

Working with Loan and Borrow

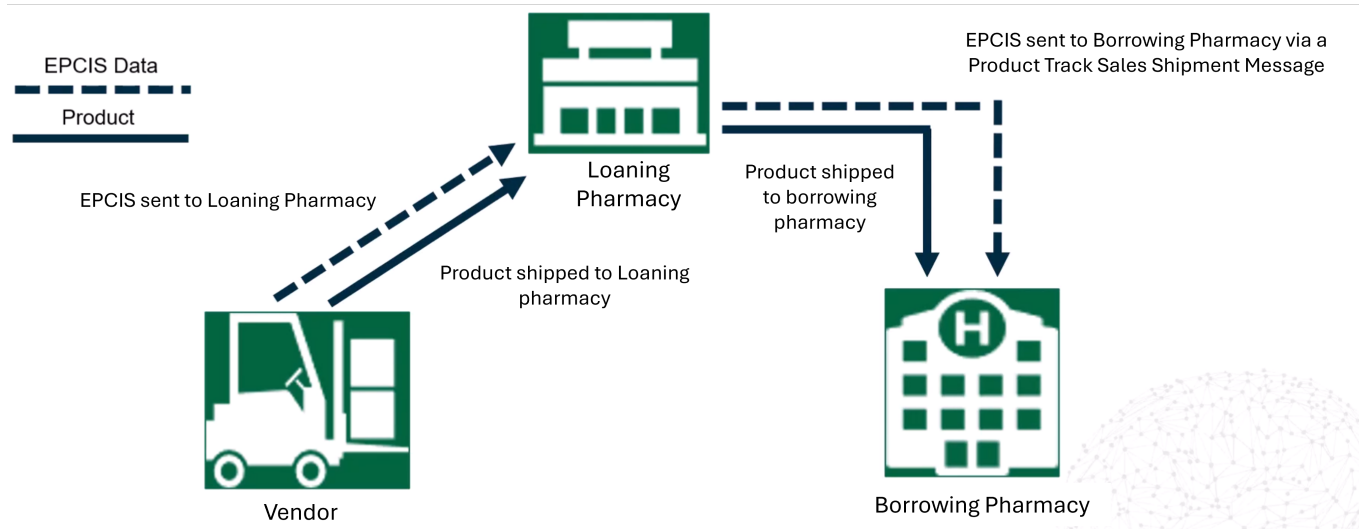
Under the Drug Supply Chain Security Act (DSCSA), all movements of prescription drug products must maintain full traceability and documentation from manufacturer to dispenser. When a loan or borrow situation occurs (such as temporarily using one stock category to cover another), it must still comply with DSCSA requirements for product identification, transaction documentation, and trace history.

A loan occurs when a product from one inventory is temporarily used to fulfill dispensing needs, with the intention of replacing it later using the same product from a different supply source. A borrow refers to the reverse situation, where a product is temporarily taken from another inventory or location and later replenished to maintain accurate records.

Each loan or borrow event must be documented with complete transaction information, including product identifiers, transaction information, and transaction statements, in accordance with DSCSA requirements. Clear recordkeeping ensures visibility, traceability, and verification of legitimate product movement.

These activities should remain temporary, infrequent, and fully reconciled to uphold DSCSA compliance and supply chain integrity. The goal is to maintain uninterrupted patient care while preserving the secure, verifiable chain of custody mandated by DSCSA.

Here is the workflow of the product from Vendor to Borrowing Pharmacy.



Using the Loan and Borrow Model

First ensure the prerequisites have been completed:

- The Borrowing Pharmacy is added to the TraceLink Network.
- The Borrowing Pharmacy is added to Partner Master Data.
- The Loaning and Borrowing Pharmacies are ServiceLinked in Product Track.
- The Generate Shipment EPCIS Message Workflow has been enabled.




Prerequisites



Add Borrowing Pharmacy in to Partner Master Data

1. Log in to *opus.tracelink.com*.
2. Select the **Master Data** from the **Main Menu**.
3. In the side menu, select **Partner > Partners**.
4. Click **New**.



5. In the Partner Information section, enter the following:
 - **Name:** Enter the name of the partner.
 - **Status:** Select the status of the partner's information (active or inactive).
6. In the Identifiers section, click the Add  icon on the top right of the Identifiers table.
7. In the New Identifier push panel, enter the following:
 - Select the identifier type from the Type drop-down.
 - Enter the identifier value in the Value field.
 - Set the ID to Primary.

