical Logistics division.
   c. Director, Air Force personnel center.
   d. Medical treatment facility (MTF) commander.

2. (001) Who *must* ensure that appropriate management controls are in place, for Air Force Working Capital Fund/Medical Dental Division (AFWCF/MDD) assets, to minimize the occurrences of fraud, negligence, and theft?
   a. Accountable base medical supply officer (ABMSO).
   b. Medical treatment facility (MTF) commander.
   c. Medical Logistics flight commander (MLFC).
   d. Flight chief, Medical Logistics.

3. (002) Pecuniary responsibility applies to *all* persons who
   a. are appointed supply custodians.
   b. are guilty of fraud, waste, or abuse.
   c. have property responsibility.
   d. work for the government.

4. (002) Which category of evidence can be used by a commander to relieve individuals of custodial responsibility without processing a report of survey (ROS)?
   a. Adjustments incidental to abnormal operations.
   b. Records showing transfer of assets.
   c. Security forces report indicating theft.
   d. Unapproved reports that provide for disposition.

5. (002) Report of survey (ROS) investigations are mandatory when which criteria is met?
   a. Any value equipment item.
   b. Any war reserve materiel supply item.
   c. Individual items valued at more than $3,000.
   d. Total inventory adjustments less than $50,000.

6. (003) Which functional account code (FAC) prefix is used to identify medical activities?
   a. 2XXX.
   b. 3XXX.
   c. 4XXX.
   d. 5XXX.

7. (004) Why is prime vendor (PV) the preferred method of purchase for most items?
   a. Costs less administratively.
   b. Easier to order through Defense Medical Logistics Standard Support (DMLSS).
   c. More reliable than government purchase card (GPC).
   d. Quicker delivery when local.

8. (004) Which method do custodians use to place orders for single items when they have the item identification (ID) readily available?
   a. Automatic replenishment.
   b. Batch HHT.
   c. Customer catalog screen.
   d. Manual replenishment.

9. (004) How do custodians check their current funding balances in Defense Medical Logistics Standard Support (DMLSS)?
   a. CAIM, Check Available Funds.
   b. CS, Project Center Balance.
   c. IM, Build Process Submit.
   d. SS, Expense Center Management.

10. (005) Which item lists where specific documents are to be maintained?
    a. Air Force Records Information Management System.
    b. Archive management regulation.
    c. Local file plan.
    d. Records disposition schedule.

11. (005) Which is the digital equivalent of a paper-based filing system?
    a. Air Force Records Information Management System.
    b. Electronic records management.
    c. Local file plan.
    d. Records disposition schedule.

Please read the unit menu for unit 2 and continue ➔

Unit 2. Environment of Care

2–1. Safety Programs 2–1
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THE ENVIRONMENT OF CARE (EOC) PROGRAM integrates all management responsibilities for risk management, job safety, equipment safety, fire prevention and protection, hazardous material (HAZMAT) management, security, utility safety, and emergency preparedness under one management program. The purpose of the EOC program is to provide a functionally safe and secure physical environment and manage staff activities to reduce the risk of injury for patients, staff, and visitors. At each medical treatment facility, the EOC committee is responsible for implementing an EOC program.

Medical logistics personnel have several duties and responsibilities associated with the EOC program. These range from fire prevention and protection to equipment safety and the management of HAZMAT. Specifically, this unit will cover the Quality Assurance/Risk Management (QA/RM) program, safety programs, and HAZMAT management.

2–1. Safety Programs

Regardless of career field or job duties, safety is a top concern for all personnel. After all, people are our most important resource. Therefore, various programs have been implemented to help ensure the safety and well-being of all employees. Some of these standards are universal while others are more specific to certain job types. In this section, we will go over the Air Force's occupational safety and health standards and discuss some common safety concerns and standards that apply specifically to the 4A1 career field.

006. Managing personal safety programs

Both the Air Force and your unit are committed to providing a safe and healthful environment for you. The goal is to reduce the number of occupational injuries and illnesses to zero. If you are a first-line supervisor, you are an extremely important person in implementing and evaluating safety programs in your unit. You are the first link between managers and the work force to ensure workers are properly trained to safely perform the mission. You are also in the best position to motivate and maintain positive safety attitudes, and to identify, assess, and eliminate undue risk. The attitudes of the workers toward safety and mishap prevention will reflect the attitudes of their supervisor. This lesson will provide a general look at implementing and evaluating safety programs and will conclude with an introduction to mishap reports.

Implementing and evaluating safety programs

As a supervisor, you must assure safe and healthful working conditions for those in your section. You must enforce the safety standards and procedures established in the safety program for your facility as well as evaluate the effectiveness of the program in an effort to identify, control hazards, and prevent mishaps.

To assist you in evaluating your safety program, you are required to conduct periodic safety inspections of your workplace. These inspections should include, but are not limited to, checking:

- Personnel work habits.
- Tools and equipment (repair or replace defective ones).

- Housekeeping, illumination, and ventilation.
- Serviceability and availability of safety and arrangement of equipment.
- Fire hazards and other potential risks.

Evaluating your safety program keeps the workplace safe and allows successful mission accomplishment. Seek the advice of your safety officer to gain knowledge and develop a checklist. Doing so will help you better identify problems in the workplace and a good checklist will prove invaluable in your efforts.

One of the most effective ways to evaluate your safety program and prevent mishaps is to observe your workers. Let your workers know that you are observing them to avoid the appearance of "spying." As you observe the manner in which they do the work, you will be able to determine if they are following safety requirements. If you identify a safety problem, correct it and explain your concern to the worker. Observe all workers regardless of their experience level. Sometimes experienced workers may take shortcuts that could put themselves or co-workers at risk. Finally, as you inspect, observe, and correct potential hazards, don't forget to add your observations to your safety training program and get the word out to all your workers.

Reporting mishaps

A mishap investigation is a detailed, systematic search to uncover the "who, what, when, where, why, and how" of a loss producing event and to determine what corrective actions are needed to prevent a recurrence. Mishap investigations take precedence over other activities and investigations connected to the mishap. Investigators have the right to impound Air Force property involved in the mishap. This means that once the mishap scene is stabilized (i.e., personnel have been rescued, hazardous materials have been secured, fires have been extinguished, etc.) investigators may impound any property, materials, and documents that are relevant to the investigation.

Timely investigation of mishaps depends on prompt notification. That is why mishap-reporting procedures must be established within each unit. In the MTF you will have a safety officer that manages the program for the facility. The safety officer will brief you on the specific procedures in place in your MTF. On the other hand, if you are a supervisor, it is your job to ensure workers are thoroughly briefed on these procedures. Supervisors play an important role in relaying mishap information. When advised of a mishap, supervisors must notify the proper emergency response agencies (e.g., fire department, medical facility, security forces) and then pass the information through command and control elements (to include the safety officer) to the installation safety staff. All mishaps must be reported to the installation safety office, not just those mishaps that *seem* to be reportable. The installation safety staff decides if a mishap meets reporting criteria. As a general guideline you must:

- Report *on-duty mishaps* (military and civilian) to your supervisor and unit safety representative (USR) immediately. Supervisors must then report the mishap up the chain of command, and as soon as possible complete and route a mishap report to the USR. Supervisors must make sure that the USR is notified as soon as possible. The USR should then contact the safety office immediately in order for the investigation process to begin.
- Report *off-duty mishaps* (military only) to your supervisor not later than the next duty day. Supervisors must then follow the same reporting procedures as for on-duty mishaps. Serious mishaps resulting in hospitalization or death are reported to the installation safety office immediately.
- The convening authority determines the depth of an investigation. Several factors determine the depth of the investigation:
    - Severity of injury or occupational illness.
    - Future mishap potential.

- Whether another agency's investigation will produce a report that the AF can use for mishap prevention.

The safety investigation should be completed within 30 days of the mishap. The investigation should place a greater priority on a complete and accurate safety report than on trying to finish in the 30-day timeline.

007. Air Force Consolidated Occupational Safety Standards

The well-being of each employee is a major concern for the DOD workforce. The federal government has long recognized the need for standardizing policies and procedures related to workers' safety and health. In this lesson we will look at some important factors of the Air Force Consolidated Occupational Safety program and how it specifically relates to the medical materiel career field.

Occupational Safety and Health Act

The Occupational Safety and Health Act (OSHA) of 1970 directs the Department of Labor to develop and enforce standards to ensure safe and healthful working conditions for all employees in both the federal and private sectors.

Section 19 of OSHA directs federal agencies to have and use comprehensive occupational safety and health programs consistent with those areas in OSHA that apply to the civilian workforce. In compliance with Section 19 of OSHA, the Air Force created its own occupational safety, fire prevention, and health program.

Air Force Occupational Safety and Health responsibilities

The Office of the Inspector General (IG), HQ USAF, has Air Force–wide responsibility for safety. The Office of the Surgeon General (SG) of the Air Force is responsible for health standards and determining how they apply to Air Force personnel, operations, equipment, and facilities.

Local

The responsibility for implementing programs for occupational safety, health, fire, and accident prevention is delegated to unit commanders, functional managers, and supervisors in their respective areas of responsibility. Local responsibilities and compliance are monitored through surveys and inspections. Wing, group, and installation authorities are responsible for conducting the occupational safety, health, fire, and accident surveys or inspections. These surveys and inspections must be conducted in all non-high work places at least once a year and in high-hazard workplaces at least once a month. These inspections and surveys can be conducted with or without prior notice. Half of all fire inspections must be conducted without prior notice.

Commanders and supervisors

- Commanders and supervisors have numerous duties associated with OSHA, Air Force Occupational Safety and Health (AFOSH), and Air Force safety programs. These duties are as follows:
- Ensure applicable OSHA guidance for the workplace and operations are available to personnel.
- Ensure compliance with occupational safety, fire prevention, and health program requirements in their areas of responsibility.
- Ensure areas and operations that require personal protective equipment (PPE) or other special precautions are identified and posted as necessary.
- Ensure compliance with PPE program requirements.
- Provide safe and healthful workplaces, and conduct periodic self-inspections for hazards or deficiencies.

- Conduct job safety analyses for each work task not governed by technical order, or other definitive guidance; and any time a new work task or process is introduced to the industrial or nonindustrial work place, to determine potential hazards.
- Consult with the installation ground safety staff and (or) the bioenvironmental engineering (BEE) staff, when assistance is required.
- Provide training for employees in job safety, fire prevention and protection, and health as required by OSHA guidelines.
- Establish and implement hazard reporting and abatement programs.
- Establish procedures for employees to follow in situations of imminent danger.
- Enforce compliance with OSHA guidelines.
- Notify the installation ground safety personnel and the injury compensation program administrator (ICPA) of the civilian personnel flight (CPF) of all mishaps as soon as possible after the occurrence, to allow timely investigations to determine reportability and root causes.
- Notify the installation ground safety staff to schedule required supervisor safety training when a military member or civilian becomes a supervisor.
- Evaluate military and civilian nonsupervisory personnel, if occupational safety and health is a significant factor in work performance and assigned duties. These elements may be used or modified as appropriate. Enlisted performance evaluations are accomplished according to AFI 36–2406, *Officer and Enlisted Evaluation Systems*.

Air Force personnel

All Air Force personnel must comply with OSHA and AFOSH guidance. At a minimum, we must perform the following tasks:

- Promptly report safety, fire, health hazards, and deficiencies.
- Promptly report injuries and illnesses to the supervisor.
- Comply with PPE requirements that apply to the work situation, including its use, inspection, and care.
- Give due consideration to personal safety and the safety of fellow workers while doing assigned tasks.

All Air Force personnel have the opportunity to do the following:

- Take part in the AFOSH program without fear of coercion, discrimination, or reprisal.
- Request inspections of unsafe or unhealthful working conditions or report those conditions to the supervisor, safety manager, fire protection specialist, or BEE, including OSHA officials.
- Have access to applicable OSHA and AFOSH standards; installation injury and illness statistics; safety, fire protection, and health program procedures; and their own exposure and medical records.
- Decline to perform an assigned task because of a reasonable belief that the task poses an imminent risk of death or serious bodily harm. The person and local management may request an assessment by installation safety, fire protection, or health professionals before proceeding.
- Use official on-duty time to take part in AFOSH program activities.

Required supervisor training

Supervisors are the key players in the AFOSH program because they are directly responsible for maintaining safe and healthy environments in their work areas. To effectively implement safety programs or procedures, a supervisor must know the AFOSH requirements for work areas within his

or her realm of responsibility and enforce compliance. To do this effectively, a supervisor must be trained. As a supervisor, you receive training through the following avenues:

- Management and professional development courses.
- Air Force healthcare providers' train-the-trainer training.
- MAJCOM-developed training programs.
- Locally developed training programs.
- The Air Force supervisor safety training (SST) course.

Supervisor safety training course

The SST course is conducted at the local safety office training facility or other designated base/wing locations. This course is required for senior airmen, noncommissioned officers, civilians upon initial assignment to a supervisory position, and first-level supervisors (military and civilian) who have not attended. In addition to these individuals, any supervisor who demonstrates a lack of safety knowledge or initiative (i.e., one whose work area is rated unsatisfactory during a safety inspection) is also required to attend or reattend the course.

Safety, fire protection, and interim life-safety training

Supervisors must provide specialized safety, fire protection, and interim life-safety training to all Air Force personnel. Supervisors provide training to newly assigned individuals when they arrive and to all personnel when there is a change in equipment, procedures, or processes, or safety, fire protection, and health requirements. Safety, fire protection, and health officials (e.g., BEE, flight surgeon and/or occupational medicine physician) will provide technical assistance to supervisors in developing an appropriate lesson plan for this training.

4A1X1 standards

AFOSH standards for medical materiel require that all medical supplies be clearly marked to indicate their content. The standards also require that heavy bulky items be stored on lower shelves. Appropriate ladders should also be used when an item is out of reach. Shelves should not be overloaded. Additionally, local written policy should be developed for the safe handling, storage, and disposal of needles, syringes, and other sharp objects (e.g., scalpel blades, razor blades, etc.) used in patient care.

Gas cylinders

The storage and maintenance of medicinal and industrial gases are of an additional concern. Flammable and combustible liquids and gases must be stored in an approved flammable storage room or cabinet. In addition, these guidelines apply to the storage and maintenance of gases:

1. Store flammable gases (ethylene, ether) and fuel gases (acetylene, propane) separately from oxidizing gases (oxygen, nitrous oxide).
2. Chain or otherwise secure cylinders in a vertical position, with safety caps securely in place.
3. Color-code cylinders, and stencil the contents on the cylinder according to Military Standard (MIL-STD) 101B, *Color Code for Pipelines and Compressed Gas Cylinders*. Post color-codes for commonly used gases in the storage area.
4. Identify empty cylinders, and store them separately from full cylinders.
5. Do not subject cylinders to extreme temperatures, especially heat.
6. Keep oil, grease, and other petroleum products away from cylinders, regulators, and so forth.
7. Post "No Smoking" signs. Smoking or flames are not permitted in cylinder storage areas.

Hazardous waste

Each MTF has a hazardous waste management plan (HWMP). This plan contains procedures for identifying, handling, storing, using, and disposing of HAZMAT from receipt through use. The plan also provides for identification and management of infectious waste from generation to final

disposition. Be sure you review the plan and become familiar with it. Plans are developed to follow all local, state, and federal guidelines.

Use incinerators only for their intended purpose, and conform to existing pollution abatement criteria. Ensure that incinerators are used in accordance with manufacturer's guidelines, and restrict use to authorized personnel only. When not in use, lock the room and control access to prevent unauthorized use.

Inspections

Safety inspections are one of the principal methods of locating hazards and helping to determine what actions are necessary to provide a safe environment for hospital personnel, patients, and visitors. At least monthly, section supervisors should conduct inspections of their areas to monitor for unsafe conditions or unsafe acts by employees. Supervisors determine the reasons for an unsafe condition and find solutions to correct unsafe conditions. The best way to ensure these standards are met is through training.

Operational risk management

Operational risk management (ORM) is the process of identifying and controlling hazards to protect the force. It is applicable to any mission and environment. The aim is to minimize losses (e.g., money, equipment, or personnel safety) while maximizing mission success. In other words, weigh expected costs against expected benefits.

No technical order (TO), AFOSH standard, or OI can possibly address every hazard or potential hazard that may arise from a specific task or combination of tasks. Where situations exist that do not appear to be adequately covered by existing directives, use an ORM process to assess risk associated with those situations and determine adequate safeguards or procedures to manage the risk. Each unit should have a designated primary and alternate representative.

Warehouse risk management

The danger of personal injury is always present in the storage and distribution section. The most effective way to reduce the probability of injury is through *prevention.* Almost 90 percent of all personal injuries are caused by unsafe acts. Strains, sprains, hernias, fractures, bruises, and lacerations result from poor manual materiel handling and lifting practices. The increase in size and quantities of equipment and materiel being used throughout the Air Force contributed to an increase of injuries associated with manual materiel handling and operations. Lifting, carrying, dropping, and lowering are the common physical acts responsible for these injuries. Sprains account for 30 percent of the lost time injuries in the Air Force. Many strains are the direct result of improper lifting techniques, lifting with no assistance, or failure to use required and available material handling equipment. Safety is everyone's concern!

Materiel handling

You must consider the following factors when manually lifting materiel:

- Size.
- Shape.
- Weight of the object.
- Distance the object is to be moved.

Proper lifting techniques are as important as the weight of the object you are to lift. In most situations, avoid lifting when possible and use material handling equipment (MHE) to move supplies.

Proper lifting methods

Regardless of whether MHE is used or not, be aware of the proper lifting techniques. Know your limitations. Many containers are marked to indicate the container weight. If you feel the item is too heavy, avoid lifting and get help. This is called "team lifting." Team lifting is the best method for moving heavy or unusual shaped items. For this method of lifting, make sure that the load is equally

adjusted between each person. If possible, the workers should be similar in size and trained on team lifting. The workers need to understand that if one worker lifts too soon, shifts, or lowers the load improperly, the other person or partner may be overloaded or strained. The key to lifts using two or more personnel is to make every move in unison. This is best done by assigning one person to give clear orders to ensure the movements are coordinated.

One of the main points to remember when lifting bulky items is to protect your back. Your legs are the primary part of the body that should be used to lift bulky items; *do not bend your back.* As a logistician, you should remember the mantra, "Lift with your legs, not with your back." Do this by:

1. Standing close to the load with feet slightly apart and solidly placed.
2. Squat down, get a good grip underneath the load.
3. Lift slowly with your legs, *not* with your back.
4. Bring the object as close as possible to your body to avoid an unbalanced position. Working too fast may cause an accident, too.
5. Work at a moderate, consistent pace.

There is no single technique for preventing injuries during lifting and materials handling. The best prevention strategy is to ensure loads are manageable in both size and weight distribution, the frequency and duration of lifting are not excessively stressful, and workers can demonstrate knowledge of proper techniques for materials handling

Manual materials handling equipment

Use MHE when loads are too heavy or bulky to lift or carry efficiently or safely by hand. Use hand trucks, dollies, forklifts or other devices to simplify handling of materials and reduce the hazards of handling the supplies and equipment. Remember to use MHE for its intended purpose only. Some MHE, such as forklifts, require special training. Most MHE mishaps occur because of improper use or lack of training. Place extra emphasis to ensure workers are trained on MHE and frequently observe their practices to immediately correct any unsafe acts.

Personal protective equipment

Supervisors must identify the need for PPE. PPE includes safety-toed shoes, gloves, and eye protection. As minimum PPE requirements, personnel will wear the following:

- Protective footwear when there is a reasonable possibility of sustaining foot injuries due to heavy or sharp objects.
- Leather or leather-palmed gloves when manually handling objects that have sharp or burred edges or splintered surfaces.
- Appropriate ear protection when working in or visiting hazardous noise areas.
- Goggles and/or safety glasses with side shields and leather gloves when cutting strapping.

Personnel handling materiel will *never* wear jewelry (e.g., rings, watches, loosely fitting bracelets) and neckwear when manually handling bulky property. These items can easily catch on the property and cause extensive damage to your fingers, hands, or neck.

Hand tools

Improper use of hand-tools is the source of many accidents. Hand-tools are precision instruments capable of performing many tasks when used properly. A major principle in using hand tools is, "Never use a tool for a purpose other than that for which it was designed." In other words, think safety first and use the proper tool! For example, use a nail puller and tin snips to open a banded, nailed, wooden box, or a screwdriver and adjustable jaw wrench to open a small, metal drum containing alcohol. A gashed finger, a smashed toe, or damaged property is too high a price to pay for carelessness or ignorance.

It is an unsafe practice to cut toward you when using knives or cutting tools of any kind. The knife or cutting tool could slip or sever whatever you are cutting more easily than you thought, thus allowing the blade to "follow through" and cut some part of your body. Always cut in a direction *away* from your body! Additionally, cutting blades should be kept sharp by frequently replacing them. A dull blade could cause you to take unnecessary risks by using more force than what is needed with a sharp blade. Additionally, a dull jagged blade can cause more extensive tissue damage compared to the "clean cut" caused by a well-sharpened blade.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

006. Managing personal safety programs

1. What is the most effective way to evaluate your safety program and prevent mishaps?

2. What is the purpose of a mishap investigation?

3. Who is responsible for managing the mishap-reporting program in the MTF?

4. When should you report on-duty mishaps (military and civilian) to your supervisor and USR?

5. When should you report off-duty mishaps (military only) to your supervisor?

6. A safety investigation should be completed within how many days of a mishap?

007. Air Force Consolidated Occupational Safety Standards

1. What does the abbreviation OSHA stand for?

2. The responsibility for implementing programs for occupational safety, health, fire, and accident prevention is delegated to whom?

3. How frequently should your non-high hazard workplace be inspected for safety?

4. How frequently should high-hazard workplaces be inspected for safety?

5. Who notifies the installation ground safety staff to schedule required supervisor safety training when a military member or civilian becomes a supervisor?

6. At a minimum, who must promptly report injuries and illnesses to the supervisor?

7. Who has direct responsibility for maintaining safe and healthy environments in the work area?

8. Who is *required* to attend the SST course?

9. When shelving, where should heavy, bulky items be stored?

10. Where should flammable/combustible liquids and gases be stored?

11. What is contained in the MTF's HWMP?

12. What is one of the principal methods of locating hazards?

13. How often should section supervisors conduct safety inspections?

14. What is ORM?

15. How can you effectively reduce the probability of injury in the storage and distribution section?

16. What are the four most common physical acts responsible for on-the-job injuries?

17. List the factors to consider when manually lifting materiel.

18. What is the best manual lifting method for moving awkward or heavy items?

19. Describe the proper way to lift bulky items.

20. What is the best prevention strategy for preventing injuries during lifting and materiel handling?

21. Which personnel are responsible for identifying the need for PPE?

22. What types of items should *not* be worn when handling bulky materiel?

23. What major principle should be kept in mind when using hand tools?

24. What direction should you cut when using a cutting tool?

2–2. Hazardous Materiels Management

Medical logistics is at the center of the action for all materials entering and exiting the medical facility. This includes hazardous materials and hazardous waste. In this section, we will discuss the various responsibilities of the individuals involved in the movement, tracking, and management of hazardous materials and hazardous waste. We will then briefly look at the significance of material safety data sheets (MSDS) and their importance when dealing with HAZMAT.

008. Functions and responsibilities

There are numerous levels of responsibility involved in the management of hazardous waste. Headquarters Air Force Medical Operations Agency, Health Facilities Division (AFMOA/SGSF) is responsible for formulating policy and guidance on hazardous materials/hazardous waste (HM/HW) management and assists MTFs in developing HM/HW management plans. AFMOA also develops and maintains points of contact for technical support to help answer MTF questions on HM/HW management.

Base environmental manager

The base environmental manager (BEM) manages the HW management program at the base level. The BEM function usually falls under base civil engineering. The BEM provides technical advice to the base on all environmental compliance or pollution prevention issues and ensures that the base has a current hazardous waste management plan (HWMP). Listed are other responsibilities of the BEM:

- Acts as base liaison on environmental compliance matters with regulatory agencies on all HW disposal issues.
- Applies for and manages all base HW permits with input from the MTF.
- Provides technical information for completing HW turn-in documents.
- Certifies that HW is properly characterized, labeled, and packaged.
- Programs and manages funds for disposal of HW.
- Provides HW management training to generating activities on base.

Bioenvironmental engineering

The BEE department plays a major part in the HM/HW management program for the base. BEE provides the following services:

- Technical support to the environmental compliance assessment and management program.
- Characterizes HW, develops an HW analysis plan for the installation, and determines HW sampling requirements.
- Coordinates and is responsible for developing and maintaining the installation's HW stream inventory and completes the health sections of HW profile sheets.
- Serves as member of the HM Emergency Planning and Response Team.
- Identifies HM and authorized users and is a member of the base cross-functional HM "Pharmacy/Cell" for control of HM.
- Inventories hazardous chemical usage and storage to support reporting requirements of the Pollution Prevention Act, toxic release inventory, and state reporting requirements of the Emergency Planning and Community Right to Know Act (EPCRA).
- Recommends proper disposal procedures.
- Evaluates all spill clean-ups and plans.
- Keeps a master file of MSDSs in electronic or paper form and provides copies to workers upon request.

Medical logistics flight commander

The medical logistics flight commander (MLFC) develops and monitors the HM/HW management program for medical logistics and the MTF. The management program includes plans for all medical logistics personnel to properly order, receive, handle, store, label, transport, deliver, and dispose of all MTF-owned HM. The plan also contains instructions for identifying, categorizing, segregating, safe handling and disposing of all MTF generated HW.

The MLFC assists the BEEs in performing an initial and annual MTF HM/HW stream analysis by providing a copy of the Defense Medical Logistics Standard Support (DMLSS) Hazardous Material Report (fig. 2–1). This report identifies items that have on-hand balances that are coded as hazardous. You can locate this report in the reports module of the IM application. Select the report to open the hazardous material report criteria window. This window gives you the option to select the scope of the report such as inventory management (IM), assemblage management module (AM), or customer area inventory management (CAIM). Depending on the scope you choose, you may need to select other criteria from the dropdown list. Once you have selected the report criteria, click on the OK button and DMLSS will display the report.

The MLFC ensures base and duty section hazard communication and hazardous waste training requirements identified by the base are given to all medical logistics HM/HW handlers and the training is documented. Training also includes educating receiving and delivery personnel on HM hazards, personal protection measures, symptoms of exposure, first-aid responses, and the medical logistics emergency spill response plan. Maintain training documentation for two years after personnel depart the duty station.

Hazardous Material Report

Current Date: 21-Aug-2004

Item ID	Short Item Description	Strat State	Strat Type	U/P	Haz Mat Cd	Qty
6135008264798	BATTERY NONRECHARGE	SER	OPR	EA	Y	59
6135008357210	BATTERY NONREC1.5V12S	SER	OPR	EA	Y	13
6135009857845	BATTERY NONRECHARG24S	SER	OPR	EA	Y	96
6135009857846	BATTERY C	SER	OPR	EA	Y	32
6505000836544	SODIUM CHL INJ 12S	SER	OPR	CS	P	2
6505001050102	TUBERCULIN PRO 50 DO	SER	OPR	CO	P	7
6505001538480	HYDROG PEROX SOL 1 PT	SER	OPR	BT	Y	9
6505001538809	LUBRICANT SURG 4 OZ	SER	OPR	TU	Y	3
6505001656519	MEASLES MUMPS&RUBELLA	SER	OPR	PG	P	4
6505002617257	BENZOIN TINCTURE 1 PT	SER	OPR	CN	Y	1
6505002998296	TETANUS&DIPHT TOX 5ML	SER	OPR	BT	P	8
6505004434582	SOD CHL IRRIG3000ML4S	SER	OPR	CS	P	12
6505005594819	PHENOBARB20MG/5ML 1PT	SER	OPR	BT	Y	1
6505006558366	ISOPROPYL ALCOHOL 1PT	SER	OPR	BT	Y	25
6505008556979	MEPERIDINE 50 MG 10S	SER	OPR	PG	Y	4
6505010916063	RABIES VACCINE HUMAN	SER	OPR	PG	P	2
6505011604201	METHYLPHENIDATE TABS	SER	OPR	BT	P	9
6505012303130	DIAZEPAM TABS 5MG100S	SER	OPR	BT	P	41
6505013308926	SOD CHL 1000ML12S	SER	OPR	CS	P	2
6505013454468	GLUCOSE TEST SOL 12S	SER	OPR	PG	P	2
6505013856328	TYPHOID VACCINE MODIF	SER	OPR	VI	P	5
6505014131331	VARICELLA VIRUS VAC	SER	OPR	PG	P	2
6505014320379	HEPATITIS A VIRUS VAC	SER	OPR	PG	P	1
6505014611546	MENINGOCOCCAL POLYSAC	SER	OPR	PG	P	5
6505014624369	WATER F/IRRIG 500ML18	SER	OPR	PG	P	3
6505015053476	DIAZEPAM INJ 2ML 10S	SER	OPR	PG	P	14
6508013780530	SKIN CLEANSER MED 15S	SER	OPR	BT	Y	88
6510000547255	SKIN CLOS 1/4X4IN500S	SER	OPR	BX	P	1
6510000583047	BANDAGE GAU4-1/2100S	SER	OPR	EA	P	362
6510000584421	SPON SURG 2X2 3000S	SER	OPR	CO	P	27
6510001110708	PAD NONADH4.125X3.125	SER	OPR	BX	P	1
6510001161311	SPONGE 4X4 1280S	SER	OPR	CO	P	128
6510002011755	BANDAGE 37X37X52IN	SER	OPR	EA	P	17
6510005596130	PAD POST SURG OB 288S	SER	OPR	BG	P	12
6510005827993	BANDAGE 5YDX3 12S	SER	OPR	CS	P	4
6510007219808	SPONGE SURG 4X4 1200	SER	OPR	BX	P	12
6510007755706	PAD ABD 7.5X8 240S	SER	OPR	CO	P	12
6510007822698	SPONGE SURG GAUZE4X4	SER	OPR	BG	P	30
6510007822700	SPONGE SURG 2X2 200S	SER	OPR	BX	P	23
6510007863736	PAD ISOPROPYL ALCOHOL	SER	OPR	PG	Y	26
6510009268881	ADH TAPE .50INX10YDS	SER	OPR	BX	P	3
6510009268882	ADHESIVE TAPE SURG 1	SER	OPR	BX	P	3
6510009268883	ADHESIVE TAPE SURG 2	SER	OPR	BX	P	2
6510009355820	BANDAGE ELAS 4.5YDX2	SER	OPR	BX	P	2
6510009355821	BANDAGE ELAS 4.5YDX3	SER	OPR	BX	P	4
6510009355822	BANDAGE ELAS 4.5YDX4	SER	OPR	BX	P	3
6510009355823	BANDAGE ELAS 6X4.5YD	SER	OPR	BX	P	4
6510010087917	APPLICATOR POV-IOD150	SER	OPR	BX	P	6
6510010100307	PAD POV-IOD IMPRE100S	SER	OPR	PG	Y	12
6510010536259	STOCKINET SURG 48X12	SER	OPR	CS	P	1

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Figure 2–1. Hazardous material report.

There are numerous administrative tasks associated with the HM program. By regulation, the tasks are the responsibility of the MLFC, but in reality, medical materiel personnel aid in getting these tasks done. Some of these tasks are listed below:

- BEE reviews any new purchase requests for known or suspected HM.
- Ensures receiving and delivery personnel have access to MSDS information on items being received and delivered. Most, but not all, MSDSs are contained in the Hazardous Material Information System (HMIS).
- Ensures HW turn-ins to Defense Logistics Agency Disposition Services or the HW disposal contractor is in accordance with the base HW management program procedures.
- Medical materiel personnel ensure compliance with current Joint Commission on Accreditation of Healthcare Organizations (JCAHO) standards applicable to MTF HM/HW management programs. Acquire and maintain a current state HW generator permit (if required) through base equipment management (EM). Normally, hospitals are considered small generators of HW.
- Maintain copies of HW disposal manifests and the generator copy returned by the treatment, storage, and disposal (TSD) facility. Time requirements for maintaining the copies may vary based on federal, state, and local regulations.

Now that you have a basic understanding of the various areas of responsibility, let's review the characteristics and purpose of MSDSs.

009. Material safety data sheets

While cooking in the kitchen with oil, have you ever been told to turn the heat down when the oil starts to smoke because it might catch fire? Or, have you ever been told not to douse a kitchen oil fire with water because it will cause the fire to spread? Without this information the resulting situations could be devastating and you could be seriously injured or worse. Critical information such as flash points, chemical reactivities, and fire-fighting procedures can be located in a hazardous items material safety data sheet.

An MSDS is a document containing the data required by, and prepared in accordance with, Federal Standard (FED-STD) 313, *Material Safety Data, Transportation Data and Disposal Data for Hazardous Materials Furnished to Government Activities*, to communicate the chemical, physical, and hazardous properties of a material to the user.

In the past, MSDSs were only provided to safety professionals and trained workers in the chemical industry. As more of the work force began to require such information, federal and state regulations expanded to include everyone working around hazardous materials. As the sign (fig. 2–2) shows, everyone has the right to know about HM.

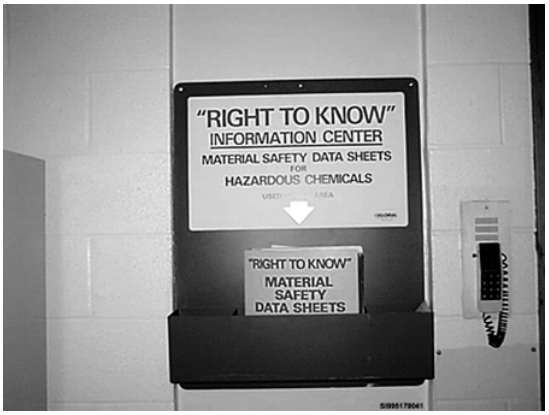

Figure 2–2. Sample MSDS information center sign.

MSDS objective and purpose

The MSDS is a standardized document that is extremely functional and could end up saving your life. This document is developed for products that contain one or more dangerous chemical substances. The primary objective of the MSDS is to concisely inform you about the hazards of the materials you work with so that you can protect yourself and respond to emergency situations. The purpose of the MSDS is to inform you about:

- The chemical's identity or product name.
- The material's physical properties or potential health and physical hazards.
- PPE required to handle the item. PPE includes all clothing and other protective devices to be worn to protect workers from workplace hazards.
- First aid treatment to use if you or someone else is exposed.
- Prevention and necessary steps to take for handling spills, fires, and day-to-day operations.
- The correct way to respond to accidents.

The Chemical Manufacturers' Association (CMA) began the standardization of MSDS documents that the American National Standard Institute (ANSI) later approved. The MSDS may come in any format or style, but the format (paragraph heading) is standardized. Also, MSDSs may be in any language but must also be in English. They contain these 16 specific section headings:

Section 1. Chemical Product & Company Information.
Section 2. Composition/Information on Ingredients.
Section 3. Health Hazards Identification.
Section 4. First Aid Measures.
Section 5. Fire Fighting Measures.
Section 6. Accidental Release Measures.
Section 7. Handling and Storage.
Section 8. Exposure Controls/Personal Protection.
Section 9. Physical and Chemical Properties.
Section 10. Stability and Reactivity.
Section 11. Toxicological Information.
Section 12. Ecological Information.
Section 13. Disposal Considerations.
Section 14. Transport Information.
Section 15. Regulatory Information.
Section 16. Other Information.

MSDS management

Employers must have an MSDS for every chemical they use and have them readily available for all workers. MSDSs may be retrieved through various electronic means.

- Manufacturer website.
- HMIS.
- Free online repositories. (Note that many of these sites can only be accessed after registering.)

Ensure MSDSs are forwarded to the BEEs for inclusion in their central repository, and to the requesting section the first time the item is delivered. MSDSs and updates may be kept in binders or on computer CD-ROMS. All MSDSs should be archived and stored for 30 years after the date of the product's last use to avoid employer liability.

010. Processing Hazardous Materials Pharmacy requests

The purpose of the hazardous materials pharmacy (HMP) is to provide Air Force installations with a standard way to monitor the procurement and use of HM and comply with environmental, safety, and occupational health (ESOH) requirements. The HMP is tasked by the HMP implementation plan to minimize HM on base and to track it from the time it is requested through its final use or disposition. The responsibilities of the HMP also include those identified by BEM and the Bio-environmental engineering squadron (BES). The HMP must review, validate, and approve all requests for HM and ozone depleting substances (ODS). Items applied directly to a patient for medical purposes are exempt from this particular process.

Using activity ordering process

Before submitting a new request, using activities should identify HM by type (e.g., flammable, corrosive, reactive, toxic, radioactive, antineoplastic [i.e., chemotherapy drug]). Coordinate with the BES to certify that the new items are the least hazardous available to do the job and ensure that workplace users have been properly trained and equipped (e.g., HW receptacles and protective gear) to use the item. The using activity is responsible for obtaining the necessary health and environmental authorization from the base HMP.

HM authorization process

The authorization process is documented on an AF Form 3952, Chemical Hazardous Material Request Authorization Form, and establishes a standardized procedure for requesting and authorizing HM through all sources of supply. The work area supervisors use the AF Form 3952 to initiate a request for HM. This detailed request provides information to support the hazardous materials management plan (HMMP). Authorized requests are entered into Defense Environmental Security Corporate Information Management (DESCIM) approved HM tracking system. This system is used to create an authorized users list (AUL) for the HM item. HM will not be procured or issued unless the authorization for the user appears on the AUL. The requesting activity must maintain copies of their completed AF Form 3952. The approval process includes BES, the base HMP, and medical logistics.

Medical Logistics review process

Medical logistics personnel review available research tools prior to establishing a medical HM requirement. Take all new item requests that have been verified as HM or have a federal supply class (FSC) contained in Federal Standard 313c to BES for their review and verification. Compare the item against the most current data maintained in DMLSS to determine if an “H” (hazardous) notes code is assigned.Also verify the item against the Health Management Information System (HMIS) for pre-existing records. If required, users should ensure the item has a HAZMAT code of “Y” loaded in the MTF catalog, as well as the appropriate MTF restriction and destruction codes for each hazardous item.

The four hazardous material codes are given in the following table.

Haz Mat Code	Description
D	Hazardous, no HMIS information.
N	Non-hazardous.
P	May be hazardous, no HMIS information.
Y	Hazardous.

The MTF restrictions tab lists any restrictions placed on the item. The restrictions include a code with an associated description.

MTF Restriction Code	
Code	**Description**
B	Corrosive or poison.
C	End item containing one or more component items that are coded “R.”
D	Antineoplastic (chemotherapy) drug.
F	Subject to change by freezing.
G	Require refrigeration 2–8 degrees Centigrade (°C).
H	Hazardous.
I	Flammable or oxidizing.
J	Subject to pilferage control/items not controlled.
M	Potential recoverable precious metal.
Q	Drug Enforcement Administration (DEA) Class III, IV, or V substances & other items requiring security storage.
R	DEA Class II substances & other items requiring vault storage.
W	Must be frozen for storage.

Processing HM receipt

Upon receipt of HM, inspect the condition of the container to ensure it is sealed and in good condition. If damage or leaks are apparent, do not accept the material from the shipper. If the shipper has departed, exercise the medical logistics emergency spill response plan, don protective clothing, and proceed with spill clean-up according to the spill clean-up plan.

Verify that the labeling and markings on each container agree with the manifest or shipping document. Ensure the MSDS is on hand or in the container. If HM is received which was not previously identified to receiving personnel as HM, consult the MSDS for handling procedures, update the appropriate catalog record in DMLSS to identify the item as hazardous, and provide a copy of the MSDS to BES. Handle items according to MSDS information. If an MSDS cannot be located, segregate HM in a safe location and contact the source of supply and BES for assistance.

ESOH-MIS generated barcodes will be affixed to each item for accountability.

Issuing HM

When breaking down containers to smaller units of issue, ensure proper HM labeling is present on all units of issue (e.g., unit containers, intermediate containers, and exterior packs). The supplier should have included labels in the original container or the information can be found in the HMIS. Include the following on each label:

- Product trade name.
- National drug code (NDC) or part number.
- Batch or lot number.

Labels must also include manufacturer’s name, date of manufacture, emergency telephone number, and applicable shelf-life information. Do not deface the HM label information. It is against the law and carries severe penalties.

Segregate incompatible items to ensure safe delivery by reducing the possibility of dangerous chemical reactions. Follow base HM transportation requirements when transporting HM on base, and federal, state, and local transportation regulations and laws for transporting HM off base. For additional information contact the transportation management office (TMO).

