

OFFICECARE - INVENTORY TRANSFER IN MOTIONMD®

This guide will provide the steps to transfer products between Inventory locations. Reference the appropriate scenario based on whether the account(s) are in MotionMD or Non-MotionMD for inventory management.

Inventory Transfers within a MotionMD Account:

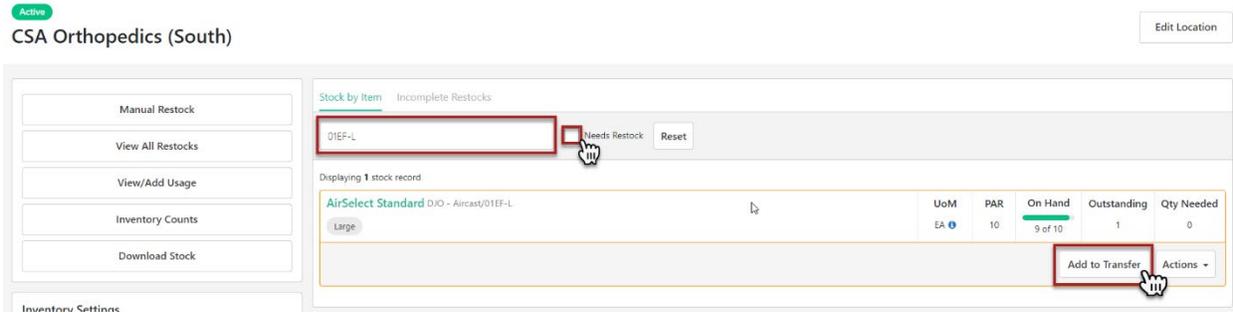
Inventory transfers can easily be completed between Inventory Locations under the same MotionMD account.

On the top menu bar, click **INVENTORY LOCATIONS** from the **INVENTORY** drop-down. Click on the location you need to transfer inventory from.

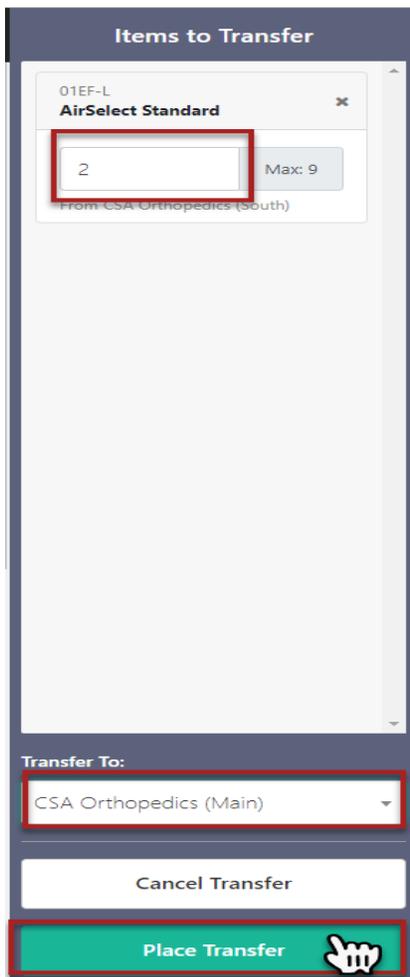
The screenshot shows the MotionMD web interface. At the top, a dark navigation bar contains the following items: MOTIONMD, Clinical (with a dropdown arrow), Inventory (with a dropdown arrow and a red box around it), HCPCS Codes, Reports, and Admin (with a dropdown arrow). The 'Inventory' dropdown menu is open, showing a list of options: Products, Rental Products, Manufacturers, Vendors, and Inventory Locations (which is highlighted with a red box and a hand cursor). Below the navigation bar, the main content area displays 'CSA Orthopedics' and 'Patient Agreements'. A search bar is visible with the text 'Search All Patient Agre...'. Below this, a section titled 'Displaying all 2 inventory locations' contains two cards. The left card is for 'CSA Orthopedics (Main)' and the right card is for 'CSA Orthopedics (South)'. The right card is highlighted with a red box and a hand cursor. Each card displays the following information: address (1430 Decision ST, Vista, CA 92081 for Main; 2900 Lake Vista Drive, Lewisville, TX 75067 for South), phone number (888-225-4398), and OC Account # (123456). Below the information, each card has buttons for 'Incomplete Restocks' (with a red circle containing the number 2), 'View/Add Usage', and 'Restock' (with the number of items to restock: 11 for Main, 0 for South).

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In the search bar type the SKU(s) of the product(s) that are being transferred and unselect **NEEDS RESTOCK** to search all inventory in stock. Once SKU(s) are selected, click **ADD TO TRANSFER** and a side bar will open up.



