

# CPSM MEDITECH 5.67

## MEDITECH

### Inventory Requisition Options

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## CPSM – Inventory Requisition Options

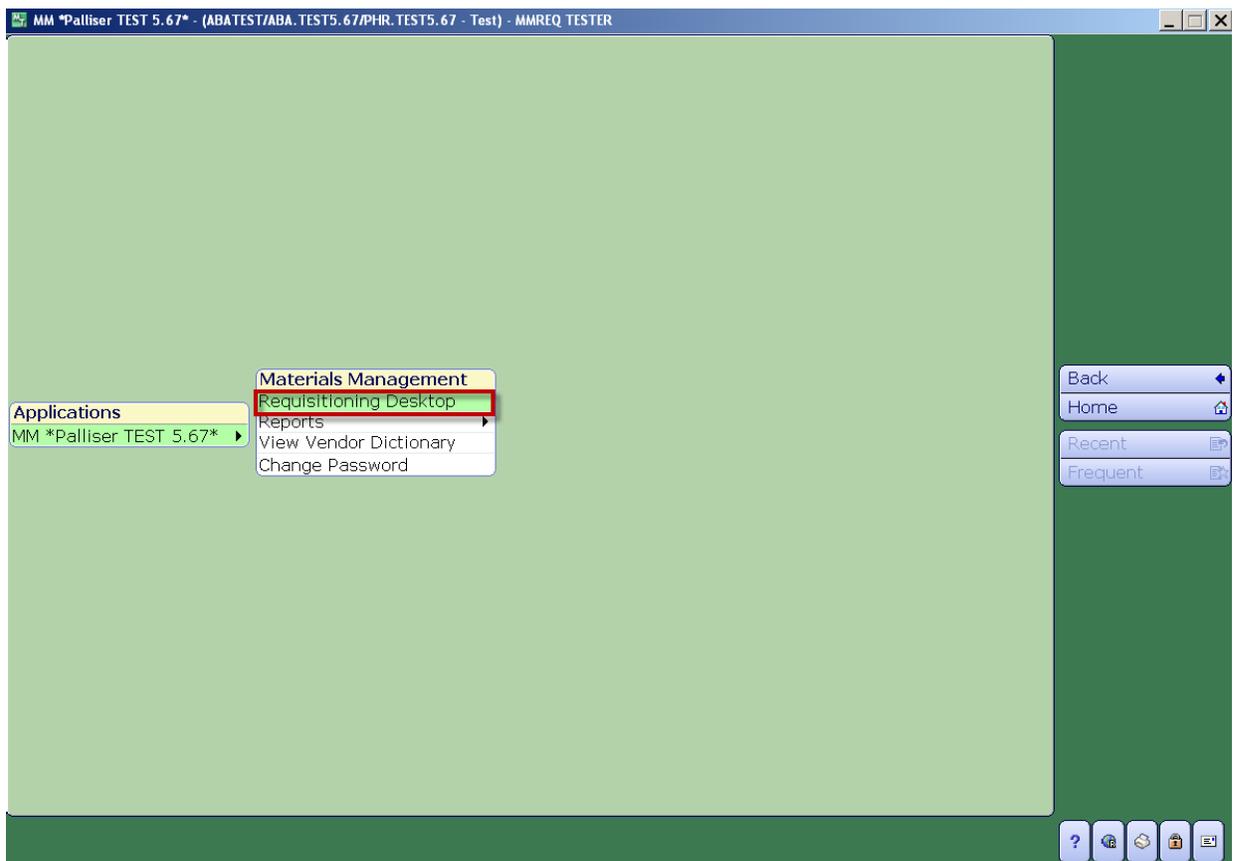
### Process Item Requisition – Using a Template

**Purpose:** Use this routine to create an Item Requisition by using a template which is a prebuilt list of items for your department that are available from your local CPSM Inventory.

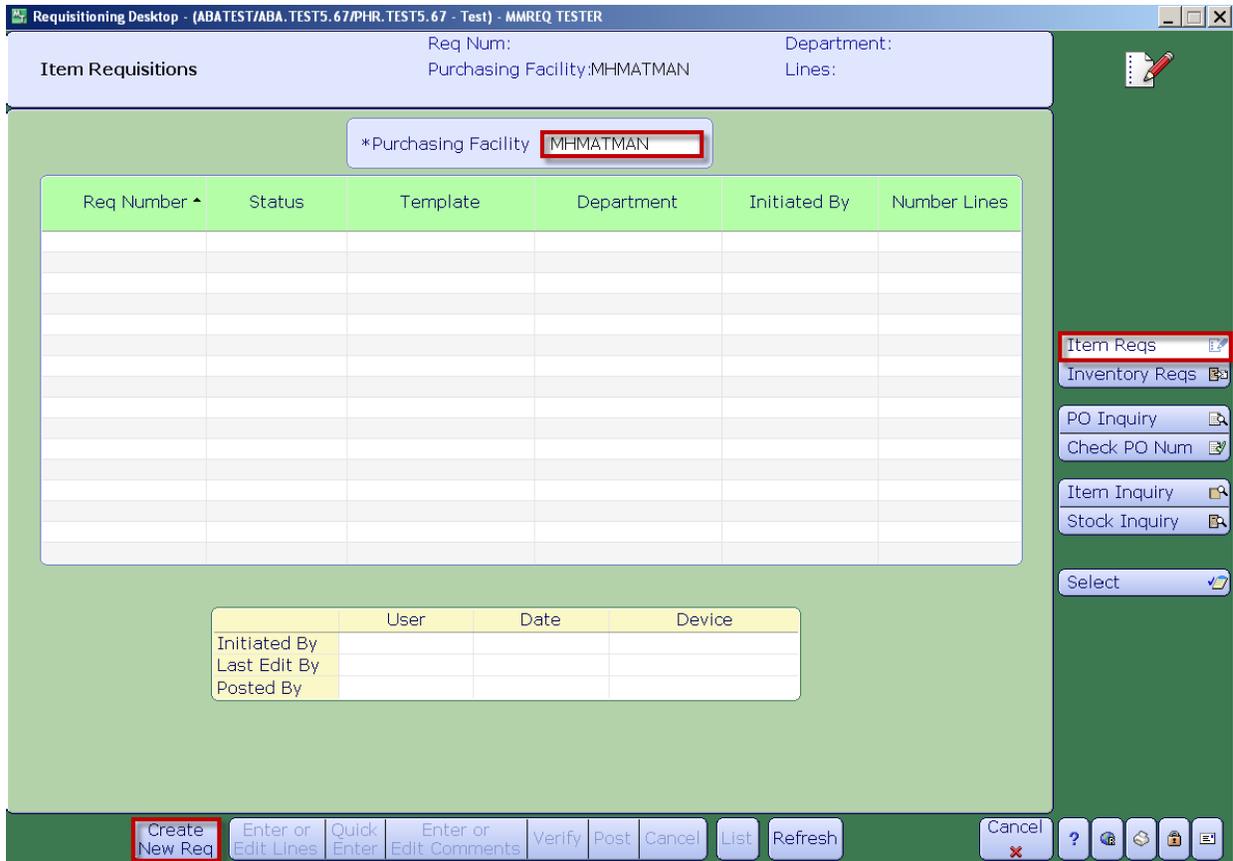
Please contact your local CPSM Warehouse to have a template built for your department.

**NOTE:** Profiles will vary between users. The first menu will be *Applications* followed by *Role* based (e.g. Nursing, Diagnostic Imaging etc.), at this point a user will select *MM Inventory Requisition*. The next menu will be *Materials Management*. The screen shots in this document show from Application menu to Materials Management Menu leaving out the *Role* based menu.

#### 1. Click the *Requisitioning Desktop*.



2. **Type** in your *Purchasing Facility* or **search** for your *Purchasing Facility* by **clicking** on the dropdown arrow. This field may default for some users.
3. **Click** on **Item Reqs** which is located on the right hand menu listing.
4. **Click** on the *Create New Req* footer button.



Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Item Requisitions

Req Num: Department:  
Purchasing Facility:MHMATMAN Lines:

\*Purchasing Facility

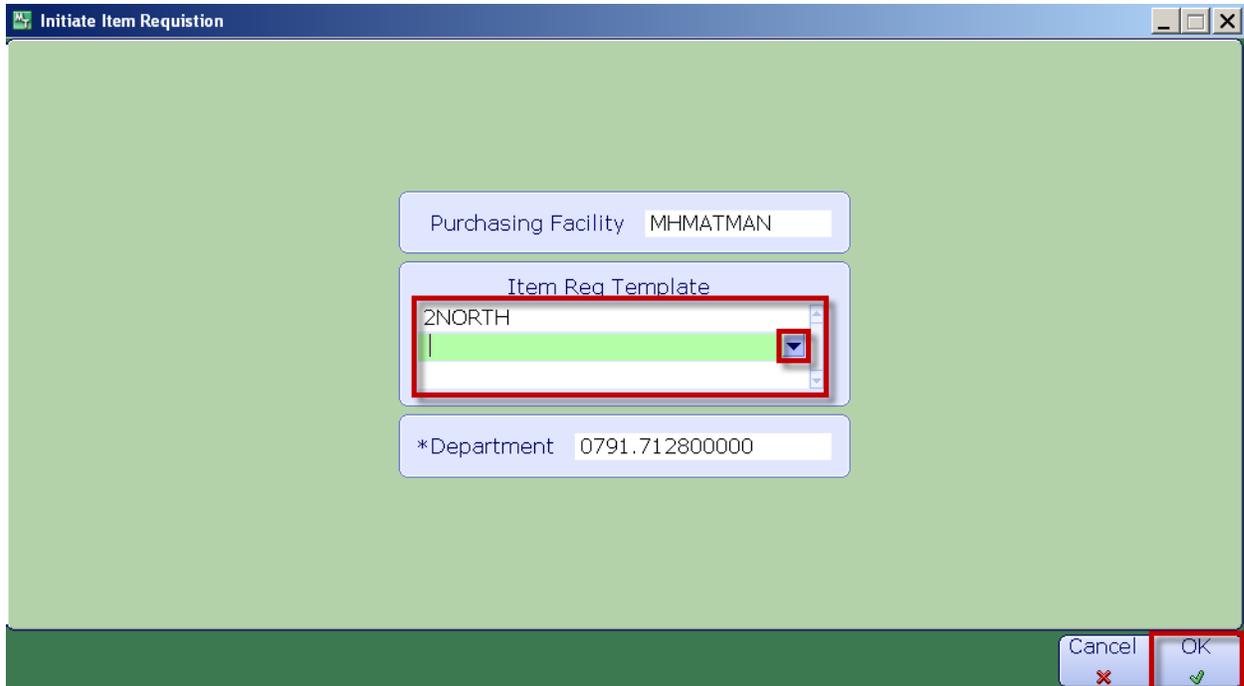
Req Number	Status	Template	Department	Initiated By	Number Lines

	User	Date	Device
Initiated By			
Last Edit By			
Posted By			

Item Reqs  
Inventory Reqs  
PO Inquiry  
Check PO Num  
Item Inquiry  
Stock Inquiry  
Select

Create New Req Enter or Edit Lines Quick Enter Enter or Edit Comments Verify Post Cancel List Refresh Cancel

5. **Type** in your *Item Requisition Template* or **search** for your *Item Requisition Template* by **clicking** on the dropdown arrow.
6. Once you have located your *Item Requisition Template*, **click** on it. It will appear on the screen along with your Department Code.
7. **Click** on *Ok*.



Initiate Item Requisition

Purchasing Facility MHMATMAN

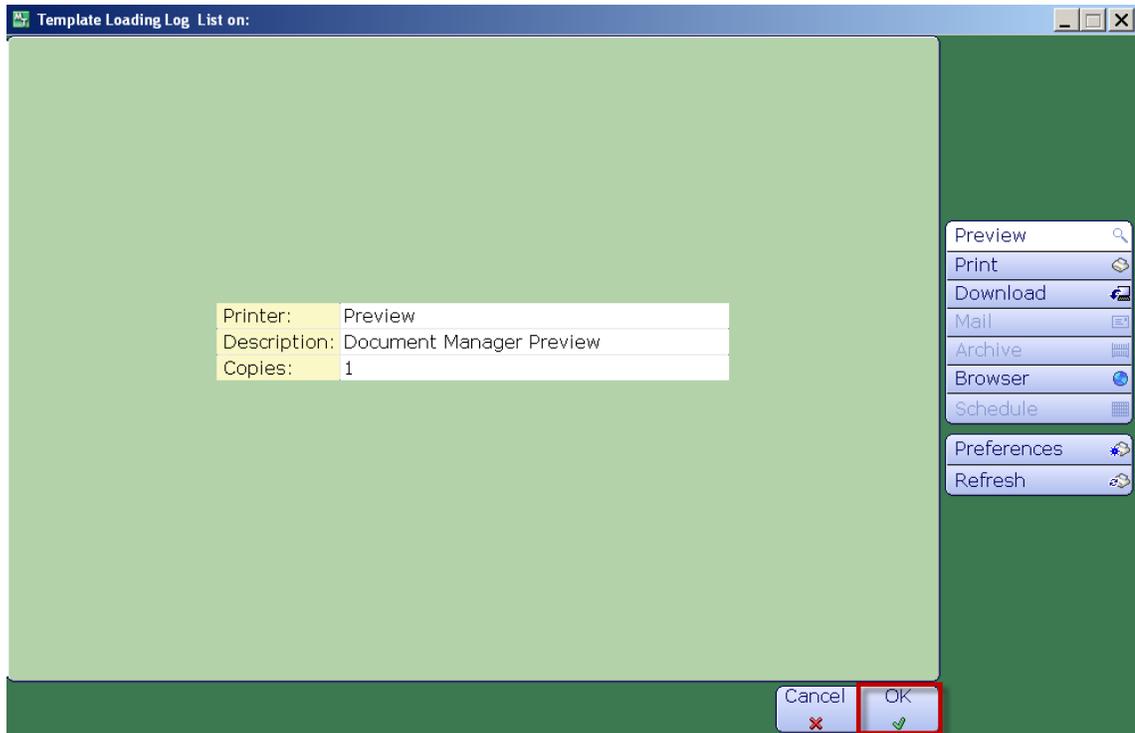
Item Req Template  
2NORTH

\*Department 0791.712800000

Cancel OK

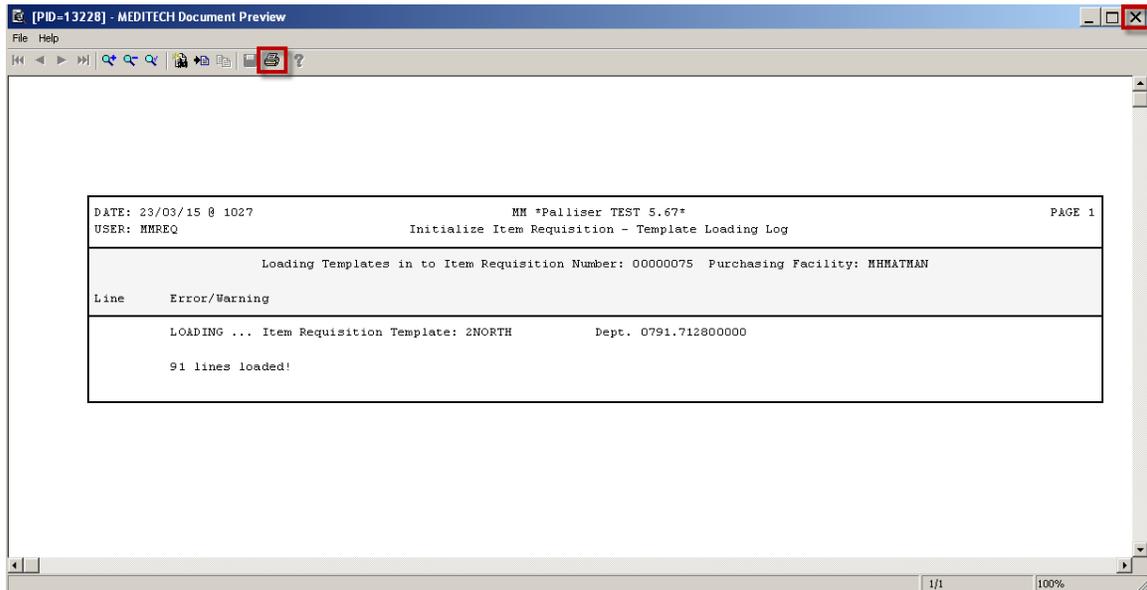
The Template Loading Log List window will appear.

8. Click *OK*.



At this point Meditech validates the GL Code Combinations and will indicate whether or not all of the template lines have been loaded and/or if there are any errors.

If any errors are listed, print the document by clicking on the Printer icon which is located on the header and contact your local CPSM Department to resolve the errors.