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

008. Functions and responsibilities

1. What agency is responsible for formulating policy and guidance on hazardous materials and waste management?

2. Who manages the hazardous waste management program at the base level?

3. Who is responsible for providing HW management training on base?

4. The BEEs provide technical support for what program?

5. Who inventories hazardous chemical usage and storage to support EPCRA requirements?

6. Who develops and monitors the HM/HW management program for Medical Logistics and the MTF?

7. How does the MLFC assist the BEEs in performing an initial and annual MTF HM/HW stream analysis?

8. BEE is required to review new purchase requests for what type of items?

009. Material safety data sheets

1. What does an MSDS communicate?

2. What is the primary objective of an MSDS?

3. How many specific section headings are there in each MSDS?

4. Which MSDS section contains first aid information in case of accidental contact?

5. What information is contained in section 8 of an MSDS?

6. List three methods of obtaining MSDSs?

7. How long should MSDS's be archived and stored?

010. Processing Hazardous Materials Pharmacy requirements

1. What is the purpose of the HMP?

2. Who is responsible for obtaining health and environmental authorizations from the base HMP?

3. The HM authorization process is documented using which form?

4. What DMLSS notes code is used to identify hazardous items?

5. List the four hazardous material codes used in DMLSS.

6. What should you do when receiving HM that is leaking and the shipper has already left?

7. What type of barcodes will be affixed to each item for accountability?

8. Why should incompatible items be segregated during delivery?

Answers to Self Test Questions

006

1. Observe your workers.
2. A detailed, systematic search to uncover the "who, what, when, where, why, and how" of a loss producing event, and to determine what corrective actions are needed to prevent a recurrence.
3. Safety officer.
4. Immediately.
5. Not later than the next duty day.
6. 30.

007

1. Occupational Safety and Health Act.
2. Unit commanders, functional managers, and supervisors.
3. At least once a year.
4. At least once a month.
5. Commander or supervisor.
6. All Air Force personnel.
7. Supervisors.
8. Senior airmen, noncommissioned officers, civilians upon initial assignment to a supervisory position, and first-level supervisors who have not attended. In addition to these individuals, any supervisor who demonstrates a lack of safety knowledge or initiative is also required to attend or re-attend the course.
9. Lower shelves.
10. In approved flammable storage rooms or cabinets.
11. Procedures for identifying, handling, storing, using, and disposing of HAZMAT from receipt through use.
12. Safety inspections.
13. At least monthly.
14. The process of identifying and controlling hazards to protect the force.
15. By prevention.
16. Lifting, carrying, dropping, and lowering.
17. Size, shape, weight, and distance the object is to be moved.
18. Team lifting.
19. Lift with your legs, not with your back.
20. Ensure loads are manageable in both size and weight distribution.
21. Supervisors.
22. Rings, jewelry, loosely fitting bracelets and neckwear.
23. Never use a tool for a purpose other than that for which it was designed.
24. Cut away from your body.

008

1. AFMSA/SGSF.
2. The BEM.
3. The BEM.
4. The Environmental Compliance Assessment and Management Program.
5. BEE.
6. MLFC.
7. By providing a copy of the DMLSS Hazardous Material Report.
8. Known or suspected HM.

009

1. The chemical, physical, and hazardous properties of material to the user.
2. To concisely inform you about the hazards of the materials you work with so that you can protect yourself and respond to emergency situations.
3. 16.
4. Section 4.
5. Exposure controls and personal protection.
6. Manufacturer’s Website, HMIS, free online repositories.
7. For 30 years after the date of the product’s last use.

010

1. To provide Air Force installations with a standard way to monitor the procurement and use of HM and comply with ESOH requirements.
2. Using activities.
3. AF Form 3952.
4. "H".
5. D, N, P, Y.
6. Exercise the Medical Logistics Emergency Spill Response Plan, don protective clothing, and proceed with spill cleanup according to the spill cleanup plan.
7. ESOH-MIS generated.
8. To ensure safe delivery by reducing the possibility of dangerous chemical reactions.

Complete the UREs before proceeding to the next unit.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter.

12. (006) After a mishap occurs, who determines the depth of the investigation?
a. Convening authority.
b. Flight commander.
c. Supervisor.
d. Unit safety representative.

13. (007) Safety inspections *must* be conducted in all *non-high hazardous* workplaces at least once every
a. month.
b. three months.
c. six months.
d. twelve months.

14. (007) Air Force Office of Safety and Health (AFOSH) standards for medical materiel require that all medical supplies be clearly marked to indicate what?
a. Contents.
b. Destination.
c. Flammability.
d. Weight.

15. (007) What is the *most* effective way to reduce the probability of injury?
a. Education.
b. Inspections.
c. Prevention.
d. Teamwork.

16. (008) Who develops and monitors the hazardous materials/hazardous waste (HM/HW) management program for Medical Logistics and the medical treatment facility (MTF)?
a. Bio-environmental engineering.
b. Civil engineering.
c. Facility manager.
d. Medical logistics flight commander.

17. (009) The primary objective of the material safety data sheet (MSDS) is to concisely inform you about the hazards of the materials you work with so that you can protect yourself and
a. clean up spills.
b. prevent serious accidents.
c. respond to emergency situations.
d. train coworkers.

18. (009) When reading a material safety data sheet (MSDS), what information is always contained in section 1?
a. Chemical product name.
b. First aid measures.
c. Health hazards.
d. Regulatory information.

19. (009) Material safety data sheets (MSDS) should be archived and stored for how many years after the date of the product's last use to avoid employer liability?
a. Five.
b. Ten.
c. Twenty.
d. Thirty.

20. (010) Which Defense Medical Logistics Standard Support (DMLSS) hazardous materiel (HAZMAT) code is used to indicate that an item *may* be hazardous?
a. D.
b. N.
c. P.
d. Y.

21. (010) While delivering two incompatible hazardous items, what additional action should you take to ensure safe delivery?
a. Clearly label the items.
b. Don protective gear.
c. Place items in vermiculite.
d. Segregate the items.

Please read the unit menu for unit 3 and continue ➔

Unit 3. DMLSS System and Office Administration

3–1. DMLSS System Administration 3–1
011. System administrators 3–1
012. Smart card-enabled log-in 3–5
013. User administration 3–6
3–2. Daily Data Transmissions 3–10
014. Incoming and outgoing transmissions 3–10
015. Transmission errors 3–11

STOP AND THINK FOR A MOMENT about how much data is needed just to get one item to the customer. The ability to search for and choose the right item among the many thousands of possibilities is only one of several processes. Then you must requisition the item, track it from the source to your loading dock, and receive it. After that, you may have to store the item or issue it to the correct custodian while all the time accounting for the whereabouts and the cost of the item. All this is to say, you are dependent on information systems that are capable of performing multiple functions for hundreds or thousands of items all at the same time. Every job you do as logisticians requires that you both understand computer terminology and the use of information systems such as the personal computers (PC) made available to you. Rapid processing of large volumes of information is critical to the medical logistics environment.

3–1. DMLSS System Administration

The DMLSS servers require attention on a regular basis. Some processes automatically happen each night and some processes require manual intervention. In this section, you will learn about some of these manual processes.

011. System administrators

System administrators (SA) monitor and manage the server activities, establish valid system users, perform server administrative functions, and assist with troubleshooting. As you will see in this lesson, the SA has an important job with many responsibilities. SAs will be responsible for administering and maintaining the DMLSS server on a daily basis.

System administrator functionality

Functionality for the administrator is contained in either the system services application or the DMLSS server system administrator tool module.System services encompasses all modules serving the entire system such as logistics/MTF/unit organization, funds management, user privileges, table maintenance utility, communications management, and records management.

The DMLSS server system administration tool module enables the SA to perform a host of system administration tasks such as user, PC, printer, server, medical management (MM) and facility management (FM) administration, and so forth. It can be accessed via your web browser.

System administrators

In the simplest of terms a SA can be defined as a person who manages a multi-user computer.The SA manages all aspects of the DMLSS system and has total system access. SAs (and their responsibilities) are limited to those appointed by the medical logistics flight commander. One important role for the SA is to initially assign each user a valid user ID through the DMLSS system administration (admin) tool.

Application security manager

An application security manager (ASM) controls the roles and privileges within specific applications. Once a user is created, the ASM establishes an authorization profile for each user through the use of

database roles, using the system services' UP module. ASMs assign individual privileges commensurate with assigned duties and responsibilities.

The ASM attribute equates to the security manager role in the user privileges (UP) module. A user may be assigned the ASM role for more than one application; however, it is strongly recommended that there be only one ASM for each application per site. Only a limited amount of users should be given access to UP to assign powerful capabilities in areas such as organization and funding. An exception would be the temporary assignment of an ASM to another user to cover the absence of the regular ASM.

Because of the system services (SS) ASM elevated priviledges, it is important to limit the number of SS/ASMs per site, (contingent upon the size of the account). The site SA creates this first ASM in the DMLSS system administration module and all subsequent ASM associations take place in the UP module.This user can give virtually any rights in the system to anyone, including himself.Only the SS ASM has the unique ability to assign the ASM attribute for other applications; every other ASM is limited to their associated applications only. For example, the FM ASM is only able to assign FM ASM to another user, whereas the SS AA can assign ASM attributes for all of the modules to any user ID including his or her own. A user need not have application access (have one or more application-user roles) to be an AA for that application.

Additional duties

The site SA should perform regular backup of the DMLSS server using the system administration module of SS. As an SA you must accomplish required tape backups to ensure the most current information is available in the event of a catastrophic systems event.

You should monitor the usage of each tape and replace them in accordance with manufacturer's recommendations. Tapes wear out and lose their record ability over time; therefore, the SA should track the life of the tapes and create a replacement schedule. Before using a new tape, ensure that the tape is not set to write-protect. There is generally an indicator or color tab that indicates a tape is write-protected. Tape backups will fail if the tape is set to write-protect. Backup tapes should not be set to write-protect unless directed to do so by the Department of Health Affairs (DHA) Tier I/II, or DMLSS program personnel.

Finally, the SA should ensure backup tapes are stored in a secure location away from the DMLSS server and safeguarded against fire, moisture, high electrical currents, and accidental reuse. Tapes should also be maintained in an organized manner. It is recommended that tapes be numbered sequentially or in a manner that will assist with daily rotations.

Other duties include user management (e.g., initial training, controlling DMLSS access levels, setting roles and privileges, and purging user accounts). SAs also monitor the DMLSS communication manager (DCM) process and manage system database audit procedures.

DMLSS SA Tool

The DMLSS system provides several tools for SAs and ASMs to monitor and manage the server. In addition to the SS module available through the DMLSS PC software, there are additional tools for administrators located directly *on* the DMLSS server. The section that contains the SA tool is where you will perform the majority of your server administration duties.

To access the DMLSS server webpage, open internet explorer and on the address line enter https:// and the server name or IP (Internet protocol) address of your DMLSS server. Read the DOD notice and consent banner and select the CLICK HERE TO CONTINUE button.

The DMLSS Admin start page displays when you access the webpage for your DMLSS server. SAs use this page to install DMLSS software, log on to the SA Tool, and access standard links.

After selecting the SA Tool and logging in, the SA tool homepage will display. Just like the DMLSS homepage, the navigation pane includes a list of options under task areas, quick links, and DMLSS

links; however, the vertical task area in the SA tool has additional menus that are used to manage SA activities. Remember to log out of the SA tool when done by clicking “Exit” on the list of quick links located on the left side of the navigation pane.

The SA tool homepage is divided into two main segments: the main window and a vertical toolbar on the left-side. The main window is further broken down into two sections: services and process dates. Both sections provide a visual status of your server’s health. The services section covers information such as central processing unit (CPU) usage, database status, and number of users logged-in. The process dates section indicates when key server processes were last completed (e.g., backups, restarts, and updates). Any items not marked as green, for either section, should be promptly investigated and resolved as applicable. This screen must be checked daily by your site’s SA.

The area on the left side of the screen marked as the task area provides access to the main server administration categories and functions. Each category expands to provide access to specific tasks. These main categories consist of the following:

- Manage Users.
- Manage Security.
- Manage User Messages.
- Manage Server.
- Manage Devices.
- Manage Services.
- Manage Database.
- Manage Medical Materiel.
- Facility Management.
- Manage Backups.

System services

The SA must become familiar with the system services application screen of the DMLSS.

SS allows you to monitor and interact with some processes generally managed on the server. This application supports security for the other applications, controls the data accessed in the applications, and allows you to monitor and interact with some processes generally managed on the server.

The SS application includes the following basic modules, or parts:

1. MTF/Unit.
2. Funds Management.
3. Point of Contact (POC).
4. User Privileges (UP).
5. Table Maintenance Utility (TMU).
6. DMLSS Communications Management (DCM).
7. End of Period (EOP) Process Management.

The following paragraphs provide a brief overview of each part or module.

MTF/unit tree view

The MTF/Unit screen is used to review and update your MTF’s organizational structure. The organizational structure consists of all of the service/customers and/or departments. An organization in DMLSS is also referred to as the MTF/unit.

Funds management

Briefly, the funding screens let you:

- View and manage your funding through expense centers, project centers, and the logistics (Log) fund.
- Gather information on elements of resource (EOR) and commodity classes.
- View and manage details such as commitments, obligations, and target amounts.
- View and manage your assemblage management (AM) and other procurement (OP) funds.

Point of contact

A POC is a point of contact for an organizational record. In the point of contact (POC) module you can search, open, edit, create, and delete POC information as appropriate. The POC is usually responsible for managing the area that the organizational record describes. POC information is entered into the POC screen and is available for association to the organizational records. An important part of administering the DMLSS system is having valid and up-to-date POC information for key personnel. This data is important to medical equipment management office (MEMO) and customer service. However, because it is also passed to wide area work flow (WAWF), it is crucial that the information be kept accurate.

A POC can be associated with one or more POC types. It is important to associate the correct POC types, so that the POC will be available for selection in other applications.

User privilege assign

In the UP assign screen, security managers (SM) may associate module-specific roles to individual user identifications (ID). As previously mentioned, roles grant and/or restrict access to certain modules, processes, and actions to protect the server database from unauthorized access.

User privilege manage

In UP manage roles for each DMLSS module can be created, deleted, and modified by changing the attributes of the resources of that role in the UP manage module.

Table maintenance utility

Table maintenance utility (TMU) provides a centralized listing of all the values and codes used throughout the DMLSS application. Use TMU to view, add, or delete data elements that appear in the different modules. To view tables in TMU, users must have the appropriate TMU resource(s) assigned to their user ID. At each MTF, one or more individuals should be assigned to manage these tables. Before being assigned this task, the individual should have some basic knowledge of medical logistics data elements and codes including Defense Logistics Agency (DLA) and military specific (MILSPEC) codes, such as advice codes and device codes.

- There are three types of tables viewable in the TMU screen: STQ18
- DMLSS wide (centralized): These tables are not editable since the information must remain common across all MTFs.
- DMLSS and site managed: The data in these tables may vary from site to site.
- Site managed data: These decentralized tables contain data unique to the local MTF and are completely editable. STQ19

DMLSS communications management

DCM is an automated tool within DMLSS used to transmit site data to external agencies. Information flowing from DMLSS includes requisition files, financial data, and PV usage information. DCM is also the conduit for receiving transmission of incoming status files, and it provides tools that allow SAs to monitor progress of these files and to troubleshoot any errors.

In the DCM monitor window, you can view the most current status of a DCM transaction. You can specify how many days of transactions you want to see, as well as how often to check the database for updates. When necessary, you can resubmit items. You can also view the actual form that is prepared and sent using view file.

DCM monitor always shows only the most recent status on a transaction. To view the entire life cycle of a transaction, use the DCM search window. A member of your team should be designated to ensure that your financial transactions are correctly transmitted to the Defense Finance Accounting Service (DFAS) every day. Enter the previous day's date in the DCM search window's date field, and review the status code of your transactions. The system purges some DCM files after a certain amount of days has passed.

In the DCM monitor window, the user may resubmit a transaction; view the process code description for a transaction; and/or view a transaction file.

Resubmit a transaction

You can select an order-related or financial transaction to be retransmitted immediately using the DCM monitor. The initial transmission may have failed because of a power outage or temporary problems in the receiving system. To resubmit a transaction in DCM monitor:

1. Change the DCM monitor options, as necessary.
2. In the DCM monitor window, highlight the transaction you want to resubmit.
3. Click resubmit.
4. Click yes in response to the confirmation message.

Resubmit a transaction only when you are sure the recipient is configured correctly. Also, be sure to only mark "resubmit" on transactions with a status of failed or not sent. If you first mark one for "resubmit" then unmark it, the transaction's status reverts to not sent regardless of what its status was before.

View the process code description for a transaction

To view the process code description for a transaction, select the transaction for which you want to view the process code description and click **Desc** or you can double-click on the transaction.

The status code is a general category for describing DCM processing/transmission activity. The typical life cycle for an outgoing transaction is several reports of In-Process, then Complete or Transmitted. If a transaction has an error status code and the process code is related to hypertext transfer protocol secure (HTTPS) transmission, check the intended recipient's configuration in the DCM Configuration window.

View a transaction file

Viewing a file can be helpful to PV users who are familiar with electronic data interchange (EDI) or the older military standard requisitioning and issue procedure (MILSTRIP) formats. The main reasons to view a file would be in the instance of a format failure process code, or if someone at the receiving end of the file had a question about its content.

012. Smart card-enabled log-in

This lesson covers DMLSS access via the use of public key infrastructure (PKI) smart card authentication, also known as a common access card (CAC). Previously, DMLSS users were assigned a user ID and password; however, as of March 2013, all users should have smart card-enabled log-ins, thus replacing the need for DMLSS passwords. The driving factor for this change occurred when the use of user IDs and passwords was identified as a serious vulnerability to the DOD's overall security posture. As a result, the chief information officer for DHA directed that all DHA information technology systems migrate to using DOD-approved PKI certificates to authenticate user identity.

The DOD and DHA overall objective is to completely eliminate the use of usernames and passwords whenever and wherever feasible. How did this affect medical materiel? SAs are now responsible for managing smart card user access while also creating new smart card-enabled accounts.

The following steps are used to create new smart card-enabled user accounts. This is a two-person process and requires actions by both the SA *and* the new user. Therefore, it is recommended that the new user either be given temporary access to a PC in medical logistics or be sent instructions on how to complete their part from their own workstation.

New users must first create their unique DMLSS username. At the same time, they will also be associating their smart card certificate with their new username. Users must then provide their username to the SA, who will in turn validate their PKI certificate and approve the association and DMLSS access.

New users use the following steps:

1. Log in to PC with user's smart card.
2. Navigate to the unit's DMLSS homepage web address.
3. Select "assign user smart card information".
4. Enter new username.
5. Verify database is set to DMLSSDB (default setting).
6. Submit.
7. Provide DMLSS SA with new username.

SAs use the following actions to create new accounts:

1. Log in to DMLSS SA tool.
2. Expand *manage users* in task area.
3. Select "manage smart card access."
4. Search for new user ID.
5. Verify PKI certificate name matches username.
6. Check box next to username.
7. Click on "approve selected users."

013. User administration

Now that you have an understanding of how the SA manages and creates user accounts, we will discuss how the administrators restrict application access and how they can further manage what individual users can do in DMLSS. It is important to note that while in SS, modules as previously discussed are referred to as *applications* (e.g., IM, AM, and SS are listed in SS as applications); therefore, in this lesson, the terms module and application are interchangeable.

As mentioned previously, UP manage and UP assign are the most important functions the SA will use to manage and restrict user accounts. A user's access to DMLSS is determined by the application, privileges, and roles assigned to their user ID. The roles assigned to users grant and/or restrict access to certain applications and functions within the system and ultimately protect the database from unauthorized access. The UP function consists of two different screens: UP manage and UP assign.

UP manage

This function is used to view, add, modify, and/or delete roles by application. Roles for each DMLSS application can be created or deleted, and existing roles may be modified by changing the attributes of the resources of that role in the UP manage module. To access the UP manage window, a user must be designated as an SA or possess an application security manager role.

UP assign

This function is used to *assign* one or more applications and/or roles to another user. Only those with SM roles are authorized to access UP assign and grant privileges to other users. The SM should have a basic knowledge about what each role performs before assigning a role to a user.

Granting user access to an application

Use the following steps to assign user access to an application.

1. On the navigate menu, click user priv – assignment or click on the UP assign icon on the horizontal toolbar.
2. In the user priv – assignment window, select a username.
3. Click applications.
4. In the non-associated applications box in the application management window, double-click the name of the application you want to authorize.
5. Click save.

Certain applications require additional privileging.

- CAIM, CS, and IM require one or more service customers (SVC/CUST) be assigned.
- EM, FM, and MA (equipment maintenance modules) require assignment of applicable management or maintenance activity.
- AM requires assignment of applicable assemblages.

Pending actions should also be associated for users of the AM, IM, and CAIM applications. Pending actions must be associated by individual action codes. When the action code's associated event is triggered, a message or action request is posted to the user's application in box.

Assigning user roles

As previously mentioned, roles provide specific access and abilities per module. A user *must* be assigned application roles before they are able to use the assigned applications.

Use the following steps to associate application roles to a user.

1. On the navigate menu, click user priv – assignment or click on the UP assign icon on the horizontal toolbar.
2. In the user priv – assignment window, select a username.
3. Click roles.
4. In the non-associated roles box in the roles management window, double-click the name of the role you want to associate.
5. Click save.

While it is possible to give a user all non-associated roles at once by clicking << it is generally frowned upon and should not be used. Excessive and unnecessary association of overlapping roles decreases the SM's ability to restrict access to critical functions and can therefore degrade system integrity.

Special rules for role management

The following rules apply to security managers who are authorized to assign roles in DMLSS;

1. You can only add or remove SM roles for those applications in which you have the *same* SM role.
2. You cannot remove SM roles from your own user ID.
3. Be very careful assigning SS roles containing MTF resources. A user with these resources can make changes that affect the entire structure and budget of your site.

4. If users are logged on when UP changes are made, they must exit DMLSS and log back in to gain access to the new changes**.**

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

011. System administrators

1. What are the primary responsibilities of DMLSS SAs?

2. How does an SA access administrator functionality in DMLSS?

3. What types of system administration tasks are available to the SA via the SA tool?

4. What does an ASM do?

5. How many ASMs should there be for each DMLSS application?

6. Why should there be a limited number of SS ASMs per site?

7. Who should perform regular backups of the DMLSS server?

8. When should data tapes be replaced?

9. Backup tapes should be safeguarded against what conditions?

10. How can you access the DMLSS server webpage?

11. What DMLSS webpage is used to install DMLSS software, log on to the SA Tool, and access standard links?

12. How should you log-out of the DMLSS SA tool?

13. What does the MTF/unit tree view allow you to do?

14. What does the funds management—funding screen allow you to do?

15. An important part of administering the DMLSS system is having valid and up-to-date POC information for whom?

16. Which screen is used to associate module-specific roles to individual user IDs?

17. TMU provides a centralized listing of what?

18. List each type of table viewable in the TMU screen.

19. Which TMU table contains data unique to the local MTF and is completely editable?

20. DCM is an automated tool within DMLSS used to do what?

21. Which screen is used to immediately retransmit order-related or financial transactions?

22. What is the typical life cycle for an outgoing transaction?

012. Smart card-enabled log-in

1. What concept is used to replace the need for DMLSS-generated passwords?

2. What was the driving factor for the change to smart card-enabled logins?

3. Who is responsible for managing smart card user access while also creating new smart card-enabled accounts?

4. Where do new users establish their unique user ID?

5. Which application is used by SAs to create new user accounts?

013. User administration

1. Which two functions are used by the SA use to manage and restrict user accounts?

2. How is the UP manage function used?

3. How is the UP assign function used?

4. Why should all application roles *not* be given to users?

3–2. Daily Data Transmissions

As previously mentioned, DCM is an automated tool within DMLSS used to transmit data to external agencies. Information flowing from DMLSS includes requisition files, financial data, and prime vendor usage information. DCM is also the conduit for receiving transmission of incoming status files, and it provides tools that allow SAs to monitor progress of these files and to troubleshoot any errors. This section will cover the basics of how to monitor transmissions and how to resolve transmission errors using the DCM tool.

014. Incoming and outgoing transmissions

DMLSS' primary connection method is the DLA transaction services value added network (VAN), using HTTPS. DLA transaction services forwards these transactions to DLA troop support for PV payments, to the Defense Finance & Accounting Service (DFAS) for non-PV payments, and to point-of-use (POU) systems as needed. The movement of DMLSS data to and from external sources starts with the DCM.

DCM search

The DCM search function is used to view transaction files and manage the interface between DMLSS and other systems. Specifically, use this window to check the status of files and submit or resubmit files that failed to transmit. It is important to note that the DCM retains transaction files for only the current and previous month (or 62 days total). Financial transaction files are retained in the system until archived; depending on the file this can range from 90–365 days.

DCM search may be accessed by either using the DCM search option in the SS navigate drop-down menu or you can click on the DCM search icon located on the horizontal toolbar.

The DCM search window provides multiple search options. Specific criteria may be entered to limit the number of results. The available search fields are as follows:

- Call/sequence/block number: Provides a list of all call numbers and financial sequence numbers that have processed through DCM.

- Method: How the transaction files are processed or transmitted (i.e., HTTP or Print).
- Form: File format used to transmit the file (e.g., MILSTRIP, ANSI, EDI, etc.).
- Contract number: Use to search for transaction files associated to a specific contract number. For example, enter FOA-REPORT if you want the system to locate and display report data transmitted to AFMOA/SGALD during a particular EOP session.
- Source of supply (SOS): Use to search for transaction files associated to a SOS.
- Status code: Identifies the status of the file as it passed through DCM (e.g., complete, error, in-progress, transmitted).
- Process code: Provides more information on the status of orders as they pass through DCM.
- User ID: Use to search for a specific user ID used to transmit a file. (**NOTE:** DMLSS records a user ID of DFAS for all financial transactions.)
- Begin Date: Identifies the begin date of the search. A blank begin date will include all dates.
- End Date: Identifies the end date of the search. A blank end date defaults to the current date.

Transmission status determination

Review the DCM search window daily to ensure all transaction files are successfully transmitted and received as a result of the previous day's business. In particular, verify financial files are transmitted to DFAS daily without error. To accomplish this, enter the previous day's date in the begin date field and click *search*. Review the status and process codes to verify all transaction files transmitted successfully.

When searching transaction file history in DCM search, look for the following three lines, which indicate the entire life cycle of the file was successful (applies to most file types). Using *outbound transmissions* as an example, look for the following process codes:

(1) ARCORGFL—archived original file.

(2) FMTGOOD—File was successfully formatted.

(3) TMTGOOD—Transmission was successful.

This sequence indicates the file was successfully archived, formatted, and then transmitted. If you are unsure of what a particular process code means, you may view its description by highlighting the transaction first, then clicking the **Desc** icon on the vertical toolbar.

015. Transmission errors

To identify formatting errors or failed transmissions, monitor the transactions for an error status code. Each error code has a corresponding process code that indicates in which stage the error occurred. Whenever this occurs, the SA should troubleshoot problems with the local area network (LAN), interface connectivity, or an incorrect IP address, login, or password. All electronic communications activities are required to periodically update passwords so you may need to contact the activity to verify current passwords. The SA should track/monitor password update schedules to prevent transmission failures.

Resubmission options

If transaction files do not successfully transmit, the SA should verify with the medical systems office that the network is up and that the required ports and firewalls are open. Upon verification, use the submit or resubmit options to retransmit the transaction files. Users must be judicious on which files require retransmission. For example, if an electronic PV order fails to transmit, and the acquisitions manager elects to cancel the order and re-accomplish the order *manually*, the EDI 850 should *not* be retransmitted. This will result in a duplication of orders. When the DCM is down completely for an extended period of time, the logistics account should activate manual supply operations. Manual orders to PV sources will result in the creation of a pseudo EDI 850 image which ultimately goes to DLA troop support. When DCM connections are restored, these files will require retransmission.

DLA troop support requires this data in order to build their order profile between the MTF and the PV.

Resubmit vs. financial resubmit

The two resubmission options, resubmit and financial resubmit, are used in very different situations. It is important to understand what actions are taken by both options and when each one should be used.

Resubmit

In most instances, when a transaction file failed to transmit due to network connectivity problems or another reason not related to the IP address, login, or password, use the resubmit function located on the vertical toolbar to retransmit that file during the next EOD process. This action will simply re-attempt to transmit the previously failed file without making any changes to it.

Financial resubmit

This action is only for financial files which have an assigned contract number of "financial-xxx", and should only be used if the original transmission failure is due to an incorrect IP address, login, and/or password. This action will rebuild the transaction file and retransmit it to DFAS. The financial resubmit is used in this case because the IP address, login, and password are embedded into the financial file; therefore, if any of this data changes, the file must be rebuilt. If a financial file transfer fails for any other reason, use the previous resubmit option to retransmit the existing file without rebuilding a new one.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

014. Monitoring incoming/outgoing transmissions

1. In general, how is the DCM search function used?

2. How long does the DCM retain transaction files?

3. What user ID is recorded for financial transactions?

4. List the DCM search window fields that may be used to *limit search results.*

5. When reviewing outbound files for successful transmission, for what process codes should you search?

6. How can you get more information on a process code if you are unsure of what it means?

015. Resolving transmission errors

1. What status code is used to indicate formatting problems or failed transmissions?

2. Which type of code indicates the stage in which a transaction failure occurred?

3. What five things should the SA troubleshoot when a transmission failure occurs?

4. When your files don't successfully transmit, who should you check with to ensure that the network is functional, and your ports and firewalls are open?

5. When would you *not* retransmit a failed PV order?

6. What are the two options for resending failed transmission files?

7. Which option is used to rebuild and retransmit failed transmission files to DFAS?

Answers to Self Test Questions

011

1. Monitor and manage the server activities, establish valid system users, perform server administrative functions, and assist with troubleshooting.
2. Through either the System Services Application or the DMLSS Server System Administrator Tool module.
3. User, PC, printer, server, MM and FM administration.
4. They control the roles and privileges within specific applications.
5. Only one per site.
6. This user can give virtually any rights in the system to anyone, including himself.
7. The site SA.
8. In accordance with manufacturer's recommendation.
9. Fire, moisture, high electrical currents, and accidental reuse.
10. Open Internet Explorer and on the address line enter https:// and the server name or IP address of your DMLSS server.
11. DMLSS Admin Start Page.
12. Click "Exit" on the list of Quick Links.
13. To review and update your MTF's organizational structure.
14. (1) View and manage your funding.
    (2) Gather information on EOR and commodity classes.
    (3) View and manage details such as commitments, obligations, and target amounts.
    (4) View and manage your AM and OP funds.
15. Key personnel.
16. UP Assign.
17. All the values and codes used throughout the DMLSS application.

18. (1) DMLSS Wide.
    (2) DMLSS and Site Managed.
    (3) Site Managed Data.
19. Site data.
20. Transmit data to external agencies.
21. DEM Monitor.
22. Several reports of In-Process, then Complete or Transmitted.

012

1. Smart card-enabled log-ins.
2. The use of User IDs and passwords was identified as a serious vulnerability to the DOD's overall security posture.
3. SA.
4. DMLSS homepage, then select "Assign User Smart Card information."
5. SA Tool.

013

1. UP assign and UP manage.
2. To view, add, modify, and/or delete roles by application.
3. To assign one or more applications and/or roles to another user.
4. Can decrease the SM's ability to restrict access to critical functions and can degrade system integrity.

014

1. To view transaction files and manage the interface between DMLSS and other systems.
2. Current and previous month or 62 days.
3. DFAS.
4. Call/Sequence/Block Number; Method; Form; Contract Number; Source of Supply; Status Code; Process Code; User ID; Begin Date; End Date.
5. ARCORGFL, FMTGOOD, TMTGOOD.
6. View its description by highlighting the transaction first, then clicking the Desc icon on the vertical toolbar.

015

1. ERROR code.
2. Process code.
3. Problems with the LAN and interface connectivity; incorrect IP address, login, and password
4. Medical Systems office.
5. When the acquisitions manager elects to cancel the order and re-accomplish the order manually.
6. Resubmit and financial resubmit.
7. Financial resubmit.

Complete the UREs before proceeding to the next unit.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter.

22. (011) Who controls the roles and privileges within each specific Defense Medical Logistics Standard Support (DMLSS) application?
a. Account site manager.
b. Active system's manager.
c. Application security manager.
d. Automated support manager.

23. (011) Where should Defense Medical Logistics Standard Support (DMLSS) back-up tapes be secured?
a. On top of the server.
b. Next to the server.
c. No more than 20 feet from server.
d. In a location away from the server.

24. (011) Which Defense Medical Logistics Standard Support (DMLSS) screen provides a centralized listing of all the values and codes used throughout the DMLSS application?
a. DMLSS communications manager (DCM).
b. DMLSS system's administrator (SA) tool.
c. System Services (SS).
d. Table maintenance utility (TMU).

25. (012) At a *minimum*, how many people are needed to create a new Smart Card-enable Defense Medical Logistics Standard Support (DMLSS) account?
a. One.
b. Two.
c. Three.
d. Four.

26. (013) Which Defense Medical Logistics Standard Support (DMLSS) User Privilege (UP) function is used to view, add, modify, and/or delete roles by application?
a. Access.
b. Assign.
c. Manage.
d. Services.

27. (013) When managing Defense Medical Logistics Standard Support (DMLSS) user roles, why should users *not* be assigned *all* non-associated roles?
a. Increases access control.
b. Degrades system integrity.
c. Reduces computer security.
d. Slows down processing speed.

28. (014) Which Defense Medical Logistics Standard Support (DMLSS) Communication Management (DCM) search field identifies how the transaction files were transmitted?
a. Method.
b. Process.
c. Sequence.
d. Source.

29. (015) What Defense Medical Logistics Standard Support (DMLSS) Communication Management (DCM) *status* code is used to identify formatting inaccuracies or failed transmissions?
a. ERROR.
b. TMTFAIL.
c. FMTBAD.
d. ARCORGFL.

30. (015) Who should the system administrator (SA) coordinate with to ensure ports and firewalls are properly configured?
a. Material Handling Support (MHS)help desk.
b. Defense Logistics agency (DLA) troop support.
c. Medical Systems office.
d. Base information & technology.

31. (015) Which option is used to *rebuild* failed transmission files due to an incorrect destination Internet protocol (IP) address?
a. Resubmit.
b. Retransmit.
c. Financial Resubmit.
d. Financial Retransmit.

Please read the unit menu for unit 4 and continue ➔

Unit 4. Funds and Customer Account Management

4-1. Funding and account management 4–1
016. Air Force Working Capital Fund/Medical-Dental Division and Operations and Maintenance 4–1
017. Establish/revise/delete expense/cost center records 4–4
018. Establish/revise project centers/project fund management records 4–5
4–2. Customer account management 4–10
019. Performing customer inventory 4–10
020. Performing customer replenishments 4–11

BUDGETING AND FUNDING are the most critical aspects of an operation. If you don't have the funds to buy supplies or if your customers do not have the funds to pay for supplies, patient care is compromised. As a logistician, you perform the function of the bookkeeper for the medical treatment facility to a certain degree. Defense Medical Logistics Standard Support (DMLSS) is the automated financial accounting system that supports your bookkeeping function. It is important that you understand the funding process and how it relates to DMLSS and your customers. Everything you do in this profession is built on service to your customers. The following lessons center on that theme.

4-1. Funding and account management

You must do everything possible to protect the stock fund's resources, and at the same time, you also have to look out for the best interest of each custodian. They have limited funds available to accomplish the mission, so they must budget and spend their money wisely. You help by obtaining the right item at the best price, and correctly running DMLSS transactions that affect the MTF's operations and maintenance O&M funds.

016. Air Force Working Capital Fund/Medical-Dental Division and Operations and Maintenance

The Air Force Working Capital Fund (AFWCF) consists of three groups: depot maintenance, supply management, and information services. In this lesson, we limit the discussion to the supply management activity group, which is divided into four divisions— one wholesale and three retail. The following paragraphs give you an overview of the supply management group and describe the elements and features of the wholesale and retail divisions. We will then look at the concepts that make the AFWCF/MDD ideal for medical materiel usage.

Wholesale division

The wholesale division consists of the materiel support division (MSD). This division manages depot level repairable and consumable items directly related to AF weapons systems, such as F–16, F–15, C–5, and B2 aircraft. This division also buys and repairs such items as engines, landing gear assemblies, and electronics (e.g., radios, radar).

Retail division

The retail division consists of the following three elements:

1. General support – is used for items procured by Air Force base supply activities from sources other than the Air Force depot system which are not included in any other division of the AFWCF.
2. Academy cadet store – includes clothing, athletic supplies, bedding, textbooks, scholastic supplies, and other items to be supplied to cadets.
3. Medical-dental division (MDD) – includes the following items procured for use in medical activities:
    - Medical and dental supplies and expense equipment.

- Nonmedical materiel not stocked by base supply.
- Service contracts for credit returns program.

The retail division does *not* include funding for the following:

- Other procurement (capital equipment costing $250,000 or more).
- Service contracts for other than credit returns program.

Retail divisions feature monthly phased inventory targets and inventory/capital control without finite controls on obligation authority. Dollars available for purchases are determined by the sales made. Of the three retail divisions, only one of these, the MDD, is of special interest to medical materiel personnel.

AFWCF concepts

All working capital funds have certain advantages in supply operations that make them valuable additions to the traditional system of AF supply. Two very important aspects of the AFWCFs are working capital fund and revolving fund concepts.

Working capital fund

AFWCF assets include cash, outstanding orders (due-ins), and inventory (on-hand stock) and are defined as working capital. Stock fund assets represent the financial resources needed to bring goods to the customer. Another part of this concept is the principle that we should be able to sell what we buy. As customers buy these goods, they provide funds for continuing the process.

Revolving fund

The revolving fund concept is the most distinctive feature of AFWCFs. When an AFWCF sells items to its customers, it receives money back in the form of credit reimbursements. These funds are then used to order replacement supplies. In this way, the AFWCF becomes a revolving fund because it continually sells the items that it holds in inventory and then reinvests the proceeds from these sales in additional inventories, which are sold at a future date.

The same process occurs in dealing with due-outs (back orders). Customer funds are obligated when customer due-outs are established. Obligated in this sense means the customer's available fund balance is decreased by the cost of the items placed on order. When the due-in supplies are received, receipts are processed and payment is generated by the Defense Accounting Office (DAO) (also known as finance). If for some reason the customer's current year due-outs are canceled, the customer's funds are de-obligated and returned for future orders. If a customer's previous fiscal year (PFY) due-outs are cancelled, the funds are de-obligated and returned to the PFY; these funds cannot be used for current year obligations.

Fund effectiveness

Like any other operation that deals with buyers and sellers, funds can be affected by many factors that can increase or decrease its effectiveness. Decreases in average monthly sales and increases in excess inventory can negatively affect the AFWCF.

Decreases

Decrease in sales is one of the most common causes of decreased effectiveness. When average monthly sales decrease and operating inventory levels remain the same, the amount of funds available to place new orders for needed supplies is reduced. As you learned earlier, you do not get money to reinvest in new inventory until current on-hand stocks (inventory) are sold (issued).

Excess

Excess is another way effectiveness is decreased. Increases in items categorized as excess represent an investment of funds that ties up capital that could be used to purchase additional items for resale. If excess is reported and no refund for your purchases is given (no credit is authorized), the AFWCF's effectiveness is further decreased. Ways to help prevent these types of problems are to screen orders

closely, talk with your customers, and be aware of changes within your medical facility. When you identify materiel as excess, report it promptly for disposition.

Losses

Losses are another factor that can have a major impact on operating inventory. Losses involve damaged goods, theft, destruction due to deterioration, and expiration. Damaged goods and warehouse refusals (stock shortages) can seriously affect the AFWCF. Damaged goods are those items that you cannot sell because, for whatever reason, they are unserviceable. Warehouse refusals are those items that we processed as received but cannot be found to fill customer orders/requirements (lost customer issue).

One method of dealing with these factors is to add surcharges to the cost of local purchase (LP) and Defense Logistics Agency items. Surcharge is an additional cost added to the purchase price of an item. It is similar to a handling fee or state tax. One method initiated by the Office of Secretary of Defense (OSD) for correcting unbalances between obligations and sales is the use of various surcharges.

We see surcharges daily in the various additional taxes we pay on purchases such as gas taxes, property taxes, and so forth. In addition to our LP surcharges and maintenance surcharges, other surcharges are being considered by OSD to recover losses to the stock fund. In the past we have used the high inflation rate as our excuse for obligations being greater than sales. This premise has proven to be false because every time we receive supplies, we revalue our inventory, and in turn, we always sell materiel at current acquisition costs. Our obligations continue to exceed sales. Application of surcharges helps reduce the impact on losses affecting the AFWCF. They are not the answer to the problem. The answer lies in improved inventory management.

Improved inventory management effectiveness

One of the most common local measures used to increase AFWCF effectiveness is to maintain a consistent sales level that ensures an adequate balance between obligations (due-outs) and net sales (issues). This simply means, keep receipt of new stocks consistent with customer sales. Sell what you buy, and only buy what you can sell. Avoid getting stuck with items that sit on the shelf forever.

You must strive to maintain adequate and realistic stock control levels. As you learned earlier, one way of doing this is to maintain close communication with customers, and closely monitor stock control levels. Reduction of stock on-hand and due-in reduces potential losses of outdated and excess materiel. Another part of this effort is to ensure that dated items are routinely monitored and receive maximum utilization prior to disposition. As a result, you should be able to minimize the number of destructions you perform.

Communicate with your customers; find out if they are going to continue using those items that seem to be slow issue items. If they can’t use the items or can’t use them soon, try redistributing them using the excess program. Keep in mind, shipping costs are not cheap. Plus, if you reorder later, more time, money, and manpower will be lost. Accomplishing this takes a lot of work on your part, but your hard work will make a big difference in the effectiveness of your account—the medical dental division (MDD).