On the side bar, set the quantity to be adjusted for each product. To remove an item from the transfer click the **X**. Select the destination location from the **TRANSFER TO** drop-down menu. Click **PLACE TRANSFER** to complete.



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Helpful Information:

- No check-in is required at the receiving Inventory Location. On-hand counts are automatically decremented and incremented on each Stock Record.
- Transfers to an Inventory Location will automatically create a new Stock Record if it did not exist previously. However, the Stock Record setup will need to be completed by the Customer Success Team, submit a Help Ticket requesting the Item setup be completed.
- All Inventory Transfers between Inventory Locations in MotionMD will automatically be submitted to OC Logistics at the end of each business day to process the transfer in Oracle. No need to contact them if both Inventory Locations are in MotionMD.

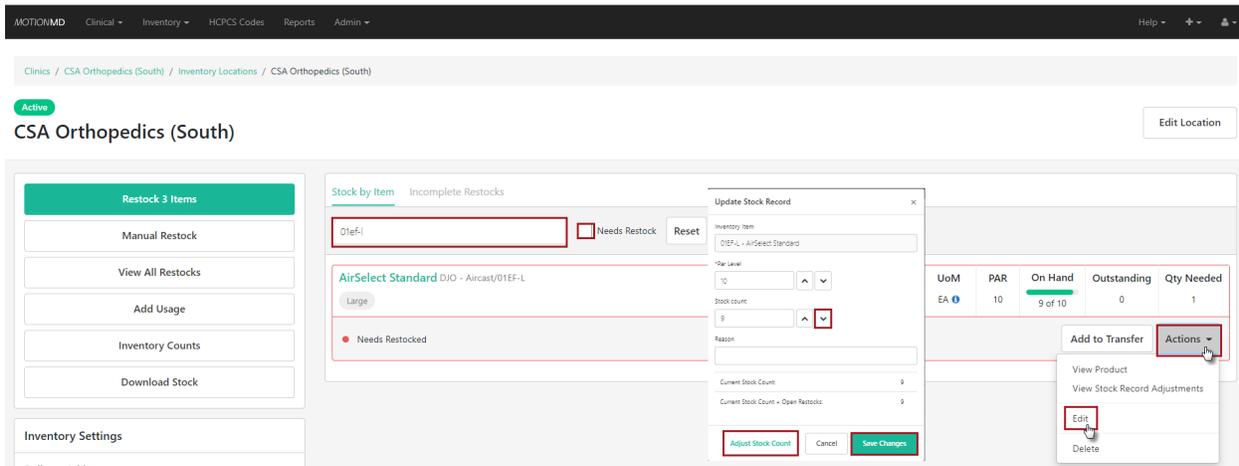
Inventory Transfers between two different MotionMD Accounts:

Complete an inventory transfer in Beacons OR email an inventory transfer request to:

OfficeCareLogistics@djoglobal.com

In MotionMD Account Transferring FROM:

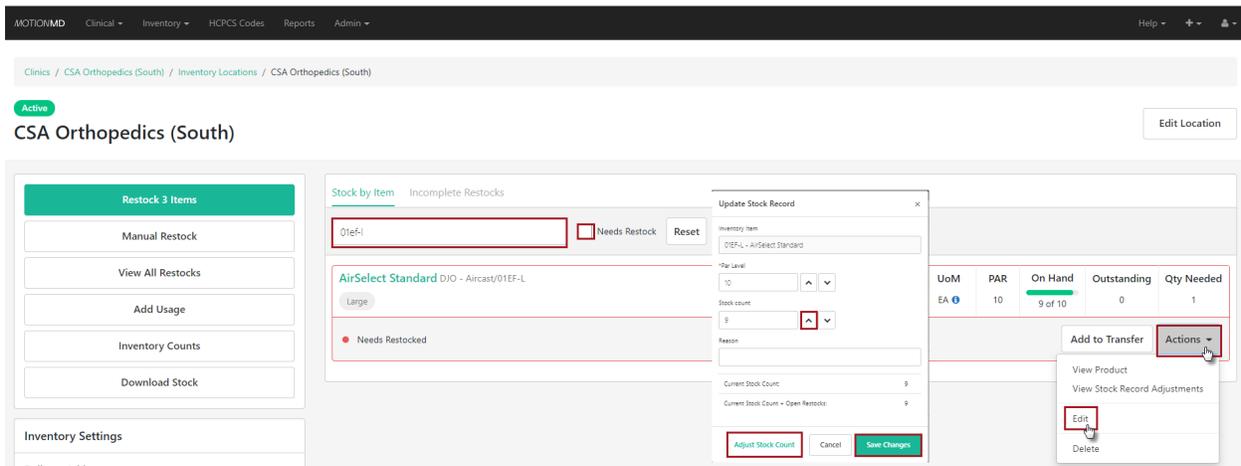
Log into MotionMD Account to transfer product FROM. Select the appropriate Inventory Location to complete the transfer. Utilize the Stock by Item tab and search for SKU(s) that were transferred to adjust. Unselect **Needs Restock** to search all inventory in stock. Once the SKU(s) is chosen select **Actions > Edit > Adjust Stock Count** and manually **decrement** the On-hand count by the quantity to transfer out of the location. Once complete select **Save Changes**.



