

- Field Inventory Services
- BuzzeoPDMA Specialist Instructions
- TO BE COMPLETED ON JAN 7, 2016 **ONLY**



Derm Annuals

**\*\*YOU MAY BEGIN CONTACTING YOUR REPS IMMEDIATELY HOWEVER APPOINTMENTS MAY ONLY BE COMPLETED ON JANUARY 7, 2016\*\***

**Items needed for execution**

- Allergan Annual Inventory Instructions (this document)
- Sample Inventory Form
- Storage Location Inspection Form
- Sample description/Unit count
- Field Sales Communication

**If any of the above are missing from packet contact our office**

- Ballpoint pen (**black or blue ink only**)
- Calculator
- Flashlight
- Business casual attire

\* Be professional and courteous. Do not discuss any other assignments or clients with the SR. If you have questions during the annual, please contact **our office** for assistance.

**Scheduling the annual**

- Contact the Allergan sales representative (SR) via the number provided on your assignment sheet. **If there is no phone number listed, use the email address found in the 'VMX' field.** Please use the following script:

*"My name is \_\_\_\_\_ a specialist with BuzzeoPDMA. We have been assigned to conduct your annual inventory on behalf of Allergan. I would like to set up a time FOR JANUARY 7<sup>TH</sup> to come out and complete your annual inventory. Please call me at (XXX) XXX-XXXX to set up an appointment. Thank you."*

- Document all contact dates and appointment date and time on our website <http://webtools.buzzeopdma.com/pdma/login.aspx> within 24 hours from the time the call attempt and/or contact is made.
- If you have not heard back from the SR within 24 hours, contact the employee again.
- If SR has not responded after leaving 3 messages over 72 hours (3 business days), update the website as "SR Non Responsive" and notify our office. We will contact Allergan for direction.
- Remind the SR to have all their samples (including samples from the vehicle, detail bag, etc.) at the storage location organized by product, lot number & expiration date.
- Confirm the address where you are to meet is the same as provided on your assignment sheet.
- Exchange cell phone numbers.
- If SR is not cooperative or refuses to schedule the annual inventory, notify our office. We will contact Allergan for direction.
- Your packet includes a copy of the field communication sent to each SR. Please reference this if the SR has questions regarding client scheduling requirements or when they can resume sample transactions.

## On Site Process:

### 1. Sample Inventory Form

#### NO Samples at Annual Inventory: (ZERO INVENTORY)

- Complete an Inventory Form indicating ZERO samples.
  - Complete the header with the SR's name and the address where the appointment takes place.
  - Select the **"Annual"** box. Enter the territory/Rep ID, date and time of appointment.
  - Slash (\) the body of the form and enter '0' (zero) in the last 'Total Units' column for the sample count.
  - Print your name and date the form.
  - Once complete, you both will sign where indicated.
  - Ask the SR to take a picture of the completed inventory form with their iPad so they will have a copy for their records.

#### Samples ON-SITE at Annual Inventory:

Record the SR's inventory using the sample inventory form. Segregate the samples by product, then by lot number of that product.

All samples are counted by lot number.

- Complete the header with the SR name and the address where the appointment takes place.
- Select the **"Annual"** box. Enter the territory #/Rep ID, date and time of appointment.
- **Record** the product description (including size and strength), product code number, lot number and then quantity. Record the number of full sealed cases (if not sealed they must be opened to verify products have not been co-mingled.) Then multiply by the number of units within each full case. Enter any loose units found in the storage location, car, detail bag or miscellaneous units. Total all units and record in "Total Units" column.-
- **Continue for each product - remember to count by LOT NUMBER.**
- Once all products are accounted for and you both agree the count is correct, you both will sign where indicated. You will also print your name and date the form.
- Ask the SR to take a picture of the completed inventory form with their iPad so they will have a copy for their records.

### 2. Storage Location Inspection Form

- Record the SR's **Name, Rep# and Territory#.**
- Record the address of the SR's storage facility (if applicable) or home address.
- Check the correct box for the type of storage, Commercial Unit or Residence.
- Answer all questions on the form either Yes or No.
  - If the physical storage address **DOES NOT** match the address within your assignment on the website, the SR **MUST** change their address in Veeva at the time of the audit.
- Please provide comments for any 'NO' responses.
  - After the form is completed please make sure you and the SR sign and date.

### 3. Off-site process

- Make a copy of ALL forms for your own records.
- **IMMEDIATELY FAX OR EMAIL LEGIBLE COPIES** of the Sample Inventory Form, Storage Location Inspection Form and your invoice to our office – **NO EXCEPTIONS!** We will reimburse your fax expense as this method of paperwork return is a client requirement. Please include a copy of your receipt with the paperwork (do not include expense report).

**FAX:** 804-267-1746

**EMAIL:** [allergancloseouts@imshealth.com](mailto:allergancloseouts@imshealth.com)

**For general, off site questions,** please send an email to [Allergancloseouts@imshealth.com](mailto:Allergancloseouts@imshealth.com). This will allow our phone lines to remain open for specialists on site that encounter issues.