Note: One of the identifiers must be marked as the primary identifier and only one primary identifier is allowed.

 - Click **Apply**.
8. Click **Save**.



Create ServiceLink between Loaning and Borrowing Pharmacies in Product Track.

1. Log in to *opus.tracelink.com*.
2. Select **Administration** from the **Main Menu** .
3. From the side menu, select **TTS Administration**, then select **Administration**.
4. In **Configure Applications and Links** section, click **ServiceLinks** tile.
5. Click **Create ServiceLinks**.
6. Product Track US defaults as the **Service Type**.
7. For **Subscribing Entity**, click the drop-down icon  and select the company you're linking to.

If the partner does not appear in the list, be sure that the partner exists in Partner Master Data. To add an entity to an application, it must be in Partner Master Data.

8. Click the [Create Another ServiceLink](#) link on the right to add more ServiceLinks.

9. Click **Create ServiceLink(s)**.

If the partner is already on the TraceLink network, TraceLink creates the Link automatically and the partner is linked to the application.

Manage ServiceLinks

Search Criteria

SERVICE TYPE: **All** | SERVICELINK STATUS: **All** | DATE ON OR AFTER: **9** | DATE ON OR BEFORE: **22 Jun 2015** | 9

SUBSCRIBING COMPANY: Enter company name or ID
Enter company name or ID value

KEYWORDS: Subscribing entity address, service administrator, etc. **Search** **Reset**

Create ServiceLinks

1 Displaying 1-16 of 16 results | [Export Results to CSV](#)

After you create a ServiceLink, the Subscribing Entity is shown and status is set to **Linked**.

Service Type	ServiceLink Status	Uploaded ID Uploaded Company	Subscribing Entity	Last Updated	Actions
Product Track	No Match Found	DEA RR2366401 Wholesale Inc 1000 Corporate Drive Sacramento, CA 95833 US	--	04 Dec 2014 09:24 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove Resubmit
Product Track	Linked	DEA RC0221236 Cardinal Health 7000 Cardinal Place Dublin, OH 43017 US	Cardinal Health, Inc. 7000 Cardinal Place Dublin, OH 43017 US	18 Sep 2014 08:36 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove
Product Track	No Match Found	DUNS 223334444 TLRX 1 Main St N Reading, MA 01864 US	--	07 Apr 2015 12:58 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove Resubmit
Product Track	Linked	DUNS 070338189 HD Smith 4650 Industrial Ave Springfield, IL 627035318 US	H. D. Smith LLC 3063 Fiat Ave Springfield, IL 62703 US	17 Nov 2014 04:15 PM GMT by Caitlin Mackeown of TracelinkRoot	View Details Remove

If the global identifier you added to Partner Master Data for your trade partner is not yet on the TraceLink network, a No Match Found occurs. The TraceLink Verification Team monitors the queue for No Match Found records. Usually within an hour, they will verify the identifier, add the partner to the network, and create the Link to the partner. TraceLink will notify you if the identifier is not valid.

Manage ServiceLinks

Search Criteria

SERVICE TYPE: All | SERVICE LINK STATUS: All | DATE ON OR AFTER: 22 Jun 2015 | DATE ON OR BEFORE: 22 Jun 2015

SUBSCRIBING COMPANY: Enter company name or ID | KEYWORD: Enter company name or ID value

Create ServiceLinks

1 Displaying 1-16 of 16 results | [Export Results to CSV](#)

Service Type	ServiceLink Status	Uploaded ID	Uploaded Company	Subscribing Entity	Last Updated	Actions
Product Track	No Match Found	DEA RR2366401	Wholesale Inc 1000 Corporate Drive Sacramento, CA 95833 US	--	04 Dec 2014 09:24 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove Resubmit
Product Track	Linked	DEA RC0221236	Cardinal Health 7000 Cardinal Place Dublin, OH 43017 US	Cardinal Health, Inc. 7000 Cardinal Place Dublin, OH 43017 US	18 Sep 2014 08:36 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove
Product Track	No Match Found	DUNS 223334444	TLRX 1 Main St N Reading, MA 01864 US	--	07 Apr 2015 12:58 PM GMT by Sally Goodwell of Kendall Pharma	View Details Remove Resubmit
Product Track	Linked	DUNS 070338189	H. D. Smith LLC	H. D. Smith LLC	17 Nov 2014 04:15 PM	View Details Remove

If the Partner has not been added to the TraceLink network, the status is "No Match Found."