In MotionMD Account Transferring TO:

Log into the MotionMD Account to transfer product TO. Select the appropriate Inventory Location to complete the transfer. Utilize the Stock by Item tab and search for SKU(s) that were transferred to adjust. Unselect **Needs Restock** to search all inventory in stock. Once the SKU(s) is chosen select **Actions > Edit > Adjust Stock Count** and manually **increase** the On-hand count by the quantity that is being transferred into the location. Once complete select **Save Changes**.

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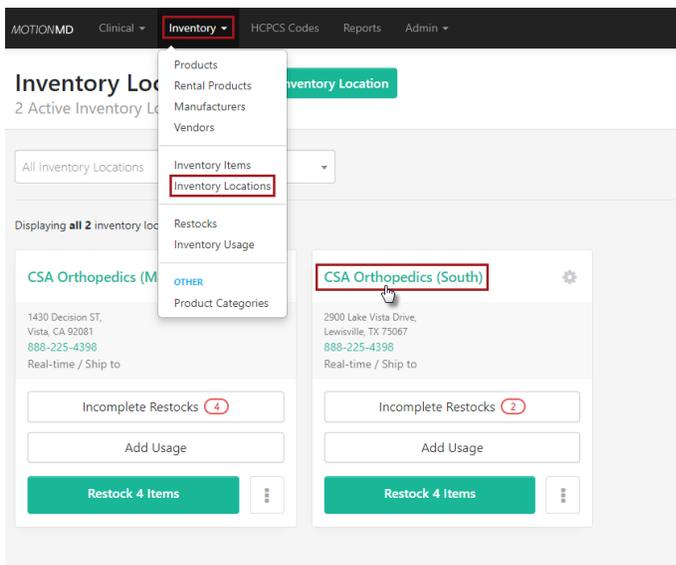


Inventory Transfer from a NON-MotionMD Account to a MotionMD Account or vice versa:

Complete an inventory transfer on Beacons OR email an inventory transfer request to:

OfficeCareLogistics@djglobal.com

On the top menu bar, click on the **Inventory > Inventory Locations** and Select the Inventory location to Transfer product(s) FROM OR TO:



Utilize the Stock by Item tab and search for SKU(s) that were transferred **TO/FROM** and adjust. Unselect **Needs Restock** to search all inventory in stock. Once the SKU(s) is chosen select **Actions > Edit > Adjust Stock Count** and manually **INCREASE/DECREMENT** the On-hand count by the quantity that is being transferred **TO/FROM** the location. Once complete select **Save Changes**.

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The screenshot shows the MOTIONMD web application interface for inventory management. The top navigation bar includes 'MOTIONMD', 'Clinical', 'Inventory', 'HCPCS Codes', 'Reports', and 'Admin'. The breadcrumb trail indicates the current location: 'Clinics / CSA Orthopedics (South) / Inventory Locations / CSA Orthopedics (South)'. The main content area is titled 'Active CSA Orthopedics (South)' and includes an 'Edit Location' button. On the left, there is a sidebar with buttons for 'Restock 3 Items', 'Manual Restock', 'View All Restocks', 'Add Usage', 'Inventory Counts', and 'Download Stock'. The central area displays a table of 'Stock by Item' with columns for 'Inventory Item', 'Par Level', 'Stock count', 'Current Stock Count', and 'Current Stock Count - Open Transfer'. An 'Update Stock Record' modal is open, showing fields for 'Inventory Item', 'Par Level', 'Stock count', and 'Reason'. A dropdown menu is open over the table, showing options like 'Add to Transfer', 'View Product', 'View Stock Record Adjustments', 'Edit', and 'Delete'. A table on the right shows inventory details for 'AirSelect Standard D.I.O - Aircast/01EF-L' with columns for 'UoM', 'PAR', 'On Hand', 'Outstanding', and 'Qty Needed'.

UoM	PAR	On Hand	Outstanding	Qty Needed
EA	10	9 of 10	0	1

NOTE: If the Inventory Location the SKU is transferred TO is a MotionMD account that did not have an existing Stock Record for that product please contact the MotionMD help desk for further assistance to set up stock record.