The peacetime side of the MDD is self-sustaining, and there is no infusion of cash to keep it operating. All MDD expenses and losses must be recovered through sales to customers. Once again, the MDD is a revolving fund in that a dollar in sales provides a dollar in obligation authority for the purchase of materiel. A surcharge is assessed on local purchase (LP) sales to cover costs incurred by the fund, such as, transportation expenses, destructions, inventory losses, theft, free issues, and so forth. The MDD must not end the fiscal year (30 September) with obligations exceeding sales. Overall responsibility for management of the MDD is vested in the surgeon general and has been delegated to the AFMOA/SGAL.

Channels

The funds that keep the AFWCF turning through its cycle of sales are not directly appropriated by Congress. They come indirectly from Air Force Operations and Maintenance funds (AF O&M) (fund code 30) that are appropriated by Congress through numerous channels to the various MAJCOM/resource advisors (RA). MAJCOM/RAs then distribute the funds to the individual base financial managers or RAs, and finally to the accounts (service customer). If the service customer has the money and you have the goods, issues can be sold. This way, the O&M funds that Congress appropriates each year are more closely related to the cost of funding the AF in that year.

Sales income

Each time an issue or receipt is processed, DMLSS transactions are transmitted to DFAS. The medical materiel accounting technician at the servicing DFAS uses a project center (referred to as project fund management record (PFMR) in finance terms) to record reimbursable issues of element of resource 604 (medical supplies) and 624 (medical expense equipment) fund items to using activities. The servicing DFAS prepares documents citing the supporting fund appropriation for these issues and forwards them to the DFAS-DE (Denver), where the actual transfer of the funds is made. Payments to the suppliers of the MDD (DLA and local vendors) are made by the servicing DFAS, citing the central account of the MTF on the payment instrument. Through DFAS, all sales, receipts, payments, and cash balances, as shown on the AFWCF books, are reconciled with the amount credited to the AFWCF's account in the US Treasury.

Operations and maintenance funds

We have dealt quite extensively with the explanation of the MDD portion of the AFWCF, but there is one other type of funding you should be aware of; O&M funds. We have already made mention of this fund because it is the money that provides reimbursement to the AFWCF.

The most important budget in your facility is the O&M fund.These funds are used for the general and ordinary business of the government—it covers the cost of your facility. In other words, this is the fund we draw money from to conduct our daily business to operate and maintain AF resources. When custodians submit their requests for supplies to medical logistics, there is a financial transaction that takes place. The customers are spending their unit's O&M funds to purchase the items they requested. The O&M budget program operates on a fiscal year (FY) basis.

017. Establish/revise/delete expense/cost center records

In DMLSS, the cost center (a finance term) is referred to as the expense center. You use the expense center to manage funds at the DMLSS service customer level. An expense center can only be related to one project center in DMLSS. The expense center is only used with transactions that pertain to the O&M appropriation. It identifies the responsible and using organizations that are incurring the costs. Simply put, it tells who is spending the funds. Before we begin the lesson on establishing and revising expense center records, let's first discuss the terms "service customer" and "expense center" more in-depth.

Service customer

In DMLSS, the service customer (SVC/CUST) identifier (ID) manages the account's detail records. This identification number is not passed from DMLSS for any financial processing. The service customer ID is a unique identifier that can be any six-digit prefix the medical treatment facility assigns to a customer. All customer catalog records, transaction history, and issue consumption are tied to the service customer's ID. It is for this reason that once the service customer is set, there is no need to change it. Creating a new service customer for an existing service customer will result in lost historical records for the customer. Once a service customer is established, it must be tied to at least one expense center. To create a new SVC/CUST record, select **service/customer** from the system services (SS) navigate dropdown menu. DMLSS immediately prompts you to assign the associated MTF/unit and department. Upon associating to a MTF/unit and department, the **SERVICE/CUSTOMER DETAIL-NEW** window appears. Upon entering and saving

mandatory data in the basic and materiel tabs, the funding tab becomes available. Follow the guidance as established in Air Force Manual (AFMAN) 41–216, *Defense Medical Logistics Standard Support User's Manual,* to complete the mandatory fields. Save the record after all mandatory fields have been completed.

Expense center

The purpose of an expense center is to serve as the funding (checkbook) for the service customer. Expense centers capture funding data from associated SVC/CUST records, which is rolled up to the associated project center. The expense center hosts all elements of resource (EOR) and provides a breakdown of expenditures and fund balances for the associated service customers. The expense center identifies a section or work center within a unit. The expense center manager or work center supervisor regulates the day-to-day consumption of supplies, equipment, and services used in performing his or her unit mission. The expense center is the basic production unit within the chain of command. We use the expense center to collect costs that relate to a specific department.

Establishing expense centers

Because it is difficult to quickly clean up the organizational structure after mistakes are made, you should be very careful when creating a new service/customer or expense center. Prior to creating a new expense center, you must first create a new SVC/CUST record.To create a new expense center, select expense center from the SS navigate dropdown menu. Enter the new expense center ID, military service, fund code (defaults to 2X), and expense center name in the **MM EXPENSE CENTER** DETAIL NEW window. The expense center must be associated to a project center at this time. The expense center target may be loaded at this time, but it is not mandatory.

Revising expense centers

To keep financial records straight, you cannot change expense centers in DMLSS. However, you can revise certain fields. A change to any data field (except funding targets) causes changes throughout the funding data structure. Be sure to coordinate your actions with your MTFs resource advisor.

To revise an expense center you must be in the SYSTEM SERVICES application and use the following steps:

1. Open the **FUNDING-SEARCH** window by either selecting Funds from the SS navigate menu or click the funds icon located on the horizontal toolbar.
2. Retrieve an expense center fund record by entering the expense center ID or expense center name into the appropriate search field and click search.
3. In the **EXPENSE CENTER DETAIL** window, you may update expense center names, expense center target amounts, and target amounts for individual EORs.

Deleting expense centers

You can mark an expense center for deletion when it is no longer required or when you receive guidance from DFAS or your resource advisor by placing a check in the MARKED FOR DELETION field of the **EXPENSE CENTER DETAIL** window. If you mark a record for deletion, it will continue to appear in the system, but it will not support any further financial activity. The expense center is removed during EOFY processing as long as there are no remaining financial ties to it. If there are still financial obligations that were not cleared prior to EOFY, the expense center will remain visible in DMLSS but will continue rejecting financial activity.

018. Establish/revise project centers/project fund management records

In DMLSS, the PFMR (a finance term) is referred to as the "project center." The project center accumulates current fiscal year O&M financial data to include fund targets, reimbursable issues, creditable turn-ins, obligated due-outs, and LP surcharges. As reimbursable issues are processed, the system uses this financial data to determine if there are enough funds available in the project center to reimburse the stock fund. If funds are not available and the project center negative authorized field is

set to (N)o, the system will not allow the issue to process. If the project center negative authorized field is set to (Y)es, the system will allow the issue to process, regardless of fund availability. This state is not authorized for day-to-day operations.

The project center is used to manage funds and load fund targets at the DMLSS project center level. Project centers are related to a department level or service customer indirectly through a shared expense center. The project center is where you or your RA load fund targets and it represents the highest level in the fund relationship. In DMLSS, the **PROJECT CENTER** window is similar to the **EXPENSE CENTER** window; however, the project center collects all of the financial data from the associated expense centers. You can increase, decrease, and restratify funds between EORs from the **PROJECT CENTER** window.

Although the project center is assigned by accounting and finance office (A&F), it's often loaded into DMLSS by medical logistics. You should not make any fund changes to project centers without documentation and coordination with your resource management office (RMO).

Establishing project centers

Multiple project centers may be assigned to each organization. For example, separate project centers could be established for large expense center such as pharmacy and laboratory, while smaller expense centers, such as outpatient clinics, could be assigned to the same project center. You can create, delete, edit, and open project centers in the DMLSS PROJECT CENTER DETAIL window from the SYSTEM SERVICES application.

To establish a new project center, select PROJECT CENTER from the SS NAVIGATE dropdown menu. Then enter a project center ID and name in the MM PROJECT CENTER DETAIL-NEW window. A fund target may be loaded at this time, but it is not mandatory.

Revising project centers

You cannot change project centers; however, you can create new ones, re-associate them to the required expense center and revise certain fields. After creating a project center in DMLSS, the project center is added to the project center table and it is available when creating new expense centers or changing the project center of an existing expense center.

You revise project centers by accessing the PROJECT CENTER DETAIL window in the SYSTEM SERVICES application. DMLSS audits this window because of the impact these actions have on financial records. What this means is that DMLSS captures the changes you make to a project center by capturing the type of change along with the date, user ID, and other information. To revise a project center:

1. Search for the project center you want to revise. To search for a project center:
2. On the navigate menu, click project center.
3. In the PROJECT CENTER DETAIL – NEW window, click the FIND button on the right side of the window.
4. In the PROJECT CENTER SEARCH window, type your search criteria. You can see a list of all the project centers by leaving the search criteria blank and clicking the SEARCH button in the window.
5. Open the project center. To open the project center:
    - In the result list, select the project center you want to open
    - Click the DETAIL button. The PROJECT CENTER DETAIL window appears.
    - In the PROJECT CENTER DETAILwindow, click in any field with a white background that you want to edit.
    - Enter the new value.
    - Click SAVE.

You can undo any changes up to the last save by clicking the REVERT icon.

Deleting project centers

You can mark a project center for deletion when it is no longer required or when you receive guidance from DFAS or your resource advisor, by placing a check in the MARKED FOR DELETION field of the PROJECT CENTER DETAIL window. If you mark a project center for deletion, it will appear in the system but it will not support any further financial activity. The project center marked for deletion is removed from DMLSS during end-of-fiscal year (EOFY) processing as long as there are no financial ties to it. If there are still financial obligations that were not cleared prior to EOFY, the project center will remain visible in DMLSS but will continue rejecting financial activity.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

016. Air Force Working Capital Fund/Medical-Dental Division and Operations and Maintenance

1. What three groups make up the AFWCF?

2. What are the four divisions that make up the supply management group?

3. The retail division does *not* include funding for what actions?

4. Dollars available for retail division purchases are determined by what?

5. Cash, outstanding orders (due-ins), and inventory (on-hand stock) make up what type of assets?

6. What is the most distinctive feature of AFWCFs?

7. What happens to a customer’s funds if a current year due-out is cancelled?

8. What happens to a customer’s funds if a PFY due-out is cancelled?

9. What two actions can negatively affect the AFWCF’s effectiveness?

10. What method was initiated by the OSD for correcting unbalances between obligations and sales?

11. What are the most common local measures used to increase AFWCF effectiveness?

12. What agency has been delegated with the responsibility to manage the AFWCF/MDD?

13. What is the EOR code for medical supplies?

14. What is the EOR code for medical expense equipment?

15. Which fund type provides reimbursement to the AFWCF?

16. How are O&M funds used?

017. Establish/revise/delete expense/cost center records

1. Which DMLSS term replaces cost center?

2. Expense centers are used to manage funds at what level?

3. Expense centers are used to identify what?

4. Which identification number is not passed from DMLSS for any financial processing?

5. What type of data is tied to the SVC/ID?

6. What is the purpose of an expense center?

7. To create a new expense center, what must you first create?

8. What four items must be entered in the MM EXPENSE CENTER DETAIL-NEW window when creating a new expense center?

9. What must new expense centers be associated to when first creating one?

10. What fields may be updated using the EXPENSE CENTER DETAIL window?

11. How do you delete an expense center?

12. What happens when you mark an expense center for deletion?

13. When are expense centers removed from the system?

14. What happens to an expense center marked for deletion, during the EOFY, if there are still financial ties linked to it?

018. Establish/revise project centers/project fund management records

1. What types of financial data do project centers accumulate?

2. What happens if funds are not available and the project center negative authorized field is set to (N)o?

3. How are project centers linked to department levels or service customers?

4. Which window is used to increase, decrease, and restratify funds between EORs?

5. Which SS window is used to create, delete, edit, and open project centers?

6. How do you establish a new project center?

7. Which SS window is used to revise project centers?

8. How can you see a list of all the project centers while in the PROJECT CENTER SEARCH window?

9. How do you undo any accidental changes while in the PROJECT CENTER DETAILwindow?

10. When may you mark a project center for deletion?

11. How do you mark a project center for deletion?

12. When are the project centers that are marked for deletion removed from the system?

4–2. Customer account management

The primary objective of every medical materiel section is to provide medical supplies to all customers as efficiently as possible; however, before we can do that, either you or the customer must recognize a need for a specific item. These requirements are normally communicated to medical materiel through the use of the customer area inventory module (CAIM).

019. Performing customer inventory

The DMLSS CAIM application uses bar coding and scanner technology to create the type of customer inventory environment you frequent every time you go shopping. It allows you to go into the customers' area and inventory their shelves for replenishment both quickly and efficiently. When used with other DMLSS applications, you are able to build a powerful system capable of supplying our customers on a daily basis.

Understanding the uses of inventory logic within the CAIM application will have a huge affect on how effectively you manage supplies in the customer area. Too often we hear stories of how a customer continually replenishes the supply area day after day, yet the customer doesn't fully understand how the inventory logic is designed in DMLSS. Poor inventory management ultimately leads to potential excess, cramped storage areas, and depleting funds.

The CAIM inventory process begins by conducting an inventory of the customer's area. Each time you scan the customer's shelves for replenishment, you are, in fact, inventorying their stock. There are three distinct inventory *logic* types or methods you can use to inventory the customer's shelves. The following table gives you a brief description of each inventory method.

CAIM Inventory Process	
Inventory Method	**Description**
Order Quantity	The customer enters the desired quantity into the hand-held terminal (HHT).

	No calculations are performed; the system orders exactly what the customer has entered. In other words, this method is used to replenish the amounts entered per item.
Empty Shelf	The customer only scans shelves that are empty (or have not stock); no quantity is entered.The system assumes zero balance in the location and orders the full or entire level amount. Very few CAIM customers select the empty-shelf method.
Shelf Count	The customer counts the items on the shelf, enters the on-hand (O/H) quantity into the HHT; the system orders the difference between the O/H balance and the authorized level (minus any due-in and due-out quantities).

The following are simplified means in which to remember these methods:

- Order Quantity is how much you want.
- Empty Shelf is all or nothing.
- Shelf Count is what you have.

In the customer area, the inventory method used for each customer is identified on the header label. The chosen method is set in the SYSTEM SERVICES application using the MATERIEL tab from within the SERVICE/CUSTOMER DETAIL window. DMLSS imposes certain limitations on inventory logic type assignment. For example, you can only use one logic type at any one time. This means that you won't be able to dictate certain commodities within a customer's area as shelf count and others as empty shelf.

Your understanding of the uses of the various inventory logics within the CAIM application will determine how effectively you are able to manage supplies in the customer areas. After completing the customer inventory, you must then process the replenishment in DMLSS to generate the issues to fill the requests.

020. Performing customer replenishments

If you will recall, the supply chain starts with a customer's request. As a result, either the customer or a medical materiel technician must first identify which items and quantities are required. Once the actual needs are established, we can start the process of getting the items for the customer. CAIM will notify the customer of any errors preventing the order from being placed. Finally, CAIM will format and transmit the order to Logistics where you can either fill the request or order the requirement.

Replenishment types

There are three different types of replenishment options offered by the DMLSS Customer Replenishment module, that may used when inventorying a customer's area: Manual, Automatic, and Batch HHT. These *replenishment types* should not be confused with the *inventory methods* mentioned in the previous lesson. Each account and situation should be closely evaluated in order to determine which method is the best in terms of value added for the customer, while at the same time weighing the risks and disadvantages.

Manual replenishment

The manual replenishment type requires you or the customer to use an inventory list to inventory an entire location. You use the list to record on-hand quantities (shelf count), zero or near zero balance items (empty shelf), or desired quantities (order quantity). To print the inventory list, open the Manual Replenishment Inventory Entry screen for the account. Then click SEARCH without entering any criteria. A complete shopping guide will be retrieved. Order the list by whichever means is most appropriate, then select PRINT from the vertical toolbar; this same screen will be used to enter the inventory later. After you conduct the manual inventory, enter the quantities required in the QUANTITY field in the Manual Replenishment Inventory Entry screen. For items not being ordered, the QUANTITY field may either be left blank or you may enter zeroes. When finished updating the quantities, select the REPLENISH button on the vertical toolbar.

Automatic replenishment

DMLSS uses an item's daily demand rate (DDR) to calculate how long O/H stock should last a customer. It then calculates estimated on-hand (EOH) quantities using that information along with customer receipts. When selecting this option, DMLSS will automatically order the difference between each item's EOH quantity and its level.

This method is *not recommended* because automatic replenishment values are based on *estimated* quantities and further *assumes* that customer levels are valid. Since the option identifies all potential requirements, you and the customer could be surprised with a rather large order. You should be thoroughly familiar with your options and the customer's account before deciding to use this method.

Batch HHT

The most commonly used method to replenish the customer's area is using an HHT in the batch mode. HHT batch-mode means that you use the HHT to inventory one or more customer areas; once the inventory is completed, the file is transferred to DMLSS.

Performing the inventory

Accomplish the following steps in strict order to perform an inventory with the HHT:

1. On the HHT main menu, select REPLENISH INV.
2. At the HHT LOG-IN window, enter your user ID; then, instead of entering a password, select BATCH.
3. Scan the appropriate *header* barcode label (HBL).
4. Scan the *shelf* barcode label (SBL).
5. Enter the quantity. Be sure you remember the inventory method you are using!
6. Repeat the process for each item.

Processing the inventory in the HHT

After performing the inventory, the next step is processing the inventory you have in your HHT. Use the following steps to download all the inventory data to DMLSS:

1. After the replenishment inventory count is completed, select the SEND FILE (BATCH) button on the HHT and return it to the docking station.
2. Log into DMLSS using your CAC.

   NOTE: The user ID on HHT must match the user ID used in the login to DMLSS. In other words, the user that does the inventory must be the same person that downloads the file.
3. Open CAIM and select the customer ID that has been inventoried.

   NOTE: If you inventoried multiple customers, the batch transfer process will update all of these customers, regardless of which customer you log into first.
4. Click BATCH HHTs on the horizontal toolbar, and follow the instructions on the window.
5. On the vertical toolbar, click INVALID RECORDS to view the INVALID INVENTORY REPORT window.
6. Manually correct any listed errors.
7. Click the CLOSE button (CAIM prompts you to print the Invalid Records list).

Replenishment exceptions

If there were any exceptions (errors) during the replenishment process, DMLSS will prompt you with an exception notification and will print a Replenishment Inventory Exception Report. Items with exceptions are not ordered until the exceptions are resolved. All other items are transferred to BPS (build/process/submit) Orders. If you want to see a list of items that caused exceptions, access the REPLENISHMENT EXCEPTION PENDING ACTION window from the IM application,

UTILITIES menu INBOX. In this window you can delete an item from the list of exceptions, print a list, or process an order for an item with replenishment exception(s).

NOTE: Replenishment Exceptions will hold your entire order (not process the order) until all exceptions are resolved for that account.

If the customer has Auto Orders turned on in the SYSTEM SERVICES application, CAIM will automatically pass the orders through the BPS module. BPS is similar to the IM LOG ORDERS module. What you have done is generate orders for your customer, and the next step is ordering them from your source of supply SOS. As you learned early in this lesson, in most cases, your customer's SOS is Logistics. If the customer does not have Auto Orders turned on, BPS must be manually invoked. The main advantage to using the manual method to push orders through BPS is that you are able to view and modify the orders before they are submitted to the SOS.

Build/process/submit orders

Before the orders are sent to the LOG SOS to be filled, CAIM will hold them in the BPS module. It is the BPS module that checks for funds, deleted items, and so forth, prior to sending the order to LOG ISSUES. If the items ordered pass all the checks and the customer has sufficient funds to cover the order, then the order will automatically process. Typically all customers are set up to automatically engage the BPS module upon completion of their order. CAIM will not generate a due-out or due-in until BPS sends the entire order to LOG. In the BUILD ORDERS: ORDER SUMMARY window, you can build, modify, review, and execute orders. You can perform the following tasks from this window:

- Access log orders (IM only).
- Hold and order (CAIM only).
- Print order summary reports.
- Resolve exceptions.
- Submit orders.
- View order detail information.

Window displays

The upper half of the window contains a listing of SOS types, project codes, total line items in the order, total values, and exceptions. The lower portion of the window contains financial information to include funding, EOR, commitments, and available balances. You can view the order detail information by clicking on the DETAILS icon from the vertical toolbar and opening the ORDER DETAIL window. This window lists all line items associated with the customer's order for the affected SOS.

Resolve exceptions

The ORDER DETAIL window also identifies items with exceptions to the orders. Items with exceptions will have an X to the left of the detail record.You must resolve order exceptions before you can place the order. The EXCEPTION DETAIL window provides an explanation of why there is an exception on the order. You will be prompted to take one of the following actions to resolve an exception:

- Edit potential due-in or due-out quantities.
- Adjust fund targets.
- Adjust the maximum/minimum order amounts.
- The SOS may require use of a purchase card.
- MTF Restrictions—if an item has an MTF restriction, it will not let the customer process that specific item in CAIM.

When you resolve all exceptions for an order, you will not see the X in the EXCEPTION box for the selected order on the BUILD ORDER: ORDER SUMMARY window. Once you have resolved the exceptions to the order, you can then submit it. On the NAVIGATE menu, select ORDERS, then BUILD/PROCESS/SUBMIT ORDER to view the BUILD ORDERS – ORDER SUMMARY window. Once in this window, click on EXECUTE. Your order is now processed and passed to the LOG ISSUES module.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

019. Performing customer inventory

1. Which DMLSS application uses bar coding and scanner technology to create a customer inventory shopping environment?

2. Poor inventory management ultimately leads to what conditions?

3. How does the CAIM inventory process begin?

4. List all of the available inventory methods that you can use to inventory the customer's shelves.

5. Which inventory method is used to replenish the exact amounts that are entered in the HHT?

6. Which inventory method is used when the customer only scans shelves that have zero on-hand stock remaining?

7. Which inventory method involves the system ordering the difference between the O/H balance and the authorized level?

8. Where in the customer area is the inventory method identified?

9. Where is the chosen inventory method selected within DMLSS?

10. How many logic types can be used per customer area at a time?

020. Performing customer replenishments

1. List the replenishment options that are available in the CUSTOMER REPLENISHMENT module.

2. Which inventory method requires you or the customer to use an inventory list to inventory a location?

3. How do you print an inventory list when using the manual replenishment option?

4. While processing a manual replenishment, what should be entered into the QUANTITY field for items that are *not* being ordered?

5. Which replenishment option allows DMLSS to order the difference between EOH quantities and levels for a customer?

6. Why is the automatic replenishment method *not* recommended?

7. What is the most commonly used replenishment method?

8. How does HHT batch-mode work?

9. When conducting a customer inventory, which option is selected on the HHT main window?

10. When conducting a replenishment inventory, what should you enter on the HHT's LOG-IN window?

11. What do you do with the HHT after you have completed the replenishment inventory count?

12. What will DMLSS do if there were any exceptions during the replenishment process?

13. Which window may be used to delete an item from the list of exceptions, print a list, or process an order for an item with replenishment exceptions?

14. CAIM will automatically pass the orders through the BPS module if which customer option is turned on?

15. What is the main advantage to manually pushing orders through BPS?

16. Before orders are sent to the LOG SOS to be filled, CAIM holds them where?

17. Where can you build, modify, review, and execute BPS orders?

18. What window provides an explanation of why there is an exception on an order?

19. How are items with an exception identified in the ORDER DETAIL window?

20. Which ORDER DETAIL window provides an explanation of why there is an exception on the order?

21. What should you do once you have resolved the exceptions to an order?

22. Once your BPS order is processed, where is it passed?

Answers to Self Test Questions

016

1. Depot Maintenance, Supply Management, and Information Services.
2. Wholesale Division, the General Support Division, the Academy Cadet Store Division, and the Medical Dental Division.
3. Other procurement (capital equipment costing $250,000 or more) and service contracts for other than credit returns program.
4. The sales made.
5. AFWCF.

6. The revolving fund concept.
7. The customer's funds are de-obligated and returned for future orders.
8. The funds are de-obligated and returned to the PFY and cannot be used for current year obligations.
9. Decreases in average monthly sales and increases in excess inventory.
10. The use of various surcharges.
11. Maintaining a consistent sales level that ensures an adequate balance between obligations (due-outs) and net sales (issues).
12. AFMOA/SGAL.
13. 604.
14. 624.
15. O&M.
16. They are used for the general and ordinary business of the government.

017

1. Expense center.
2. Service customer.
3. The responsible and using organizations that are incurring the costs.
4. SVC/ID.
5. Customer catalog records, transaction history, and issue consumption.
6. To serve as the funding (checkbook) for the service customer.
7. A new SVC/CUST record.
8. Expense center ID, military service, fund code, and expense center name.
9. A project center.
10. Expense center names, expense center target amounts, and target amounts for individual EORs.
11. Place a check in the MARKED FOR DELETION field of the EXPENSE CENTER DETAIL window.
12. It will continue to appear in the system but it will not support any further financial activity.
13. During EOFY processing as long as there are no remaining financial ties to it.
14. The expense center will remain visible in DMLSS but will continue rejecting financial activity.

018

1. Fund targets, reimbursable issues, creditable turn-ins, obligated due-outs, and LP surcharges.
2. The system will not allow the issue to process.
3. Indirectly through a shared expense center.
4. PROJECT CENTER.
5. PROJECT CENTER DETAIL.
6. Select Project Center from the SS Navigate dropdown menu. Then enter a project center ID and name in the MM Project Center Detail-New window.
7. PROJECT CENTER DETAIL.
8. Leave the search criteria blank and click the SEARCH button.
9. Click the REVERT icon.
10. When it is no longer required or when you receive guidance from DFAS or your resource advisor.
11. Place a check in the MARKED FOR DELETION field of the PROJECT CENTER DETAIL window.
12. During EOFY processing.

019

1. CAIM.
2. Potential excess, cramped storage areas, and depleting funds.
3. By conducting an inventory of the customer's area.
4. Order quantity, empty shelf, shelf count.

5. Order quantity.
6. Empty shelf.
7. Shelf count.
8. On the header label.
9. In the SS application using the MATERIEL tab from within the SERVICE/CUSTOMER DETAIL window.
10. You can only use one.

020

1. Manual, Automatic, and Batch HHT.
2. Manual replenishment.
3. Open the MANUAL REPLENISHMENT INVENTORY ENTRY screen. Click search without entering any criteria. Order the list by whichever means is most appropriate. Select Print from the vertical toolbar.
4. Either leave it blank or enter zeroes.
5. Automatic replenishment.
6. Values are based on estimated quantities and further assumes that customer levels are valid.
7. HHT in the batch mode.
8. You use the HHT to inventory one or more customer areas; once the inventory is completed, the file is transferred to DMLSS.
9. REPLENISH INV.
10. Your user ID and instead of entering a password select Batch.
11. Select the SEND FILE (BATCH) button on the HHT and return it to the docking station.
12. DMLSS will prompt you with an exception notification and will print a Replenishment Inventory Exception Report.
13. REPLENISHMENT EXCEPTION PENDING ACTION.
14. Auto Orders.
15. You are able to view and modify the orders before they are submitted to the SOS.
16. In the BPS module
17. In the BUILD ORDERS: ORDER SUMMARY window.
18. ORDER DETAIL.
19. With an X to the left of the detail record.
20. EXCEPTION DETAIL.
21. Submit it.
22. The LOG ISSUES module.

Complete the UREs before proceeding to the next unit.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter.

32. (016) Medical Dental Division (MDD) funds may *not* be used to procure which type of items?
    a. Dental supplies.
    b. Medical supplies.
    c. Capital equipment.
    d. Expense equipment.

33. (016) Which factor can negatively affect the effectiveness of the Air Force Working Capital Fund (AFWCF)?
    a. Decrease in excess.
    b. Decrease in monthly sales.
    c. Increase in average due-ins.
    d. Increase in on-hand stock.

34. (016) What is the most important budget in each medical facility?
    a. Department of Health Affairs (DHA).
    b. Medical Dental Division (MDD).
    c. Operations and maintenance (O&M).
    d. Other procurement (OP).

35. (017) In the Defense Medical Logistics Standard Support (DMLSS) system, when a new service customer is established, it must be tied to at least one
    a. cost center.
    b. expense center.
    c. fund cite.
    d. project center.

36. (018) Project centers may be revised by using which SYSTEM SERVICES (SS) Project Center window?
    a. DETAIL.
    b. MANAGE.
    c. SEARCH.
    d. UPDATE.

37. (018) When updating project centers in Defense Medical Logistics Standard Support (DMLSS), you can undo any changes up to the last save by clicking on which icon?
    a. Abort.
    b. Cancel.
    c. Revert.
    d. Undo.

38. (019) Which customer inventory mode is essentially an *all or nothing* system?
    a. Batch mode.
    b. Empty shelf.
    c. Order quantity.
    d. Shelf count.

39. (020) What is the *most* commonly used method to replenish customer areas?
    a. Batch.
    b. Manual.
    c. Empty shelf.
    d. Shelf count.

40. (020) How are detail records with exceptions identified in the ORDER DETAIL window?
    a. Lined out.
    b. Highlighted in red.
    c. Marked with an X.
    d. Listed at bottom of page.

Please read the unit menu for unit 5 and continue ➔

Unit 5. Inventory Management

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INVENTORY MANAGEMENT, also referred to as stock control, has various responsibilities that all revolve around the maintenance of the stock record account. As the name suggests, the primary purpose of this section is to better manage the account's inventory. You major responsibilities while assigned to this section include optimizing storage and distribution, providing accurate inventory control, managing excess and credit returns, and maintaining accurate accountability for on-hand stock inventories.

Imagine for a moment how your stock record account would function if the responsibilities listed in the opening paragraph were not accomplished. Have you ever been in a store where you could tell the ownership had no inventory policy? Furthermore, they had no idea of what they had on the shelves, in the storeroom, or whether stock was missing. Topping it all off is a business with poor practices such as lack of good record keeping, methods for researching, and inventory control. This unit provides the information you need to prevent this nightmare from occurring at your account.

5–1. Storage and Distribution

The storage and distribution section is the first area where stock is physically handled within the supply chain cycle. Actually, storage and distribution personnel are the *only* medical materiel personnel that should be routinely handling medical supplies. Storage and distribution is where the physical job gets done, where the items are received, inspected, stocked, picked, pulled, and delivered. We will start this section by first reviewing the procedures for processing receipts. We will then look at how to resolve issue discrepancies.

021. Receiving procedures

The DMLSS IM Receipts module enables users to process receipts. Receipts are processed either manually or by using the radio frequency (RF) hand-held terminal (HHT). Pertinent item information is required prior to processing receipts in DMLSS. Obtain this information from the item, receiving document, materiel packing list, and/or shipping document. Using this data, receiving personnel can effectively process complete, partial, discrepant, and/or receipt not due-in transactions.

To access the RECEIPTS module, select NAVIGATE and then RECEIPTS. The RECEIPTS window is separated into two tabs: SEARCH and PROCESS RECEIPTS.

Receipts search tab

Use this tab to search for active or inactive due-ins, to obtain delivery lists, or to process receipts. *Active due-ins* are those in which the receipt has not processed and *inactive due-ins* are those in which the receipt has already processed. Search for all due-ins by clicking SEARCH while all data fields are blank. To narrow the search, enter at least three characters into any of the search fields. Adjust the record limit between 1 and 500 to further minimize or maximize the search results.

Upon completing the search, the system displays the search results in the PROCESS RECEIPT SEARCH RESULTS tab. The PROCESS RECEIPT SEARCH RESULTS tab is used to view due-in details, process due-in status, adjust due-in quantities, process complete and partial receipts, and process cancellations.

Process receipts tab

The PROCESS RECEIPT SEARCH RESULTS tab displays all due-ins matching the pre-determined search criteria. As a rule, editable fields appear with a white background. The RECEIPT QUANTITY, CANCEL QUANTITY, STATUS PRICE, LOCAL CONTRACT, and SUBSTITUTE fields can be modified prior to processing a receipt.

Pipeline time

A pipeline time (PLT) checkbox is added to each record when the delivery time varies by plus or minus 10 days. Check this box only if you want to record the data as an actual PLT. Remember, PLTs are used to calculate the reorder points (ROP) for stocked items. They are also a valid indicator of actual delivery time. The system will not record the PLT if this box is unchecked.

Quantity

Receipt actual quantity received. A discrepant receipt or due-in adjustment may be necessary if different than current due-in quantity.

Price

Enter the billing price in this field.

Process box

The system automatically checks this box unless the due-in is from a prime vendor type source of supply, the vendor has not provided an advanced shipping notification (EDI 856), or one of the following receipt exceptions exists.

Hazardous materials exception

Receipts for hazardous material must be processed manually. Place a checkmark in the PROCESS box to continue. A message indicating that the item is hazardous will be displayed. Select OK to continue.

Local contract number exception

A contract number must be loaded prior to processing the receipt. Click DETAIL from the vertical toolbar and enter the local contract number from the source document. Close the DETAILS window to update the contract information in the due-in detail. The receipt may now be processed.

Quality assurance record exception

The message “An existing QA message exists for this Item ID” appears if a quality assurance (QA) Record exists for the item. Receipts cannot be processed using RF/HHT when linked to a QA Message. These receipts must be processed using the DMLSS RECEIPTS module. The receipt cannot be processed until the QA message is reviewed. Check the QA box and click the JUMP TO icon to view the message. If the receipted material meets the QA recall criteria, do not process the receipt. Contact the vendor and request replacement materiel. If necessary, process a discrepant receipt and make sure the material is not issued to the customer(s). If the material does not meet the QA criteria, process the receipt.

Annotating documents

The DD Form 1155, Order for Supplies or Services, printed from DMLSS, will be used as the primary receiving document. When the quantity received equals the quantity ordered, circle the quantity on the DD 1155. If a line item is partially shipped, annotate the actual quantity shipped/received next to the quantity ordered on the DD 1155 and circle it. If the quantity received does not match the quantity shipped, first verify that the item was not shipped in another container. If the missing quantity is not located, annotate the discrepancy and notify your acquisitions department. Second, check the inspected, received, and accepted boxes on the DD 1155. Annotate discrepancies when applicable. Finally, whenever you are processing receipt actions for an order you should sign, date, and print your name on the DD 1155.

Processing receipts

Select the RECEIPTS icon on the horizontal toolbar to open the IM RECEIPT SEARCH window. Under most situations, you will enter the document number; however, if the document number is unavailable, you may run an inquiry using the other search fields. Use the SEARCH icon on the vertical toolbar to begin your search. If the DD Form 1155, is not already printed, you may select the DD 1155 icon on the vertical toolbar to print the current order.

After verifying that the received items are correct, update the RECEIPT QUANTITY, CANCEL QUANTITY, STATUS PRICE, LOCAL CONTRACT, and SUBSTITUTE fields as applicable. Check the PLT box if you wish to record the pipeline-time for the item. Check the PROCESS box if unchecked, and use the process receipts (PROC RCPTS) icon to run the receipt. The RECEIPT AND ACCEPTANCE pop-up window will appear, accept the acknowledgement if you are ready to process the receipt. Print the DD Form 250, Material Inspection and Receiving Report, if required at your location. If there are pending orders for the item, the BACKORDER RELEASE window will appear. Print the backorder list, receipt label, and barcode label as appropriate. Finally, a PRINT DELIVERY list window will appear; the delivery list should be printed as required.

022. Resolving issue discrepancies

There will be times when you will have issue discrepancies or warehouse refusals. The term warehouse refusal identifies items that were processed for issue, but storage and distribution section personnel were unable to locate them when pulling issues using the picklist. When you cannot locate an item in its assigned storage area and location, as indicated on the picklist, you should initially check the immediate area around where the item should have been located. The item may not have been shelved in proper stock number sequence and could be in the general area, just out of place. If the item is not found, then you should indicate this on your picklist by annotating the actual quantity picked. If nothing was pulled, indicate this by annotating a zero in the actual qty column on the picklist; if a partial was pulled then indicate the actual number pulled. After confirming the picklist, an inventory exception will be generated, and the item will be locked for inventory. Individuals with the proper privileges will receive an alert in the form of an IM “issue exception” notification in their DMLSS inbox.

The following steps should be followed *first* in an attempt to locate the missing item:

1. Look for the item in its normal shelf location and the immediate surrounding around.
2. Search other storage locations to determine if the items were misplaced (loose versus bulk, freezer versus refrigerator, or flammable storage).
3. Check the receiving area. The item may have been received but has not been placed on the shelf yet.
4. If you still cannot find the item, check the receipt document for any clues to the location of the item. Check with the person who received the item. Query the transaction history file to determine if a transaction processed in error. Also, review documents from the last physical inventory to determine if any overages and/or shortages might have caused the problem.

5. Contact the using activity to determine if they already received the item, prior to the issue cycle completing. The item may have been pulled without being issued properly.

After the item search has been completed, open the IM issue exception pending action in the IM inbox. Make sure the scope is set to IM, then select ENTER COUNTS for: INVENTORIES FROM ISSUE EXCEPTIONS. Finally, select the correct inventory number and then click SEARCH. The PHYSICAL INVENTORY DETAIL screen will open. This is the same screen used during annual operating inventories. Enter the actual quantity located. This includes any item that was *given* to the customer without being issued.

- If the same count is entered as the current DMLSS O/H balance, the inventory will close-out with no additional changes taking place.
- If the count is less than the O/H balance, DMLSS will generate an inventory adjustment loss (IAL).
- If the count is greater than the O/H balance, DMLSS will generate an inventory adjustment gain (IAG).

NOTE: If the second count does not match the first count, from the original pick process, DMLSS will prompt you to conduct a third count. If none of the counts match, it is recommended that another count be conducted off-line until at least two counts match.

If the inventory results in an increase or decrease to the DMLSS O/H balance or a third count is required, the inventory manager will need to process the PHYSICAL INVENTORY—RESEARCH DISCREPANCIES screen and enter a final count and an adjustment reason. The inventory will then need to be finalized using the finalize inventory action. Gains or losses will generate an inventory adjustment voucher (IAV) that will need to be signed by the MTF commander or administrator.

Generating inventory losses is a major event and should not be taken lightly by anyone. It is up to you to work with your supervisor to develop a plan to minimize the occurrence of inventory exceptions. Some accounts conduct line by line inventories as they pick stock. Other accounts may prefer to conduct partial inventories throughout the year, while others conduct one full inventory per year.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

021. Receiving procedures

1. The RECEIPTS window is separated into which two tabs?

2. What is the RECEIPTS SEARCH tab used for?

3. How do you search for all due-ins?

4. What is the PROCESS RECEIPT SEARCH RESULTS tab used for?

5. Which fields in the PROCESS RECEIPTS tab can be modified prior to processing a receipt?

6. When is a PLT checkbox added to a record in the PROCESS RECEIPTS tab?

7. When should you check-off the PROCESS RECEIPTS tab PLT checkbox?

8. List the four reasons why DMLSS would not automatically check-off the process box, located within the PROCESS RECEIPTS tab.

9. What should you do when receiving materiel that meets existing QA recall criteria?

10. What should be done first if the quantity received does not match the quantity shipped?

11. What should be done if the missing quantity is not located?

12. When processing receipts, what should you do after you have verified that the received items are correct?

022. Resolving discrepancies

1. What should you do initially when you cannot locate an item in its assigned storage area and location?

2. If the item is not found after an initial search, what should you indicate on the picklist?

3. Which DMLSS inbox notification is used to alert personnel that an item has been locked for inventory?

4. Why should you contact the using activity if you cannot locate an item?

5. When closing out the inventory, what happens if the count is less than the O/H balance?

6. Inventory gains or losses will generate what document that needs to be signed by the MTF commander?

5–2. Inventory control

A sound definition of inventory management is "the supply operation required to provide materiel economically when and where it is needed, and in the necessary quantity." One aspect of inventory management is stratifying inventory into its appropriate inventory type (category) and continually managing the movement between inventory categories. The other portion of inventory management is determining the ideal amount of a product to maintain while balancing the associated workload, costs, and risks. This section covers these concepts and teaches you how to effectively stratify your inventory and how to determine ideal stock control levels.

023. Interpreting stratifications

The term "stratify" literally means to "arrange in layers;" hence, to "arrange in suitable classes or categories." In this lesson, you'll review the different inventory stratification types, states, and procedures that are used to determine how items are stratified.

Inventory stratification types

In order to better manage your account, you will sometimes need transfer or stratify materiel into various inventory types. This permits better control and visibility of the account under the MDD inventory/capital control concept. The following three categories are used in the inventory stratification (strat) of medical materiel.

Stratification Types	
Code	**Description**
OPR	Operating
SPJ	Special Projects
WRM	War Reserve Materiel

Operating inventory

Operating (OPR) inventory designates materiel in stock, maintained for day-to-day consumption and is readily available to be issued when and where it is needed. The MLFC establishes an inventory control policy to minimize the costs of having too much or too little operating inventory on hand. The operating inventory control policy involves balancing the carrying costs of storage space, capital, and deterioration of stock against the costs of being out of stock when the item is needed, losing quantity discounts for local purchase items, and administrative costs of processing additional orders.

Special projects inventory

Special projects (SPJ) inventory is the inventory stratification type used to identify, separate, and control medical materiel required for a specific or unique purpose. This material is not used to satisfy materiel requirements to support war plans or day-to-day operations. MAJCOMs will direct the items to be maintained in this inventory stratification type.