- TraceLink verifies the partner and adds them to the network.
- Once verified, TraceLink adds the partner to the network and subscribes the partner.

10. Once you create the Link (ServiceLink), if you are aware that the partner has B2B capabilities, send an email to case@tracelink.com to indicate that your partner is ready for TraceLink to configure its connection, using the following subject line:

Subject: Please Configure New Partner: <Partner Company Name>

In the email, include the following information:

Partner Company: <Partner Company Name>

Partner Identifier: <Global Identifier>

My Company: <Company Name>

For **Partner Identifier**, enter a global identifier such as a DEA, DUNS, or HIN value.

TraceLink will configure your partner's connections if necessary and will provide information to get your partner started with TraceLink.

The **Generate Shipment EPCIS Message** workflow allows US Product Track to send a copy of the EPCIS data (T2) to the Borrowing Pharmacy.



Enable the Generate Shipment EPCIS Message Workflow

1. Select **My Networks** from the **Main Menu** .
2. Select the Administration network from the **Network** drop-down.
3. From the side menu, select **TTS Administration**, then select **Administration**.
4. In **Configure Applications and Links** section, click the **Workflow Events** tile.
5. In the Event Source (Application) drop-down, search under the **Serialized Operations Manager(Serialized Operations Manager)** application.
6. Find the **Generate Shipment EPCIS Message** workflow and select the check box to enable it.
7. Click **Save**.



Step 1: Retrieve the Inbound Delivery Number for the Serial Number

1. Select **My Networks** from the **Main Menu** .
2. Select the Serialized Operations Management network from the **Network** drop-down.
3. Click **GO**.
4. Click **Serialized Items** then **Search** from the side menu.
5. Enter the **Serial Number**.
6. Click **Search**.
7. Note the **Last Delivery Number**.

Serial Number Information ▾	
Serial Number	Serial Number Status
00503123450000000474	Commissioned
Encoding Type	Item Status
AI(00)	Pending Receipt
Commissioning Location	Registered
0312345.66666.0	False
Last Delivery Number	Child Count
09112024CHPT3	25

8. Repeat this process for each serial number you wish to send.



Step 2: Find and Receive the Inbound Receipt

1. Select **My Networks** from the **Main Menu** .
2. Select the Serialized Operations Management network from the **Network** drop-down.
3. Click **GO**.
4. Click **Receipts** then **Search** from the side menu.
5. In the **Delivery Number** field, enter the **Delivery Number**.
6. In the **Search Criteria** section enter the **Delivery Number**.
7. Ensure the **Status** is **In Progress**.
8. Clear all Additional Filters, if any.
9. Click **Apply**.


10. Click the [Delivery Number](#) link in the **Delivery Number** column.
11. Expand the Receive Serial Numbers section and select either **Receive All** or **Receive Specific Serial Numbers**.
12. If you selected the **Receive Specific Serial Numbers** radio button, enter the specific serial numbers.
13. Choose any of the desired options.
14. Click **Receive**.

All the serial numbers in the receipt are now in an **Available** state which means they are ready to ship.

15. Repeat this step for any additional inbound receipts if other serial numbers you are sending are on a different inbound receipt.



Step 3: Create an Outbound Delivery

1. Select **My Networks** from the **Main Menu** .
2. Select the Serialized Operations Management network from the **Network** dropdown.
3. Click **GO**.
4. Click **Serialized Operations Management (Classic)** from the side menu.
5. Select **Outbound Movement** > [Create Delivery](#).
6. Enter a **Delivery Number** of your own choosing.

For example, enter the name of the borrowing pharmacy followed by the date.

7. For **Sale Type**, select **Sale - In Country**.
8. For **From Country Code** and **To Country Code**, select **US**.
9. Enter a **From Business**, **To Business**, **Ship From Location** and **Ship To Location**.

- Four addresses are required for US EPCIS data exchange.
 - For the **To Business**, enter the borrowing pharmacy.
10. Add a **Transaction ID** of your own choosing.
 - For example, for **Identifier Type** select **Other**.
 - Enter the **Delivery Number** you just entered in the **Identifier Value** field.
 - Leave **Document Date** blank.
 11. Click **Next**.
 12. Click **Next** again.
 13. In the **Serial Numbers** section, select **Scan Serial Numbers**. This option allows you to type in the box.

Scan the serial numbers or paste/enter them in the Serial Numbers box.
 14. Ensure the **Automatically disaggregate serial numbers that are aggregated to another number** check box is selected.
 15. Click **Submit**.