**For onsite, urgent questions,** please call:

Jennifer Custalow 804-230-5039

Jessica Warn 973-316-4057



Sample Inventory Form

Sales Representative Name (PRINT):

Annual

Close Out

Location: Street Address: Unit # (commercial storage only)

Terr# / Rep ID

Date

Time

City, State & Zip

COUNT AND RECORD BY UNITS!

NAME OF PRODUCT SAMPLE	PRODUCT CODE (SAP) NUMBER	LOT NUMBER	Storage Location CASE UNITS	Storage Location PARTIAL CASE UNITS	Vehicle UNITS	Detail Bag UNITS	Misc. UNITS	TOTAL UNITS
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					
			# of cases _____ x # of units ( ) = _____					

Sales Representative Signature:

Date:

Specialist Signature:

Specialist Print Name:



## STORAGE LOCATION INSPECTION APPROVAL FORM

Name: \_\_\_\_\_ Rep #: \_\_\_\_\_ Territory #: \_\_\_\_\_

Facility Name (if applicable): _____
Facility / Residence Address: _____
City: _____ State: _____ Zip: _____ Phone Number: _____

<input type="checkbox"/> Commercial Unit	<input type="checkbox"/> Residence
--	------------------------------------

<input type="checkbox"/> Yes <input type="checkbox"/> No	Does this physical storage location match the sample storage address provided on the assignment? <b>If 'No', rep must change address in Veeva at time of audit.</b>
<input type="checkbox"/> Yes <input type="checkbox"/> No	The storage location is secure and only accessible by the sales representative or other authorized persons.
<input type="checkbox"/> Yes <input type="checkbox"/> No	The samples are stored in a climate controlled environment in accordance with the package insert.
<input type="checkbox"/> Yes <input type="checkbox"/> No	The storage location provides an environment in which samples may be stored where they will be free of contamination, adulteration and deterioration.
<input type="checkbox"/> Yes <input type="checkbox"/> No	The storage area contains only corporately provided samples and literature. No personal items are stored in the sample storage location.
<input type="checkbox"/> Yes <input type="checkbox"/> No	All samples in sales representative's possession have more than 30 days to expiration.

Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Sales Representative: \_\_\_\_\_ Date \_\_\_\_\_  
(signature)

Specialist: \_\_\_\_\_ Date \_\_\_\_\_  
(signature)

## Allergan Product list

Active As Of : 11/11/15

Product #	Product	Units/Case
93669	ACZONE Gel 5% - 15x3g	24
94297DB	ACZONE Gel 5% - 90g	24
93092	TAZORAC Cream 0.05% - 15x3.5g	24
93093	TAZORAC Cream 0.1% - 15x3.5g	24
93091	TAZORAC Gel 0.05% - 15x3.5g	24
93090	TAZORAC Gel 0.1% - 15x3.5g	24
95268DB	TAZORAC Cream 0.1%-5x3.5g	24

\*no one should have these, but check the labels carefully

this only has one lot number **84575**, so as not to confuse with the other Tazorac Cream 0.1%

All,

As part of the transition to Veeva, and in accordance with Allergan policy in order to maintain compliance with the Prescription Drug and Marketing Act, we will be conducting the Annual Audits of sample inventory on Thursday, January 7<sup>th</sup>, 2016. BuzzeoPDMA will be performing the audits and storage unit inspections.

The process and timeline will be:

## **Procedures**

- ▶ Beginning December 7<sup>th</sup>, A Field Inventory Specialists (FIS) will make initial contact with you
  - *Please return the call within 24 hours to schedule the appointment for Thursday, January 7<sup>th</sup>*
  - *If you will not be available to conduct your audit on January 7<sup>th</sup>, then you must schedule it for your last working day before the National Sales Meeting*
  - *If you do not hear from a Specialist by close of business Tuesday December 15<sup>th</sup>, please email nazzario\_patrick@allergan.com*
- ▶ The FIS will conduct a physical inventory of all drug samples in your possession
- ▶ The FIS will review the inventory with you to ensure you are in agreement with the count
- ▶ A review of the sample storage site will be conducted
- ▶ The inventory will be recorded on paper and you will be required to sign indicating your agreement

***Once your audit has been completed, you will not be able to conduct any sample transactions until after the NSM***

## **How to Prepare**

- ▶ Gather all samples in your possession, including car & detail bag, & place them in one location in the storage area on the day of the audit
- ▶ Samples must be organized by product, strength, and lot number
- ▶ Do a pre-count

## **FAQ's**

- ▶ Why do I have to do an annual inventory?
  - It is required in order to load your beginning inventory into Veeva
  - Additionally, It is Allergan policy to have a physical inventory conducted once per year by an independent auditor
- ▶ Can I schedule my inventory after Thursday, January 7<sup>th</sup>?
  - No, Allergan has made special arrangements with Buzzeo to have the inventories conducted on this date
  - Sampling activities may be delayed for several days after the NSM if the audit is not conducted on or before January 7<sup>th</sup>
- ▶ What if I am on medical leave during the inventory period?
  - You will be required to conduct your inventory once you return to the field
- ▶ Do I need to input a quarterly inventory count for Q4?
  - No. The annual audit will serve as you Q4 inventory