War reserve materiel

War reserve materiel (WRM) is materiel required to support the capability of a medical unit to function effectively in a contingency situation.

Stratification states

In addition to the three stratification or strat *types* previously mentioned, there are five stratification *states* used in DMLSS to further categorize items. These strat states provide the ability to further identify and segregate assets by allowing stratification *state* (condition) transfers while an item is still

assigned to a particular strat *type*. When you determine that the condition of a specific item has changed (for example Food and Drug Administration (FDA) recalls/alert notices quality assurance issues, safety, etc.), you must take actions to record the change. The following table shows the stratification state codes:

Stratification States	
Code	**Description**
FDA	FDA test
REP	Reparable
SER	Serviceable
SUS	Suspended
UNS	Unserviceable

NOTE: Every item under the control of the AFWCF/MDD, down to the unit of issue, will always be assigned to a single strat type and strat state, until it is either issued or removed from record.

Food and drug administration testing

Food and Drug Administration (FDA) testing is used for WRM/contingency pharmaceuticals that are a part of the shelf life extension program (SLEP), have exceeded their current shelf life, and are temporarily suspended pending the results of extension testing.

Reparable

The strat state "reparable" is reserved for non-consumable items that require biomedical intervention before the item may be used.

Serviceable

The most common stratification state and the only state from which items may be issued to using activities is "serviceable." Items assigned to this state are good to go.

Suspended

Items assigned to the "suspended" state meet recall requirements and have been removed from service. These items will normally only be removed from this state upon receipt of disposition action indicating destruction or return to vendor.

Unserviceable

Items assigned to this strat state do not meet all of the requirements to be considered serviceable. However, after passing further inspection, these items may be returned to a serviceable state if appropriate.

Stratification state changes may be processed between operating, special projects, and WRM stratification types. In addition to processing the change in DMLSS, you must promptly segregate the physical items into unserviceable, suspended, reparable, or FDA testing states, from the other serviceable items. Inventory and verify these items at least quarterly. As with processing changes to stratification types, you use the INTERNAL TRANSFER module in IM to transfer assets between stratification states.

Internal transfers

Internal transfers allow users to restratify assets and transfer an item from one stratification type or state to another. Examples include OPR/SER to OPR/SUS, or OPR/SER to WRM/SER. DMLSS generates both an ITG and ITL when an internal transfer is processed. Upon transferring an item, DMLSS will create both an inventory transfer gain (ITG) to the new stratification state and inventory transfer loss (ITL) to the old stratification state.

To process an internal transfer select INTERNAL TRANSFER from the Navigate menu to access the INTERNAL TRANSFER window. Enter an item ID or select one from the dropdown list. Depending

on the item ID entered, various fields will be populated with default catalog data associated to the item ID.

In the “From” section, use the dropdown menus to select the stratification state the item is being transferred from. In the “To**”** section, use the dropdown menus to select the stratification state the item is being transferred to. If there is no location ID associated with the item being transferred, click the JUMP TO button and add a location for the item.

Enter the transfer quantity and click SAVE. The transfer quantity must be less than or equal to the available quantity. After processing, users have the option to print a delivery list. The delivery list can be used to relocate the assets from the old storage location to the new location.

024. Processing gains and losses

In any operation or business there is a certain amount of operational loss. In this lesson we discuss a few of the procedures used in recording and accounting for losses to inventory, as well as the occasional gain (other than normal receipts).

Gains

Although the primary reason or cause for increasing/gaining inventory is processing receipts for materiel, several other reasons exist. Some inventory gains are due to uncovering items that were lost and dropped from inventory, while other gains occur as a result of property being shipped from one account to another. Occasionally, materiel is found on base, or property is donated to the medical facility. Let’s explore some of the reasons for gains.

Inventory Gains		
Transaction Code	**Transaction Reason Code**	**Process**
IAG	Inventory Adjustment Gain (IAG)	The balance of an item in a specific stratification increased due to a spot or cyclic inventory.
SHG	Shipment gain: In shipment Gain (SFG)	An item was transferred between accounts.
MSG	Individual/Component Gain (IIG)	Miscellaneous gain.
MSG	End/Kit Item Gain (EIG)	Miscellaneous gain.
TIG	Turn-in Adjustment gain: Found on Installation (FBG)	A supply or equipment item was found and turned in to LOG.
SHG	Shipment gain: Donated Item Gain (DPG)	An item was donated to the command.
SHG	Shipment gain: Receipt from DLA Disposition Services (FZG)	An item was received from DLA Disposition Services.
MSG	Capitalization of stock fund (SF) asset (MDG).	Miscellaneous gain.

Inventory adjustment gain

The IAG is processed to increase the balance records when the quantity of actual stock on hand is more than the quantity reflected on accountable records. Prior to using this reason for the gain, be sure you thoroughly research the item or items.

In-shipment gain

The in-shipment gain (SFG) is used to record individual gains from other medical materiel accounts. Place the computer-assigned document number on the receipt document before placing it in the permanent document file.

Found on installation

The found on installation (FBG) reason is used to process medical materiel (supply or equipment) found on base, outside of the MTF, and turned in to LOG./FBG materiel includes medical materiel that was lost, abandoned, or is not in the custody of an individual or organization. Additionally, medical consumable supplies obtained from individual patients, Office of Special Investigations seizures, or other sources where management controls are unknown or suspect will be considered FBG materiel. FBG materiel reported to medical logistics is considered *unserviceable* until proven otherwise by formal evaluation. The FBG normally is processed into unserviceable, suspended, or repairable inventory states. Prepare a DD Form 1348–1, DOD Single Line Item Release/Receipt Document or DD Form 1348-1A, Issue Release/Receipt Document, as a source document. Annotate the computer-assigned document number on the DD Form 1348–1 prior to placing it in the permanent file.

Receipt from defense reutilization and aarketing service

Often, hospital personnel will screen DLA Disposition Services stock looking for a needed item. Any Air Force member or employee may screen property at the DLA Disposition Services; however, the property may be withdrawn only when authorized by the MLFC or a designated representative. The receipt from DLA Disposition Services (FZG) reason is used to gain materiel drawn from DLA Disposition Services. Prepare a DD Form 1348–1A as a source document. Annotate the computer-assigned document number on the DD Form 1348–1A before placing the form in a permanent file.

If you are withdrawing an item that was originally sent to DLA Disposition Services by the MTF (our own excess that was turned-in) the materiel must be sold to the customer. In other words, you can't send your own stock to DLA Disposition Services, withdraw it later, and then give it away.

Losses

There will be times when you will have losses to inventory. The reasons for losses discussed here are losses caused by normal supply activities. Any losses caused by other than normal supply activities such as fire and theft must be documented by reports of survey or statements of charges. Reasons for losses are listed below.

Inventory Losses		
Transaction Code	**Transaction Reason Code**	**Process**
SHL	Shipment loss: Out shipment to DLA Disposition Services (TZL)	An item was turned in to DLA Disposition Services.
IAL	Inventory Adjustment Loss (IAL)	The balance of an item in a specific stratification decreased due to a spot or cyclic inventory.
SHL	Shipment Loss: Out shipment loss (SFL)	An item was transferred between MDD accounts.
TIL	Turn-in Adjustment Loss: Return to Source of Supply (RTL)	A supply or equipment item has been offered as excess and returned to the source of supply.
MSL	Individual/Component Loss (IIL)	Miscellaneous loss.
MSL	End/Kit Item Loss (EIL)	Miscellaneous loss.
TIL	Turn-in Adjustment Loss: Return Item for Trade-in (TRL)	A supply or equipment item was returned to the source of supply for trade-in.
IAL	Natural Disaster Inventory Loss (MIL)	The balance of an item in a specific stratification was decreased due to the item being destroyed by a natural disaster.
MSL	Decapitalization of stock fund (SF) asset (MDL).	Miscellaneous gain.

Out shipment to DLA disposition services

Out shipments to DLA Disposition Services (TZL) are used to record losses when medical logistics forwards materiel to the DLA Disposition Services as directed by higher authority or in accordance with written guidance. Normally, medical materiel that cannot be redistributed and does not meet the criteria for destruction will be turned in to DLA Disposition Services. Enter the computer-assigned document number on the shipping document prior to processing the shipment to the gaining activity. File one copy of the DD Form 1348–1A, signed by the DLA Disposition Services representative, in the permanent document file to support the loss to inventory.

Out shipment loss

An out shipment loss (SFL) is used to record individual out shipments to another medical materiel account. DMLSS assigns a document number to each SFL processed. Place this document number on a shipping document. Ensure a copy of the shipping document is attached to each item being shipped. In most cases, these out shipments will consist of materiel that you have reported as excess.

Return to source of supply

The return to source of supply (RTL) transaction reason is used to record the out shipment loss of materiel returned as directed by DLA, General Services Administration (GSA), Air Force Medical Support Agency (AFMSA), or other authority for materiel returned to commercial vendors. Enter the computer-assigned document number on the shipping document prior to processing the shipment to the gaining activity

Return item for trade-in

The return item for trade-in (TRL) action is used to record the out shipment loss when an asset is shipped to a commercial source as a trade-in towards the purchase of another item. Enter the computer-assigned document number on the shipping document prior to processing the shipment to the gaining activity.

025. Establishing stock control methods

Medical logistics inventory control policies require that we maintain sufficient stocks on hand to provide required materiel when needed. The primary keys to effective inventory management include factors such as local needs, economical investment in inventory, customer requirements, and medical mission requirements. We must consider these factors when we establish and revise stock control levels. This lesson covers some of the important principles of inventory control that are used to establish stock control levels.

Inventory control concepts

There are two main methods of inventory control:

1. Stockless/just-in-time (JIT).
2. Economic order quantity (EOQ) method.

Stockless/just-in-time

The primary objectives of the stockless/JIT inventory method are to eliminate warehouse inventory and the associated overhead costs of operating a warehouse. Items managed as “stockless” are delivered directly to the requesting activities after being received. Electing to use the stockless/JIT inventory method requires extremely reliable suppliers and short delivery timeframes (24 hours to five days maximum). The stockless/JIT inventory method allows the MLFC to focus manpower on providing logistics services directly in patient care areas by eliminating much of the need to manage warehouse stocks. Additional personnel may need to be assigned to the acquisitions department to cover the increase in daily ordering.

There are risks to this concept since no safety stocks are available for demand fluctuations, bad weather, and so forth. Prior to implementing any form of a stockless/JIT inventory policy, the MLFC should consider the following:

- Reliability of suppliers for different commodity lines.
- Ability of logistics staff to support ordering and receiving more frequently.
- Customer comfort level when no safety stock is available.
- Availability of adequate distribution systems and material handling equipment.
- Availability of backup supply sources.

Using this method, inventory control is applied to the maintenance of O&M funded stock that is owned and stored at the using activity's level. There is no stock level maintained and no materiel stored in the warehouse. Instead, all stock is issued to, delivered to, and stored by the using activity. The stock is inventoried based upon predetermined schedules, and requirements are identified depending on the replenishment method used.

Economic order quantity

The EOQ inventory control method uses a minimum-maximum system to control operating inventory. Unlike the stockless/JIT method, the EOQ method maintains warehouse inventories for regularly used items. The *planned minimum* stock position under EOQ is the safety level, and the *planned maximum* is the stock control level. The safety level is the least amount of supplies you should have on hand (planned minimum) to support projected needs. This reserve can be used if receipts are delayed or if there are no projected increases in issues. The planned maximum of an item (referred to as the stock control level) should consist of the on-hand and on-order minus due-outs at any one time for operating purposes. The goal is to maintain stock between these two positions. While the on-hand quantity should not exceed the stock control level, requisitioning should occur in time to ensure receipt before stock on hand reaches the safety level. The EOQ method is more suitable for items whose supplier has a long (greater than one week) delivery timeframe. Using this method, inventory control is applied to assets owned by the MDD of the AFWCF.

Near-stockless

The MLFC at each account must determine which inventory control method best meets their accounts needs. However, for most locations, a combination of the two has shown to be ideal. Rarely should any account be completely stockless, nor should they stock every single item. Instead, the last decade has shown us that a balance between the two extremes (JIT and EOQ) is ideal. The term "Near-stockless" is used to describe an account that primarily uses the stockless/JIT concept, but backs it up with EOQ for a limited amount of long-pipeline items. Under this concept, every effort should be made to convert EOQ items to JIT by working with your prime vendor in an attempt to find a suitable substitute which they carry. Alternatively, you may request that the PV carry the item for you provided you have enough projected usage.

Factors used to compute a stock control level

DMLSS computes a stock level based on the following factors:

1. History Begin Date (HBD) – Occurs when the first recurring issue of an item is recorded.
2. Daily Demand Rate (DDR) – The amount of stock consumed daily.
3. Requirement Code – Based on the projected dollar value of annual issues.
4. Safety Level Quantity – Equals the minimum number of days of stock to keep on-hand.
5. Economic Order Quantity (EOQ) – The number of days of stock deemed economically prudent to requisition.
6. Average Pipeline Time (PLT) – The number of calendar days between the date a requisition is made and the date the materiel is received by medical materiel personnel.

DMLSS has three options available for the level computation method:

1. Standard (STD) Leveling Algorithm.
2. Days of stock.
3. Wilson EOQ.

These level control options are located in the SS application, in the COMPUTATION tab of the MM SERVICE DETAIL window. Air Force policy dictates this option always be set to "Days of Stock." The MLFC or system administrator is responsible for ensuring that medical logistic accounts operate in the days of stock level computation method. Generally, only the MLFC and materiel manager can edit information used for level computations so *do not* edit this information without their approval or guidance. In DMLSS you can establish and/or edit the level computation environment factors from the following modules:

1. SS TMU ENVIRONMENTAL TABLE.
2. SS MM SERVICE DETAIL COMPUTATION tab.
3. Inventory management (IM) SOS ENVIRONMENT tab.
4. IM MTF CATALOG LOG CAT tab.

Since only the MLFC or materiel manager accomplishes adding and/or editing the level computation methods in DMLSS, we will only briefly cover each module.

SS table maintenance utility environmental table

TMU is a listing of all the values and codes used in DMLSS. To access this table, you need to go into the SS application and click on the TMU button on the horizontal toolbar or select TABLE MAINTENANCE UTILITY from the NAVIGATE menu.

SS medical management service detail window

Details the factors and method used to determine stock levels. Air Force policy dictates that Medical Logistics accounts operate in the Days of Stock level computation method.

IM source of supply environment tab

In the SOS ENVIRONMENT tab, you can add and/or edit the factors (environment information) that are used to compute levels for items from a specific SOS. Remember; do not adjust these factors without the approval of the MLFC or materiel manager.

IM military training flight catalog log cat tab

By using the IM MTF CATALOG LOG CAT tab, you can change the computation level type for an individual item. If you will recall, in DMLSS, you can choose between three types of levels:

1. Static—the user maintains the level. After 90 days of consumption, the system will provide recommended level changes.
2. Core—computer controlled.
3. Stockless—customer will use the item, but not stock it.

IM recommended level changes

DMLSS conducts automatic leveling during the end-of-month (EOM) processing and makes recommendations for level changes based on consumption history. The recommendations are posted as an "IM Recommended Level Changes" pending action message in the INBOX. DMLSS groups and displays recommended level changes into the following three categories and sequence:

1. Critical core items with a recommended level of zero.
2. Nonstocked items with a recommended level.
3. Static items with a recommended level change.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

023. Interpreting stratifications

1. List all of the stratification type codes with corresponding descriptions.

2. Which strat type designates materiel in stock, maintained for day-to-day consumption?

3. What concepts make up the operating inventory control policies?

4. Which strat type is used to identify, separate, and control medical materiel required for a specific or unique purpose?

5. Which strat type is used to identify materiel required to support the capability of a medical unit to function effectively in a contingency situation?

6. List all of the stratification state codes.

7. Which strat state is used in conjunction with SLEP?

8. How frequently should items be inventoried when not assigned to the serviceable strat state?

9. What action is used to transfer an item from one stratification to another?

10. What two transactions are generating when processing a transfer?

11. How do you access the INTERNAL TRANSFER window?

12. Transfer quantities must be less than or equal to what?

024. Processing gains and losses

1. Which gain transaction code is used to increase the balance record of an item when the quantity of actual stock on hand is more than the quantity reflected on accountable records?

2. Why would the in-shipment gain (SFG) transaction reason be used?

3. Why would the found on installation (FBG) reason be used?

4. FBG materiel reported to Medical Logistics is placed into which strat state pending evaluation?

5. Which transaction reason code is used to gain materiel drawn from DLA Disposition Services?

6. Which transaction reason is used to record losses when medical logistics forwards materiel to the DLA Disposition Services?

7. Why would the SFL transaction reason be used?

8. Why would the RTL transaction reason be used?

025. Establishing stock control methods

1. What are the main inventory control methods?

2. What are the primary objectives of the stockless/JIT inventory method?

3. What is required prior to using the stockless/JIT inventory method?

4. The stockless/JIT inventory method allows the MLFC to focus manpower where?

5. The JIT method may require additional personnel be assigned to which department?

6. What should the MLFC consider prior to implementing a stockless/JIT policy?

7. While using JIT, where is inventory control applied?

8. Which inventory control method uses a minimum-maximum system to control operating inventory?

9. Under EOQ, what is the safety level?

10. Under EOQ, what is the planned maximum known as?

11. The stock control level consists of what?

12. The EOQ method is better suited for what type of items?

13. While using EOQ, where is inventory control applied?

14. The last decade has shown us that the ideal stock control method is what?

15. What does “near-stockless” describe?

16. Who should you work with to convert items from EOQ to JIT?

17. What factors are used by DMLSS to compute stock levels?

18. What are the available options for the DMLSS level computation method?

19. Where are the level control options located in DMLSS?

20. AF policy dictates that you use which level computation method?

21. Which table provides a listing of all the values and codes used in DMLSS?

22. Which window details the factors and method used to determine stock levels?

23. Which tab is used to add and/or edit the factors that are used to compute levels for items from a specific SOS?

24. Which IM tab is used to change the computation method for an individual item?

25. List the three DMLSS level types.

26. Where does DMLSS post monthly recommendations for level changes based on consumption history?

5–3. Excess and commercial returns

On-hand materiel for which an account has neither an immediate need nor an anticipated requirement, can be a costly burden. Costly in both the sense that another account may have a requirement and in terms of the manpower and storage space required to properly maintain the materiel. Whether the unneeded items are supply or pharmaceutical, serviceable or unserviceable, you will need to understand the various methods used to remove the items from the MTF. This section will cover how to manage both the excess and commercial credit returns programs.

026. Managing excess

This lesson covers the identification, reporting, and disposition procedures for excess medical materiel. Proper management demands that you report and dispose of excess materiel properly. The term *excess* refers to materiel that cannot be resold or reused within the medical treatment facility. General policy for reporting excess is contained in DOD 4140.26-M, *Defense Integrated Materiel Management Manual for Consumable Items,* and AFI 41–209, *Medical Logistics Support.*

Materiel on hand that is not needed, whether it is medical or nonmedical, is excess. As previously mentioned, maintaining stocks of materiel that are above established requirement levels with no projected future requirements is considered to be a poor management practice. There are several acceptable reasons for the quantities on hand to be in excess of current requirements. For instance, the mission of the using organization may be redirected from time to time. When there is a decrease in the number of personnel supported, the quantity of materiel required normally changes accordingly. Development of new techniques and products may also alter materiel requirements.

To aid in identifying excess you must know your customer and their needs. You must have good sound materiel communication. By talking with your customer you can find out why certain items are not being used as frequently as in the past, or why some items are not used at all. The answers could be as simple as "the physician is on temporary duty for six weeks or is trying a new treatment procedure."

Determining excess materiel

Excess materiel may be discovered during the routine operation of issuing stock, inventorying dated items, and so forth, but you can identify potential excess in the IM EXCESS module from the NAVIGATE menu. Materiel is determined to be *local excess* when all of the following conditions are met:

1. It is not required to meet the stock control level.
2. It does not meet the criteria for economic retention.
3. It is not a requirement for WRM.
4. It is not a requirement for special projects.
5. It cannot be used as a substitute for a requirement in any of the preceding categories.

There are two categories of excess found in most medical materiel accounts—total excess and partial excess. An item is considered total excess when there is no operating level for it. An item is partial excess when there is an operating stock control level and on-hand quantities exceed the operating level plus economic retention requirements. In this situation, some, but not all, of the materiel can be used in the foreseeable future.

Once it is determined that certain materiel is excess, it must be reported, distributed elsewhere, or disposed of otherwise. In some cases, excess materiel can be returned to the manufacturer for replacement, credit, or disposal. Keep in mind that they do not want excess materials on their shelves either.

Reporting excess

Due to much advancement in the way we manage supplies, our excess has decreased tremendously over the past decade; however, when excess material does exist, it's reported through the Tri-Service Medical Excess Distribution System (TRIMEDS). As a means of minimizing transportation costs, medical logistics should ensure there are no requirements at AF and DOD MTFs in their local area for the excess materiel prior to reporting it to TRIMEDS.

Excess reported through TRIMEDS will be offered for redistribution to all AF and DOD MTFs. Reported excess is available for a total of 45 days. The first 20 days will be restricted to AF activities only; the remaining 25 days will be open to all eligible DOD facilities.

Due to the inherent cost of shipping excess supplies, there are a few restrictions on what can be reported.

- Total minimum line item value must be at least $3,000.
- Only condition codes A, B, and C are accepted.
- Expiration dated items must have at least 120 days shelf life remaining.

As stated above, medical logistics personnel must report materiel determined to be local excess and in serviceable condition. Items assigned condition codes A through C are reported by both continental United States (CONUS) and overseas bases for disposition instructions. The following chart provides an explanation of the various supply condition codes.

Supply Condition Codes		
Code	**Title**	**Definition**
A	Serviceable (Issuable without qualification)	New, used, repaired, or reconditioned materiel that is serviceable and issuable to all customers without limitation or restriction. Includes materiel with more than six months shelf life remaining.
B	Serviceable (Issuable with qualification)	New, used, repaired, or reconditioned materiel that is serviceable and issuable for its intended purpose but that is restricted from issue to specific units, activities, or geographical areas by reason of its limited usefulness or short service life expectancy. Includes materiel with three through six months shelf life remaining.
C	Serviceable (Priority issue)	Items which are serviceable and issuable to selected customers, but that must be issued before condition code A and B materiel to avoid loss as a usable asset. Includes materiel with less than three months shelf life remaining.
D	Serviceable (Test/Modification)	Serviceable materiel that requires test, alteration, modification, conversion, or disassembly. This does not include items that must be inspected or tested immediately prior to issue.

NOTE: Current AFMOA guidance states, "Nonmedical items should not be reported to TRIMEDS." Just because an item is purchased with MDD funds does not make it a medical item. Serviceable nonmedical items should be turned in to the base supply on a DD Form 1348–1 using the FM account as the "From" address and the FB/FE account as the "To" address. Consult with your supervisor for your local operating procedures.

DMLSS excess procedures

DMLSS users have the ability to restratify excess assets directly into WRM while working the excess process. In DMLSS you will use the following procedures to report, review, and search for potential excess.

Reporting excess

As mentioned previously, the excess reporting process begins in the EXCESS module accessed from the IM NAVIGATE menu. Searching for potential excess items takes place in the REPORT EXCESS window. Results are displayed in the REPORT EXCESS SEARCH RESULTS window. These items can be retained, reported, or restratified. The information provided is slightly different for IM and assemblage management (AM) items; however, the basic functionality is the same. When the REPORT EXCESS window opens, perform the following steps:

1. Select IM or AM for the scope of your search.
2. If you want to include all items in the search, then click the SELECT ALL checkbox. If you want to include only selected items in the search, clear the SELECT ALL checkbox and select the items from the left section. Click the > button to move those items to the right section.
3. In the STRAT STATE section, select the checkbox next to any stratification state that you want to include in the search.
4. If you are searching for AM items and want to consider economic retention quantities for potential restratification to operating, then select the USE OPERATING ERQ FOR ASSET REVIEW checkbox in the economic retention quantity (ERQ) section.

5. Click the SEARCH button to view results in the REPORT EXCESS SEARCH RESULTS window.

Assets can be available for restratification and excess reporting. In cases where both the A/R (asset redistribution) box and REPORTABLE columns are checked, users should perform the asset redistribution before reporting as excess. It is also appropriate to use all excess stocks to cover WRM shortages. If excess still exists after all assets are redistributed users should report the remaining quantities.

In the REPORT EXCESS – IM SEARCH RESULTS window you can click on the following buttons on the vertical toolbar to:

- EXCESS REPORT – Report an item as excess.
- ASSET REVIEW – Review the potential excess assets and restratify items by performing internal transfers.
- ITEM G/L – Process a gain or a loss for an item.
- LOG DETAIL – View an item's LOG catalog detail record.
- PRIME SUB – View balance information for any associated prime items if the selected item is a substitute item. Click this button to view, edit, or create prime/sub relationships for assemblages with this item. A prime/sub relationship exists when a prime item has a designated or authorized substitute item.
- DATED ITEM – Produce/print the excess dated item worklist. This will identify potential excess items that are dated items. Use this list to annotate expiration dates prior to reporting excess in DMLSS. Some of the items identified on this worklist can be skipped if they do not meet the reportable dollar value established in the SS application.

Reviewing potential excess assets

Asset review can only be viewed if the checkbox in the A/R column is selected. Select an item from the REPORT EXCESS SEARCH RESULTS window. Click the ASSET REVIEW button from the vertical toolbar. In the ASSET REVIEW window, the potential excess amount is the quantity that should be restratified. To select an item(s) for restratification, select the SEL checkbox in the bottom section of the window and click the TRANSFER button. Multiple items may be selected from this window to transfer. Transfers may also be done for detachments and nonstandard assemblages from this window. Click SAVE to print the delivery list. The option not to print this list is available from the message box. If multiple transfers are performed, a delivery list for each project is printed.

Select records that have an "X" in the reportable column—these are the only items you can report as excess. Only one record can be selected at a time. Click on the EXCESS REPORT button on the vertical toolbar. This causes the EXCESS REPORT SCREEN window to open. Validate the excess quantity and condition code and click SAVE. If the item is dated, the expiration date is also required prior to saving the information. A message box with the assigned document number for the reported excess is displayed. Click OK to return to the REPORT EXCESS—IM SEARCH RESULTS window.

The item is removed from this window and is considered reported excess. An inventory transfer loss (ITL), stratification type "OPR," is written to the transaction history file for the operating loss, and an inventory transfer gain (ITG), stratification type "EXS," is written to the transaction history file for the excess gain.

Search for excess

Use the SEARCH EXCESS window to search for and follow-up on reported excess. The detail button allows for the review of a specific item, including detail and status information from the date of the initial report and all transactions thereafter. Users can search for reported excess by:

- Document number.
- Item ID.
- Julian date.
- Who the request was routed to.
- Equipment nomenclature.
- Report status. The report status can take any of the following values:

Code	Description
A	Active.
D	Disposition Received.
L	Outship Processed.
S	Shipped.
C	Cancelled/Complete.
R	Rejected.
T	Troubled Report.

To further condense the search, a scope is included to target select types of records: All IM, AM, equipment, or repair parts and whether the records are in the active or inactive files. If a search is performed and the fields are left blank, DMLSS returns all reported excess records in the SEARCH EXCESS RESULTS window. In this window you can select an excess record you want to view and click the DETAIL button to open the EXCESS REPORT DETAIL window. This window has two tabs:

1. DETAIL – View general information about the excess record.
2. STATUS – View updates to the excess record's status. For an explanation of the status code, click the DESC button.

Updating excess report status

DMLSS will follow-up on requests automatically or users can follow-up manually by clicking the STATUS REQ button on the vertical toolbar from the SEARCH EXCESS RESULTS window and selecting follow-up. Follow-up is sent to the SOS during EOP processing. The item(s) are listed in the EXCESS SEARCH RESULTS window. Click the STATUS REQ button to open the EXCESS STATUS REQUEST window, select FOLLOW-UP, and click OK. The follow-up status is generated for EOP processing and posted to the STATUS tab in the excess record detail. To verify status, highlight the excess record and click DETAIL from the vertical toolbar. Click the STATUS tab to view the status history of the record. The possible actions/codes you can choose from are:

- Follow up – FTF.
- Cancellation – FTC.
- Shipment – FTM.
- Shipment Delay – FTL.
- Receipt by DLA – FTZ.

Processing IM excess pending actions

The INBOX is where DMLSS will post the "IM Excess pending action" message if you have received status on excess reports that require your action. The INBOX is the first window that appears when you open the IM application. If you close the INBOX and you need to view it again, you can

access it by selecting the UTILITIES menu from the horizontal toolbar and then clicking on INBOX. Once in the INBOX, review it for the "IM excess pending action" message. To view the report, select it and double-click or click on the JUMP TO button to open the EXCESS – PROCESSING PENDING ACTIONS window. The EXCESS PENDING ACTIONS report appears with different tabs depending on the nature of the pending action. On any tab, you can select an item and click the DETAIL button to view more information or click the PROCESS button to process the pending action. There are six different tabs and only the ones with excess reports that require your action for that category will appear. The tabs will appear for reasons as follows:

1. Troubled Shipped—user has not responded to two consecutive requests for user action or status from another system.
2. Ship Material— received status message directing shipment of the reported excess to DLA or another facility. To clear this message, click on the PROCESS button, prepare the item(s) for shipment, ship the item, and open the detailed excess report to enter the shipment information.
3. Turn-in Material—received status message directing shipment of the reported excess to DLA Disposition Services or another activity.
4. Destroy Material—received status message directing destruction of the reported excess.
5. Stop Shipment—received message from DLA canceling a prior return authorization. If you have not shipped the item(s), do not ship them. You can delete this pending action message.
6. Misc—received information status messages. Review the description, respond appropriately, and delete the pending action message.

To delete an excess-related pending action you must first process it, if required, and then click the DELETE button on the vertical toolbar.

Requesting excess through TRIMEDS

Using excess available from other bases is a sound and logical business practice that has been in use for years. In a perfect medical logistics world, we would never have excess. Every item that we order our customers gladly use with a smile. We never order too much, too little, or the wrong item—every item is just right. So much for the perfect world concept!

Usage policy

Excess can be requested and issued as a nonreimbursable issue (free issue) for using activities when the materiel account has *no stock control level* for the requested item or it is for WRM. Items that are requested to support stock control levels and all local excess will be issued as reimbursable (activity pays). An asterisk in the allowance standard (AS) column means the item is a component of three or more ASs. Screen this list against WRM shortages; this is an excellent way to fill these requirements without using WRM monies.

Property custodians are instructed to screen the excess screens at the Air Force Medical Logistics (AFML) website for needed excess items. Requesters should screen the list carefully, paying particular attention to condition codes and potency dates. When requesting equipment, have the biomedical maintenance equipment repair (BMER) staff contact the BMER staff at the reporting base. Together, the true condition of the item can be determined. Property custodians should be reminded that they are not allowed to request, on a nonreimbursable basis, excess items on which medical logistics maintains a stock control level. Also, all issues of excess stock with established stock control levels are reimbursable (customer pays).

DMLSS process for requesting excess from TRIMEDS

DMLSS allows users to request reported excess from the TRIMEDS. To review available excess, visit the AFML website applications window. To request the material, from the EXCESS menu in the IM application, select REQUEST EXCESS. The REQUEST EXCESS window opens. There are three request types to choose from: Operating, WRM, and Customer. Customer is the default setting.

Operating request

The operating request type replenishes on-hand stocks. Users enter an item ID or select an item ID from the dropdown menu, then enter the required quantity. Users may enter the excess request document number and condition code, but this is not a mandatory requirement. If these fields are left blank, the TRIMEDS system searches for the first record that matches the requirements and fills the requirement. The detail information is retransmitted to DMLSS and updated in the excess and due-in file. Click the JUMP TO button to review information in the LOG catalog. Click EXECUTE to transmit the request to TRIMEDS. The request is transmitted during end-of-period (EOP) processing. An established due-in (ESD) is created in the transaction history file for the assemblage due in. The stratification type operating (OPR) and state is serviceable (SERV).

WRM request

The WRM request type replenishes WRM shortages. Users enter an item ID or select an item ID from the dropdown menu, then enter the required quantity. Users must also select the appropriate WRM assemblages. Once again, users may enter the excess request document number and condition code but this is not a mandatory requirement. If these fields are left blank, the TRIMEDS system searches for the first record that matches the requirements and fills the requirement. The detail information is retransmitted to DMLSS and updated in the excess and due-in file. An ESD is created in the transaction history file for the assemblage due in. The stratification type and state is WRM and the state is SERV.

Customer request

The customer request type allows excess to be issued directly to the end customer. Users enter an item ID or select an item ID from the dropdown menu, enter the required quantity, and select the customer ID. Users may enter the excess request document number and condition code but this is not a mandatory requirement. If these fields are left blank, the TRIMEDS system searches for the first record that matches the requirements and fills the requirement. The detail information is retransmitted to DMLSS and updated in the excess and due-in file. An ESD and due-out (IOU) are created in the transaction history file for both the due-in/due-out for both IM and CAIM. The stratification type and state is OPR/ SERV) for the IM due-in/due-out.

Canceling requested excess

DMLSS users must request cancellation of requested excess from the DUE IN/DUE OUT window. Cancellation action cannot take place on an item the same day as the request. An EOP must be processed before cancellation actions can be processed.

Enter the document number, stock number, or SOS type. If an SOS is selected a list is displayed in the lower part of the window. Highlight the appropriate record(s) for processing.

Click the STATUS REQUEST button from the vertical toolbar and click cancellation request from the list. After selecting OK a request cancellation box opens with the original quantity displayed and required input for requested cancellation quantity. Enter the cancellation amount and click OK.

The detail status record in DMLSS is updated with status code RC to reflect the cancellation and status is sent to TRIMEDS.

027. Pharmaceutical credit returns

As with any auditable process, you must establish procedures for tracking and reporting all credits issued as a result of your commercial credit returns program. In this lesson we cover procedures to track credits issued through your pharmaceutical prime vendor (PVP) and those issued for returns direct to the manufacturer.

The DLMSS commercial credit return module is designed specifically to manage pharmaceutical returns through a third party vendor and is not designed or intended for use with returns direct to a supplier.

Processing commercial returns

In DMLSS, you will manage the pharmaceutical credit return process using the COMMERCIAL RETURN module accessed from the IM NAVIGATE menu window. This module will allow you to select which items you are returning for potential credit. The process involves selecting the applicable items and then updating which phase of the return cycle they are currently in. The cycle starts with READY FOR PICKUP. After the item is shipped the status should be updated to DISPOSITION PENDING. Following that, you may update it again if your vendor notifies you that it has been processed and your credits are on the way. Finally, the items should be closed out after the credit has been received (COMPLETE PV CREDIT) or other final disposition has been taken (i.e., COMPLETE DESTROYED).

This audit process is important as it allows investigators to determine if the credit returns vendors are being honest or committing fraud. Because of the high number of items processed and the large dollar figures involved, it may be tempting for a commercial vendor to charge an account for more than what was actually turned-in. For the most part, the contractors are honest, but in the past some companies have been known to follow poor operating practices. Either way, you should always follow the current guidance and make sure to pay attention to details at all times to ensure that the taxpayers' dollars are effectively utilized.

The MANAGED COMMERCIAL RETURN window allows you to track and update the status of items ready for return to a commercial returns vendor. This window also provides status and details on all items processed from the RETURN ITEM(S) module. In the MANAGED COMMERCIAL RETURN window, the item's detail information appears at the top of the window. All items are initially assigned a status of "ready for pickup." Prior to the items being picked-up by the shipper, update the status by selecting the PICKUP icon from the MANAGED COMMERCIAL RETURN window. In the PICKUP window, select the items being picked-up and annotate your locally assigned call number to the shipment. Select PROCESS to complete the action and print the commercial return report for you records. Have the shipper or credit returns' representative sign the commercial return report. The item's status will now be set to DISPOSITION PENDING.

The following are the status types for commercial return items:

- Ready for Pickup—the item is ready to be picked up.
- Disposition Pending—the item has been returned for credit determination.
- Check Pending—a refund check is on its way.
- Credit Pending—a refund credit is being processed.
- Complete Check—a refund check has been sent and received.
- Complete Credit—a refund credit has been processed.
- Complete Destroyed—the item has been destroyed.
- Complete PV Credit—the refund credit has been processed through the prime vendor.

Commercial return icons

In addition to the PV and commercial return options mention above, you also need to be familiar with the following options available by selecting the icons or buttons on the vertical toolbar of the MANAGED COMMERCIAL RETURN window:

PICK-UP icon

You will only see the PICK-UP icon when items are in "ready for pick-up" and "disposition pending" status. You can select multiple items for pick-up by using the CTRL key and clicking each selection with your mouse or holding down the SHIFT key on the first item and clicking the last selection with your mouse. Click the PICK-UP icon and DMLSS will display the MANAGED COMMERCIAL RETURN – PICKUP window. Enter the correct or new call number assigned to the item then click on the ">" or ">>" button to associate the item to the call. This process will generate the

COMMERCIAL RETURNS CALL STATUS report. This report identifies the number and the value of items processed through a commercial return goods vendor by selected return call number. It also identifies the value of items returned, credit obtained and cost by call number. Options for this report are:

- Scope – limits the report to call numbers processed in IM or AM.
- Detail – reports by status by call number.
- Summary – reports overall summary by call number.

COST CALL icon

Use the COST CALL icon when you receive credit vouchers or checks from your commercial returns vendor. In the CALL COST window, you can record the call cost or a commercial return. This option enables you to track the cost of the service and assists you in the cost effectiveness analysis of the returns vendor.You should update the CALL COST window with the dollar total from vouchers or checks every time you receive them. You must add the totals to the existing totals.

For example: Current call cost is $20.00 and a credit voucher is received for $25.00. Update the field to reflect $45.00.

DESTROYED icon

Use the DESTROYED icon when the commercial return vendor provides a disposal manifest to your facility for items that were not accepted for credit or return. Select items for destruction from a call and click the DESTROYED icon. Multiple items may be selected by using the CTRL+CLICK method. Associate the records in the MANAGE RETURN ITEMS—DESTROY window by clicking the “>” or “>>” buttons. Enter the reason for the destruction and click the PROCESS button to process the destruction. The status of the item(s) is changed to “Complete Destroyed” in the MANAGED COMMERCIAL RETURNS window.

CHECK icon

The CHECK icon allows you to enter check pending or check complete estimates for single or multiple returned items that are not applied to a prime vendor account. Click the CHECK icon to open the CHECK COMPLETE UPDATE window. Select the status for the call number or items selected as follows:

- Check Pending – Identifies return items were sent to the commercial returns manufacturer and the check has not been issued. You may also enter a check amount and reason if your commercial returns vendor issues a projected credit report. The status of the return item is changed to “Check Pending” in the MANAGED COMMERCIAL RETURNS window.
- Check Complete – Identifies that the check was received from the manufacturer. All fields are mandatory entries when completing check returns. Enter the actual check amount issued, check number, who the check is from, and reason. Select the item(s) to associate with the check and click the SAVE icon to process. The status is changed to “complete check” in the MANAGED COMMERCIAL RETURNS window. You can no longer modify this record.

CREDIT icon

The CREDIT icon allows you to enter credit pending or credit complete estimates for single or multiple returned items that are not applied to a prime vendor account. Click the CREDIT icon to open the CREDIT COMPLETE UPDATE window. Select the status for the call number or items selected.

- Credit Pending – Identifies return items were sent to the commercial returns manufacturer and credit has not been issued. You may also enter a credit amount and reason if your commercial returns vendor issues a projected credit report. The status of the return item is changed to “Credit Pending” in the MANAGED COMMERCIAL RETURNS window.

- Credit Complete – Identifies that actual credit was received from the manufacturer. All fields are mandatory entries when completing credit returns. Enter the actual credit issued and reason. Select the items to associate with the credit and click the SAVE icon to process. The status is changed to "complete credit" in the MANAGED COMMERCIAL RETURNS window. You can no longer modify this record.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

026. Managing excess

1. List five conditions that determine if an item can be reported excess.

2. What are the two categories of excess found in most medical materiel accounts?

3. What category of excess is an item that does not have an operating stock control level?

4. Through what system is excess material reported?

5. Prior to reporting and shipping excess, units should check with whom to see if they have requirements?

6. Reported excess is only viewable by AF activities during what period?

7. List the three restrictions used when reporting excess.

8. Which supply condition code is used for items with less than three months shelf life remaining?

9. In DMLSS, where does the search for potential excess take place?

10. What action does clicking the ASSET REVIEW button in the REPORT EXCESS – IM SEARCH RESULTS window perform?

11. What worklist in DMLSS is used to identify potential excess items that are dated?

12. What items are the only items you can report as excess when performing an ASSET REVIEW?

13. What transactions are written to the transaction history file when reporting excess in DMLSS?

14. Name six search criteria and the various scopes that are used to locate reported excess in DMLSS.

15. How can users perform a manual follow-up on excess reports in DMLSS?

16. List the possible actions you can choose from in the STATUS tab of the EXCESS REPORT DETAIL window.

17. List the six different tabs of the EXCESS PENDING ACTIONS report.

18. Excess may be requested and issued through TRIMEDS as a free issue for using activities only if what condition exists?