9. Close the window by **clicking** on the X which is located on the top right hand corner.





11. Enter the Qty you wish to order. Notice the Unit of Issue in the Units column.

12. Once you have entered all of your items, click on the Save button.

Meditech Health Care Information System

Purchasing Facility: MHMATMAN  
Item Requisition Number: 00000075  
Department: 0791.712800000

Line	Item	*Item Description	Units	Qty
1	1461300	ACUTE CARE SUMMARY REPORT	BD	1
2	1467700	ADULT MED SURG ADMIT HISTORY	BD	
3	1460500	APPOINTMENT PADS	PD	
4	1464900	AUTHORIZATION FOR OVERTIME	BD	1
5	4010500	BAG POLY 2lb	CA	
6	5020400	BAG POLY ZIP LIP 7"X5-7/8	BX	
7	0012700	BAND ELASTIC SZ 6 25YD L/F	EA	1
8	0185900	BAND STKINETTE 6"X75 *	EA	
9	6020500	BATTERIES AA Sz *	EA	
10	6020400	BATTERIES AAA Sz *	EA	
11	6020600	BATTERIES C Sz *	EA	
12	6020700	BATTERIES D Sz *	EA	
13	0015600	BOTTLES CLEANSING 240cc *	EA	
14	0015507	BRIEF SUPER SCRETCH LG/XLG	BG	1
15	0015506	BRIEF SUPER STRETCH MED/REG	BG	
16	0112000	CATH HOLDER LEG BAND *	EA	

Category: ADUISY  
Vendor Name: BOWERS MEDICAL SUPPLY CO  
Vendor Catalog Number: PROM67903  
Mfr| Mfr Catalog Num: SCAHP | SCAHP

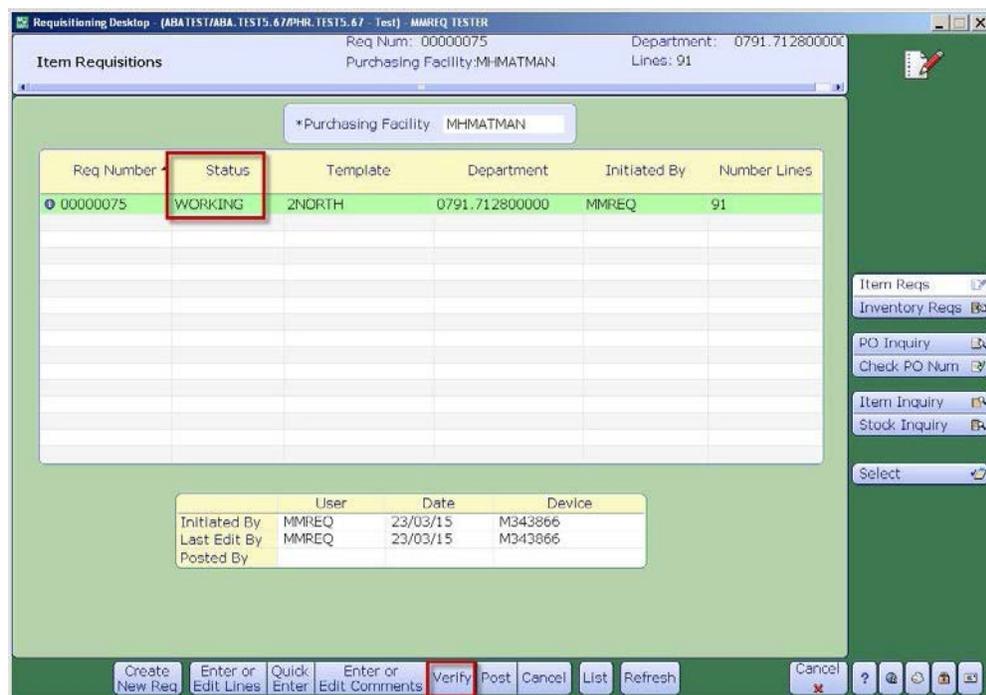
Inventory: MHSTORES  
Vendor Number:   
JIT:   
Tax Code:   
Allergen/Hazardous:

Get <F5> Deliver To

Cancel Save ? [Icons]

The Item Requisition Header will be displayed. The status = Working.

**Note:** If left in Working Status a user can come back and enter additional items if needed.



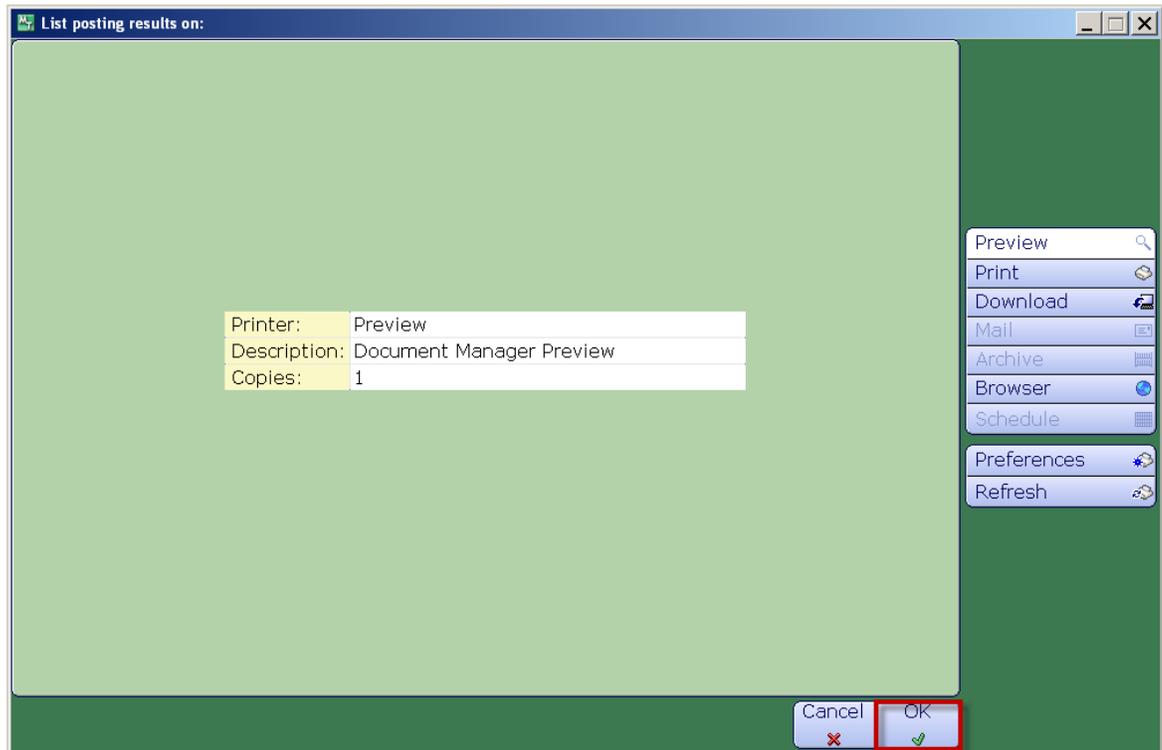
13. To proceed **click** on the *Verify* footer button. This will now place the Item Requisition in an “Open” Status.

14. Review your header information one more time and if ready to send the Item Requisition to the CPSM Warehouse, **click** on the *Post* footer button.

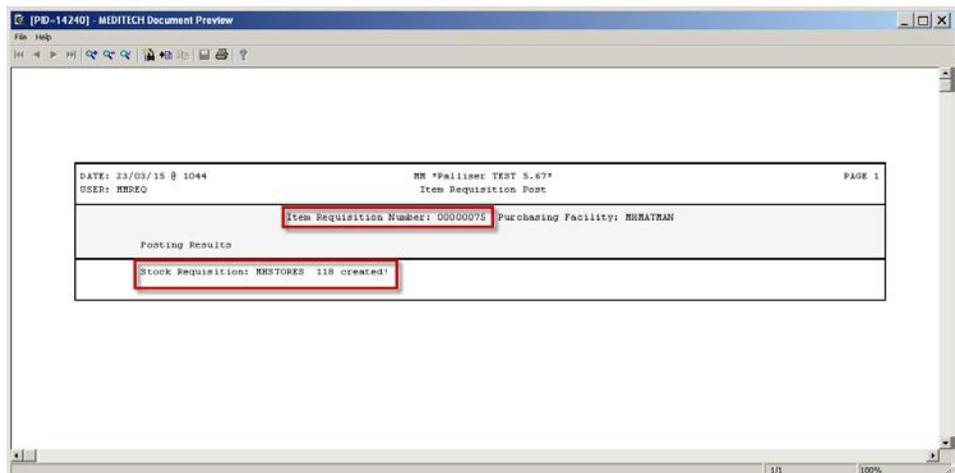
The List Posting Results window will appear.