19. What are the three request types available from the IM REQUEST EXCESS window?

20. When are excess requisitions transmitted to TRIMEDS?

21. What DMLSS window must be used to request cancellation of requested excess?

027. Pharmaceutical credit returns

1. The DMLSS commercial return module is designed specifically to manage what type of returns?

2. Which DMLSS module is used to manage the pharmaceutical credit return process?

3. Why is the audit process so important?

4. Which DMLSS window provides status and details on all items processed from the RETURN ITEMS module?

5. All processed items are initially assigned what status?

6. List the status types in the MANAGED COMMERCIAL RETURN window for commercial return items.

7. What report identifies the value of items returned, credit obtained, and cost by call number?

8. Which icon allows you to enter credit pending or credit complete estimates for single or multiple returned items that are not applied to a prime vendor account?

5–4. Inventory Procedures

The objective of a physical inventory is to verify on-hand catalog record balances against actual stocks on hand. We cannot say that we never make errors. Rather, we must realize that even in the best of operations some errors are made. We must find these errors and make the correct adjustments as quickly as possible. The most common method to mitigate inventory errors is to conduct a complete inventory count of all on-hand items. This section will cover the various steps involved in conducting an on-hand inventory.

028. Establishing inventory guidelines

Before initiating an inventory a few general guidelines must be created. First, customers must be notified in advance of the pending temporary shut-down. If the inventory is expected to be short, (i.e. closed for a few hours), the closure is likely to go unnoticed. If the closure is expected to last a few days, customers must be advised to place their orders early to cover the closed period. Next, a team must be selected. Typically, teams of two or three work well with at least one individual having thorough experience who can train the remaining team member(s). Each team should be given a specific inventory segment and should not re-count its own segment if another count is required. Prior to starting the inventory, everyone involved should receive training on how to identify, count, and annotate both regular items and write-ins that are not listed on their count sheets.

Preparing for an inventory

To ensure efficiency in performing an inventory, plan all aspects of the program in advance. Good planning is critical when an inventory is to be accomplished. The following information explains the inventory planning process:

Plan the inventory

Make thorough preparations to do an accurate inventory with the least amount of disruptions. The plan should provide for the minimum amount of interruptions in the normal supply operations. Before an inventory begins, take the following actions as soon as possible:

- Establish the inventory deadline date.
- Notify using activities.

- Make individual assignments of personnel.
- Train personnel on inventory procedures.

Deadline date

Establish an inventory deadline date for selected items to be inventoried. This is the date that the inventory count is scheduled to begin. After the date is established, notify all using activities of that date. To prevent the inventory from interfering with their mission, using activities need advance notice to regulate or restrict issue requests.

Assignments and responsibilities

Give those taking part in the inventory their assignments and responsibilities. Next, prepare and distribute a schedule of assignments as soon as possible. Personnel assigned to perform inventory counts are *not* permitted to process inventory adjustments. To help ensure the inventory is performed as accurately as possible, the count list used by the inventory team *must not contain* inventory balance data (on-hand balances) except when inventorying WRM assets. Train your inventory staff in advance on inventory procedures. This training should include, but is not limited to, the following:

- Correct reading of stock numbers/Item ID and other pertinent data on all documents or records used during the inventory.
- Sequence and arrangement of stock balance and locator information, and types of condition tags on property.
- Sequence and arrangement of storage and distribution locations, including multiple storage locations.
- Counting methods, including trial counting, for training purposes.
- Procedures for annotating inventory documents.

Complete stock updates

It is important that all receipts are processed and stock placed in storage *before* starting the inventory. Once the inventory is started all affected items are locked (frozen) so that no further processing can take place against them. Therefore, pending receipts should either be received and placed in stock or separated, if not received before the inventory freeze. You should also examine and process all other transactions that would affect the inventory, issues, turn-ins, destructions, excess shipments, and suspensions. Ensure all materiel is placed in its correct storage location and all processed issues are pulled from inventory. Designate a segregated storage area for storing items delivered after the inventory deadline date. Adding new stock to the shelves after the inventory has been frozen will cause inventory count errors and require countless hours of research time.

Opening packages

During the inventory, you do not need to open unopened packages unless the information on the outside of the package is not legible or does not contain sufficient information to indicate the correct quantity. Another reason to open a package is if you suspect the contents are damaged or misidentified; you may want to open a package if there is reason to suspect the contents are damaged or misidentified.

Preinventory counts

Preinventory counts may be taken and accepted for inventory purposes of closed stocks of non-deteriorating, long-term stocked items in bulk storage. Preinventories of WRM are an example. When this is done, a placard is displayed on each stack containing the item ID, total box or container count, total item count, date of count, and name of person performing the count.

Inventory controls

The MLFC establishes the exact controls to be maintained over the inventory count documents prepared prior to or during the course of the inventory. The inventory noncommisioned officer in

charge (NCOIC) will distribute the inventory count lists to the inventory count teams. This is where the actual count is written, during inventory, in the physical count/initials column of the inventory count list. The inventory counter enters the quantity physically counted and initials in the appropriate space of the inventory document.

Inventory counts

When making the count, give special attention to avoiding omissions, particularly when inventories are stored in several locations, such as WRM, suspended, loose, bulk, and pallet. Include any items discovered during the inventory that do not appear on an inventory count list by adding the appropriate information (e.g., quantity, location, and item ID) on the bottom of the inventory count list. Procedures should ensure that the inventory includes rechecks to determine whether any item is not counted during the inventory.

Spot checks

The inventory supervisor may perform a spot check for physical recounts, and, if verified, should initial the appropriate space on the inventory count list.

Count comparisons

The inventory research team compares the actual quantity counted with the DMLSS on-hand quantities. Initially, when the inventory count and the balance in DMLSS do not agree, a second count is conducted. If the second count does not agree with the first count, a third count will be directed. If the third count does not agree either, the item will be referred to the inventory research team for resolution. Normally, third recounts are not needed. After the final count, it is time to research and decide on how to correct the error in inventory.

029. Performing counts

A typical inventory process begins with selecting a set of items and locking them for inventory. Then count lists are generated and assigned to teams for counting. The resulting counts are then documented. After all required counts for an item have been completed, the potential gain or loss is documented and the item is available for research. After all required research has been completed, the inventory is finalized. A physical inventory may be for an entire customer area, a storage area, selected locations, or selected item IDs. Basically, the physical inventory process consists of five main steps:

1. Selecting the inventory segment: Identify the scope of the inventory and lock the items.
2. Generating count lists: Create count lists and assign to counters. Breaks the inventory into manageable sections. You can move items from one count list to another. This is helpful in assigning similar numbers of records to multiple count lists.
3. Documenting physical inventory counts: Counting the items in the inventory and then annotating on count list or entering the physical counts in DMLSS.
4. Researching discrepancies: This step is only necessary if after entering three counts for the inventory, you still have discrepant amounts. Select items needing research and research/resolve potential inventory adjustments.
5. Finalizing the inventory: This step involves reviewing and processing inventory adjustments and post inventory actions before finalizing the inventory.

Inventory control number status

You can view the status of the inventory in the PHYSICAL INVENTORY CONTROL NUMBER STATUS window. In this window, you can see the current processing status of all inventories that are in progress. The processing status of an inventory can be any of the following:

- Counting—All counts have not yet been completed.
- Research—All counts have been completed, but required research has not been completed.
- Finalization—All required actions have been completed and the inventory is ready to finalize.

While counting is in progress, you can view the COUNT LIST DETAIL window by double-clicking an inventory control number or by clicking the DETAIL button. Then you can assign a count list or reassign a list to a different count team. When the window appears you do the following:

If	Then
You want to see all the count lists for a particular team.	In the View All Count Lists for Team field select the team and click on GO.
You want to see all the count lists for the inventory control number.	Click the GO button next to the inventory control number.
You want to assign a count list to another team.	In the list of count lists, next to the count list number, select the team and click on SAVE.
You want to print the details in the window.	Click PRINT.

Cancel an inventory

In the INVENTORY CONTROL NUMBER STATUS window, you can cancel and unlock all records that are locked by an in-progress physical inventory by selecting and canceling the inventory. To cancel an inventory, select it from the list and click on the CANCEL icon on the vertical toolbar. DMLSS will prompt you with a confirmation message to verify that you want to complete the cancellation action. Click YES and the inventory is canceled and the items are unlocked.

Selecting the inventory segment

Use the PHYSICAL INVENTORY window to search for and select physical inventory segments for processing. Locked items are assigned to inventory segments in item ID sequence so that a portion of an inventory can be repeated later if found to be below desired accuracy standards. The size of each segment depends on the number of items locked for inventory. If the number of items locked is less than 1,000, each segment is 50 items. If the number of items locked is greater than 1,000, each segment is 100 items. Users can also display locked physical inventory items for processing. DMLSS allows searches for inventory segments in inventory management or assemblage management by:

- IM/AM Scope.
- Stratification Type.
- Stratification State.
- Item ID (for those items with an on-hand balance).
- Location.
- Sub Location.
- Storage Area.
- Organization.

To select an inventory segment, from the NAVIGATE menu, point to PHYSICAL INVENTORY and click SELECT INVENTORY SEGMENT. The PHYSICAL INVENTORY – SELECT INVENTORY SEGMENT window appears with the search Scope defaulted to IM. Users can select a STRAT TYPE and STRAT STATE or elect to process with the defaults.

Select at least one of the available processing options (item ID, location, storage area) or select information from all three for the inventory. Multiple item IDs can be selected using CTRL and clicking each item or using shift and selecting a list of items. Selecting locations and storage areas establishes an inventory segment for all items associated with the chosen location or storage area. Click the SEARCH button on the vertical toolbar after the information is entered. DMLSS compiles the information, locks the item for inventory, and displays the results in the SEARCH RESULTS tab.

Users have the option of adjusting inventory criteria in the SEARCH RESULTS tab. Place a checkmark in the inventory checkbox for each item included in the inventory segment. Users can click the SELECT ALL and then the INVENTORY button at the bottom of the window if all items

require processing. Items not selected for inventory will be unlocked and returned to normal operating status. After all items are selected click the PROCESS INV button on the vertical toolbar. A message is displayed providing the inventory control number. This control number identifies the inventory segment that was just created and represents all of the items, locations, and storage areas you selected in the segment. Click the OK button and DMLSS displays the option for you to generate count lists. You have the option of generating separate counts lists for each storage area or location. Click the OK button and DMLSS will take you to the second step of generating count lists and assigning teams.

DMLSS will store all inventory segments in the PROCESS COUNTS window until the inventory is processed or cancelled. This is the last opportunity to cancel an inventory segment. Once a segment is selected and SEARCH is clicked, the inventory locks until processing is complete.

Generating count lists

When you have selected the inventory segment and DMLSS has assigned an inventory control number (ICN), the GENERATE COUNT LISTS window will open. You can also access this window from the NAVIGATE menu, PHYSICAL INVENTORY and selecting GENERATE COUNT LISTS. In this window, you can create count lists for an ICN, assign those lists to count teams, and view the distribution of items by team or count list. Up to 26 count teams (teams A through Z) can be used for inventories. If you decide to generate the count lists, DMLSS will prompt you to enter the count list information and then display the GENERATE COUNT LISTS AND ASSIGN TEAMS window.

From this window you can add count teams and the number of lists required for an inventory segment. Count lists for the inventory are printed from the PHYSICAL INVENTORY REPORTS module. Enter the ICN and print the required count lists. The STATISTICS icon on the vertical toolbar of the GENERATE COUNT LISTS AND ASSIGN TEAMS window enables you to view the total number of item locations and percentages counted by count team or by count list. This function provides a snapshot of the inventory progress at a given point between the start and finish of the inventory. The ICN status identifies the current status of an active inventory. The window lists all active ICNs, current status or progress, and the number of records. You can view the count list summary information for items with the process status of counting by clicking the DETAIL icon or double-clicking the ICN. DMLSS does not track which individuals belong to a particular count team. If necessary, document this information on a letter and file it with other completed inventory documentation.

You can perform the following tasks in the GENERATE COUNT LISTS window:

- Add a count list: Depending on the size of the inventory segment, click on the ADD COUNT LIST button to add as many lists as necessary and assign them to teams.
- Add a team to the list of available inventory teams: Up to 26 count teams (teams A through Z) can be used for an inventory. These teams can be selected in the ASSIGNED TEAM field. To add another team to the list (for example, if teams A through D already appear in the list, but you need a team E) click on the ADD TEAM button and the next alphabetical team is now available in the ASSIGNED TEAM field.
- Assign a team to a count list: Select a team from the ASSIGNED TEAM field dropdown list for the count list number displayed next to this field and click the SAVE button on the vertical toolbar.
- Move selected items on a count list to another count list: To move an item to another count list, select the item(s) to be moved in the lower section of the window. You can select multiple items by pressing the SHIFT or CTRL keys on your keyboard while selecting the items with the mouse. In the CHANGE HIGHLIGHTED ROWS TO COUNT LIST field, select the new count list and then click the APPLY and SAVE buttons.
- Regenerate count lists: If you want to regenerate a count list (for example, if you want the list sorted differently), click on the REGEN LISTS icon on the vertical toolbar. This action will

open the GENERATE COUNT LISTS AND ASSIGN TEAM CRITERIA window where you will select the ICN, break and sort criteria for the list, and click OK.

- View the statistics for a count list: To view the statistics for a physical inventory count list, click on the STATISTICS icon on the vertical toolbar to open the window. Once in the window, select TEAMS or COUNT LISTS to view specific statistics by inventory teams or count lists. You can also select PRINT to print the statistics or click OK to close the window.

To print the count lists, access the NAVIGATE menu, select PHYSICAL INVENTORY, REPORTS to display the PHYSICAL INVENTORY REPORTS window. Select the INVENTORY COUNT LIST and click on the VIEW icon on the vertical toolbar. DMLSS will display the SPECIFY REPORT SELECTION CRITERIA – INVENTORY COUNT LIST window. Select the ICN and count list(s) you want to print and click OK to view them in the INVENTORY COUNT LIST – IM window. Click on the PRINT icon on the vertical toolbar to print the report. You will have to repeat this process to print new count lists for counts 2 and 3 if necessary.

Entering counts

When you begin an inventory, an inventory control number (ICN) is assigned for the selected inventory segment. In the CRITERIA FOR ENTERING PHYSICAL INVENTORY COUNTS window, you can select a count list number and retrieve the related items to record/enter the counts. The search criteria are slightly different for AM or IM inventories, but the basic functionality is the same for both. You can perform the following tasks in the CRITERIA FOR ENTERING PHYSICAL INVENTORY COUNTS window:

- Enter an inventory count.
- Use an HHT to enter an inventory count.

To enter an inventory count, from the NAVIGATE menu, select PHYSICAL INVENTORY and then click on ENTER COUNTS. This action displays the CRITERIA FOR ENTERING PHYSICAL INVENTORY COUNTS window. Select the criteria for the inventory count you want to enter and click the SEARCH icon on the vertical toolbar. The next window you will see is the ENTER COUNTS FOR PHYSICAL INVENTORY: (ICN) window. In this window, in the available count column (1st, 2nd, or 3rd), enter the inventory count. You can also perform the following actions by clicking on the buttons at the bottom of the window:

If	Then
You want to undo the counts that you have entered.	Click the REMOVE COUNTS button.
You want to use the on-hand balance number for the first count.	Click the MOVE O/H INTO 1st COUNT button.
You want to use the numbers from the first count for the second count.	Click the MOVE 1st COUNT INTO 2nd COUNT button.
You want to use the numbers from the second count for the third count.	Click the MOVE 2nd COUNT INTO 3rd COUNT button.

If while entering the inventory count, you find that an item was not included in the original inventory, you can add the item to the inventory by clicking on the ADD ITEM icon on the vertical toolbar. DMLSS will display the PHYSICAL INVENTORY – ADD ITEM window. Enter the item ID and the 1st count for the item and if necessary update the MTF catalog record by clicking on the MTF CAT icon on the vertical toolbar. Click the PROCESS ITEM to add it to the inventory and DMLSS will return to the ENTER COUNTS window. Clicking on the SAVE icon completes the process for 1st counts and the system determines which items can be dropped from the inventory. Quantities that are different from the on-hand quantity require a recount. The ENTER COUNT window will display only the items that have an out-of-balance from the first count. You will need to repeat this process for 2nd and/or 3rd counts if necessary.

DMLSS processes the physical inventory counts as follows:

- No processing occurs until all locations for an item have been counted.
- All entries for locations other than the primary location are displayed with an asterisk (*) after the quantity (IM scope only).
- Once all locations for an item have been counted, the sum of all counts is compared to the recorded inventory balance.
- If the balances agree, the item is unlocked and removed from the inventory.
- If the balances disagree, and it is either the 3rd count or the 1st/2nd count and the value of the potential inventory adjustment is below the count criteria value, no further counts are required.

030. Researching, adjusting, and finalizing inventories

Before finalizing your inventory, you may encounter one or more inventory discrepancies. You will need to determine which steps to take to correct these out of balance situations. This lesson will introduce you to the procedures used to research gains and losses for an IM inventory and then how to finalize the inventory itself.

Correcting inventory discrepancies

When a count disagrees with the inventory balance, DMLSS will force up to three counts. If the counts still do not agree and the value is greater than the count criteria value, the item will become an inventory discrepancy and will be visible in the RESEARCH DISCREPANCIES window. The RESEARCH DISCREPANCIES window is used to view all of the items requiring research and to enter a final inventory count when necessary Final counts are required when none of the previous counts agree with the inventory balance. However, research is required when the potential adjustment amount is greater than the count criteria value.

Research inventory gains and losses for IM inventory

The RESEARCH INVENTORY GAINS and LOSSES for IM INVENTORY screen is used to drill-down to a discrepant item's individual level. To access the RESEARCH INVENTORY GAINS and LOSSES for IM INVENTORY screen from the RESEARCH DISCREPANCIES window, first, select the ICN or any combination of elements from the dropdown list in the CRITERIA for ENTERING RESEARCH window. From the list you can select one, some, or all items to process. Click PROCESS on the vertical toolbar to open the selected inventory. From this window, users can preview potential gains and losses, enter final counts, add an adjustment reason, document required post-inventory actions, review transaction history, and print an Inventory Research Report. When the final count entered agrees with the recorded balance, the item will be unlocked and removed from the inventory. An adjustment reason is required for all items with CII Code of J, R, or Q, and when the potential inventory adjustment value is greater than the count criteria value. The adjustment reason will print on the Inventory Adjustment Voucher.

An example of an inventory condition requiring research would be as follows: The physical balance for an item is 12; however, the inventory counts reflect that 24 are on the shelf. Researchers discover a receipt for 12 has not been processed. Enter a final count of 12 to agree with the DMLSS balance and later process the receipt as a post-inventory action, after the inventory is closed.

Post inventory actions

The POST-INVENTORY ACTIONS screen allows the inventory lead to annotate future corrective actions. These actions will take place after the inventory is closed and the freeze is lifted. An example might be that you determined during the research process that you were short one package of dental amalgam. You contacted the dental clinic and they state that they received it; however, there is no transaction history indicating this. You make the determination that it was delivered without an

accompanying issue list. Therefore, you note that after the inventory is finalized, you will need to process an issue (without delivery) of the item to dental to correct the on-hand balance.

The post-inventory action notes can also be used to identify problems associated with day-to-day business, target additional training opportunities, document inventory after action notes, or to provide recommendations for other upcoming inventories. All post-inventory action notes are compiled as part of the inventory finalization process. A post-inventory actions report, by ICN, is available from the IM physical inventory reports function.

Finalizing the inventory

Use the FINALIZE INVENTORY window to preview the inventory accuracy analysis report, finalize an inventory, and review completed inventory documents. DMLSS processes pending inventory adjustment gains and losses.

An inventory cannot be finalized until:

- All items are counted and counts entered into DMLSS.
- All required research is completed.

Reports

The following physical inventory reports are available either during or after the inventory is finalized. The inventory manager is advised to print these reports and file them in a binder as part of the complete physical inventory report. DMLSS stores inventory reports for three years; however, the dates posted on the reports are updated to the date the report is requested and printed. Maintain these reports in accordance with the Air Force Records Information Management System (AFRIMS) T 41–04 R 13.00.

- Inventory Accuracy Analysis—Identifies the gain/loss amount and the accuracy of each inventory segment.
- Inventory Adjustment Voucher—Use this option to print or reprint the formal Inventory Adjustment Voucher resulting from a finalized inventory.
- Inventory Count List—Use to reprint Inventory Count List(s).
- Inventory Research Report—Lists the items that required research.
- Items with Location set to —None is self-explanatory.
- Missed Locations Count List—Identifies items by count list that still require a physical count.
- Post-Inventory Actions Report—Reflects required post-inventory actions.
- Potential Inventory Discrepancy Report - Identifies the gain/loss transactions that would result based on the current count information. This report is reviewable prior to finalizing an inventory.
- Preview Inventory Accuracy Analysis—Identifies the gain/loss amount and the accuracy of each inventory segment that would result if an inventory were finalized with current counts.

Self-Test Questions

After you complete these questions, you may check your answers at the end of the unit.

028. Establishing inventory guidelines

1. Before beginning an inventory, what are some inventory preparations?

2. What is the inventory deadline date?

3. Why is it important to designate a segregated storage area for storing items that are delivered after the inventory freeze?

4. When are sealed packages opened?

5. When can preinventories be taken and accepted for inventory purposes?

6. Who prescribes the exact controls to be maintained over the inventory count documents?

7. Who initials each entry on the physical inventory count list?

8. Who may perform spot checks for physical recounts, and if verified, must initial the Inventory Count List?

9. Who compares the quantity actually counted with the DMLSS on-hand quantities?

029. Performing counts

1. Name the five main steps of the physical inventory process.

2. What DMLSS window allows you to view the current processing status of all inventories in progress?

3. Name the three processing statuses of an inventory.

4. What DMLSS window allows you to assign a count list or reassign a list to a different count team?

5. How many items are in a segment when the number of items locked for inventory is less than 1,000?

6. How many items are in a segment when the number of items locked for inventory is greater than 1,000?

7. In DMLSS, when does the inventory become locked with no opportunity to cancel until processing is complete?

8. When generating count lists, up to how many count teams can be used for inventories?

9. What function in DMLSS provides a snapshot of the inventory progress at a given point between the start and finish of the inventory?

10. List the tasks you can perform in the GENERATE COUNT LISTS window.

11. When beginning an inventory, what is assigned for the selected inventory segment?

12. What DMLSS window allows you to enter inventory counts?

13. What action do you take if you want to use the numbers from the first count for the second count when entering inventory counts?

14. When entering inventory counts, what action does DMLSS process if the balances agree?

030. Researching, adjusting and finalizing inventories

1. Which window is used to view all of the items requiring research?

2. When are final counts required?

3. When is research required?

4. What is the RESEARCH INVENTORY GAINS AND LOSSES for IM INVENTORY screen used for?

5. Which screen is used to preview potential gains and losses, enter final counts, add adjustment reasons, document required post-inventory actions, review transaction histories, and print Inventory Research Reports?

6. What happens when the final count entered agrees with the recorded balance?

7. An adjustment reason is required for which items?

8. Which screen allows the inventory lead to annotate future corrective actions?

9. What all can post-inventory action notes be used for?

10. Which window is used to preview the Inventory Accuracy Analysis Report, finalize an inventory, and review completed inventory documents?

11. How is the Inventory Accuracy Analysis report used?

12. How is the Missed Locations Count List used?

13. Which report is used to view the gain/loss transactions that would result based on the current count information?

14. Which report is used to identify gain/loss amounts and the accuracy of each inventory segment that would result if an inventory were finalized with current counts?

Answers to Self Test Questions

021.

1. SEARCH and PROCESS RECEIPTS tabs.

2. To search for active or inactive due-ins, to obtain delivery lists, or to process receipts.
3. Clicking SEARCH while all data fields are blank.
4. To view due-in details, process due-in status, adjust due-in quantities, process complete and partial receipts, and process cancellations.
5. RECEIPT QUANTITY, CANCEL QUANTITY, STATUS PRICE, LOCAL CONTRACT, and SUBSTITUTE.
6. When the delivery time varies by plus or minus 10 days.
7. When you want to record the data as an actual PLT.
8. (1) Prime vendor has not provided an advanced shipping notification (EDI 856).
   (2) Hazardous Materials exception.
   (3) Local Contract Number exception.
   (4) QA Record exception.
9. Do not process the receipt. Contact the vendor and request replacement materiel.
10. Verify that the item was not shipped in another container.
11. Annotate the discrepancy and notify your Acquisitions department.
12. Update the receipt quantity, cancel quantity, status price, local contract, and substitute fields as applicable.

022

1. Check the immediate area around where the item should have been located.
2. The actual quantity picked.
3. Issue Exception.
4. The item may have been pulled without being issued properly.
5. DMLSS will generate an IAL.
6. Inventory Adjustment Voucher.

023

1. (1) OPR, Operating.
   (2) SPJ, Special Projects.
   (3) WRM, War Reserve Materiel.
2. Operating (OPR).
3. Balancing the carrying costs of storage space, capital, and deterioration of stock against the costs of being out of stock when the item is needed, losing quantity discounts for local purchase items, and administrative costs of processing additional orders.
4. Special projects (SPJ).
5. War reserve materiel (WRM).
6. FDA, REP, SER, SUS, UNS.
7. FDA testing.
8. At least quarterly.
9. Internal transfers.
10. ITG and ITL.
11. Select INTERNAL TRANSFER from the Navigate menu.
12. The available quantity.

024

1. IAG
2. To record individual gains from other medical materiel accounts.
3. To process medical materiel found on base, outside of the MTF, and turned in to LOG.
4. Unserviceable.
5. FZG.
6. TZL.

7. To record individual out shipments to another medical materiel account.
8. To record the out shipment loss of materiel returned as directed by DLA, GSA, AFMSA, or other authority for materiel returned to commercial vendors.

025

1. JIT and EOQ.
2. To eliminate warehouse inventory and the associated overhead costs of operating a warehouse.
3. Extremely reliable suppliers and short delivery timeframes.
4. Directly in patient care areas.
5. Acquisitions.
6. (1) Reliability of suppliers for different commodity lines.
   (2) Ability of logistics staff to support ordering and receiving more frequently.
   (3) Customer comfort level when no safety stock is available.
   (4) Availability of adequate distribution systems and material handling equipment.
   (5) Availability of backup supply sources.
7. To the maintenance of O&M funded stock that is owned and stored at the using activity's level.
8. EOQ.
9. The planned minimum stock position.
10. Stock control level.
11. On-hand and on-order *minus* due-outs.
12. Those that have a long delivery timeframe.
13. To assets owned by the MDD of the AFWCF.
14. A balance between the two extremes (JIT and EOQ).
15. An account that primarily uses the stockless/JIT concept, but backs it up with EOQ for a limited amount of long-pipeline items.
16. Your prime vendor.
17. (1) HBD.
    (2) DDR.
    (3) Requirement code.
    (4) Safety level quantity.
    (5) EOQ.
    (6) Average PLT.
18. (1) STD.
    (2) Days of stock.
    (3) Wilson EOQ.
19. In the SS application, in the COMPUTATION tab of the MM SERVICE DETAIL.
20. Days of Stock.
21. TMU.
22. SS MM SERVICE DETAIL.
23. SOS ENVIRONMENT.
24. MTF CATALOG LOG CAT.
25. Static, core, stockless.
26. "In the INBOX as an IM Recommended Level Changes" pending action message.

026

1. (1) It is not required to meet the stock control level.
   (2) It does not meet the criteria for economic retention.
   (3) It is not a requirement for WRM.

(4) It is not a requirement for special projects.
(5) It cannot be used as a substitute for a requirement in any of the preceding categories.

2. Total excess and partial excess.
3. Total excess.
4. TRIMEDS.
5. AF and DOD MTFs in their local area.
6. The first 20 days.
7. (1) Total minimum line item value must be at least $3,000.
   (2) Only condition codes A, B, and C are accepted.
   (3) Expiration dated items must have at least 120 days shelf life remaining.
8. C.
9. REPORT EXCESS window.
10. Review the potential excess assets and restratify items by performing internal transfers.
11. Excess Dated Item Worklist.
12. Records that have an "X" in the reportable column.
13. An ITL for the operating loss, and an ITG for the excess gain.
14. (1) Document number.
    (2) Item ID.
    (3) Julian date.
    (4) Who the request was routed to.
    (5) Equipment nomenclature.
    (6) Report status.
15. Click the STATUS REQ button on the vertical toolbar from the SEARCH EXCESS RESULTS window and select follow-up.
16. (1) Follow up – FTF.
    (2) Cancellation – FTC.
    (3) Shipment – FTM.
    (4) Shipment Delay – FTL.
    (5) Receipt by DLA – FTZ.
17. (1) Troubled Shipped.
    (2) Ship Material.
    (3) Turn-in Material.
    (4) Destroy Material.
    (5) Stop Shipment.
    (6) Misc.
18. The materiel account has no stock control level for the requested item, or it is for WRM.
19. Operating, WRM, and Customer.
20. During the EOP process.
21. DUE IN/DUE OUT.

027

1. Pharmaceutical returns through a third party vendor.
2. COMMERCIAL RETURN.
3. It allows investigators to determine if the credit returns vendors are being honest or committing fraud.
4. MANAGED COMMERCIAL RETURN.
5. Ready for Pickup.
6. (1) Ready for pickup.

(2) Disposition pending.
(3) Check pending.
(4) Credit pending.
(5) Complete check.
(6) Complete credit.
(7) Complete destroyed.
(8) Complete PV credit.

7. COMMERCIAL RETURNS CALL STATUS report.
8. CREDIT.

028

1. Establish the inventory deadline date, notify using activities, make individual assignments of personnel, and train personnel on inventory procedures.
2. The date the inventory count is scheduled to begin.
3. Adding new stock to the shelves will cause inventory count errors and require countless hours of research time.
4. When the information on the outside of the container is not legible or does not contain sufficient information to indicate the correct quantity; or you suspect damage or misidentification.
5. On closed stock and nondeteriorating, long-term stocked items in bulk storage.
6. MLFC.
7. The person performing the inventory.
8. Inventory supervisor.
9. Inventory research team.

029

1. (1) Selecting the inventory segment.
(2) Generating count lists.
(3) Document physical inventory counts.
(4) Researching discrepancies.
(5) Finalizing the inventory.

2. PHYSICAL INVENTORY CONTROL NUMBER STATUS.

3. (1) Counting.
(2) Research.
(3) Finalization.

4. COUNT LIST DETAIL.
5. 50 items.
6. 100 items.
7. Once a segment is selected and SEARCH is clicked.
8. 26 (teams A through Z).
9. STATISTICS icon in the GENERATE COUNT LISTS AND ASSIGN TEAMS window.
10. (1) Add a count list.
(2) Add a team to the list of available inventory teams.
(3) Assign a team to a count list.
(4) Move selected items on a count list to another count list.
(5) Regenerate count lists.
(6) View the statistics for a count list.

11. An ICN.
12. CRITERIA FOR ENTERING PHYSICAL INVENTORY COUNTS window.
13. MOVE 1ST COUNT INTO 2ND COUNT button.

14. The item is unlocked and removed from the inventory.

030

1. RESEARCH DISCREPANCIES.
2. When none of the previous counts agree with the inventory balance.
3. When the potential adjustment amount is greater than the count criteria value.
4. To drill-down to a discrepant item’s individual level.
5. Research Inventory Gains and Losses for IM Inventory.
6. The item will be unlocked and removed from the inventory.
7. All items with CII Code of J, R, or Q, and when the potential inventory adjustment value is greater than the count criteria value.
8. POST INVENTORY ACTIONS.
9. To identify problems associated with day-to-day business, target additional training opportunities, document inventory after action notes, or to provide recommendations for other upcoming inventories.
10. FINALIZE INVENTORY.
11. Identify the gain/loss amount and the accuracy of each inventory segment.
12. Identify items by count list that still require a physical count.
13. Potential Inventory Discrepancy Report.
14. Preview Inventory Accuracy Analysis.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter.

41. (021) While processing receipts, which box do you check to record abnormal transit times?
    a. Exceptions.
    b. Pipeline.
    c. Process.
    d. Quality assurance.

42. (021) How do you process a receipt when there is an existing quality assurance message for the item's identification (ID) number?
    a. Contact Defense Logistics Agency (DLA).
    b. Contact the source of supply.
    c. Delete the message.
    d. Review the message.

43. (022) What is the *last* step when attempting to resolve an inventory exception?
    a. Check other storage locations.
    b. Contact customer for accidental delivery.
    c. Look around normal shelf location.
    d. Search receiving area.

44. (022) When closing-out inventories from issue exceptions, what transaction is made when the actual count is less than the on-hand (O/H) balance?
    a. IAL.
    b. ISU.
    c. RND.
    d. SFL.

45. (023) What stratification (STRAT) type is used to identify items required for a unique purpose?
    a. Food and Drug Administration (FDA) testing.
    b. Operating (OPR).
    c. Special projects (SPJ).
    d. War reserve materiel (WRM).

46. (024) Which transaction code is used to record individual gains transferred from other medical materiel accounts?
    a. FBG.
    b. IAG.
    c. MSG.
    d. SFG.

47. (025) Which inventory control method involves the delivery of items directly to the using activity after being received?
    a. Economic order.
    b. Empty shelf.
    c. Order quantity.
    d. Stockless.

48. (025) Which level computation method is required to be used by *all* Air Force accounts?
    a. Days of stock.
    b. Near stockless.
    c. Standard.
    d. Wilson Economic Order Quantity (EOQ).

49. (026) What is the *minimum* single-line item value for an item to be reported as excess?
    a. $100.
    b. $500.
    c. $2,500.
    d. $3,000.

50. (026) Which Defense Medical Logistics Standard Support (DMLSS) window must be used to request cancellation of requested excess?
    a. DUE-IN/DUE-OUT.
    b. ITEM G/L.
    c. PROCESS PENDING.
    d. STOP SHIPMENT.

51. (027) Which commercial returns *pending* status is used when an item has been returned for a credit determination?
    a. Destruction.
    b. Disposition.
    c. Pickup.
    d. Process.

52. (028) Pre-inventory counts may be taken and accepted for inventory purposes for what type of items?
    a. Bulk.
    b. Loose.
    c. Expiration dated.
    d. Fast movers.

53. (029) What is the *first* step when beginning the inventory process?
    a. Documenting inventory counts.
    b. Generating count lists.
    c. Identifying items needing research.
    d. Selecting the inventory segment.

54. (030) What inventory window is used to preview the Inventory Accuracy Analysis Report?
    a. ENTER COUNTS.
    b. FINALIZE INVENTORY.
    c. POST INVENTORY ACTIONS.
    d. RESEARCH INVENTORY GAINS AND LOSSES.

Please read the unit menu for unit 6 and continue ➔

Unit 6. Miscellaneous Functions

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IN THIS FINAL UNIT OF VOLUME ONE, we will cover a wide-range of miscellaneous medical materiel functions. In the first section we will discuss specific quality assurance and risk management actions. Afterwards, we will look at some of the DMLSS generated reports, pending actions, and status edits. Finally, we will cover a few aspects of the acquisitions management element.

6–1. Quality Assurance/Risk Management

When items of medical materiel are suspected of being unserviceable immediate action is required to ensure these items are removed from all using activities and serviceable inventories. This includes inventories at your medical facility and at all other military medical facilities and depots worldwide. Your reporting of unserviceable materiel not only impacts AF medical activities, but also all DOD medical activities.

The quality assurance/risk management (QA/RM) program consists of quality assurance messages and medical materiel complaints. Each account must establish effective control over the quality of medical supplies and equipment maintained within the MTF. In this section, we will cover the procedures for processing QA messages and materiel complaints.

031. Retrieving quality assurance messages

Effective control of quality is one of the basic responsibilities of medical materiel management. The MLFC achieves quality control through inspection, classification, and surveillance as materiel is received, issued, stored, and shipped. The MLFC relies on various DOD and commercial agencies for notification of supply and/or equipment recall/alerts. These notices are normally received in the form of a QA message.

Recalls and alerts that require medical logistics action are obtained through two different source type categories:

1. DOD medical materiel quality control (DODMMQC) notices.
2. Offline notices (e.g., non-DODMMQC or Emergency Care Research Institute (ECRI) Tracker alerts).

DODMMQC alerts are automatically downloaded by the DMLSS server at every end-of-day period. Normally, you will receive your alerts in this way. On occasion, you may receive an alert from an offline source. These alerts need to be manually retrieved and added to the DMLSS QA module.

When an offline alert message is received, first determine if a DODMMQC notice already exists. If not, use the new QA record function to create a new QA record. The item description, QA reference number, class, and QA source are mandatory fields and must be completed. Additional information such as the item ID, should be completed if known. Once the new record is created, promptly notify Air Force Medical Operations Agency/Medical Logistics Division (AFMOA/SGALC).

DOD medical materiel quality control messages

DODMMQC messages are a quad-service product distributed by the US Army Medical Materiel Agency (USAMMA). The numbering of the MMQC consists of the calendar year followed by a consecutively numbered message beginning with 1001. The MMQC number is an aid which helps you track and identify missing messages. Normally, you receive DODMMQC messages automatically through DMLSS. You can always manually retrieve missing MMQC messages by visiting the following websites:

- USAMMA (fig. 6–1) – http://www.usamma.amedd.army.mil or
- Joint Medical Asset Repository (JMAR) (fig. 6–2) – https://jmar.detrick.army.mil

When working in DMLSS, you are also able to access JMAR from the DMLSS SYSTEM – NAVIGATION window (fig. 6–3).

We will discuss how to process MMQC messages in DMLSS more in-depth later in this lesson.

Figure 6–1. USAMMA website.

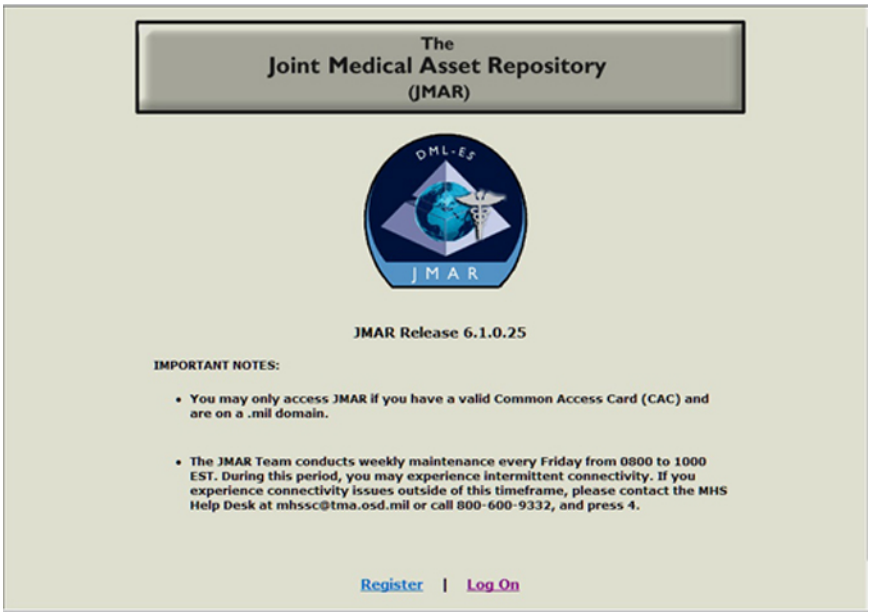

Figure 6–2. JMAR website.

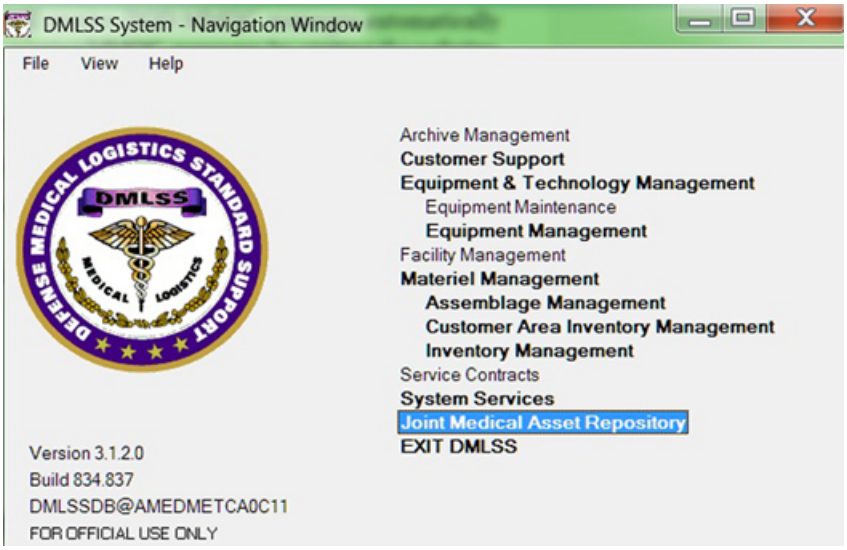

Figure 6–3. DMLSS system – navigation window.

USAMMA website

The following steps list the actions that a user may take to retrieve individual MMQC messages from the USAMMA Website.

1. Access the USAMMA Website at http://www.usamma.amedd.army.mil
2. Click on the tab labeled: MMQC/MMI Messages.
3. Select the link labeled: DOD-MMQC & MMI Message Search (2005 to Present).

You may narrow your search by modifying any or all of the search fields (fig. 6–4). The search fields include: message number, product type, product name, national stock number (NSN), part number, lot number, manufacturer, and distributor.