15. **Click** on the *Preview* button which is located on the right hand menu listing.

16. **Click** on the *OK* button.



17. This will indicate the Item Requisition Number and the corresponding Stock Requisition Number that is used by the CPSM Warehouse to process to your order.



18. **Click** the X located at the top right of the window to close.

The Item Requisition will now be sent to CPSM Warehouse where it will be processed.

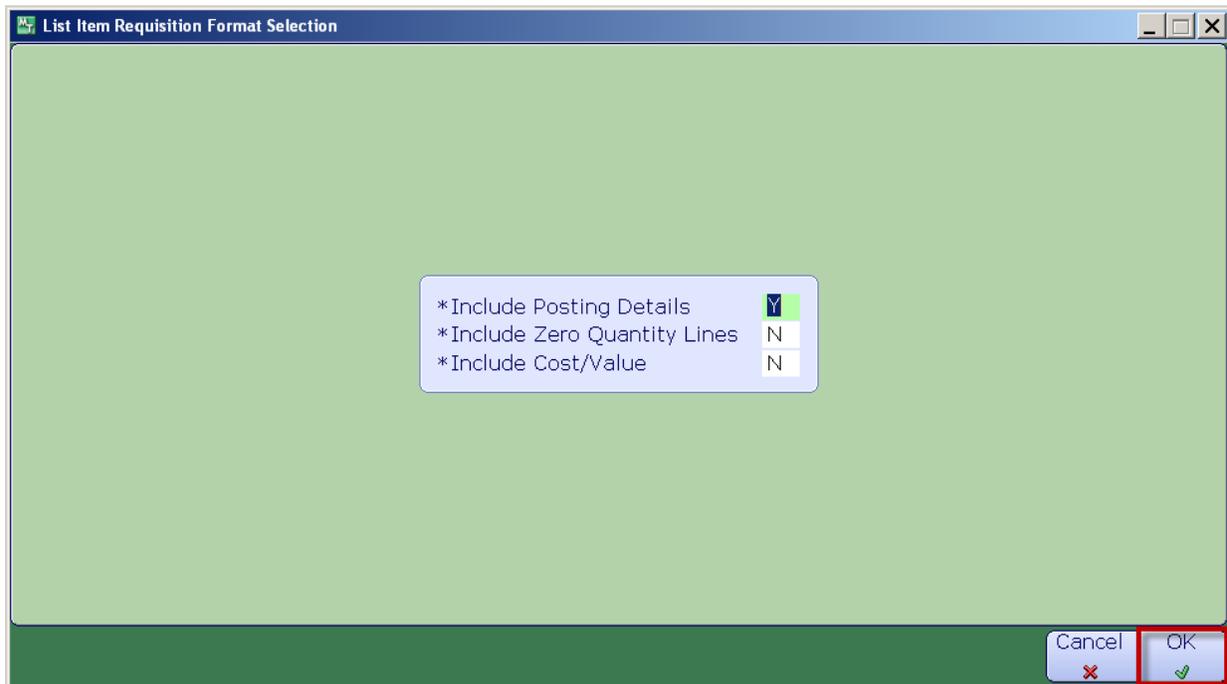
19. **Click** *Close*.



20. To print the Order, **click** on the *List* footer button. The List Item Requisition Format Selection window will be displayed.

21. **Click** or **Tab** through each field. The defaults will auto populate.

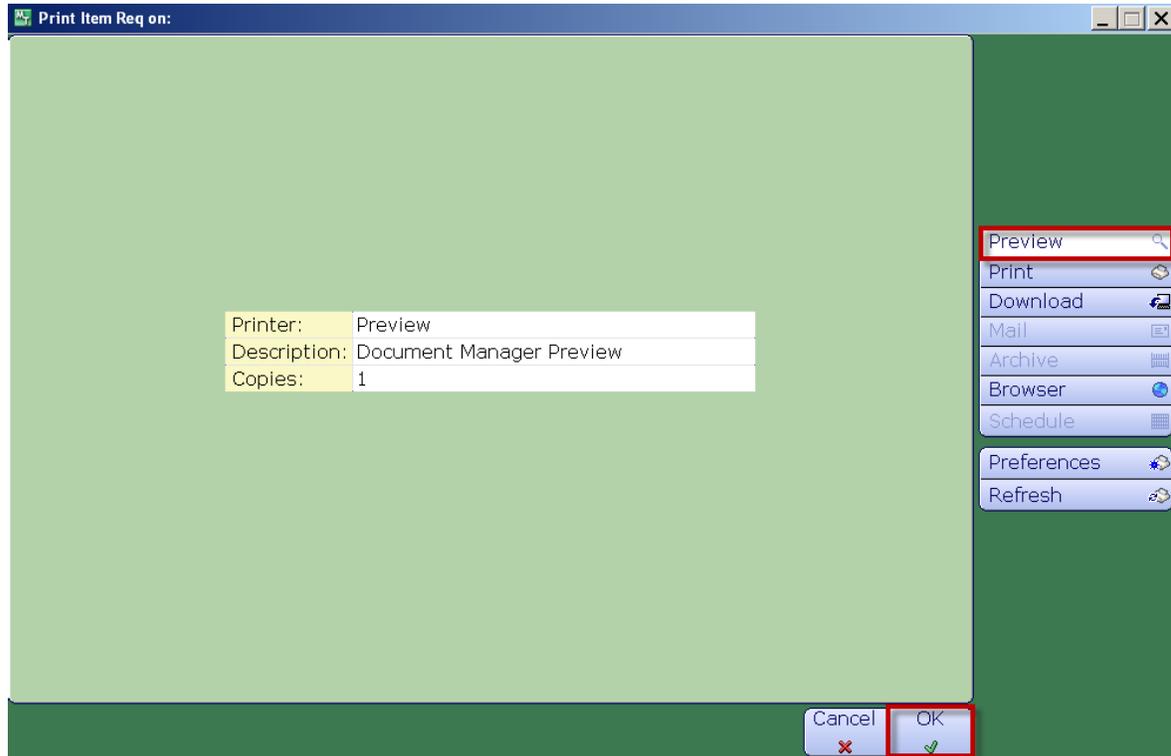
22. **Click** on the *OK* button.



The Print Item Req window will appear.

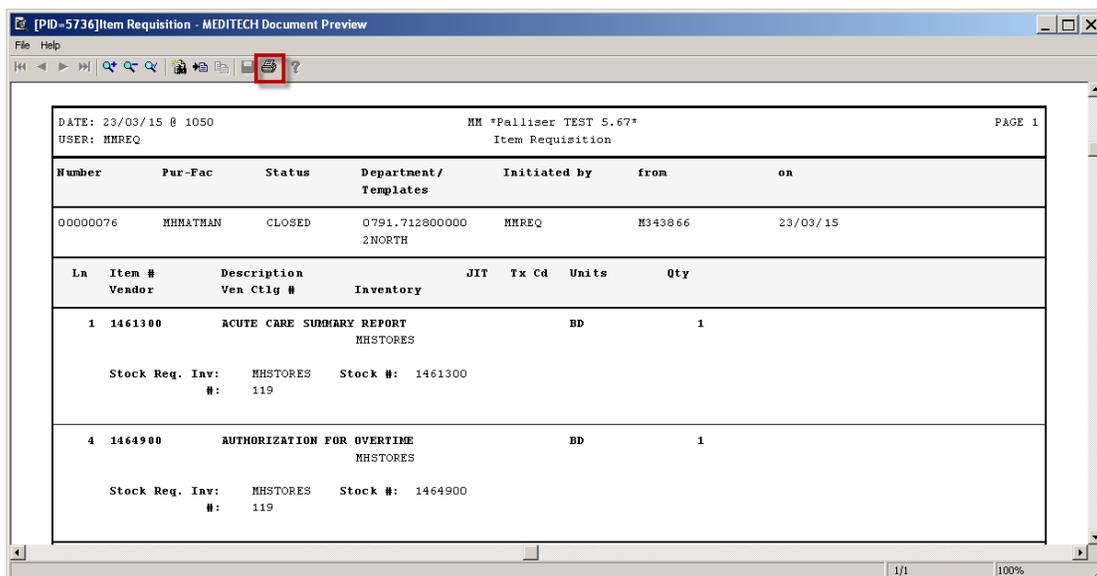
23. **Click** on the *Preview* button located on the right hand menu listing.

24. **Click** on the *OK* button.



Details of your Item Requisition will be displayed.

25. To print **click** on the *Printer* icon located on the header.



Number	Pur-Fac	Status	Department/ Templates	Initiated by	from	on
00000076	MHMATHAN	CLOSED	0791.712800000 2NORTH	MMREQ	M343866	23/03/15

Ln	Item #	Vendor	Description	Ven Ctlg #	Inventory	JIT	Tx Cd	Units	Qty
1	1461300	MHMATHAN	ACUTE CARE SUMMARY REPORT	MHSTORES	MHSTORES		BD		1
			Stock Req. #:	Inv. #:	Stock #:				
			119	119	1461300				
4	1464900	MHMATHAN	AUTHORIZATION FOR OVERTIME	MHSTORES	MHSTORES		BD		1
			Stock Req. #:	Inv. #:	Stock #:				
			119	119	1464900				

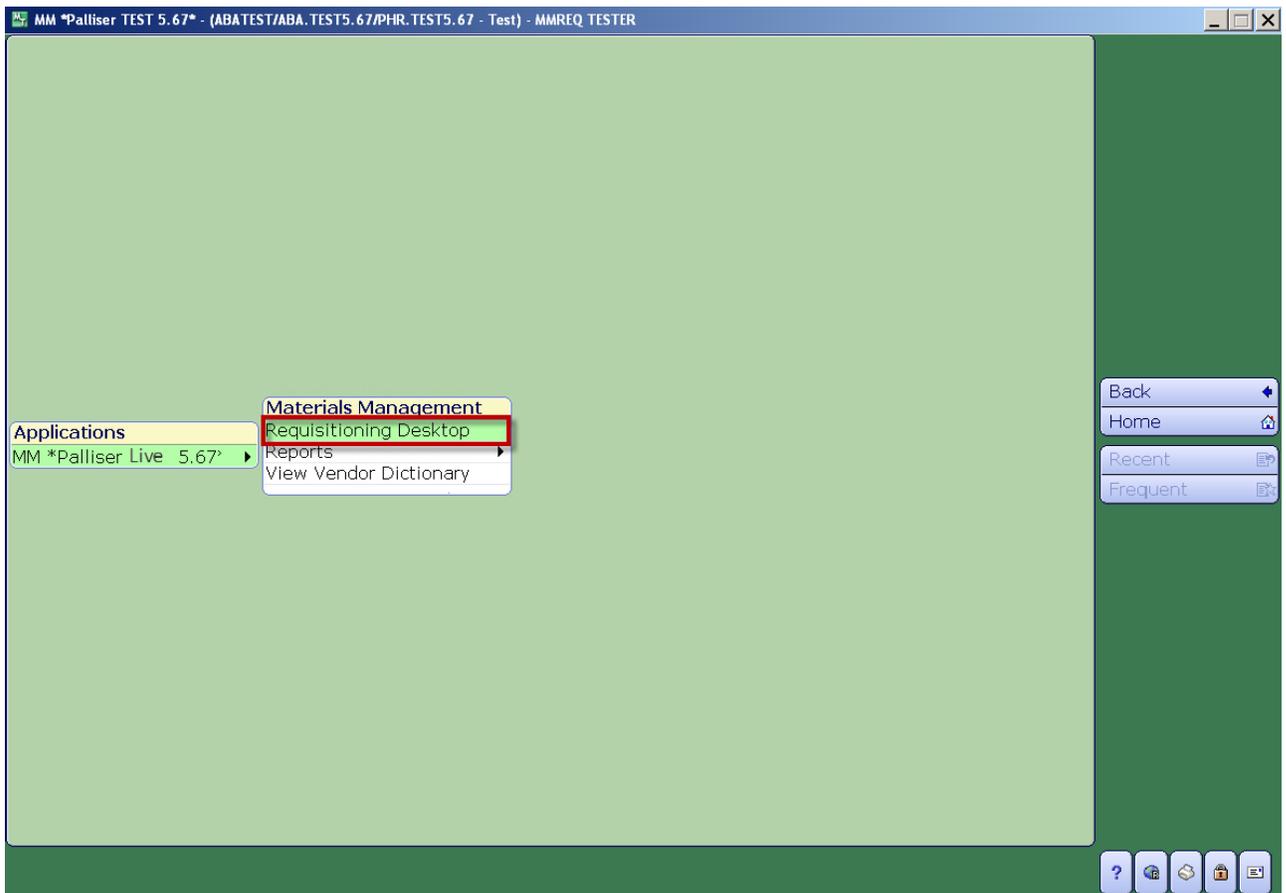
## CPSM – Inventory Requisition Options

### Process Item Requisition – Using a Department Code

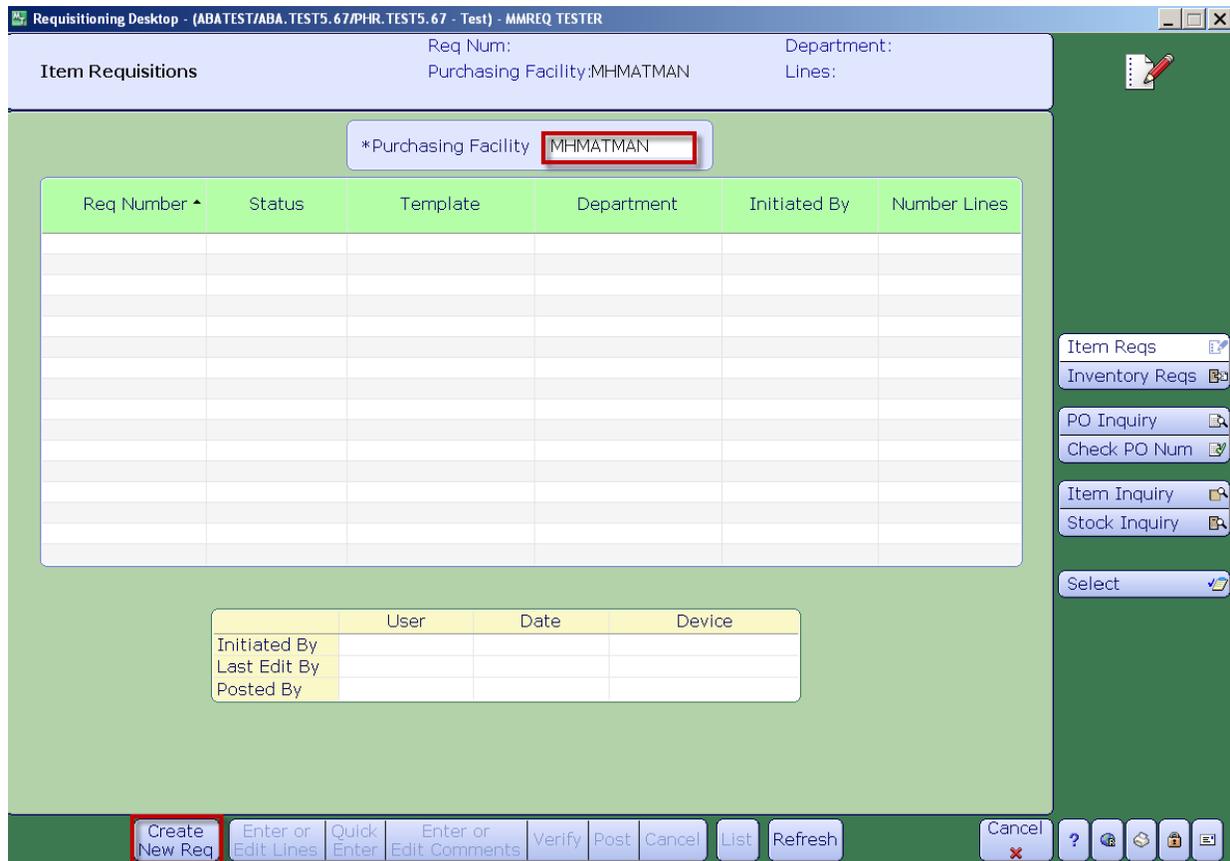
**Purpose:** Use this routine to create an Item Requisition for the Department by using a Meditech Department Cost Centre. Then manually select from a list of Items that are available from the local CPSM Inventory.