Figure 6–4. USAMMA MMQC search window.

032. Managing quality assurance messages

When you receive notification to suspend an item, immediately make sure that each using activity is notified to withdraw that item from use. It is important for you to make sure activities you support outside of the facility, including dispensaries and clinics, are also notified and that you complete turn-in actions. You must acknowledge receipt of any category I messages by the given suspense date. All medical logistics storage areas must be inspected for affected materiel including WRM and MC-CBRN assemblages. Ensure that all suspended materiel located in the using activities is promptly turned into medical logistics. Immediately mark and segregate the suspended items to prevent accidental re-issue. Use the DMLSS IM return item screen (fig. 6–5) to complete turn-ins from using activities; choose strat state “suspended.” The turn-ins will be for no credit only.

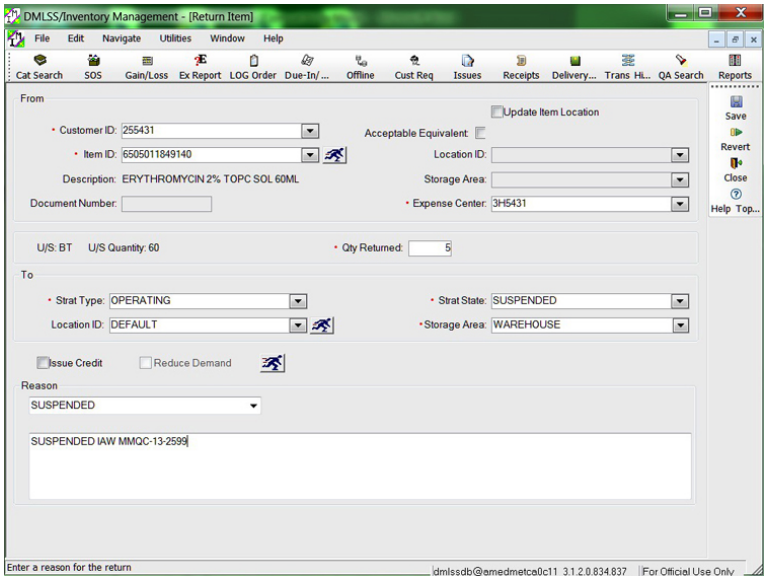

Figure 6–5. Item return window.

Suspension

When a suspended item is turned-in, follow the disposition instructions from the recall message (if applicable) or hold it in suspension until higher headquarters provides additional management action. You may be directed to return materiel to stock for use (transfer items from stratification state suspended to operating serviceable), return it to DLA or the contractor for credit, return it to DLA or the contractor for replacement, destroy it, or send it to DRMS

When death or personal injury occurs as a result of the use of equipment devices or products that may be defective, the items are not used again. If DLA or the Food and Drug Administration (FDA) requires the item(s) involved for investigation, these agencies will advise the MLFC to maintain item integrity to support any litigation resulting from the incident. Thus, the MLFC will keep the item(s) in his or her custody. Proper chain of custody is maintained on these items; they will not be disposed of, released to the manufacturer/distributor, or repaired without first notifying and receiving approval from HQ USAF/JACC**.**

To prepare condition tags, place suspended materiel in segregated storage and use either a DD Form 1575, Suspended Tag – Materiel (Brown) or a DD Form 1575–1, Suspended Label – Materiel, to identify it.

After you complete the suspended tag/label, affix it to the item and place the item in suspension. If you have not already done so, you may now adjust the inventory records to reflect the new condition change. The process is not complete until you close-out the recall alert in DMLSS and notify the patient safety officer.

Finalizing quality assurance records in DMLSS

After completing all necessary suspension and inventory actions, you must close-out the QA message in DMLSS by clearly indicating in the QA action field (fig. 6–6) what actions were taken by medical logistics and the using activities, along with the date the action was completed. If an item was found, removed from stock, and placed in suspension, indicate that you did so. If no matching supplies were located on-hand, indicate likewise with a statement such as: *Warehouse inventory inspected, item was not found on-hand*. Also indicate whether or not you contacted any custodians and what response was received from them. For audit trail purposes, annotate in the record along with affected quantities, document numbers, and materiel actions, such things as customer turn-ins or restratification of inventory to “suspended”. Also document negative replies.

Process medical equipment recalls in accordance with AFI 41–201, *Managing Clinical Engineering Programs*. Document work order numbers in the QA field if applicable.

Routing

Initiate collaboration with the MTF patient safety officer (PSO) by notifying him or her of all actions taken by medical logistics as a result of recalls and alerts. Notifications should include:

- Date of recall or alert.
- Source of the recall (i.e., DODMMQC, ECRI, FDA).
- Item description.
- Quantities removed from use.

Negative replies for recalls/alerts on items that are not found in the MTF do not need to be reported to the PSO. Only report items for which physical actions needed to be taken.

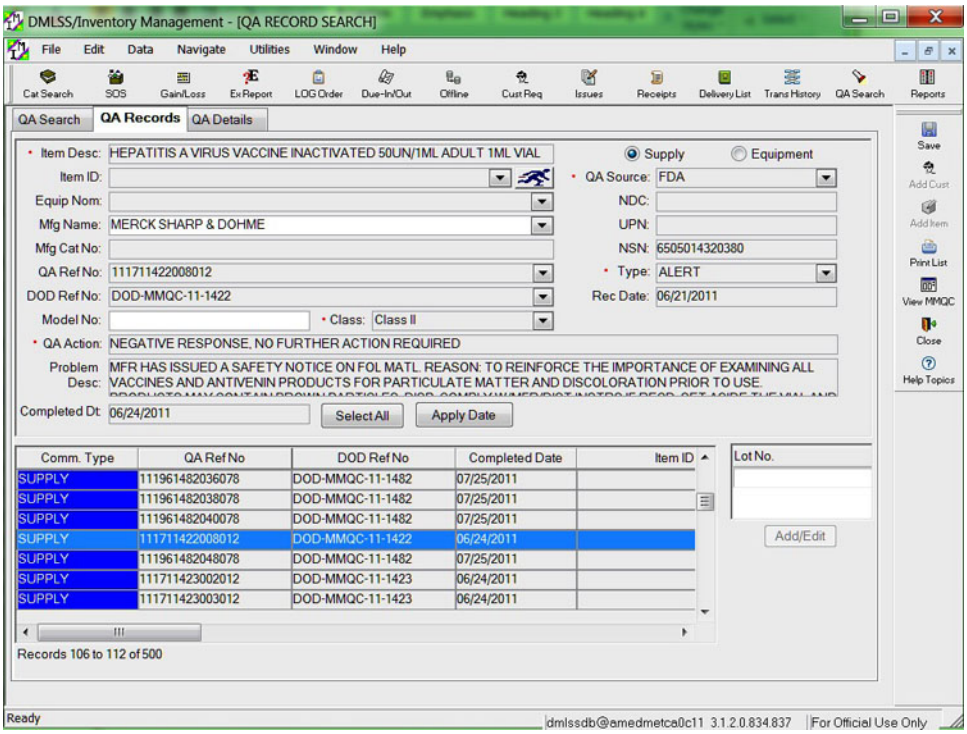

Figure 6–6. QA action field.

QA/RM files

You must maintain a log of all alerts and recalls worked by medical logistics. The log is divided by FY and can be either manual or electronic. Document the actions taken (including negative replies) including which offices or customers were notified, the date of completion, and the message/alert number. Provide a copy of the log to the PSO or risk manager (RM) on a monthly basis to facilitate EOC communication with executive leadership.

Keep the log entries in chronological order by QA message number to be sure that all alerts are reviewed and closed as applicable. For DODMMQC messages, the DMLSS missing MMQC messages report list may be used as proof of receipt. In addition, the QA/RM file must contain any instructions and messages from higher headquarters as well as other pertinent information. Because of the seriousness of the QA/RM program, property custodians and medical logistics personnel must be trained on all applicable procedures; maintain proof of training with the QA/RM binders.

033. Managing suspended items/records

As mentioned previously, DMLSS automatically receives QA messages during the EOP process. The DMLSS QA program manages recalls, suspensions, hazard alerts, and Safe Medical Device Act requirements by compiling input from various sources in a standardized electronic format. When processing QA messages, you may have the need to suspend items/records in DMLSS as part of the process. In order to do this, you have to access the QA module from the IM NAVIGATE MENU – QA (fig. 6–7). All QA activity in DMLSS takes place in the QA module. The DMLSS QA module allows you to do the following:

- Create complaints: The QA module enables a customer to fill out and submit a potential complaint whenever a supply or equipment item may be harmful to a patient or healthcare provider.
- Update the MTF QA database: Use the QA module to record and track all actions taken on internally generated alerts, as well as those actions associated with incoming quality alerts and manufacturer recalls.

- Create delinquent notices: Track actions to ensure that customer accounts respond to pending actions or internal and external quality alerts within the allotted time.

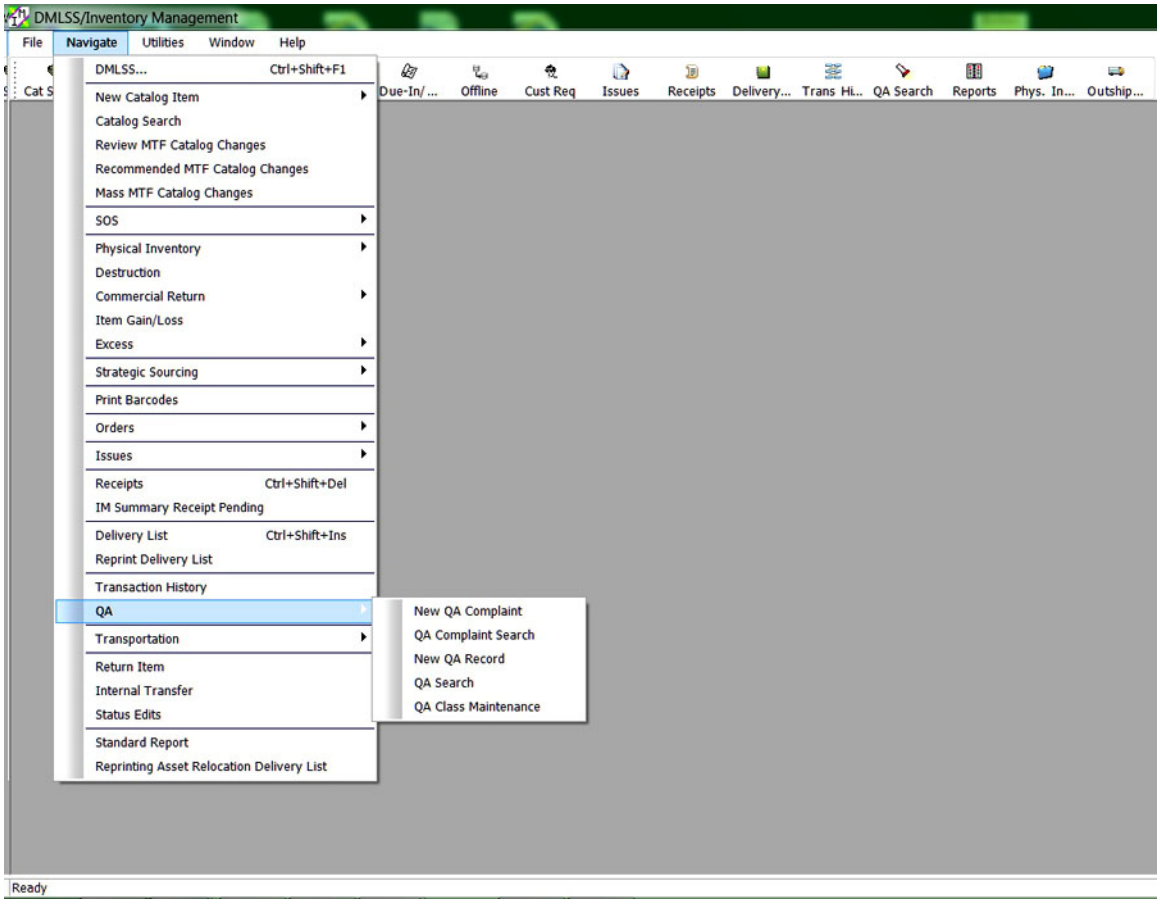

Figure 6–7. IM navigation menu – QA window.

When DMLSS receives QA messages, it builds an MTF QA database file to record and track all actions and determines whether it is a duplicate (same QA notice from the same SOS for the same item). DMLSS also identifies all customers with a consumption history. Additionally, DMLSS identifies WRM accounts that have an on-hand balance for the item and allows users to identify additional customers and WRM accounts that should be informed of the QA message. Lastly, DMLSS creates a pending action for customer accounts.

Resolving pending actions

QA notifications are all processed though DMLSS and posted to the inbox as pending actions. The pending actions are posted to the inbox to notify the user of required QA actions and/or problems. These QA pending actions are your primary source of information to determine what actions you have to take on the QA message. Possible actions may include establishing a new QA record and changing the stratification state of an item. Double clicking on a pending action takes you directly to the related QA record. The pending action messages you may see posted to the inbox are as follows:

- QA MMQC Info Bulletin.
- Missing MMQC Message.
- QA FTP Import Failed.
- IM QA Import Failed.
- QA Alert. Missing or No MTF Item ID Match.

- QA Alert. Item Qty Required.
- QA Delinquency Notice. Immediate Recall.
- QA Delinquency Notice. Item Qty.
- IM QA Complaint Alert. Complaint exists for item.

Now let's discuss these pending action messages in more detail.

QA MMQC info bulletin

This pending action is *informational only*. In the QA MMQC info bulletin window (fig. 6–8), you can view a list of QA MMQC bulletins that you have received. Clicking the view *MMQC* icon launches the web browser, and goes to the USAMMA website. View this pending action to determine if all QA MMQC messages have been received in your system. After viewing the QA MMQC info bulletin, you can delete the record from this pending action by highlighting the record and selecting DELETE button from the vertical toolbar.

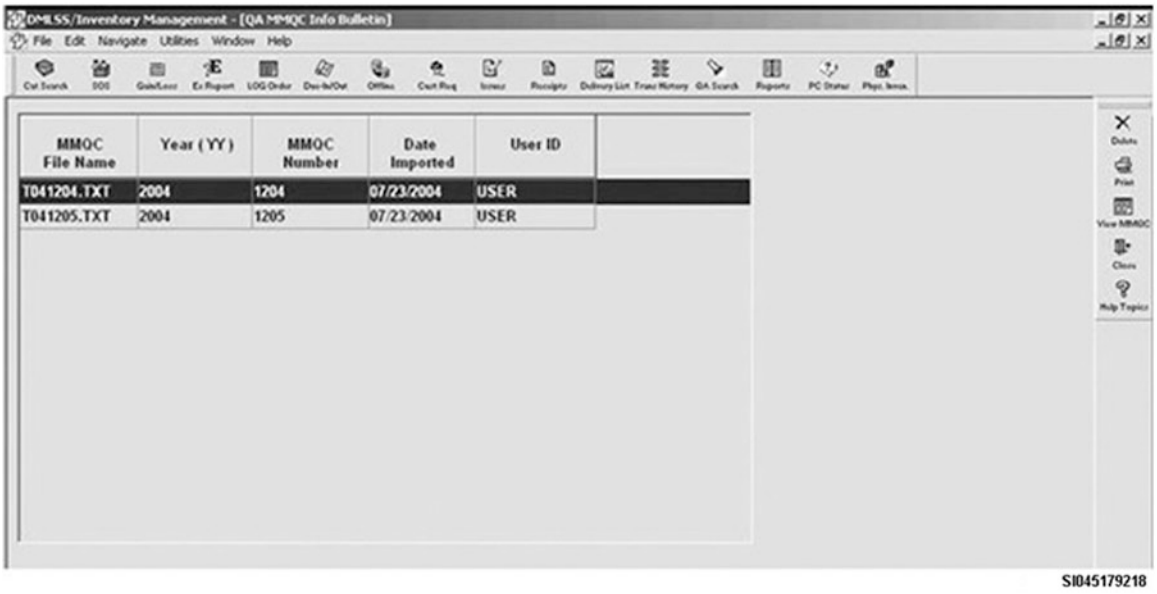

Figure 6–8. IM QA MMQC info bulletin window.

Missing MMQC message

This message indicates that there is a gap in the DOD ref numbers imported for QA messages. DMLSS will continue to search for the missing message during EOP processing and attempt to download it. A QA reference number is a number unique to each item on a MMQC message. The QA ref number consists of:

- Calendar year: 2 digits, positions 1–2.
- Julian date: 3 digits, positions 3–5.
- Serial number: 4 digits, positions 6–9 (MMQC number).
- Sequence number: 3 digits, positions 10–12.
- Segment count: 3 digits, positions 13–15.

To resolve this message, highlight the pending action and select the JUMP TO button to view a report of the missing MMQC message file names. Visit the USAMMA website to view the missing message(s) and take action. You can delete this pending action once you have either manually loaded the missing message or verified it has been downloaded.

QA FTP import failed

This inbox message indicates that DMLSS failed to import the QA file. During the EOP process, DMLSS unsuccessfully attempted to connect to the JMAR server. This pending action lists all missing QA messages. To ensure this problem is resolved, go to the USAMMA website and ensure that you have the latest QA messages downloaded. DMLSS automatically continues to try and import the files. When the QA FTP import fails, DMLSS automatically sends a message to the help desk. To initiate corrective action, highlight the pending action and select the JUMP TO button. DMLSS will display a prompt message to select YES to import the file manually (fig. 6–9). DMLSS returns the user to the IM inbox and the failed message is deleted. If you select NO, no files are imported and the pending action remains in the inbox. This pending action can be deleted only after the QA messages have been retrieved.

Figure 6–9. IM QA import failed message window.

IM QA import failed

This pending action is posted to the inbox when an MMQC file failed to import correctly to DMLSS. DMLSS automatically continues to try and import the files. If you receive this pending action message, contact the MHS help desk to research the problem. You can also input the QA message manually from the QA – NEW QA RECORD window. This pending action can be deleted only after the QA messages have been retrieved.

QA alert missing or no MTF item ID match

Selecting this pending action opens the QA RECORD SEARCH window – QA REJECTED RECORDS tab (fig. 6–10). In the QA RECORD SEARCH window – QA REJECTED RECORDS tab, you can see a list of QA messages that were rejected because there was no corresponding item in the MTF catalog. This requires a manual review to associate the QA message with the correct MTF record.

The user can manually check for a matching MTF catalog record, build a new record, or take no action and complete the record. A reason why you would need to build a new MTF catalog is that sometimes items are carried in the MTF without LOG's knowledge. An example is when a customer receives free samples from a vendor or leases a piece of equipment that may come with free reagents.

You can review the list, and if you are sure that you do not have any corresponding items, you can record the date you reviewed them (the completion date), and remove them from the list. To manually check for matching MTF catalog records, in the QA REF NO field, take note of the year (positions 1–2) and the MMQC number (positions 6–9). Click on the VIEW MMQC button on the vertical toolbar and search for the QA message to retrieve information you can use to search for the item. Once you have the search information, click on the JUMP TO icon next to the ITEM ID field. This opens the MTF catalog search screen. Search the MTF Catalog using the information you found in the MMQC message to ensure the item is not within the MTF Catalog. If you find a matching record, highlight the rejected detail record, enter the ITEM ID, and click the SAVE button. DMLSS then checks it

against the catalog and processes it. If you do not find a matching record, then you must build a new MTF catalog record and return to the pending action, highlight the rejected detail record, enter the Item ID, and click SAVE. This completes the process and the record is removed from the screen. When no action is required, complete the record by indicating that no action was required, then enter the date in the COMPLETE DATE column, click on APPLY DATE, and click SAVE.

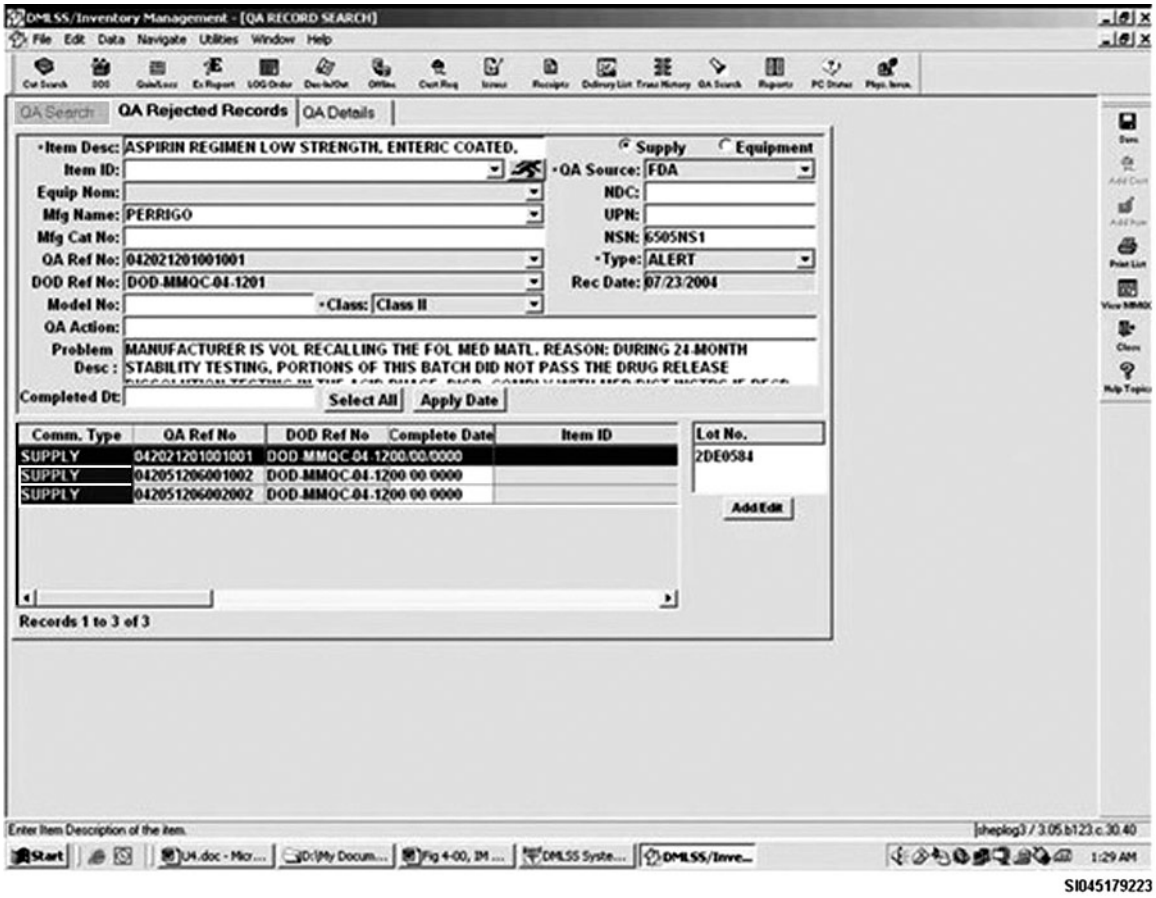

Figure 6–10. QA records search – QA rejected records tab.

QA alert item Qty required

This pending action notifies users of new MMQC QA message(s) for an item that requires the user to enter on-hand quantities. You must scan the shelves and/or storage locations to determine if you stock the item. Closely scrutinize the lot number, expiration date, serial number, and manufacturer date (MFG). Enter the quantity you found on your shelves, or zero if you did not find any.

The QA RECORD SEARCH – QA DETAILS tab (fig. 6–11) lists customers associated with this QA message. Customers that have received the message will have their customer ID displayed in the CUST ID column. A quantity in the NOTIFY QTY field designates those customers that have responded to the QA message, while those customers that have not responded will have no quantities.

The QA message provides disposition instructions in the PROBLEM DESC field. Depending on the disposition instructions, materiel may need to be consolidated. If the item is on hand, LOG needs to process a customer return that will generate a TIG to LOG and a TIL for the customer. In this window, you can also change the stratification state of the materiel by clicking on the TRANSFER button on the vertical toolbar. This pending action is not deleted until quantities have been entered for all items on the pending action.

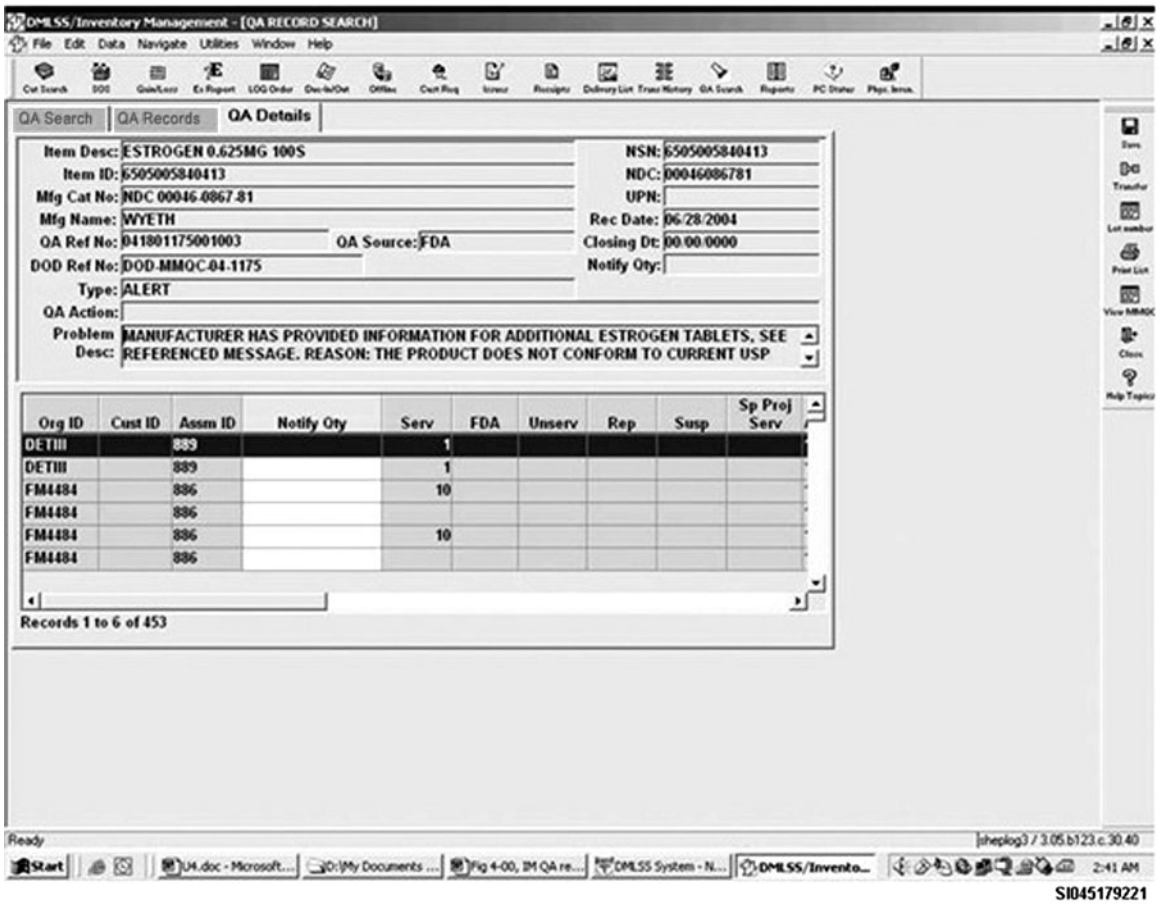

Figure 6–11. IM QA record search – QA details tab.

QA delinquency notice immediate recall

This pending action lists QA messages identified as Type I that are not updated by the times established in the QA Maintenance Table and is produced as a result of a non-response to the initial pending action message. QA messages are assigned to one of the three notification classes based on the level of the product. The delinquency notice (days) column is for the user to determine the number of days before the DMLSS issues the delinquency notice to a customer that has not responded to the QA message. This generates the QA delinquency notice. Item Qty, pending action to the customer's INBOX in the same application as the original QA message.

The delinquency notice (LOG) (days) column is for the user to determine the number of days before the delinquency notice *must be posted to LOG*. Failure to meet this timeline results in a notification being sent to customer service indicating the customer has not responded and generates this pending action. Selecting this pending action opens the IM QA RECORD SEARCH – QA DETAILS tab (fig. 4–11). Call the custodian and have him or her check the stock and verify he or she does/does not have the affected stock. Closely scrutinize the lot number, expiration date, serial number, and MFG date. Enter the quantity identified, if none is found, enter zero. If found, ensure corresponding turn-in of materiel is coordinated with the customer so disposition action can be completed. This pending action is not deleted until quantities have been entered for all items on the pending action.

QA delinquency notice item Qty

This notice is generated when QA message quantities are not updated by the times established in the QA maintenance table. Contact the users to close the pending action as soon as possible. Once all data is received and entered into the delinquent record, the pending action is removed.

IM QA complaint alert complaint exists for item

This pending action notifies logistics of a new complaint. Highlight the pending action and select the JUMP TO button to view the record. LOG should review CAIM balances, validate the complaint, and fax a printed copy to DLA. LOG cannot reject any complaints. All complaints must be forwarded to DLA. The complaint cannot be closed until a MMQC message is received from DLA. Materiel complaints are covered in the next lesson.

Creating a new QA record

In some cases, you may need to create a new QA record in order to load QA data manually; for example, when a QA message is initiated in your MTF. In the IM QA RECORD – NEW window (fig. 4–15) you can create a QA record for a supply or equipment commodity class item. You can also add a customer, lot number, or equipment control number (ECN) and serial ID to the QA record. The QA record enables you to create and submit a potential materiel complaint whenever you believe that an item, supply, or equipment may be harmful to a patient or healthcare provider.

To create a new QA record:

1. On the NAVIGATE menu, point to QA, and then click on NEW QA RECORD.
2. In the ITEM ID field, type an ITEM ID or select one from the dropdown list.
3. Select whether the item is supply or equipment.
4. In the ITEM DESC field (mandatory), enter a complete description of the item.
5. In the QA REF NO field (mandatory), type a QA reference number.
6. In the TYPE field (mandatory), select a type from the dropdown list. Your options are: Alert, Hazard, Recall, Mandatory Modification, Suspension, and Complaint.
7. In the QA SOURCE field (mandatory), select a source from the dropdown list. Your options are shown in the following table:

QA SOURCE	
DSCP	Defense Supply Center Philadelphia
ECRI	Emergency Care Research Institute
FDA	Food and Drug Administration
FOA	Field Operating Agencies
JRCAB	Joint Readiness Clinical Advisory Board
LOGISTICS	MTF Logistics Account
MANUFACTURER	

8. In the CLASS field (mandatory), select a class from the dropdown list. Options are shown in the following table:

QA CLASS	
Class	**Description**
I	Reasonable probability that the use of, or exposure to a violative product will cause serious adverse health consequences or death.
II	Exposure to a violative product may cause temporary or medically reversible adverse health consequences or where the probability of serious adverse health consequences is remote.
III	The use of, or exposure to, a violative product is not likely to cause adverse health consequences.

9. In the remaining fields, type any additional information, if applicable.
10. Add or Delete lot number(s) if applicable. Click on the ADD/EDIT button next to the Lot Number box.

11. Click the SAVE button on the vertical toolbar.
12. Click OK when you see the “Created QA Message Successfully!” message prompt.

The new QA record has been created and the reference information appears in the lower half of the window. Double-click on the new QA record reference information and DMLSS will open the QA RECORD SEARCH window to the QA DETAILS tab (fig. 6–11). Enter the customer’s quantities in the NOTIFY QTY field, click SAVE and DMLSS will return to the QA RECORD window. At this point, you can click on the ADD CUST and/or ADD ITEM buttons on the vertical toolbar to add customers that you want to receive a pending action in their inbox.

Searching for QA records

To search for QA records, first access the QA record search module from the NAVIGATE menu. In the QA record search window you can search for QA records within the DMLSS database. Select the commodity type of supply of equipment or leave it blank to search both types. If you select YES for the reject indicator (REJECT IND), the search only returns MMQC records that do *not* match catalog records. If you select NO, the search only returns MMQC records that match catalog records.

You can also select other search criteria as desired, but you must enter data in at least one field. The search results vary depending on the fields you use for the search criteria. When you identify a supply or equipment item as defective, the QA RECORD SEARCH window has all the information you need to create the QA record. For supply items, DMLSS identifies all the internal and external customer accounts that have consumption history as well as WRM accounts that have on-hand balances or due-ins for the item. Also, DMLSS allows you to select additional customer accounts or WRM accounts that should receive pending action notifications for the item. DMLSS associates customer, WRM, and equipment accounts with the QA message so that actions can be tracked and recorded. The QA RECORDS SEARCH window contains the following tabs:

- QA SEARCH (fig. 6–12): Use this tab to search for QA records created for defective supply or equipment items.
- QA RECORDS: Use this tab to edit information associated with a QA record and add a customer, item, lot number, or ECN to the record.
- QA DETAILS (fig. 6–13): This tab is used to review detailed QA record information and transfer items internally.
- EQUIPMENT DETAILS: This tab is used to review detailed equipment record information for the selected item. This tab is only available when you search for QA records using the Equipment commodity type.
- QA REJECTED RECORDS: This tab is only available by clicking the QA ALERT. MISSING OR NO MTF ITEM ID MATCH pending action message in the INBOX. You can view a list of QA messages that were rejected because there was no corresponding item in the MTF catalog.

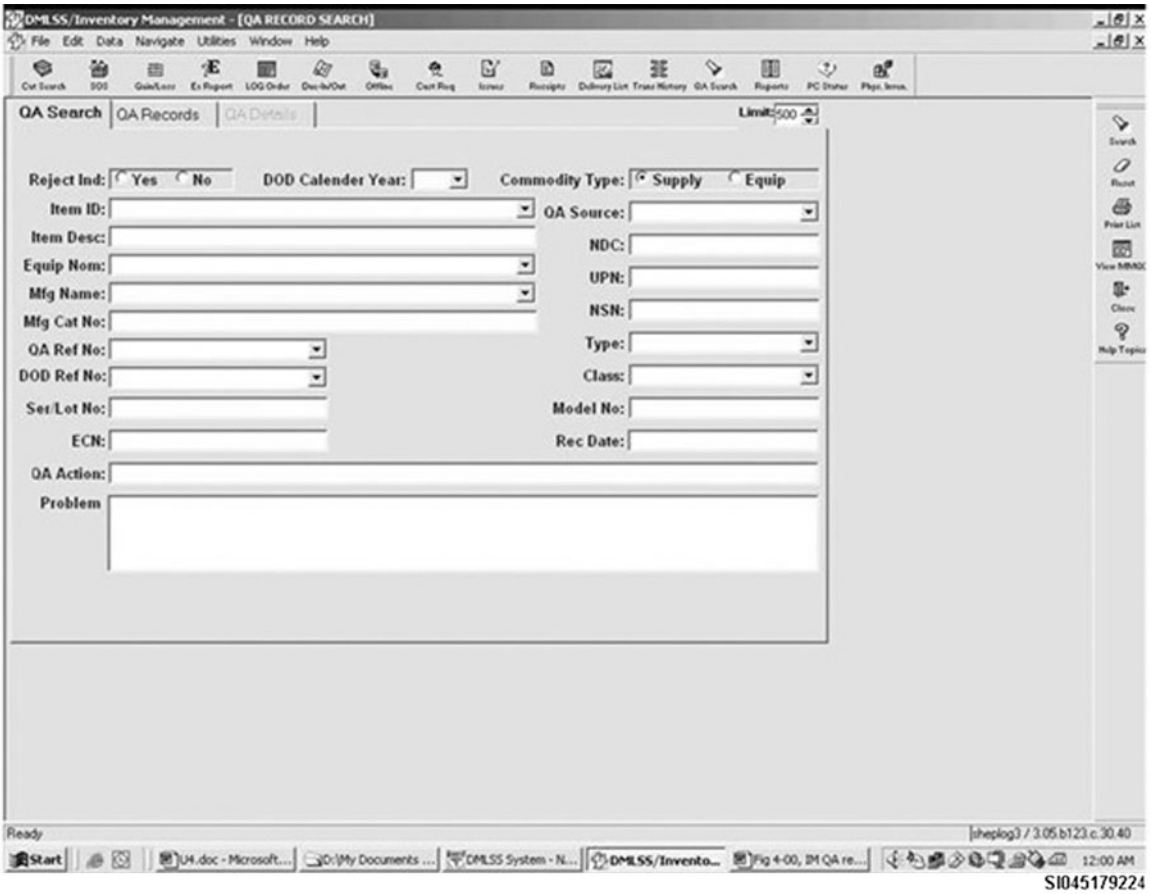

Figure 6–12. IM QA record search tab.

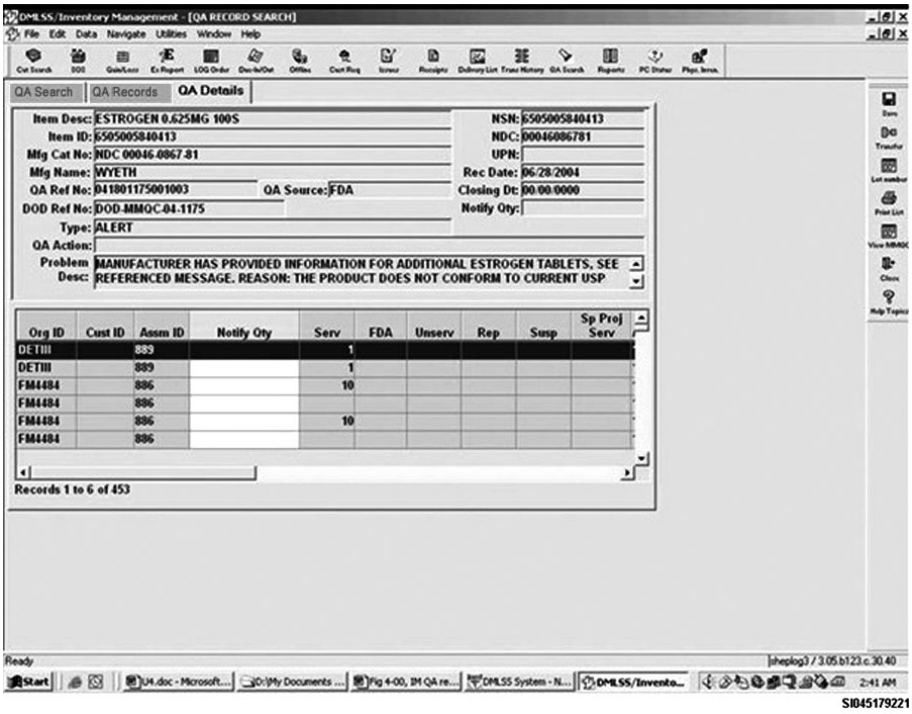

Figure 6–13. IM QA record search – QA details tab.

Transferring a QA record

You can transfer any items that matched the QA message criteria for suspension from the QA RECORD SEARCH window, QA DETAILS tab. You will know if you have items to transfer because the TRANSFER button on the vertical toolbar will be highlighted.You will not be able to transfer the item if the TRANSFER button is grayed out. To initiate the transfer, click on the button to open the INTERNAL TRANSFER window (fig. 6–14). Some fields will be automatically populated. Type the transfer information in the required fields or select it from the dropdown list. Click SAVE and then YES on the prompt message that appears to print the transferred item transaction.

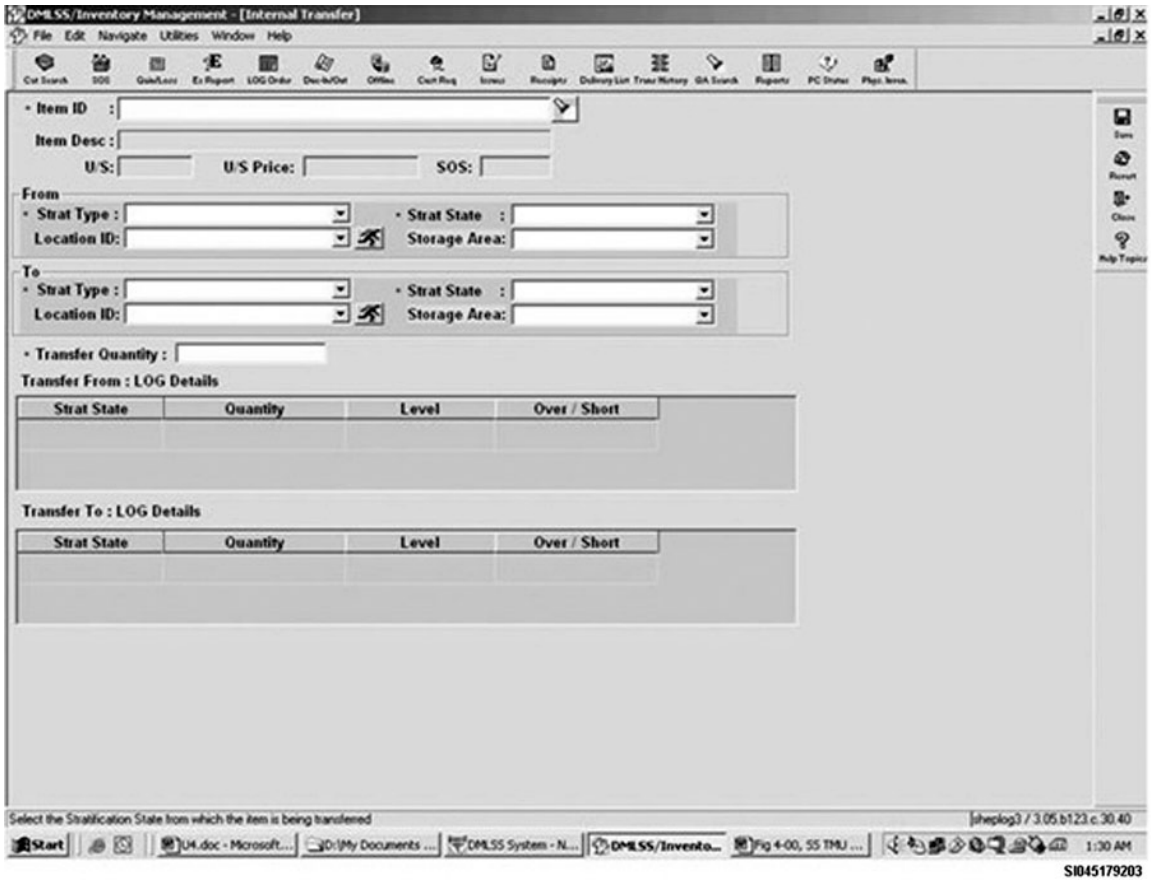

Figure 6–14. IM internal transfer window.