**NOTE:** Profiles will vary between users. The first menu will be *Applications* followed by *Role* based (e.g. Nursing, Diagnostic Imaging etc.), at this point a user will select *MM Inventory Requisition*. The next menu will be *Materials Management*. The screen shots in this document show from Application menu to Materials Management Menu leaving out the *Role* based menu.

1. Click the *Requisitioning Desktop*.



2. **Type** in the *Purchasing Facility* or search for the Purchasing Facility by **clicking** on the dropdown arrow. This may default for some users.
3. **Click** on the *Item Reqs* button which is located on the right hand menu listing.
4. **Click** on the *Create New Req* footer button.



Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Item Requisitions      Req Num:      Department:  
Purchasing Facility:MHMATMAN      Lines:

\*Purchasing Facility: MHMATMAN

Req Number	Status	Template	Department	Initiated By	Number Lines

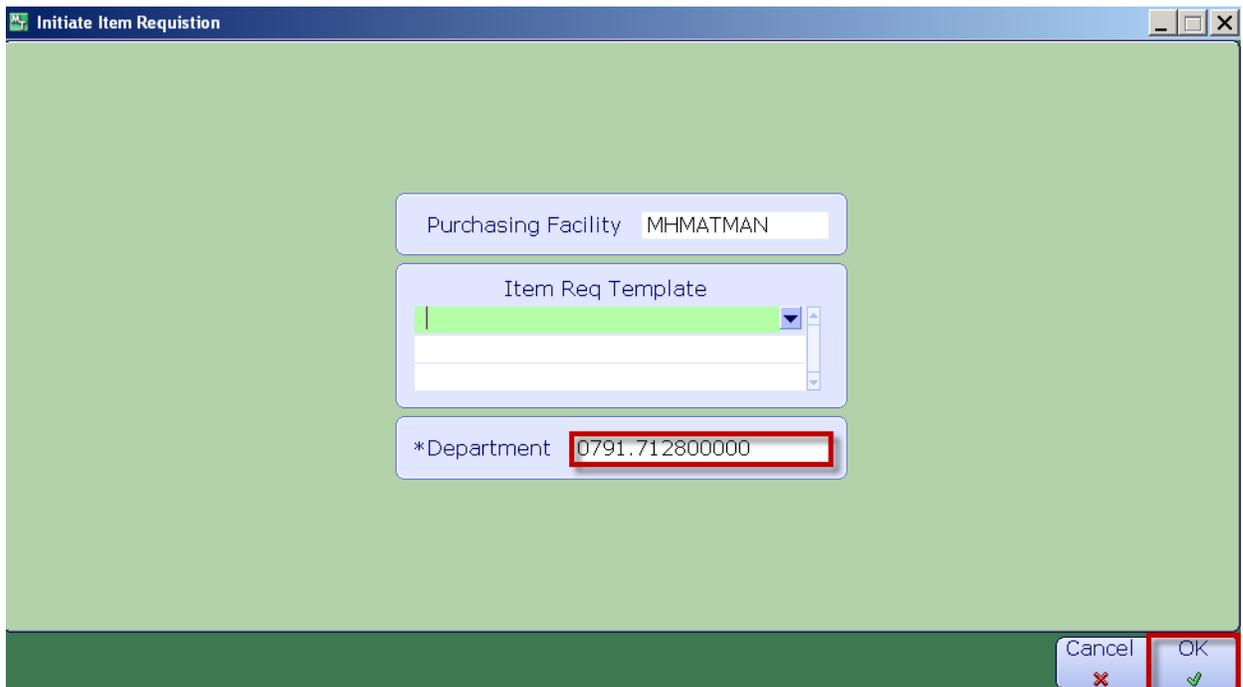
	User	Date	Device
Initiated By			
Last Edit By			
Posted By			

Item Reqs    Inventory Reqs    PO Inquiry    Check PO Num    Item Inquiry    Stock Inquiry    Select

Create New Req    Enter or Edit Lines    Quick Enter    Enter or Edit Comments    Verify    Post    Cancel    List    Refresh    Cancel

The *Initiate Item Requisition* window will appear.

5. **Click** on the *Department* field.
6. **Type** in the Meditech Department Cost Centre or search for the Meditech Department Cost Centre by **clicking** on the dropdown arrow.
7. **Click OK**.



Initiate Item Requisition

Purchasing Facility MHMATMAN

Item Req Template

\*Department 0791.712800000

Cancel OK



9. **Type** in the Stock Number or search for a Stock Number by **clicking** on the dropdown arrow.

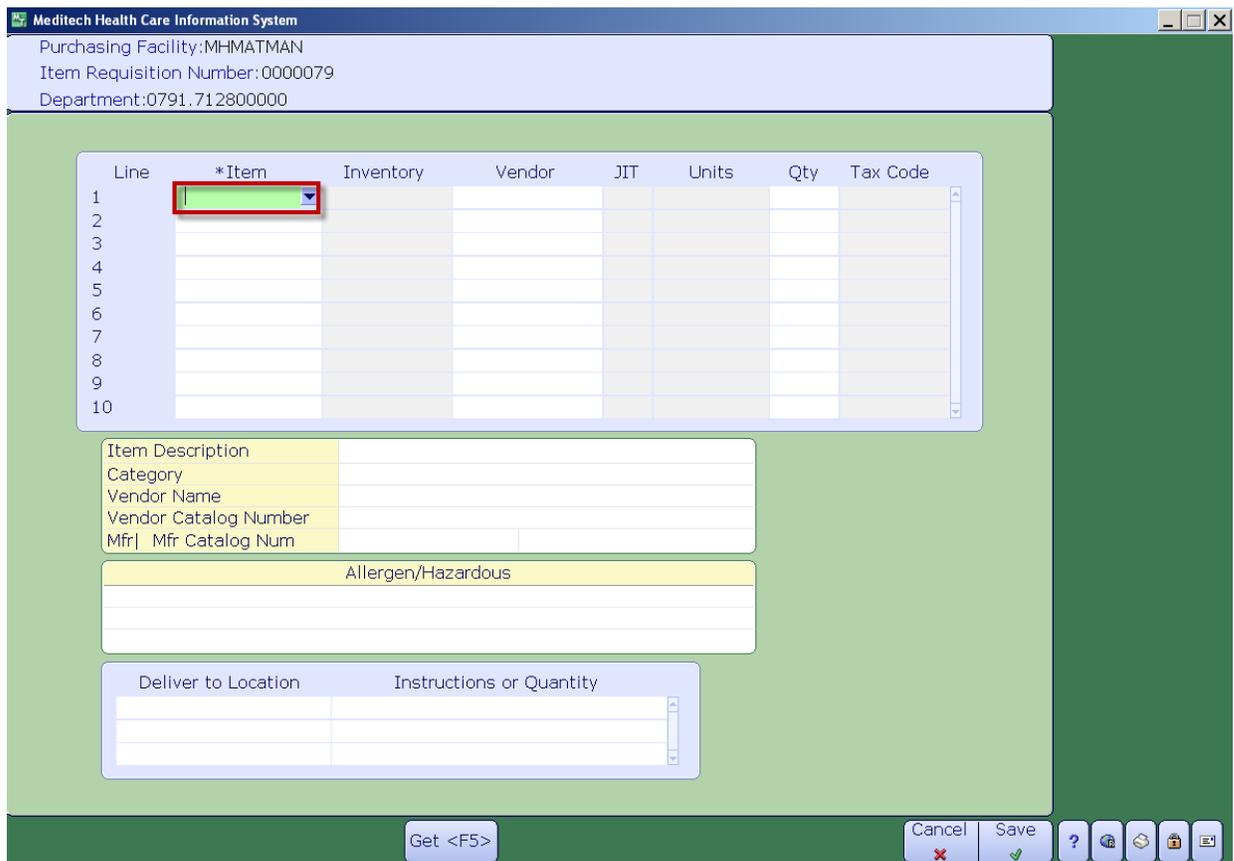
**Caution:**

All items within the Meditech Item Master are displayed both Stock and Non-Stock, these are identified by the response next to the “Stocked” field (Y or N).

Stocked = Y is Stock.

Stocked = N is Non-Stock.

Please note that Non-Stock Items cannot be ordered through Meditech, this process has been transitioned to Oracle.



Meditech Health Care Information System

Purchasing Facility:MHMATMAN  
Item Requisition Number:0000079  
Department:0791.71280000

Line	*Item	Inventory	Vendor	JIT	Units	Qty	Tax Code
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Item Description  
Category  
Vendor Name  
Vendor Catalog Number  
Mfr| Mfr Catalog Num

Allergen/Hazardous

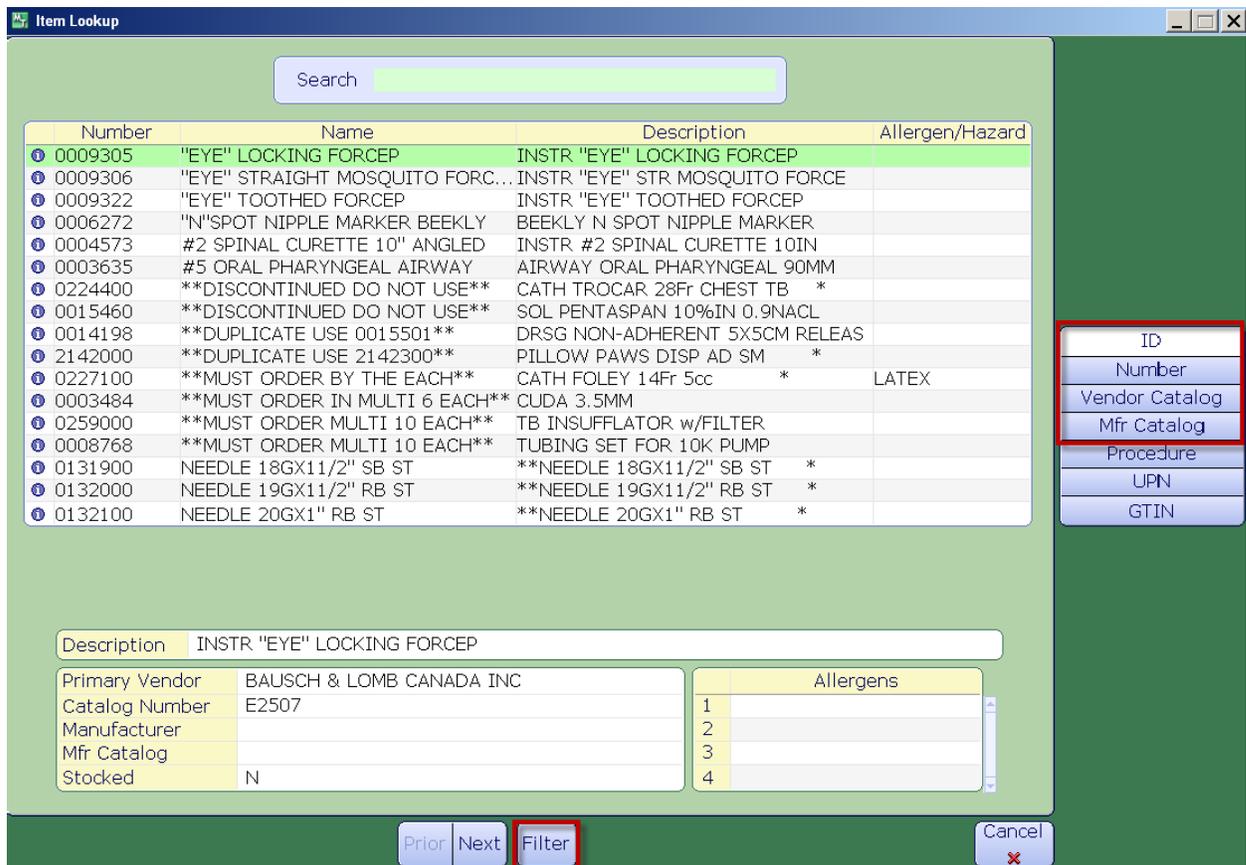
Deliver to Location      Instructions or Quantity

Get <F5>      Cancel Save ? [Home] [Print] [Refresh] [Close]

Utilize the various search options located on the right hand menu listing, such as:

- Number
- Vendor Catalog
- Mfr (Manufacturer) Catalog

10. To locate a Stocked Item, **click** on the *Filter* footer button.



The screenshot shows the 'Item Lookup' application window. At the top, there is a search bar. Below it is a table with columns: Number, Name, Description, and Allergen/Hazard. The table lists various medical items, including eye locking forceps, mosquito forceps, toothed forceps, nipple markers, spinal curettes, oral airways, trocars, catheters, and needles. Below the table, there is a detailed view for the selected item 'INSTR "EYE" LOCKING FORCEP', showing fields for Primary Vendor (BAUSCH & LOMB CANADA INC), Catalog Number (E2507), Manufacturer, Mfr Catalog, and Stocked status (N). To the right of the table is a vertical menu with buttons for ID, Number, Vendor Catalog, Mfr Catalog, Procedure, UPN, and GTIN. At the bottom of the window are buttons for Prior, Next, Filter, and Cancel.

Number	Name	Description	Allergen/Hazard
0009305	"EYE" LOCKING FORCEP	INSTR "EYE" LOCKING FORCEP	
0009306	"EYE" STRAIGHT MOSQUITO FORC...	INSTR "EYE" STR MOSQUITO FORCE	
0009322	"EYE" TOOTHED FORCEP	INSTR "EYE" TOOTHED FORCEP	
0006272	"N"SPOT NIPPLE MARKER BEEKLY	BEEKLY N SPOT NIPPLE MARKER	
0004573	#2 SPINAL CURETTE 10" ANGLED	INSTR #2 SPINAL CURETTE 10IN	
0003635	#5 ORAL PHARYNGEAL AIRWAY	AIRWAY ORAL PHARYNGEAL 90MM	
0224400	**DISCONTINUED DO NOT USE**	CATH TROCAR 28Fr CHEST TB *	
0015460	**DISCONTINUED DO NOT USE**	SOL PENTASPAN 10%IN 0.9NACL	
0014198	**DUPLICATE USE 0015501**	DRSG NON-ADHERENT 5X5CM RELEAS	
2142000	**DUPLICATE USE 2142300**	PILLOW PAWS DISP AD SM *	
0227100	**MUST ORDER BY THE EACH**	CATH FOLEY 14Fr 5cc *	LATEX
0003484	**MUST ORDER IN MULTI 6 EACH**	CUDA 3.5MM	
0259000	**MUST ORDER MULTI 10 EACH**	TB INSUFFLATOR w/FILTER	
0008768	**MUST ORDER MULTI 10 EACH**	TUBING SET FOR 10K PUMP	
0131900	NEEDLE 18GX11/2" SB ST	**NEEDLE 18GX11/2" SB ST *	
0132000	NEEDLE 19GX11/2" RB ST	**NEEDLE 19GX11/2" RB ST *	
0132100	NEEDLE 20GX1" RB ST	**NEEDLE 20GX1" RB ST *	

Search:

Description: INSTR "EYE" LOCKING FORCEP

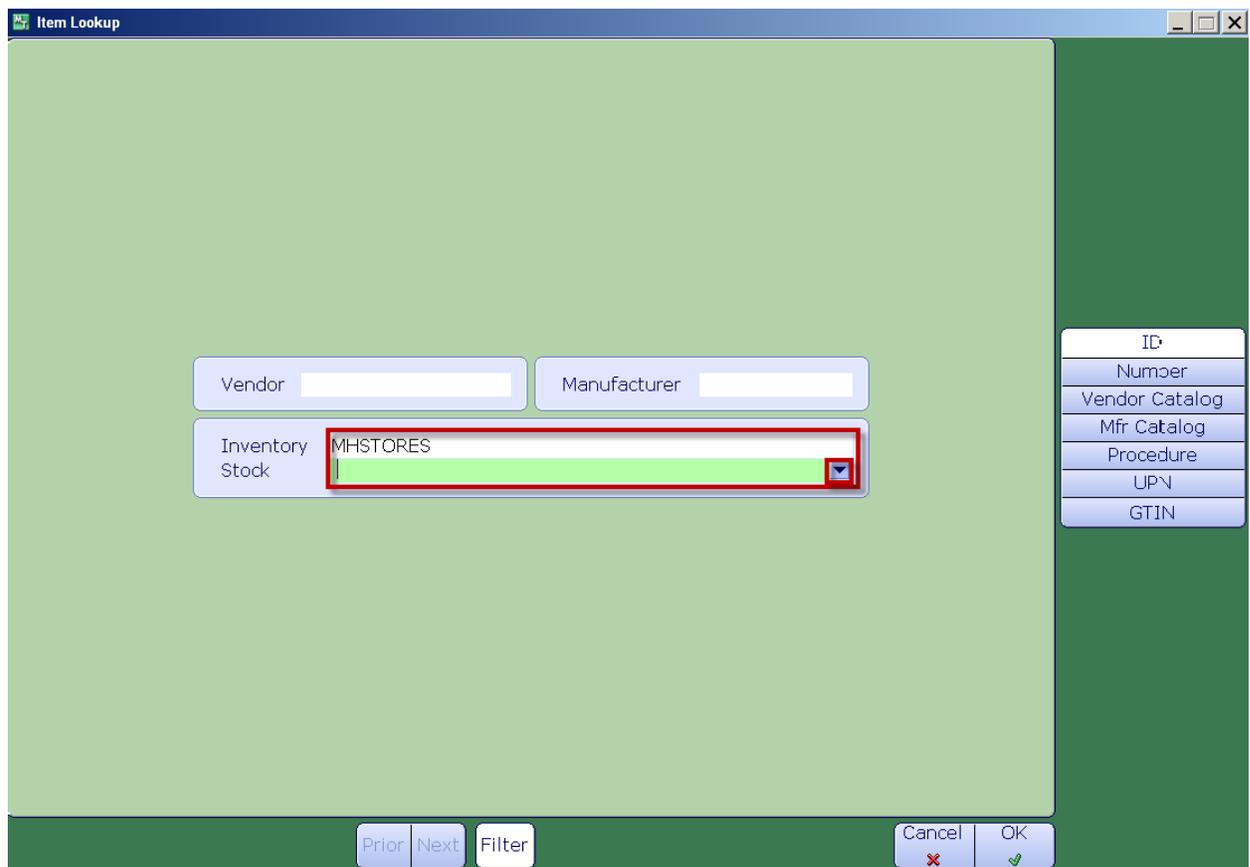
Primary Vendor	BAUSCH & LOMB CANADA INC
Catalog Number	E2507
Manufacturer	
Mfr Catalog	
Stocked	N