034. Materiel complaints

New medical materiel complaints should be thoroughly evaluated by the professional staff, patient safety, risk management, and medical materiel personnel for credibility, validity, and potential harm of the item before being submitted. Materiel complaints are classified as category I or category II.

Category I

Category I (Cat I) medical materiel complaints are used to report supply or equipment items that have been determined by use or by test to be harmful or defective to the extent that their use has caused, or may cause, illness, or death (i.e., an IV solution that caused a patient to have a violent life-threatening reaction or a heart defibrillator that sends too little or too much electrical current). Items that are a direct cause of patient-related illness or death must be reported. Here are some common examples of situations requiring Type I complaints:

- Medication marked or labeled with improper dosage instructions.
- Items with incorrect or deficient labeling.

- Foreign or particulate matter in liquids and solids.
- Imperfectly manufactured items that are off-color, off-taste, or off-odor.
- Items suspected of having less or more than regulated potency.
- Holes or tears in sterile plastic products, such as tubing and surgical gloves.
- Faulty calibration or defective devices.

Suspected materiel for Cat I complaints are immediately withdrawn from using activities and serviceable inventory and placed in suspension. This materiel must *not* be destroyed prior to receipt of disposition instructions.

Category II

Category II (Cat II) medical materiel complaints are used to report a supply or equipment item suspected of being defective, deteriorated, or otherwise unsuitable for use. Cat II items are not life threatening; however, they should be reported promptly. Examples of Cat II complaints include such things as surgical tape that will not stick, dull needles, dull scissors, rusting surgical instruments, and so forth. When Cat II complaints are filed, the materiel is quickly withdrawn from using activities and serviceable inventory, and placed in suspension. This materiel must *not* be destroyed prior to receipt of disposition instructions.

Submitting new materiel complaints

The new QA complaint process is used by DMLSS customers to build new complaint detail(s) and submit a product quality deficiency report (PQDR) when there is a quality deficiency with a medical product. It is also the vehicle for submitting safe medical device (SMD) incidents. Examples of discrepancies, which should be reported on the PQDR, are:

- Wrong or deficient labeling.
- Foreign or particulate matter in liquids and solids.
- Imperfectly manufactured items that are off-color, off-taste, and off-odor.
- Suspected sub-potency or super-potency.
- Defective devices.
- Pinholes in tubing.
- Faulty calibrations.
- Systemic equipment failures.
- Poor quality products.

In the DMLSS/IM navigate menu, select QA and then new QA complaint to access the CREATE NEW COMPLAINT window. Select the appropriate complaint type (I or II). If type I is selected, a message appears instructing the user to contact DLA troop support immediately. In addition, the type I complaint detail tab is activated and requires additional patient reaction data.

NOTE: Do not use type III complaint type in the new QA complaint process. This category is not used in the PQDR process.

It is very important to identify O/H quantities. You must suspend serviceable LOG inventory quantities to prevent issue. You must also retrieve and suspend affected materiel stored in customer areas. Utilize the navigate\return item module to process a turn-in gain for no credit to strat state OPR/SUS for each customer possessing the affected materiel.

All new QA complaints immediately appear as “IM QA complaint alert/complaint exists for items” pending action. If not already done, report the complaint at this time. When the materiel complaint is successfully closed-out, notify the PSO and/or RM and enter a close reason and close date in the

COMPLAINT DETAIL tab. Click SAVE, then CLOSE, and the complaint is removed from the pending action.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

031. Retrieving quality assurance messages

1. How does the MLFC achieve quality control?

2. Recalls and alerts are obtained through what two source categories?

3. What should you do first when receiving an offline alert message?

4. Who distributes the DODMMQC Quad-Service product?

5. How do you normally receive DODMMQC messages?

6. What is the USAMMA Website address?

7. List the eight search fields available in the USAMMA DODMMQC search window.

032. Managing quality assurance messages

1. When receiving an item suspension notification, what should you do immediately?

2. When should Category I recalls be acknowledged?

3. Where can you find disposition instructions for a suspended item that has been recalled?

4. Who retains custody of an item which has caused death or injury?

5. How do you mark an item to identify it has been suspended?

6. How do you close-out a QA message in DMLSS?

7. For audit trail purposes, what three things are annotated in the QA record?

8. Who should be notified of the actions taken as a result of recalls and alerts?

9. QA log entries should be kept in what type of order?

033. Managing suspended items/records

1. How do you access the QA module?

2. List three things that the QA module allows you to do?

3. How are QA notifications posted to the user's inbox?

4. What primary source of information is used to determine what actions you will take on a QA message?

5. What happens if you double-click on a QA pending action?

6. Which QA pending action is informational only?

7. Which QA pending action indicates there is a gap in the imported messages?

8. Which QA pending action indicates that DMLSS failed to import the QA file?

9. Who do you contact if you receive an IM QA Import Failed pending action?

10. What is required when receiving the Missing or No MTF Item ID Match pending action?

11. When receiving an Item Qty Required pending action, how do you determine if you stock the item?

12. Which pending action is received when Type I messages are not updated by the times listed in the QA Maintenance Table?

13. What do you enter in the QA record quantity field if a Type I recall item is not found?

14. When is the QA Delinquency Notice Item Qty pending action generated?

15. When would you need to manually create a new QA record?

16. When would an item be classified as *Class I* recall?

17. When processing a QA record search, which records are retrieved if you select YES for the REJECT IND?

18. Which QA RECORDS SEARCH tab is used to edit and add customer information to the record?

19. Why is the QA DETAILS tab used?

20. How will you know if you have QA items that need to be transferred to suspension?

034. Materiel complaints

1. Before being submitted, new medical materiel complaints should be thoroughly evaluated by the professional staff, patient safety, risk management, and Medical Materiel personnel for what?

2. When is a Cat I medical materiel complaint used?

3. What should you do with suspected materiel for Cat I complaints?

4. When are Cat II medical materiel complaints used?

5. Surgical tape that will not stick, dull needles, dull scissors, and rusting surgical instruments are examples of which type of materiel complaint?

6. The new QA Complaint process is used by DMLSS customers to do what?

7. How do you access the CREATE NEW COMPLAINT window in DMLSS?

8. What should you do after a materiel complaint has been successfully closed-out?

6–2. Reports, Pending Actions, Status Edits

In this section we will cover some miscellaneous inventory management functions. Specifically, DMLSS provides a variety of reports, pending actions, and status edits to help you manage your account. Each report, pending action, and status edit will help you manage a certain process. We will review standard reports, business objects (BO) reports, and financial reports, along with pending actions and status edits. We will then look at quality control corrective actions.

035. Generating reports

A report is a collection of data presented automatically on a periodic or event driven basis. Reports represent the status at that point in time and/or present data of a historical nature. The data is presented in a standardized format, and cannot be manipulated. Reports are not available if the report date field is not populated. Standard reports essential for the effective management of the account are prepared automatically. You will need to produce standard reports for local MTF management, and to meet the requirements of higher headquarters reporting.

The reports module in each application enables you to generate, view, and print DMLSS reports. There are two basic types of reports: standard and BO reports.The main difference between the types of reports is how they are built. You can choose to run an existing standard report or use BOs to modify or create an ad hoc report. You will use a combination of these reports to manage the activity of the account, as well as prepare reports required for higher headquarters.

The user must have permission to generate and view standard reports. The user will access the reports module via the navigation menu or navigation toolbar depending on the application. In the equipment management (EM) module, the user is presented with an option to select either standard reports or standard inquiry. In the other applications, such as IM, the user is taken directly to the report list.

The user will be able to view standard reports that are generated during the end-of-period processing. DMLSS maintains these standard reports throughout the specified retention period. This allows the user to view previous standard reports and also facilitate trending. When viewing standard inquiries,

DMLSS requires the user to select a report and enter the input parameters. The user can view the reports and then elect to print the reports. The user also is able to save the report data to a text file for storage after the retention period has been exceeded.

Standard reports

Standard reports are compiled in an application and cannot be altered by the user. To access a report, go to the NAVIGATE menu and click STANDARD REPORTS or REPORTS. The list of reports window appears and lists the reports available for the specific application you are in. To view any report, highlight it and then click on the VIEW button on the vertical toolbar. This action opens the specify report selection criteria window. In this window, enter the necessary information (the fields in this window will vary depending on the report you selected). Click OK to open the report viewer window for the selected report.

The following list provides a general overview of some of the most commonly used DMLSS reports.

- Adjusted Unit of Issue: identifies all catalog records that have been configured with an adjusted unit of issue.
- Aged Due-in: provides detailed information on requisitions for IM that are overdue according to the procurement lead time for a given item.
- Aged Due-Out Summary: provides summary information on active due-outs.
- Best Medical Surgical Items by Dollar Savings: lists estimated savings that would occur by switching to a suggested alternative medical surgical item.
- Best Pharmaceutical Items by Dollar Savings: provides suggested alternatives for stocked pharmaceutical items that could potentially result in cost savings.
- Delinquent Purchase Card Reconciliation: displays a list of delinquent PC reconciliations based upon two categories: Part I – Closed orders that have not been reconciled by the cardholder for a specified period of time, and Part II – Reconciled orders that have not interfaced with Finance.

Business objects

A BO is a separate commercial-off-the-shelf (COTS) software package that executes independently within DMLSS to meet special reporting needs. BO allows you to search the DMLSS databases and produce ad hoc reports that are not available from each application's report module. You can refine the building criteria for these reports.This topic covers the BO concepts used to create basic BO ad hoc reports.

Business object concepts

You need to be familiar with the following concepts to use BO:

1. Objects – An object is one specific type of data, such as "room size" or "drug type." It is the smallest category in BO and is the first level to group together all the data items that exist in the application. Objects are represented in BO as items inside a folder. Objects can be grouped together in a class. In a standard (existing) report, these objects are already chosen. In ad hoc (new) report, you choose the objects. There are three types of objects:

   a) Dimension – This is a key object in which you would base a report and is static (i.e., you can base a report on *ITEM ID*). A dimension object is identified in DMLSS with the symbol of a square.

   b) Detail – This object is also static and may not form the basis of a report but would provide detailed information of a dimension object (i.e., Advice Description could provide the additional information of its Advice Code). A detail objec*t* is identified in DMLSS with the symbol of a triangle.

   c) Measure – This object represents the total calculations. It is a dynamic object where the value is dependent on the dimension object with which it is grouped in a query. For

example, the result of estimated on-hand quantity and location ID will produce different results in the output of the measure object than estimated on-hand quantity and operational level. A measure object is identified in DMLSS with the symbol of a circle.

2. Classes – A class is one level higher than an object and groups together objects that are related to one another. In some cases, a class is called a "major class" and is made up of subclasses. Classes are represented in BO as folders. Examples of objects in a class together are room size, room number, room location, drug type, unit size, and shelf location. When you create a report, only the objects from one class may be used. The objects are grouped together such that if you choose the class most suited to the report you want to create, every object that would be necessary is within that major class.
3. Universe – A universe is the highest-level grouping in BO and corresponds directly to an application. The universe contains several folders, or classes, in which the objects are kept. For example, since CAIM has its own data classes containing data objects which are queried to run reports, it has its own universes. When you open BO from DMLSS NAVIGATE window, the appropriate universes are automatically available for selection. Different universes in each application support both general and specific queries.
4. Repository – The repository is the group of databases in which standard (existing) reports and universe definitions for the DMLSS application are stored. You can extract information from the repository in the form of reports by using BO.

BO steps to creating a report

The Business Objects application offers numerous options for creating a simple BO report. Once you become familiar with BO, your creativity will be the only limitation to generating reports useful to you in managing the account. To launch BO and create a report, follow these steps:

1. Open the DMLSS application and launch BUSINESS OBJECTS in the DMLSS system – navigation window. On the popup menu that appears, click on the name of the application for which you want to see a report. If you select an application that does not have any standard reports, DMLSS launches the BO application directly. This action opens the BO standard report viewer window.
2. In the BO standard report viewer window, you have the option of doing one of the following, as indicated in the table below. When you click on the LAUNCH BO button, DMLSS will close the BO standard report viewer window.

If	Then
You want to create ad hoc reports	Click the LAUNCH BO button to open the BO window. All ad hoc reports are saved in the USERDOC/USERNAME directory of your PC.
You want to see a standard report	a. Select a report name. b. If you want the report data to be automatically refreshed, select the AUTOREFRESH REPORT ON OPEN checkbox. The DMLSS application will not be available until the report is refreshed or cancelled. The report may appear blank or may contain outdated information until refreshed. c. If you want the BO Standard Report Viewer window to close once BO has been launched, select the CLOSE VIEWER AFTER OPENING REPORT checkbox. If you want it to remain open (for example, if you want to view multiple reports) clear the checkbox. The DMLSS system – navigation window will not be available until the BO standard report viewer window is closed. d. Click OPEN REPORT. The report appears in the BO window. e. The report will be saved in the USERDOC/USERNAME directory of your PC as read only until the report is renamed.

Once you have created and viewed the report, you can save it and print it in the same Windows fashion you are accustomed to. In the BO standard report viewer window, you can also open a report by double-clicking the report name. The reports that are available to you in this window depend on your DMLSS privileges, military service, and fund type (stock fund or O&M). If at any point you need specific instructions on how to proceed in BO, access the DMLSS BO online help or review available training on the AFML website.

036. Medical materiel financial reports

One of the most important and most complicated areas in your job is interpreting and utilizing data contained on the various report products. In this lesson we will discuss one of the most commonly used medical financial reports—the medical materiel management report (MMMR)—and the DMLSS counterpart, the accountability requirements code (ARC) stratification (STRAT) report. The medical logistics flight chief is responsible for reconciling the MMMR with DFAS and notifying AFMOA/SGALO of any discrepancies and corrective actions. At the 5-skill level, you most likely did not get the opportunity to work this list, but as you progress in your 7-skill level training, it is important that you become familiar with this list and gain some experience working it.

Background

Remember that finance uses multiple accounting”modules” to make up their system. The standard materiel accounting system (SMAS) is where the actual accounting records are kept and interfund bills are paid. The MMMR is produced in SMAS during end-of-month processing. This report is used to evaluate the financial posture of the entire inventory. It also serves as a reference in the preparation of financial plans and budget calls. Finance transmits the report images to AFMOA.

MMMR explanation

The medical materiel management report is produced monthly in SMAS. It provides the director of medical logistics a stratification of the financial value of the opening inventory, year-to-date increases and decreases, ending inventory, due-ins, materiel intransit, and due-outs. It represents inventory based upon DMLSS transactions. The report is used to evaluate the financial posture of all inventories. The associated report images are transmitted by the Defense Accounting Office to the Air Force Medical Logistics Office. The report also serves as a reference in preparation of financial plans and budget calls.

The AFML Webpage version of the report is produced in three pages. Each page is a compilation of a beginning of year figure plus or minus individual lines. Due-ins and total backorders are also reflected. It is divided as follows:

- Page 1 shows AFWCF/MDD Medical Supplies (EXP 1).
- Page 2 shows AFWCF/MDD Medical Expense Equipment (EXP 2).
- Page 3 is a consolidation of pages 1 and 2.

Across the top is the title of the report, the stock record account number (SRAN) (DoDAAC)/base name, and the "as of date" (the cutoff date on the records used to prepare the report).

- Line 1 is the beginning balance. This line should be the same as the ending inventory position (MMMR Line 11) from 30 September of the prior fiscal year.
- Line 2 is the total of the receipts. It is subdivided to lines 2A, 2B, and 2C.
    - Line 2A shows all receipts from the Defense Logistics Agency-Troop Support (DLA-TS), which includes PV receipts.
    - Line 2B shows all receipts from local purchase sources.
    - Line 2C shows all other receipts, such as from the Veterans Administration or General Services Administration.

NOTE: There is one loss transaction that updates line 2, the return to vendor for credit transaction (RVL). It decreases line 2 while setting up a claims receivable record in accounting and finance for the amount of the potential credit. In DMLSS it is in commercial returns, with "check drawn" being checked.

- Line 3 is non-reimbursable receipts. Entries on this line are a result of rebate credits, items procured by AFMOA/SGAL for shipment to the accounts, materiel obtained using PV credits, and finance making adjustments (such as materiel received without charge; they would decrease line 2 and increase line 3).
- Line 4 is the total of the Issues. Line 4A is reimbursable issues, which is the majority of the medical sales business. Line 4B is nonreimbursable issues. Line 4C is not used, so it should never have any figures on it.
- Line 5 is the total of the price changes, and subdivided into line 5A (price increases) and line 5B (price decreases).
- Line 6 is the total physical inventory adjustments and subdivided into line 6A (increases/inventory gains) and line 6B (decreases/inventory losses).
- Line 7 is the total discrepancy shipment and subdivided into overages and shortages.
    - Line 7A may reflect overages in shipment or finance deletions of received not billed transactions.
    - Line 7B is shortages in shipments and may also be adjusted by finance with write-offs of old claims receivable.
- Line 8 is the total of gains to inventory and subdivided into numerous lines. These lines should normally be positive figures.
    - Line 8A is in-shipments from another SRA and includes excess item receipts.
    - Line 8B shows turn-ins where credit was allowed to the customer. Credit should be reflected in the operating balance column only.
    - Line 8C shows turn-ins where credit was not granted to the customer. Entries without credit are acceptable in any column.
    - Line 8D is not used.
    - Line 8E shows withdrawals from the Defense Redistribution and Marketing Office, or (DRMO).
    - Line 8F shows inventory transfer gains and expendability code changes.
    - Line 8G shows condition change gains.
    - Line 8H shows capitalized materiel, meaning it came from another division of the working capital fund.
    - Line 8I shows assembly actions taken.
    - Line 8J is another line not used.
- Line 9 is the total of losses from inventory and broken down into sub-lines. These figures are normal negative figures.
    - Line 9A shows outshipments to another SRAN.
    - Line 9B shows returns to source.
    - Lines 9C and 9D are not currently used.
    - Line 9E reflects destructions due to deterioration.
    - Line 9F shows turn-ins to DRMO.
    - Line 9G shows inventory transfer losses and expendability code changes.
    - Line 9H shows condition change losses.

  - Line 9I shows inventory decapitalized from the stock fund, meaning it is being sent to another division of the working capital fund.
  - Line 9J reflects disassembly actions.
  - Line 9K is all other losses, which could include finance adjustments, such as credit not allowed for a trade in.
- Line 10 shows accounting and finance book adjustments which is used when finance records are not in agreement with the medical logistics records.
- Line 11 shows the ending inventory. Caution must be taken here because line 11 is not a computed figure. A prudent manager would take line 1, then add or subtract all other lines depending on whether they are plusses or minuses, to arrive at line 11. If the calculations don't agree with the MMMR there is a problem. Contact your Defense Accounting Office (DAO) representative to correct that problem.
- Lines 12 and 13 are created from the due-in detail records at finance. Line 12 reflects items on-order, while line 13 reflects items shipped and/or billed not received.
- Line 14 shows due-outs as reflected on the due-out file.

Initial review

There are a handful of key elements that you should look for when first receiving the MMMR. Any deviation from the norm requires further investigation and a footnote explanation to AFMOA/SGALO.

- Normal positive entries: Lines 1, 2A, 2B, 2C, 3, 5A, 6A, 7A, 8A-J, 11, 12, 13, and 14.
- Normal negative entries: Lines 4A, 4B, 5B, 6B, 7B, and 9A-K.
- Are ending on-hand, due-in, and due-out balances reasonable, and what you would expect them to be?
- Do any entries appear excessively higher or lower than you would expect?
- Are non-refundable receipts (Line 3) valid?
- Are non-reimbursable issues (Line 4B) valid or authorized? Who/What provided the authorization for the free-issues?
- Is there an ending inventory in special projects? Do you know what materiel is on-hand? Has the MAJCOM approved your use of the special projects inventory code? Do you have the letter from MAJCOM approving its use?
- Is there ending inventory in the suspended and reparable categories? Do you know what materiel is on-hand in these categories? Should the materiel be on-hand or should action be taken to dispose of the materiel? Are these items equipment items that should be repaired and placed back into the serviceable inventory?
- Have situations identified during the initial scan been researched and were necessary corrective actions taken?
- Have erroneous entries been identified and footnoted? Have erroneous entries from prior months report been properly corrected?
- Are the ending balances correct? Are there any negative balances? Line 11 is not calculated and can be "plugged" by SMAS. To determine if it's correct, take the opening balance, then add all positive balances and subtract all negative balances. If the result doesn't agree with line 11 it's been plugged.
- For expendability codes 2 in the operating balance column, does the total of lines 11, 12, and 13 equal line 14? If not, has the reason been determined?

Additional training tools are available in the AFML Website. The MMMR-ARC analysis training aid is an excellent source of information should you need to work the monthly report.

Reconciliation

To verify the accuracy of the MMMR, check the end inventory closing balances.The closing balances should agree with the balances on the DMLSS report. When you are unable to resolve discrepancies on the MMMR, you must notify AFMOA/SGALO of the problems you found and your plans for correcting the problem. This information is provided to AFMOA through the use of footnotes. Footnote any out-of-balance conditions on the MMMR to AFMOA in writing. Messages, facsimile, E-mail, or memorandums are all acceptable. Provide these footnotes as early as possible. Call in significant dollar value out-of-balance conditions to AFMOA/SGAL immediately, for they may have an adverse effect on the entire stock fund and may have to be explained by the medical division manager. Consult with the AFMOA to determine what is considered a significant dollar value.

When preparing your footnotes, as a minimum, include the AF Medical (FM) account number, the month that the footnote pertains to, the expendability code, line number, and applicable column, along with a description of the discrepancy or erroneous condition and its corrective action.

037. Processing pending actions

A pending action is a report that presents data in a standard preprogrammed format. DMLSS automatically produces pending action reports on an event driven basis. DMLSS automatically posts pending action reports to the INBOX of the application it applies to. To determine which pending action messages appear in your INBOX, ask your supervisor, system administrator, or someone with the proper system privileges to access system services and assign particular pending action messages to your user ID. In the inbox, you can see important information about actions that require follow-up.

The inbox opens automatically when you initially access an application, and there are pending actions for users to complete. You can use the INBOX to immediately view and resolve issues, thus preventing the possibility of problems developing and expanding. Pending actions are listed by the as of dates.Users can also gain access to the INBOX by selecting utilities from the menu bar and clicking on inbox or by using the hot-key shortcut. You must have pending action privileges to view/access pending actions from the INBOX and the particular action(s) assigned.

Review and work processes in the INBOX daily to ensure proper management of all operating stock, excesses, quality assurance, assemblages, equipment records, and facility management actions. You can access a process or report by clicking on the “JUMP TO” icon located at the bottom of the window. Make changes as required and save actions to complete the process. Print any required reports as needed. When you complete a process, close the window to return to the INBOX. The INBOX can be closed or left open while in a module. The INBOX is not automatically updated when a pending action message is added or updated. It is recommended that you periodically click REFRESH to retrieve your latest messages. The pending actions are too numerous to list here, but refer to AFMAN 41–216, *Defense Medical Logistics Standard Support (DMLSS) User’s Manual*, for a complete list of pending actions by application (IM, AM, CAIM, EM). The list includes the pending action title, when/why DMLSS produces the message, and how/why the user should work it.

Maintain Customer Area Inventory Management user pending actions

CAIM allows you to associate pending actions to a specific user. To associate pending actions, from the UTILITIES menu, click maintain pending action reports to view the assigned pending actions window. To assign a pending action, select the YES checkbox. The INBOX opens automatically when accessing the CAIM module as a customer and there are pending actions for users to complete. Pending actions are listed by the as of dates. Users may also gain access to the INBOX by selecting utilities from the menu bar and clicking on INBOX.

Review and work processes in the INBOX daily to ensure proper management of the customer’s area. To initiate a process or report, click on the “Jump To” icon located at the bottom of the window. Make changes as required and save actions to complete the process. Print any required reports as needed. When you complete the process, close the window to return to the INBOX. Delete pending

actions once they are completed. The INBOX can be closed or left open while in the CAIM module. You can select reports or processes to post in the CAIM inbox when an action is pending.

From the utilities menu, click maintain pending action report to view the criteria window. All report defaults are set to "yes" to post in the INBOX when changes or updates take place that affect one of the criteria reports. To make changes, click the "yes" or "no" radio button and click the save icon.

Reports that are not to be sent to the INBOX can be accessed from the reports module or from the navigate and utilities menu.

Deleting a pending action

You only need to resolve a pending action if the ACTION REQUIRED field equals yes. If it equals no, you can simply delete it. To resolve a pending action, select it and click the JUMP TO button and perform the required action(s) and close. The INBOX window reappears and the pending action is removed from the list. If the action is still in the list, click the refresh button. If the action is still present select the action and click delete to remove the product. You can only delete a pending action message if the ACTION REQUIRED field equals no. If it equals yes, the pending action will remain in the INBOX until you resolve it. Processes or reports not completed and considered still pending will reappear in the INBOX after EOP processing.

038. Processing status edits

Status image updates are processed by DMLSS after they are sent from some of your suppliers. Each processed message is classified into one of three groups depending on the status code in the image and will appear on the status edits part 1, 2, or 3 tabs. To access the status edits in IM select NAVIGATE from the menu, scroll down and select STATUS EDITS. Let's look at the three groups of status edits and the associated status codes.

STATUS EDITS PART 1 – ERRORS tab

The STATUS EDITS PART 1, ERRORS tab shows all status image transactions that DMLSS did not recognize. When you select an item in the bottom section of the window, the top section will display information about it to include the reason for the error. The following table shows specific status codes that will appear on this tab and their description.

STATUS EDITS PART 1–ERRORS Tab	
DUE-IN STATUS CODE	**DESCRIPTION**
BU	Item being supplied against your FMS Case Designator or your Grant Aid Prgm and RCN
BY	Depot/storage has previously denied the MRO by DI A6.
B1	Assets are currently available. Reqn will be retained by DRMS for 60 days from date of receipt awaiting possible arrival of assets (DRMS use only).
CR	Rejected. Invalid DI for a GFM transaction.
CT	Rejected. Review records and resubmit with a new document number.
C1-C6	Rejected.
C9	Rejected. Applies only to subsistence.
DB-DG	Rejected. Processing terminated. Canceled.
DH	Terminate intransit control processing. Further research on the quantity discrepancy is being conducted.
DJ	Rejected. GFM quantity requisitioned exceeds the contract authorized quantity. The quantity that exceeds the authorized quantity will be supplied.
DN	Rejected. A valid contract is recorded at the MCA, however, the requisitioned item is not authorized GFM under the contract.
DP-DR	Rejected.
D1	Canceled. Requisition was retained for 60 days. Requested asset did not become available.

STATUS EDITS PART 1–ERRORS Tab	
DUE-IN STATUS CODE	**DESCRIPTION**
D4	Canceled. Applies only to subsistence items. Your requisition quantity does not meet the contractor's minimum order quantity.

Status edits part 2 – awaiting review tab

This tab shows all status image transactions that DMLSS recognized but are on hold pending further actions. When you select an item in the bottom section of the window, the top section displays information about it to include the reason for the delay. When you process or delete these messages, DMLSS updates the due-in detail record accordingly and the status message is removed from this tab. The following table shows specific status codes that appear on this tab with their description and DMLSS or user action.

STATUS EDITS PART 2 – AWAITING REVIEW tab		
DUE-IN STATUS CODE	**DESCRIPTION**	**ACTION**
BE	Depot/Storage activity has record of MRO but no supporting transaction/record of action taken.	Upon user approval, the due-in record is updated.
BF	No record of original requisition.	Upon user approval, the due-in status is updated, the due-in quantity is set to zero and a due-in increased due to cancellation (DQC) transaction is generated.
BG	One or more of the following fields have been changed: Stock number Unit of issue Part number	Upon user approval, the due-in status is updated along with the due-in item ID, U/P and U/P price.
BH	Substitute will be supplied. Examine unit of issue, quantity, and unit price fields for possible changes. Revise appropriate records accordingly. Additional status will be provided.	Upon approval, the due-in status is updated along with the due-in sub item ID, unit of purchase (U/P), U/P price, and U/P quantity. A local prime/sub relationship is built, and if the ratio is 1 to 1, an IM acceptable equivalent is built. If the user rejects the substitute, an AC1 transaction is sent to the source requesting cancellation of the order.
BM	Requisitioned passed to activity in record position 67–69.	Upon user approval, the due-in status is updated
BN	Requisition being processed as free issue.	Upon user approval, the due-in status is updated, along with the due-in signal code and fund code. The refund code is set to "N". The log fund obligation and commitment values are reduced by the total line item value of the order.
BQ (for O&M PFY)	Cancelled. Result of cancellation request. Also applies to cancellations resulting from deletion of an activity from the DODAAD. Deobligate funds if applicable.	If the order was funded by a previous FY O&M fund, the following updates are only made if the user approves: the due-in status and quantity are updated; the due-in quantity is set to zero, and a DQC transaction is generated.

STATUS EDITS PART 2 – AWAITING REVIEW tab		
DUE-IN STATUS CODE	**DESCRIPTION**	**ACTION**
BR (for O&M PFY)	Canceled in response to materiel obligation validation (MOV) request.	The due-in status is updated, the due-in quantity is set to zero (0), and the due-in increase due to cancellation (DQC) transaction is generated.
BS	Canceled, failure to respond to MOV request.	Upon user approval, the due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
B4 (for O&M PFY)	Cancellation request approved. Do not deobligate funds. Billing for materiel or contract termination charges will be made.	The following updates are made only if the user approves: the due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
B6 (for O&M PFY)	Materiel applicable to the requisition for cancellation has been diverted to alternate consignee.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
CA-CE (for O&M PFY)	Rejected. Rejected, quantity not available by required delivery date (RDD). Rejected. Unit of issue cannot be converted.	The following updates are only made if the user approves: the due-in quantity is reduced by the quantity cancelled, and a DQC transaction is generated.
CG-CH (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
CJ-CN (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
CP-CQ (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
CS (for O&M PFY)	Rejected. Quantity requisitioned is excessive. Partial quantity being supplied.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is reduced and a DQC transaction is generated
CU-CW (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
C7-C8(for O&M PFY)	Rejected	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
DA (for O&M PFY)	Rejected. SOS is direct ordering from the Federal Supply Schedule identified by number in record	The following updates are only made if the user approves: the due-in status is

STATUS EDITS PART 2 – AWAITING REVIEW tab		
DUE-IN STATUS CODE	**DESCRIPTION**	**ACTION**
	position 76–80.	updated, the due-in quantity is set to zero and a DQC transaction is generated.
DK-DM (for O&M PFY)	Rejected	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
DY (for O&M PFY)	Rejected. Materiel shipped by non-traceable means or supplied by DVD fro a contractor without an assigned DODAAC or there is no record of the transaction for which the follow up was submitted.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D2-D3 (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D5-D6 (for O&M PFY)	Rejected.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D8 (for O&M PFY)	Rejected. Requisition is for controlled substance, and requisitioner and/or ship-to-address is not an authorized recipient.	The following updates are only made if the user approves: the due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
RA-RB (if there is no matching RRD or RND transaction in the transaction history, but there is a matching due-in record)	Receipt acknowledgement. Receipt acknowledgement response.	From an external source: an RRD transaction is generated for the IM due-in, a backorder release issue transaction is generated for the IM due-out, and an RRD transaction is generated for the external customer's due-in. From a DLA source: a "Passed-Active Ship Status" pending Action message is posted to the IM In Box.
RF (if there is no matching RRD or RND transaction in the transaction history, but there is a matching due-in record	Follow-up request for receipt acknowledgement.	From an external source: an RRD transaction is generated for the IM due-in, a backorder release issue transaction is generated for the IM due-out, and an RRD transaction is generated for the external customer's due-in. From a DLA source: a "Passed-Active Ship Status" pending Action message is posted to the IM In Box.
***O&M PFY = Operations & Maintenance (Fund), Previous Fiscal Year**		

Status edits part 3 – processed tab

This tab shows all status image transactions that DMLSS recognized and processed. When you select an item in the bottom section of the window, the top section displays information about it to include the reason for the status message. The following table shows specific status codes that will appear on this tab with their description and DMLSS action.

STATUS EDITS PART 3–PROCESSED Tab		
DUE-IN STATUS CODE	**DESCRIPTION**	**ACTION**
BC	Item is back ordered, and a long delay is anticipated. A possible substitute may be furnished with this status; if desired, submit a cancellation for the original requisition and submit a new requisition for the offered substitute.	The due-in status is updated, along with the estimated release date.
BJ	Quantity changed to conform to unit pack or because of allowable direct delivery contract variance. Adjust the due-in records accordingly. The unit of issue is not changed.	The due-in status and due-in quantity are updated, and a due-in quantity increase (DQI) or DQC transaction is generated.
BQ (for Stock Fund or O&M CFY)	Cancelled. Result of cancellation request. Also applies to cancellations resulting from deletion of an activity from the DODAAD. Deobligate funds if applicable.	The due-in status and quantity are updated; the due-in quantity is set to zero, and a DQC transaction is generated. If the order was funded by a previous FY O&M fund, the status is posted to Status Edits Part II, and the other updates are only made if the user approves.
BR (for Stock Fund or O&M CFY)	Canceled in response to MOV request.	The due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
B2	Requested modification denied; precluded by status of supply or procurement action.	The due-in status is updated.
B4 (for Stock Fund or O&M CFY)	Cancellation request approved. Do not deobligate funds. Billing for materiel or contract termination charges will be made.	The due-in status is updated, the due-in quantity is set to zero (0),and a DQC transaction is generated
B5	Action to determine current status and/or improve established due-in (ESD is being attempted. Further status will be furnished.	The due-in status is updated.
B6 (for Stock Fund or O&M CFY)	Materiel applicable to requisition requested for cancellation has been diverted to alternate consignee.	The due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
B7	Unit price change.	The due-in status is updated along with the U/P price.
CA-CE (for Stock Fund or O&M CFY)	Rejected. Rejected, quantity not available by RDD. Rejected. Unit of issue cannot be converted.	The due-in quantity is reduced by the quantity cancelled, and a DQC transaction is generated.
CG-CH (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
CJ-CN (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero (0), and a DQC transaction is generated.
CP-CQ (for Stock Fund or O&M CFY)	Rejected. Source of supply (SOS) is local manufacture, fabrication, or local procurement.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.

STATUS EDITS PART 3–PROCESSED Tab		
DUE-IN STATUS CODE	**DESCRIPTION**	**ACTION**
CS (for Stock Fund or O&M CFY)	Rejected. Quantity requisitioned is excessive. Partial quantity is being supplied.	The due-in status is updated, the due-in quantity is reduced, and a DQC transaction is generated.
CU-CW (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
C7-C8 (for Stock Fund or O&M CFY)	Rejected	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
DA (for Stock Fund or O&M CFY)	Rejected. SOS is direct ordering from the Federal Supply Schedule identified by number in record position 76–80.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
DK-DM (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
DS	Requisition received for which your Service is not a registered user. Issue action is being processed.	The due-in status is updated.
DY (for Stock Fund or O&M CFY)	Rejected. Materiel shipped by non-traceable means or supplied DVD form a contractor without an assigned DODAAC or there is no record of the transaction for which the follow up was submitted.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D2-D3 (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D5-D6 (for Stock Fund or O&M CFY)	Rejected.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
D7	Requisition modifier rejected because of errors in one or more data elements.	The due-in status is updated.
D8 (for Stock Fund or O&M CFY)	Rejected. Requisition is for controlled substance, and requisitioner and/or ship-to-address is not an authorized recipient.	The due-in status is updated, the due-in quantity is set to zero and a DQC transaction is generated.
***O&M CFY = Operations & Maintenance (Fund), Current Fiscal Year**		

039. Performing quality control corrective actions

On occasion, errors will be made while processing DMLSS transactions. The primary goal of processing the daily Source Document Control Report (SDCR) is to identify and correct these errors before filing the supporting documentation. If an error is found while reviewing the SDCR, the required corrective action should be annotated on both the SDCR and the source document (e.g., DD 1155). If the source document is not immediately available, pull the original source document from the file or reprint it. After annotating the necessary changes, process the corrections in DMLSS. Use the SDCR produced from the next EOD cycle to verify the corrective action(s) processed.

Missing documents

You must compare the SDCR to the supporting document files daily. If a quality control (QC) document is missing, first conduct an initial search for the document. The document may not have been turned in, could have been misfiled, or could have been stapled to another document. If a

document cannot be located, it is declared “lost” and you must request a duplicate copy from the initiating activity or prepare a replacement copy.

You may obtain information needed to prepare a copy from suspense files, transportation, contracting, or accounting and finance. If you cannot obtain the information from these sources, you must obtain enough data to identify the document from the SDCR and contact the preparing activity or source of supply for a duplicate copy of the requisition or shipping document. Then use the copy of the document to determine if it processed through the stock record account properly. Take action to process required transactions, if needed. The document number assigned to the original lost document will be reassigned to the facsimile or duplicate copy. Short suspenses should be assigned to individuals when requesting missing documentation. Include flight supervision or the section NCOIC on email requests to ensure that the importance of locating missing documentation is not lost on the recipient. Place incomplete documents with missing annotations or signatures into a suspension file and deliver to the original user for completion.

Maintaining complete transaction files is a crucial best business practice that reflects the professionalism of both you and your office during various inspections and audits.

Erroneous processing

Transactions that are processed incorrectly need to be corrected as applicable to the specific transaction and error type. Processing an incorrect fix can make matters more difficult by adding an additional layer of inaccurate data. The most common errors tend to be related to warehouse receipts and issues. Often, the best way to correct a transaction is to retrace the transaction history and undo each step in reverse.

In this scenario, let’s say that while processing QC you identified a receipt that was processed for 10 each instead of 1 each. Since there were pending backorders, all 10 released to a waiting customer. By working the supply chain cycle in reverse, you could imagine taking the 10 each back from the customer and returning them to the warehouse shelves; this could be done by processing a customer return for credit. Now that the 10 each are back on record in operating stock, you would need to remove them from stock and imagine putting them back on the delivery truck; this is done by reversing the receipt. These steps will take us back to just before the initial error was made. Now, you can rerun the receipt for the correct amount of 1 each and release the single backorder to the customer. Note that you would not physically deliver the item to the customer if it were already delivered.

By working the problem in reverse, you can undo each step until you reach the point just prior to when the initial error was made.

Brief frequently encountered errors during routine flight meetings or as a part of medical materiel refresher training; be sure to document this training for inspection purposes. By sharing these lessons, you can reduce your flight’s error rate and create an even better logistics flight.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

035. Generating reports

1. What are the two basic types of reports available in DMLSS?

2. How do you access the Reports module?

3. Which type of reports are compiled in an application and cannot be altered by the user?

4. Which report is used to obtain detailed information on requisitions for IM that are overdue according to the procurement lead time for a given item?

5. Which report is used to view estimated savings that would occur by switching to a suggested alternative medical surgical item?

6. Which report is used to see suggested alternatives for stocked pharmaceutical items that could potentially result in cost savings?

7. Which report displays a list of delinquent PC reconciliations?

8. Which report type is a separate COTS software package that executes independently within DMLSS?

9. What does BO allow you to do?

10. Which BO data element is the smallest category and is the first level to group together all the data items that exist in the application?

11. List the three types of Objects available in BO.

12. Which BO data type groups together objects that are related to one another?

13. Which BO data type is the highest-level grouping in BO and corresponds directly to an application?

14. What is the name given for a group of databases in which standard reports and universe definitions for the DMLSS application are stored?

036. Medical materiel financial reports

1. Which financial system produces the MMMR?

2. The MMMR represents inventory based upon what?

3. For what is the MMMR report used?

4. Each MMMR page on the AFML Webpage version is a compilation of a beginning year figure plus or minus what?

5. Which AFWCF/MDD assets are listed on the MMMR page one?

6. Which AFWCF/MDD assets are listed on the MMMR page two*?*

7. Which MMMR line lists the beginning balance?

8. What does line 2 of the MMMR list?

9. What does line 4 of the MMMR list?

10. Where is the Ending Inventory listed on the MMMR?

11. Which MMMR lines should normally list only *positive* entries?

12. Which MMMR lines should normally list only *negative* entries?

13. When reconciling, how do you verify the accuracy of the MMMR?

14. How do you provide discrepancies and plans for correcting the problems to AFMOA/SGALO?

15. When preparing your footnotes, what information should you provide, at a minimum?

037. Processing pending actions

1. What term is used for a report that presents data in a standard preprogrammed format?

2. Where does DMLSS post pending action reports?

3. How are pending actions listed?

4. How often should you review and work processes in the INBOX?

5. What action should you take to retrieve your latest messages since the INBOX is not automatically updated when a pending action message is added or updated?

6. What action do you take on a pending action if the ACTION REQUIRED field equals NO?

038. Processing status edits

1. Which status edit tab shows all status image transactions that DMLSS did *not* recognize?

2. Which STATUS EDITS tab shows all status image transactions that DMLSS recognized but are on hold pending further actions?

3. Which STATUS EDITS tab shows all status image transactions that DMLSS recognized and processed?

4. Match the Due-in Status Code from column B to the description or action in column A. Each option from column B may be used once, more than once, or not at all.

Column A	Column B
____ (1) No record of original requisition.	a. BC.
____ (2) One of the following fields has been changed: stock number, unit of issue, part number.	b. BF.
____ (3) Substitute will be supplied.	c. BG.
____ (4) Requisition being processed as free issue.	d. BH.
____ (5) Cancelled; result of cancellation request.	e. BJ.
____ (6) Item is back ordered, and a long delay is anticipated.	f. BN.
____ (7) Quantity changed to conform to unit pack.	g. BQ.

039. Performing quality control corrective actions

1. If an error is found while reviewing the SDCR, where do you annotate corrective actions?

2. What should you do first when a QC document is missing?

3. What should be done if a document cannot be located and is declared lost?

4. Why should you include Flight supervision or NCOICs on email requests when requesting missing documentation?

5. Where should incomplete documents with missing annotations or signatures be placed?

6. Why does processing an incorrect fix often make things more difficult?

7. Often, the best way to correct a transaction is to do what?

8. Frequently-encountered errors should be briefed when?

6–3. Acquisitions

This section will begin by providing an overview of the prime vendor concept. We will then look at the management of credit return accounts. Finally you will review how to process blanket purchase agreement (BPA) requisitions.

040. Prime vendor contracts

A prime vendor is a single distributor of brand specific medical supplies who provides next day delivery. This program provides the majority of a facility's pharmaceutical and medical/surgical needs. PVs are leading distributors in their respective industries. Their regionalized contracts cover the entire United States, Europe, and Pacific for both pharmaceuticals and medical/ surgical supplies and equipment.

Purpose of the prime vendor

The DOD Medical Prime Vendor program provides participating facilities with a prime supplier for a commodity line, either pharmaceuticals or medical and surgical items. DLA medical is responsible for the overall management and operation of the DOD medical PV program. The overall purpose of the prime vendor program is to shorten the logistics pipeline and make it more reliable. It provides a rapid and cost-effective method for acquisition of medical materiel.

Under the terms of each PV contract, the contracting agency is DLA. Each MTF will have a contracting officer representative (COR). The COR is appointed by the contracting officer, and recommended by the MLFC, to perform specific technical or administrative functions.

The prime vendor med-surg (PVM) SOS is preferred; however, it is not mandatory. PVM and PVP statistics are tracked and provided monthly by DLA.

Contract type

Items covered under the PVP and PVM are on either a DLA distribution and pricing agreement (DAPA) or an indefinite delivery indefinite quantity (IDIQ) type contract. A DAPA is a formal agreement between the government and a vendor interested in selling medical supplies or equipment to federally funded activities. By entering into a DAPA, a manufacturer or distributor agrees to sell a product to all government MTFs at a specified price. The collective purchasing power of all DOD medical units allows us to negotiate as one very large entity. With this purchasing power, we negotiate as a whole and agree to buy a specific brand or product from the PV. In return, we are granted DOD-wide discounted pricing. Meanwhile, an IDIQ contract provides for an indefinite quantity of services during a fixed period of time. This is used when the government cannot predict the quantity of resources needed during a specific period of time. The IDIQ contract allows activities to place orders against the contract for whatever items and quantities are needed between the contract's start and end date, normally an entire FY.

Submission methods

When placing PV orders, there are two types of submission methods: online or offline. Under most circumstances, you will place your orders online using the log orders module. With the online method, your order is transmitted to the PV source. Meanwhile, offline orders are manually coordinated with the source and then entered into DMLSS in offline non-submit mode so that they are not transmitted electronically. Offline non-submit orders are the exception and should only be used when the online system cannot be used (e.g., DMLSS is down, schedule II controlled item orders, credit orders, and emergency orders).

Emergency orders

Both PV's normally provide a minimum of two emergency shipments per month at no additional charge to the participating medical facility. Additional fees for emergency shipments in excess of two per month may be charged to the customer, including all applicable transportation and handling costs as agreed to between the requesting medical facility and the PV at the time the order is placed.

The PV is required to make delivery of the ordered item in the required time frame (usually 6 hours) 100 percent of the time. Delivery of items on an emergency basis is by fastest possible carrier.

There are also several types of delivery methods and special order types that may be placed under the PV program. The delivery method and special order types are explained in the following paragraphs.

Pharmaceutical, prime vendor

PVP is considered a requirements contract. This means facilities are obligated to use it for all of their pharmaceutical requirements that are covered under the DOD Medical PVP contract. In fact, use of PVP is mandatory for AF medical customers as the primary pharmaceutical SOS, unless it's for one of the exceptions shown below:

- MILSPEC–If the item is only available from a government depot such as military unique item (e.g., biological warfare antidotes).
- EMERGENCY–If the PV advises the ordering activity that an emergency item covered by the program cannot be filled in the time frame/quantity required by the ordering activity.
- UNAVAILABILITY–If a routine order for an item covered by the program cannot be filled and no substitutes are available.

PVP delivery/order types

There are two PVP types of orders: just in time (JIT) and drop shipments (DRS).

Just in time orders

JIT orders are for items the customer needs delivered within 24 hours of order placement, excluding holidays and weekends. This is the primary order type submitted for the PVP. PV confirms the order within 2 hours of receipt as stipulated in the contract.

Drop shipments

DRS items are ordered through the prime vendor, but delivered to the customer directly from the manufacturer.

Special order types

We now discus special order types for narcotics and controlled substances.

Schedule II narcotics

Customers must complete and provide to the PV a Drug Enforcement Agency (DEA) Form 222, DEA controlled substance order form before ordering schedule II narcotics from the PV. The actual procedures for purchasing schedule II narcotics vary from vendor to vendor. Orders will typically be processed as offline non-submit orders, then faxed or mailed to the prime vendor. Check with your local PV for their procedures.

NOTE: A separate delivery order and call number is always required for narcotic orders.

Each order/delivery site must have its own DEA registration number. The PV is authorized only to deliver to a point that has already been assigned a DEA registration number.

NOTE: Schedule II drugs are not available for overseas activities through the PV.

Schedule III - V controlled substances

Other controlled substances are ordered on a separate call number from all other daily PV orders. Otherwise, the process is identical to ordering non-controlled items. Controlled substances are not available overseas through the PVP. These items must be ordered through DLA.

Prime vendor med/surg

There are three PVM delivery/order types: usage orders (USE), non-usage orders (NUS), and drop shipments (DRS).

Usage orders

USE is an ordering method that is used for items which you have provided usage data to the Med/Surg prime vendor and refers to items that you order consistently. This is the equivalent of medical logistics stocking an item in the warehouse that has a guaranteed daily demand rate. Usage items must be ordered at least monthly; failure to do so will result in the PVM removing the level for that item.

Non-usage orders

This ordering method is used for DAPA items when you have not provided usage data to the PVM and refers to items that you do not use consistently. These are items that you will order "one-time" or maybe only a few times per year in sporadic quantities. You do not need to coordinate NUS items with PVM. Items that do not fit the routine order schedule and are not candidates for your usage list fall in this category. Unlike usage orders, expect delivery of approximately one week after order for non-usage orders. This gives the PVM an opportunity to have these items drop-shipped or transferred from another distribution center if necessary. If you change the delivery method, remember to notify your PVM immediately. Not notifying the PVM may result in your orders being rejected.

Drop shipments

DRS items are ordered through the prime vendor, but delivered to the customer directly from the manufacturer.

041. Managing credit accounts

The IM manage PV credits function is used to monitor available credit account balances. Ensure these balances are correct so logistics personnel can effectively use available credits. Funds must be available in a credit account prior to processing a PV credit order.

The MANAGE PV CREDITS window lists the SOS, total credit amount, add credit, loss credit, reason, and credit account number. Enter a SOS or select one from the dropdown menu to view available credits. The current available credit amount will be listed in the total credit amount field.

PV credit account fund balances are updated automatically when orders are placed within the IM offline/submit module and the PV credit indicator is checked. Balances can also be updated by completing item returns using the manage return item(s) function.

Use the IM offline orders function to process PV credit account orders. Place a check in the PV credit checkbox in the main tab; this automatically sets the refund code for the order to N and deducts the credits from the account's available balance. Sufficient funds must be present in the credit account for the order to process. Link the order to the appropriate customer if warranted. If the materiel is for LOG inventory, select the host DODAAC for the DMLSS account from the customer dropdown menu.

At the present time PV sources cannot accept electronic orders linked to the PV credit account; therefore, while using the offline orders function, check NON-SUBMIT prior to processing orders and manually submit the order to the vendor. After the order is processed in DMLSS, print the DD Form 1155 and fax it to the vendor. DMLSS will create a pseudo EDI 850 requisition file which is transmitted to the DLATS. The pseudo 850 informs DLA-TS that a credit order has been established between the DMLSS site and the PV.

Normally, each site will have two credit accounts but could have more if an account is created for secondary prime vendors. Both PVP and PVM SOSs will have one for IM and one for AM. PV Credit Account managers should compare the vendor's monthly PV Credit Report to the DMLSS PV Credit Account available balance for each account. If a difference exists, use the Manage PV Credits function to modify the DMLSS available balance to synchronize the two balances.

NOTE: Verify the accuracy of the PV credit report prior to updating DMLSS. Use the add credit and loss credit icons to increase or decrease balances.)

Add credit

Use the add credit icon to increase the DMLSS credit account available balance. Enter the difference between the PV credit report and the DMLSS available balance into the add credit field. Click SAVE to process and increase the available balance.

Loss credit

Use the loss credit icon to decrease the DMLSS credit account available balance. Enter the difference between the PV credit report and the DMLSS available balance into the loss credit field. Click SAVE to process and decrease the available balance.

042. Processing blanket purchase agreement requisitions

Blanket purchase agreements are simplified methods of filling repetitive needs for small quantities of supplies and services by establishing “charge accounts” with qualified sources of supply. When used properly, BPAs can become an important purchasing alternative.

BPAs are agreements that have been negotiated with a specific vendor to cover the recurring requirements for selected LP items. There are two types of BPAs—centralized and decentralized. Centralized BPAs are agreements awarded by your local base contracting office (BCO). These require you to submit requisitions to the contracting agency who then places orders with the vendor. Decentralized BPAs are agreements awarded by DLA that allow medical materiel personnel to either submit hard copy purchase orders or place orders (calls) directly to the vendor.

The AFML Website contains information about current DLA negotiated BPAs to include copies of new agreements, ordering instructions, and guidance in the proper use of negotiated BPAs.

Requirements are established by the MLFC or by DMLSS, based on stock control levels or back orders generated by using activities. In DMLSS, you can generate requirements for a BPA from the log orders or offline submit modules in the IM application. Regardless of how the requirement is generated, research it to confirm if it is on an approved BPA price list. Once you confirm that the item is available on the BPA, you need to establish a BPA SOS catalog record and long item description if the item is not already on record.

Establishing blanket purchase agreement item catalog/source of supply records

Before you can generate requirements for a BPA item, two conditions must exist:

1. The item must have an established catalog record associated with a BPA.
2. The BPA must have an established SOS record.

BPAs can be identified by their unique SOS. You must establish a SOS code for locally established BPAs. For locally established BPAs, the first position must be an L. The second and third positions can be numeric or alpha and are assigned for each centralized BPA (e.g., L22, L23 or L2A).

DLA assigns the SOS codes for decentralized BPAs. SOS codes for DLA negotiated, decentralized BPAs are posted on the AFML Webpage. The only alpha code that cannot be used for decentralized blanket purchase agreements (DBPA) is LPR, which is reserved for requisitions that are to be transmitted and handled by the local contracting officer.

SOS catalog record

To purchase an item from a specific BPA SOS, you must point the catalog record to that SOS. If the item is not already associated with a BPA's SOS, you must add the source to the item's catalog. To add the source you must first open the MTF catalog item record for the item that you want to edit. While in the BASIC tab, select ADD from the lower window to add a new SOS. Then, select the desired SOS code, vendor item type, and enter the corresponding vendor item number and unit of purchase for the item. This procedure only adds potential SOSs to the item's list of available sources.

After adding the new SOS, you need to direct DMLSS to use it as your default source. While still in the MTF catalog record, open the LOG CAT tab. Then, select the SOS field drop down menu and

choose the appropriate source to be used as the default SOS. This field affects under which SOS the item will appear when reviewing the log orders list.

DMLSS BPA vendor/SOS file

In DMLSS, you must access the SOS module to add, retrieve, edit, and store SOS information for BPAs. To establish the BPA files you must create the SOS, and input the vendor information into the SOS RECORD tabs. Procedures for establishing and updating SOS records were previously discussed in unit 1. The only unique tab used for BPAs that differs from other SOS records is the CONTRACT tab. Use this tab to establish, edit, or delete the BPA contract information such as the contract number, start and end dates of the contract, and call number generation.

Placing the call

Once the SOS record is established for a BPA, calls can be placed against it. As previously mentioned, you can place orders from the log orders or offline submit modules in the IM application. Depending on the dollar value of the call and classification of the supplier (large or small business), the ordering officer may do any of the following:

1. Place the call without further research. If the total dollar value of the order is under the aimplified acquisitions threshold (SAT) of $3,000, you can place the order without further research, as long as the price is considered fair and reasonable.
2. Distribute orders equitably among qualified suppliers. If the dollar value of the call is under $3,000 and available on more than one BPA, the ordering officer may distribute orders among multiple qualified suppliers.
3. Document price quotations. If the call exceeds the SAT ($3,000), an AF Form 3062, Contract Progress Schedule or other appropriate form is used to document price quotations solicited from multiple qualified suppliers. These forms serve as proof of competition and are filed in the contract file.
4. Restrict use of call numbers for multiple items. Multiple items are not given the same call number unless delivery and invoicing of all items occurs simultaneously. This helps prevent problems associated with making partial payments.
5. Submit the call. Several methods can be used to place orders under DBPAs. Orders can be placed by telephone, mail, e-mail, or fax. You must check each BPA for the authorized ordering procedure.

Place DLA DBPA orders by using DD Form 1155. Telephone ordering is authorized under most DBPAs and is frequently the norm for DBPAs. Be careful not to miscommunicate when placing the order by phone. Take the time to ask the vendor to repeat the order back to you so you can verify that all information was received correctly. Make sure you ask the vendor if you must submit a confirming DD Form 1155 to back up the telephone order. If the vendor says no, document this along with the salesperson’s name on the suspense copy of the receiving report. It’s extremely important that you maintain good documentation for telephone orders.

Documenting the call

The call must be documented on a call register. The form (call register) used may vary depending on the installation to which you are assigned. Call numbers start with the number one and run sequentially for the life of the BPA or until instructed to renumber by modification. In addition, use a hard copy of the call as a receiving document to provide an audit trail. The hard copy of the call can be a printed purchase order, DD Form 1155, or other document. However, if you are using electronic order entry, you can also use the company’s order confirmation as the hard copy.

Since each DBPA can and, most often does contain different terms and conditions, certain procedures cannot be standardized. General rules for DBPAs include the following:

- Only items listed on the current authorized price list or federal supply schedule (FSS) can be ordered.

- Only ordering officials authorized by letter can sign orders.
- Individual calls cannot exceed the SAT or the purchasing authority of the activity placing the order, whichever is less. You cannot intentionally split orders to remain under the threshold.
- If applicable, you should mark all orders FAST PAY. The use of the fast payment procedure is not authorized if the supplies are being purchased for delivery to the activity placing the order and performing contract administration. In most cases, orders placed by activities located within CONUS are not subject to fast payment procedures.

Printing the call

In most cases you will need a hard copy of the BPA order for your files. To print a BPA order you will have to access the REPRINT CONTRACT/CALL DOCUMENTATION window in the IM application. In this window, you can search the call register for a specific order and print a DD Form 1155. Use the following steps to print a copy of the DD Form 1155:

1. On the NAVIGATE menu, click on ORDERS.
2. Select REPRINT CONTRACT/CALL DOCUMENTATION to open the window.
3. In the REPRINT CONTRACT/CALL DOCUMENTATION window, type the SOS in the field or any other search method you desire and click on the SEARCH button on the vertical toolbar. The search results will be displayed in the call register area of the window. To view detailed due-in information for the order, double-click the selected call line item and the detailed information is displayed in the area immediately below the call register.
4. Click on the CALL DD 1155 button on the vertical toolbar. The form is automatically sent to your designated printer.

Self Test Questions

After you complete these questions, you may check your answers at the end of the unit.

040. Prime vendor contracts

1. Who is responsible for the overall management and operation of the DOD Medical PV program?

2. What is the overall purpose of the prime vendor program?

3. What are the two submission methods when placing PV orders?

4. Under most circumstances, you will place your PV orders online using which DMLSS module?

5. Which type of orders are the exception and should only be used when the online system cannot be used?

6. Which type of contract is PVP considered?

7. Which prime vendor source is considered mandatory?

8. List the three exceptions that allow pharmaceuticals to be procured from other than PVP.

9. Match the submission, delivery, or special order type from column B to the description in column A. Each option from column B may be used once, more than once, or not at all. Each description in column A may have one or more correct answers.

COLUMN A	COLUMN B
____ (1) Primary order type delivered within 24 hours.	a. Narcotics.
____ (2) Delivered directly from the manufacturer.	b. Emergency order.
____ (3) Items must be ordered at least monthly.	c. USE.
____ (4) Items that you will order “one-time” or a few times per year.	d. NUS.
____ (5) DEA 222 is required with each order.	e. Controlled substances.
____ (6) Ordered on a separate call number from all other daily PV orders.	f. JIT.
____ (7) Delivery is made by the fastest possible carrier.	g. DRS.

041. Managing credit accounts

1. Which DMLSS function is used to monitor available credit account balances?

2. What data is listed in the MANAGE PV CREDITS window?

3. PV Credit account fund balances are updated automatically when orders are placed within the IM Offline/Submit module and which indicator is checked?

4. Placing a check in the PV credit checkbox in the MAIN tab will automatically set the refund code to what?

5. When credit materiel is intended for LOG inventory, what should be selected for the customer account?

6. Normally, how many credit accounts should each site have?

042. Processing blanket purchase agreement requisitions

1. What are the two types of BPAs?

2. Which type of BPA is awarded by your local BCO?

3. Which type of BPA allows Medical Materiel personnel to submit orders directly to the vendor?

4. Which SOS position must be an "L" for locally established BPAs?

5. Who assigns the SOS code for decentralized BPAs?

6. Which SOS code cannot be used for decentralized BPAs?

7. Which MTF Catalog record tab is used to add new SOS's to an item?

8. Which MTF catalog record tab is used to select the default SOS for an item?

9. What type of BPA contract information needs to be added to an SOS record's CONTRACT tab?

10. Orders that cost less than what dollar amount meet the threshold requirements for the SAT?

11. What is required from multiple suppliers if the order total exceeds the SAT?

12. All BPA calls must be documented where?

13. Which DMLSS window may be used to print a BPA order's DD Form 1155?

14. What steps are taken to access the REPRINT CONTRACT/CALL DOCUMENTATION window?

Answers to Self Test Questions

031

1. Through inspection, classification, and surveillance as materiel is received, issued, stored, and shipped.
2. DODMMQC and offline notices.
3. Determine if a DODMMQC notice already exists.
4. USAMMA.
5. Automatically through DMLSS.
6. http://www.usamma.amedd.army.mil
7. Message Number, Product Type, Product Name, NSN, Part Number, Lot number, Manufacturer, and Distributor.

032

1. Make sure that each using activity is notified to withdraw that item from use.
2. By the given suspense date.
3. From the recall message.
4. The MLFC.
5. With a DD Form 1575, Suspended Tag or a DD Form 1575–1, Suspended Label.
6. By clearly indicating in the QA action field what actions were taken by Medical Logistics and the using activities along with the date the action was completed.
7. Materiel actions, affected quantities, and document numbers.
8. PSO.
9. Chronologically by QA message number.

033

1. From IM Navigate Menu—QA.
2. Create complaints, Update the MTF QA database, and create delinquent notices.
3. As pending actions.
4. QA pending actions.
5. It will take you directly to the related QA record.
6. QA MMQC Info Bulletin.
7. Missing MMQC Message.
8. QA FTP Import Failed.
9. MHS help desk.
10. A manual review to associate the QA message with the correct MTF record.
11. You must scan the shelves and/or storage locations.
12. QA Delinquency Notice Immediate Recall.
13. Zero.
14. When QA message quantities are not updated by the times established in the QA Maintenance Table.
15. When a QA message is initiated in your MTF.
16. When there is reasonable probability that the use of, or exposure to a violative product will cause serious adverse health consequences or death.
17. Those that do *not* match catalog records.
18. QA RECORDS.
19. To review detailed QA record information and transfer items internally.
20. The TRANSFER button on the vertical toolbar will be highlighted.

034

1. Credibility, validity, and potential harm of the item.
2. To report supply or equipment items that have been determined by use or by test to be harmful or defective to the extent that their use has caused, or may cause, illness, or death.
3. Immediately withdraw it from using activities and serviceable inventory and place it in suspension.
4. To report a supply or equipment item suspected of being defective, deteriorated, or otherwise unsuitable for use.
5. Cat II.
6. Build new complaint detail(s) and submit PQDRs.
7. In the IM Navigate menu, select QA and then New QA Complaint.
8. Notify the Patient Safety Officer and/or Risk Manager and enter a close reason and close date in the COMPLAINT DETAIL tab.

035

1. Standard and Business Objects.
2. Via the Navigation menu or Navigation toolbar.
3. Standard.
4. Aged Due-in.
5. Best Medical Surgical Items by Dollar Savings.
6. Best Pharmaceutical Items by Dollar Savings.
7. Delinquent Purchase Card Reconciliation.
8. Business Objects.
9. Search the DMLSS databases and produce ad hoc reports that are not available from each application's report module.
10. Objects.
11. Dimension, Detail, Measure.
12. Classes.
13. Universe.
14. Repository.

036

1. SMAS.
2. DMLSS transactions.
3. To evaluate the financial posture of all inventories.
4. Individual lines.
5. Medical Supplies (EXP 1).
6. Medical Expense Equipment (EXP 2).
7. One.
8. The total of the Receipts.
9. The total of the Issues.
10. Line 11.
11. Lines 1, 2A, 2B, 2C, 3, 5A, 6A, 7A, 8A-J, 11, 12, 13, and 14.
12. Lines 4A, 4B, 5B, 6B, 7B, and 9A-K.
13. The closing balances should agree with the balances on the DMLSS report.
14. Through the use of footnotes.
15. FM account number, month, expendability code, line number, applicable column, along with a description of the discrepancy or erroneous condition and its corrective action.

037

1. Pending action.
2. INBOX.
3. By the as of date.
4. Daily.
5. Click REFRESH.
6. Delete it.

038

1. Part 1 – Errors.
2. Part 2 – Awaiting Review.
3. Part 3 – Processed.
4. (1) b.
   (2) c.
   (3) d.
   (4) f.
   (5) g.
   (6) a.
   (7) e.

039

1. On both the SDCR and the source document.
2. Conduct an initial search for the document.
3. Request a duplicate copy from the initiating activity or prepare a replacement copy.
4. To ensure that the importance of locating missing documentation is not lost on the recipient.
5. In a suspension file.
6. By adding an additional layer of inaccurate data.
7. To retrace the transaction history and undo each step in reverse.
8. During routine flight meetings or as a part of Medical Materiel refresher training.

040

1. DLA.
2. To shorten the logistics pipeline and make it more reliable.
3. Online and offline.
4. Log Orders.
5. Offline non-submit.
6. Requirements.
7. PVP.
8. MILSPEC, EMERGENCY, UNAVAILABILITY.
9. (1) f.
   (2) g.
   (3) c.
   (4) d.
   (5) a.
   (6) a, e.
   (7) b.

041

1. IM Manage PV Credits.

2. SOS, total credit amount, add credit, loss credit, reason, and credit account number.
3. PV Credit.
4. N.
5. The Host DODAAC.
6. Two.

042

1. Centralized and decentralized.
2. Centralized.
3. Decentralized.
4. First.
5. DLA.
6. LPR.
7. BASIC.
8. LOG CAT.
9. Contract number, start and end dates of the contract, and call number generation.
10. $3,000.
11. Price quotations.
12. On a call register.
13. REPRINT CONTRACT/CALL DOCUMENTATION.
14. On the NAVIGATE menu, click on ORDERS, then select REPRINT CONTRACT/CALL DOCUMENTATION.

Unit Review Exercises

Note to Student: Consider all choices carefully, select the *best* answer to each question, and *circle* the corresponding letter. When you have completed all unit review exercises, transfer your answers to the Field-Scoring Answer Sheet.

55. (031) When are quality assurance (QA) alerts automatically downloaded by the Defense Medical Logistics Standard Support (DMLSS) server?
    a. Hourly.
    b. Daily.
    c. Weekly.
    d. As needed.

56. (031) You normally receive your daily Department of Defense medical materiel quality control (DODMMQC) messages from the
    a. Air Force Medical Support Agency (AFMSA).
    b. Defense Medical Logistics Standard Support (DMLSS).
    c. Joint Medical Asset Repository (JMAR).
    d. United States Army Medical Materiel Agency (USAMMA).

57. (032) When an injury occurs from use of a device, who maintains custody of the equipment item?
    a. Facility manager.
    b. Judge Advocate.
    c. Medical Equipment Management Office (MEMO).
    d. Medical Logistics flight commander (MLFC).

58. (033) The Defense Medical Logistics Standard Support (DMLSS) Quality Assurance (QA) module allows customers to
    a. acknowledge Food and Drug Administration (FDA) recalls.
    b. create potential complaints.
    c. submit delinquency notices.
    d. update the medical treatment facility (MTF) quality assurance (QA) database.

59. (033) Which pending action is viewed to determine if all quality assurance (QA) messages have been received?
    a. IM QA Import Failed.
    b. Missing MMQC Message.
    c. QA MMQC Info Bulletin.
    d. Missing or No MTF Item ID Match.

60. (034) What type of situation would require the submission of a Category I (Cat I) medical materiel complaint?
    a. Items that are abnormally colored.
    b. Particulate matter outside container.
    c. Smudged but legible labeling.
    d. Tear in exam glove outer packaging.

61. (034) Which complaint category is not used when submitting a Product Quality Deficiency Report (PQDR)?
    a. I.
    b. II.
    c. III.
    d. IV.

62. (035) Which report is used to obtain information on inventory management (IM) requisitions that are overdue?
    a. Aged due-in.
    b. Aged due-out.
    c. Delinquent reconciliation.
    d. Product deficiency.

63. (035) In business objects (BO), what is the highest-level grouping of data available?
    a. Class.
    b. Dimension.
    c. Repository.
    d. Universe.

64. (036) What type of information is presented on page 1 of the Air Force Medical Logistics (AFML) Webpage's version of the Medical Materiel Management Report (MMMR)?
    a. Aged due-ins.
    b. Aged due-outs.
    c. Medical Dental Division (MDD) supplies.
    d. Operations and Maintenance (O&M) supplies.

65. (036) How do you notify Air Force Medical Operations Agency/Medical Logistics Division (AFMOA/SGALO) when a problem is found during your monthly review of the Medical Materiel Management Report (MMMR)?
    a. Annotate the Medical Materiel Management Report (MMMR).
    b. Call the analyst immediately.
    c. Send online report via Air Force Medical Logistics (AFML) webpage.
    d. Submit a footnote via e-mail.

66. (037) The Pending Action inbox is made available when selecting what option from the Defense Medical Logistics Standard Support (DMLSS) menu bar?
    a. Data.
    b. Navigate.
    c. Reports.
    d. Utilities.

67. (038) Which STATUS EDITS tab lists status image transactions that Defense Medical Logistics Standard Support (DMLSS) did not recognize?
    a. Action Required.
    b. Awaiting Review.
    c. Errors.
    d. Processed.

68. (038) Which STATUS EDITS tab shows all status images that Defense Medical Logistics Standard Support (DMLSS) recognized and executed?
    a. Action Required.
    b. Awaiting Review.
    c. Errors.
    d. Processed.

69. (039) Which Defense Medical Logistics Standard Support (DMLSS) product is used daily to identify and correct processing errors prior to filing the supporting documentation?
    a. ARC/STRAT.
    b. MMMR.
    c. MMQC.
    d. SDCR.

70. (039) How should a receipt for 1 each be corrected if it were run for 10 each by mistake?
    a. Process a RTL for 9 each.
    b. Process a SFL for 9 each.
    c. Reverse the issue for 10 each.
    d. Reverse the receipt for 10 each.

71. (040) Who is responsible for the overall management and operation of the Department of Defense (DOD) medical prime vendor (PV) program?
    a. AFMSA.
    b. COR.
    c. DLA.
    d. MLFC.

72. (040) Which type of prime vendor (PV) order is delivered to the customer directly by the manufacturer?
    a. DRS.
    b. JIT.
    c. NUS.
    d. USE.

73. (041) When placing prime vendor (PV) credit orders, which order function and option must be used?
    a. Offline/Submit.
    b. Offline/Non-submit.
    c. Online/Submit.
    d. Online/Non-submit.

74. (041) Under normal circumstances, how many credit accounts should each site have loaded in Defense Medical Logistics Standard Support (DMLSS)?
    a. One.
    b. Two.
    c. Three.
    d. Four.

75. (042) Who assigns source of supply (SOS) codes for decentralized blanket purchase agreements (BPA)?
    a. Air Force Medical Support Agency (AFMSA).
    b. Base Contracting.
    c. Defense Logistics Agency (DLA).
    d. Medical Logistics.

76. (042) What should you do for a $2,500 blanket purchase agreement (BPA) order?
    a. Obtain multiple price quotes.
    b. Order from different sources.
    c. Place the call without further research.
    d. Split the order into smaller calls.

Do not return your answer sheet to the Air Force Career Development Academy (AFCDA).

Glossary of Terms, Abbreviations, and Acronyms

Terms

accountable medical supply officer (ABMSO)–A medical Service Corps officer, civilian GS-11, or fully qualified senior NCO appointed to be accountable for the medical stock record account.

Air Force supplies–Materiel and supplies made available to AF activities and/or facilities through defense military management agencies or other authorized supply sources in order to support the USAF mission.

Defense Logistics Agency (DLA)–The agency of the DOD which is responsible for the wholesale management, procurement, and distribution of items of supply common to the military departments

due-in–An order owed to a location within a customer area or to a different customer area.

external sources (SOS)–Prime vendor, BPA/DBPA, and credit-card-type suppliers.

hazardous materiel–Any materiel that is a physical or health hazard and requires an MSDS as defined in the latest version of FED-STD 313.

inventory–The comparison of items and quantities of materiel in storage and/or in-use with that reflected on the accountable records.

issue, nonrecurring–An issue made on a one-time basis with no foreseeable subsequent demand from the requisitioner.

issue to customer–Demands placed on the Logistics account by a customer that were either partially or completely on-hand.

local purchase–An authorized purchase, from sources outside the DOD, of materiel and services by a base activity for its own use or the use of a logistically supported activity. Local purchase is not limited to the immediate geographical area in which the base is located.

LOG-owned–Refers to a customer area whose inventory is logistics owned. Materiel is obligated/expensed to customer funds upon usage of the item.

materiel safety data sheet (MSDS)–A document containing the data required by, and prepared in accordance with, FED STD 313 to communicate to the user of the chemical, physical, and hazardous properties of materiel.

medical materiel–Those items listed in the Federal Supply Catalog as medical materiel and any similar nonstock listed items.

Military Standard Requisitioning and Issue Procedures (MILSTRIP)–A standardized requisitioning and issue procedure designed to provide compatibility among DOD activities and the GSA for requisitioning and issuing materiel by the military services and GSA.

MTF catalog–A table comprised of all items, both stocked and nonstocked, that an MTF uses.

navigate–A method by which the user moves from one functional process to another functional process within the DMLSS system.

physical inventory–A record of property on hand based on a physical count.

quality assurance–The management function involving inspection, sampling, classification, evaluation, and reporting of materiel for ensuring that only serviceable items are issued and in-use or stored for contingency operations

receipt–The increase in inventory caused by receipts of incoming shipments or local turn-in.

s**tratification**–A procedure for grouping elements of materiel assets and requirements by standardized categories (inventories). These categories are operating, war reserve materiel, special projects, suspended, reparable, FDA test, and unserviceable.

technical order (TO)–An AF publication that gives specific technical directives and information on inspection, storage, operation, modification, and maintenance of given AF items and equipment.

user–A person with access to DMLSS.

using activity–An organization or element of an organization that requests supplies from the medical logistics activity and/or equipment form the MEMO.

war reserve materiel (WRM)–That materiel needed to augment peacetime assets to completely support forces, missions, and activities reflected in USAF war plans.

Abbreviations and Acronyms

°C	degrees Centigrade
AAAHC	Accreditation Association for Ambulatory Health Care
ABMSO	accountable base medical supply officer
A&F	accounting and finance
AFI	Air Force Instruction
AFMAN	Air Force Manual
AFML	Air Force Medical Logistics
AFMOA/SGSF	Air Force Medical Operations Agency, Health Facilities Division
AFMOA/SGAL	Air Force Medical Operations Agency/Medical Logistics Division
AFMS	Air Force Manpower Standards
AFMSA	Air Force Medical Support Agency
AFOSH	Air Force Office of Safety and Health
AFR	Air Force Reserve
AFRIMS	Air Force Records Information Management System
AFS	Air Force Specialty
AFSC	Air Force Specialty Code
AFWCF	Air Force Working Capital Fund
AM	Assemblage Management
ANG	Air National Guard
ANSI	American National Standard Institute
ARC	Accountability Requirements Code
AS	allowance standard
ASM	application security manager
AUL	authorized users list
BCO	base contracting office
BEE	bioenvironmental engineering
BEM	base environmental manager
BES	Bio-environmental Engineering Squadron
BMER	biomedical equipment repair
BMET	biomedical equipment technician
BO	Business Objects
BPA	blanket purchase agreement
BPS	build/process/submit
CAC	Common Access Card

CAIM	Customer Area Inventory Management
CAIM	Customer Area Inventory Module
CDC	career development course
CMA	Chemical Manufacturers' Association
CONUS	Continental United States
COR	contracting officer representative
COTS	commercial-off-the-shelf
CPF	Civilian Personnel Flight
CPU	central processing unit
CSS	Commander Support Staff
DAO	Defense Accounting Office
DAPA	DLA distribution and pricing agreement
DBPA	Decentralized Blanket Purchase Agreement
DCM	DMLSS communication manager or DMLSS Communications Management (DMLSS module)
DDR	daily demand rate
DEA	Drug Enforcement Administration
DESCIM	Defense Environmental Security Corporate Information Management
DFAS	Defense Finance Accounting Service
DFAS-DE	Defense Finance Accounting Service–Denver
DHA	Department of Health Affairs
DLA	Defense Logistics Agency
DLA-TS	Defense Logistics Agency-Troop Support
DMLSS	Defense Medical Logistics Standard Support
DOD	Department of Defense
DODMMQC	DOD medical materiel quality control
DRMS	Defense Reutilization and Marketing Service
DRS	drop shipments
DSCP	Defense Supply Center Philadelphia
DQC	due to cancellation (transaction code)
DQI	due-in quantity increase
ECN	equipment control number
ECRI	Emergency Care Research Institute
EDI	electronic data interchange
EM	Equipment Management
EOC	environment of care

EOD	end-or-day
EOFY	end-of-fiscal year
EOH	estimated on-hand
EOM	end-of-month
EOP	end-of-period
EOQ	economic order quantity
EOR	elements of resource
EPCRA	Emergency Planning and Community Right to Know Act
ERM	electronic records management
ESD	established due-in
ERQ	economic retention quantity
ESOH	environment, safety, and occupational health
ESOH-MIS	Environment, Safety, and Occupational Health Management Information System
F&FP	Air Force and Financial Plan
FAC	functional account code
FDA	Food and Drug Administration
FED-STD	Federal Standard
FM	Facility Management
FOA	field operating agency
FOIA	Freedom of Information Act
FSC	federal supply class
FSS	Federal Supply Schedule
FY	fiscal year
FYDP	Future Years Defense Program
GPC	government purchase card
GRD	grade
GSA	General Services Administration
HAZMAT	hazardous material
HBD	history begin date
HBL	header barcode label
HHT	hand-held terminal
HM	hazardous material
HM/HW	hazardous materials/hazardous waste
HMIS	Hazardous Material Information System
HMMP	hazardous materials management plan
HMP	Hazardous Materials Pharmacy

HQ	Headquarters
HTTPS	Hypertext Transfer Protocol Secure
HW	hazardous waste
HWMP	hazardous waste management plan
IAG	inventory adjustment gain
IAL	inventory adjustment loss
IAV	inventory adjustment voucher
ICN	inventory control number
ICPA	Injury Compensation Program administrator
ID	Identification or identifier
IDIQ	indefinite delivery indefinite quantity
IG	Inspector General
ILC	installation location code
IM	Inventory Management
IOU	Due-out
IP	Internet protocol
ITG	inventory transfer gain
ITL	inventory transfer loss
JACHO	Joint Commission on Accreditation of Healthcare Organizations
JIT	just-in-time
JMAR	Joint Medical Asset Repository
JRCAB	Joint Readiness Clinical Advisory Board
LAN	local area network
LP	local purchase
LOG	Logistics
MAJCOM	major command
MAJCOM/SGS	Major Command Surgeon General Administrator
MAPPG	Medical Annual Planning and Programming Guide
MC-CBRN	Medical Counter-Chemical, Biological, Radiological, and Nuclear
MDD	Medical Dental Division
MDS	Manpower Data System
MEMO	medical equipment management office
MEP	Management Engineering Program
MFG	manufacturer
MFP	Major Force Program
MHE	material handling equipment

MILSPEC	military specific
MIL-STD	Military Standard
MILSTRIP	Military Standard requisitioning and issue procedure
MLFC	Medical Logistics flight commander
MM	Materiel Management or Medical Materiel
MMMR	Medical Materiel Management Report
MMQC	Medical Material Quality Control
MOV	materiel obligation validation
MSC	medical service core
MSD	Materiel Support Division
MSDS	material safety data sheets
MTF	medical treatment facility
NCO	noncommissioned officer
NCOIC	noncommissioned officer in charge
NDC	national drug code
NIR	new item request
NSS	National Stock Number
O&M	operations and maintenance
O/H	on-hand
OI	operating instruction
ODS	ozone depleting substances
OP	Other Procurement
OPR	operating
ORM	operational risk management
OSC	organizational structure code
OSD	Office of Secretary of Defense
OSHA	Occupational Safety and Health Act
OSI	Office of Special Investigations
PAS	personnel accounting symbol
PC	personal computer
PEC	program element code
PFMR	project fund management record
PFY	previous fiscal year
PKI	public key infrastructure
POC	point of contact
POS	position number

POU	point-of-use
PPE	personal protective equipment
PQDR	Product Quality Deficiency Report
PSO	patient safety officer
PV	prime vendor
PVM	prime vendor med-surg
PVP	pharmaceutical prime vendor
QA	quality assurance
QC	quality control
QA/RM	Quality Assurance/Risk Management
RDD	required delivery date
RDS	records disposition schedule
RF	radio frequency
RGR	required grade
RM	risk manager
RMO	resource management office
ROP	reorder point
ROS	report of survey
RVL	return to vendor for credit
SA	system administrator
SAT	Simplified Acquisitions Threshold
SBL	shelf barcode label
SDCR	Source Document Control Report
SEI	special experience identifiers
SF	stock fund
SG	Surgeon General
SKT	specialty knowledge test
SLEP	Shelf Life Extension Program
SM	security manager
SMAS	Standard Materiel Accounting System
SMD	safe medical device
SOS	source of supply
SRAN	Stock Record Account Number
SS	System Services
SST	supervisor safety training
STD	standard

STRAT	stratification
SVC/CUST	service customer
TJC	The Joint Commission
TMO	Transportation Management Office
TMU	Table Maintenance Utility (SS screen)
TO	technical order
TRIMEDS	Tri-Service Medical Excess Distribution System
TSD	treatment, storage, and disposal
UCMJ	Uniform Code of Military Justice
UEI	Unit Effectiveness Inspection
UMD	Unit Manpower Document
U/P	unit of purchase
UP	User Privileges (module in DMLSS)
UPMR	Unit Personnel Management Roster
USAMMA	US Army Medical Materiel Agency
USR	unit safety representative
VAN	value added network
WAWF	Wide Area Work Flow
WRM	war reserve materiel

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