Allergens

1
2
3
4

Prior Next Filter Cancel

11. **Click** the *Inventory* field.
12. **Type** in the local CPSM Inventory or search for the local CPSM Inventory by **clicking** on the dropdown arrow. This may default for some users.
13. **Click** in the *Stock* field.
14. **Type** in the *Stock Number* or search for a Stock Number by **clicking** on the dropdown arrow.



The screenshot shows the 'Item Lookup' window with the following fields and controls:

- Vendor:
- Manufacturer:
- Inventory Stock:  (highlighted with a red box)
- Stock:

Navigation and Action buttons at the bottom:

- Prior
- Next
- Filter
- Cancel (with a red X icon)
- OK (with a green checkmark icon)

Right-hand side menu options:

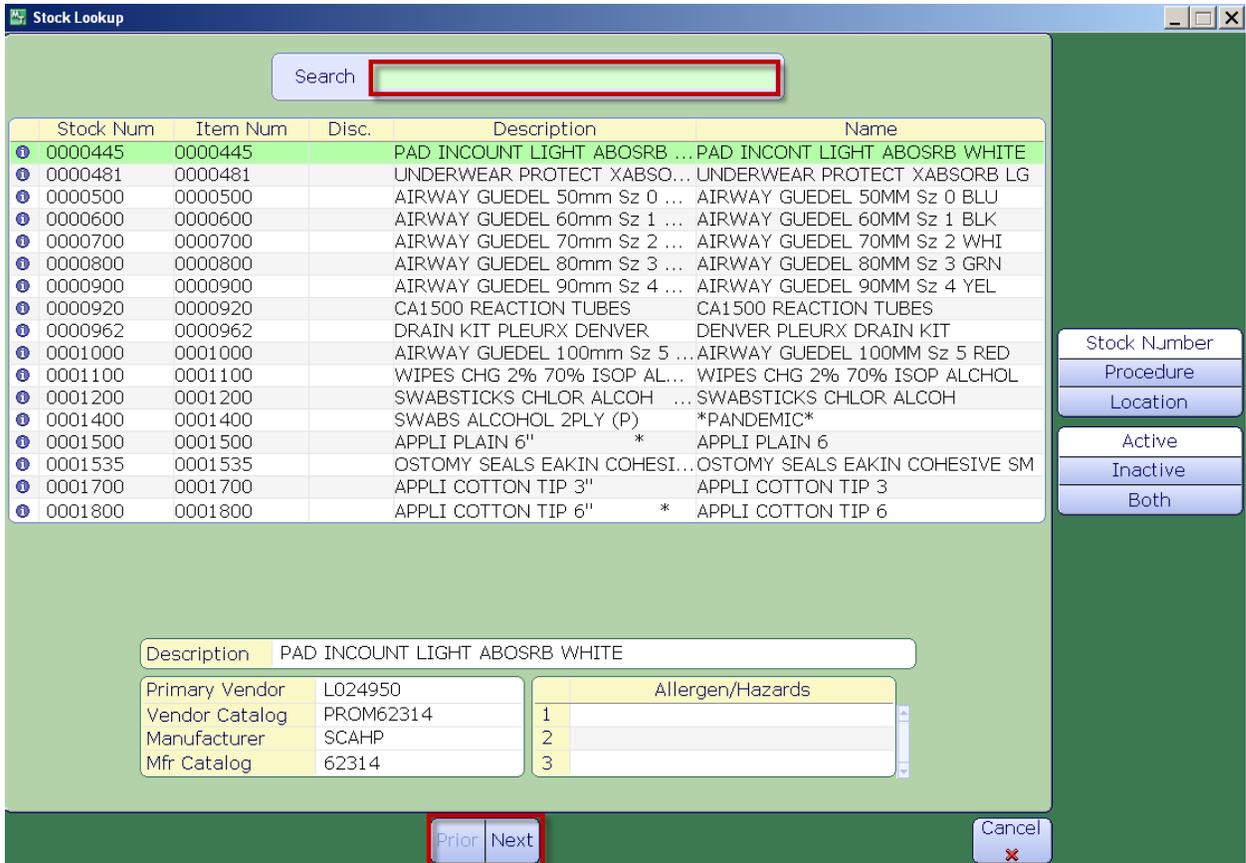
- ID
- Number
- Vendor Catalog
- Mfr Catalog
- Procedure
- UPN
- GTIN

If you are performing a search, the Stock Lookup screen will appear.

**Note:** You cannot Search by Description from this screen.

15. **Navigate** through the listing by using your keyboard *Page Up* and *Down Keys* or by using the *Meditech Next* and/or *Prior* footer buttons.

16. Locate your Stock Number and Click on it.



Search

Stock Num	Item Num	Disc.	Description	Name
0000445	0000445		PAD INCOUNT LIGHT ABOSRB ...	PAD INCONT LIGHT ABOSRB WHITE
0000481	0000481		UNDERWEAR PROTECT XABSO...	UNDERWEAR PROTECT XABSORB LG
0000500	0000500		AIRWAY GUEDEL 50mm Sz 0 ...	AIRWAY GUEDEL 50MM Sz 0 BLU
0000600	0000600		AIRWAY GUEDEL 60mm Sz 1 ...	AIRWAY GUEDEL 60MM Sz 1 BLK
0000700	0000700		AIRWAY GUEDEL 70mm Sz 2 ...	AIRWAY GUEDEL 70MM Sz 2 WHI
0000800	0000800		AIRWAY GUEDEL 80mm Sz 3 ...	AIRWAY GUEDEL 80MM Sz 3 GRN
0000900	0000900		AIRWAY GUEDEL 90mm Sz 4 ...	AIRWAY GUEDEL 90MM Sz 4 YEL
0000920	0000920		CA1500 REACTION TUBES	CA1500 REACTION TUBES
0000962	0000962		DRAIN KIT PLEURX DENVER	DENVER PLEURX DRAIN KIT
0001000	0001000		AIRWAY GUEDEL 100mm Sz 5 ...	AIRWAY GUEDEL 100MM Sz 5 RED
0001100	0001100		WIPES CHG 2% 70% ISOP AL...	WIPES CHG 2% 70% ISOP ALCHOL
0001200	0001200		SWABSTICKS CHLOR ALCOH ...	SWABSTICKS CHLOR ALCOH
0001400	0001400		SWABS ALCOHOL 2PLY (P)	*PANDEMIC*
0001500	0001500		APPLI PLAIN 6"	APPLI PLAIN 6
0001535	0001535		OSTOMY SEALS EAKIN COHESI...	OSTOMY SEALS EAKIN COHESIVE SM
0001700	0001700		APPLI COTTON TIP 3"	APPLI COTTON TIP 3
0001800	0001800		APPLI COTTON TIP 6"	APPLI COTTON TIP 6

Stock Number  
Procedure  
Location  
Active  
Inactive  
Both

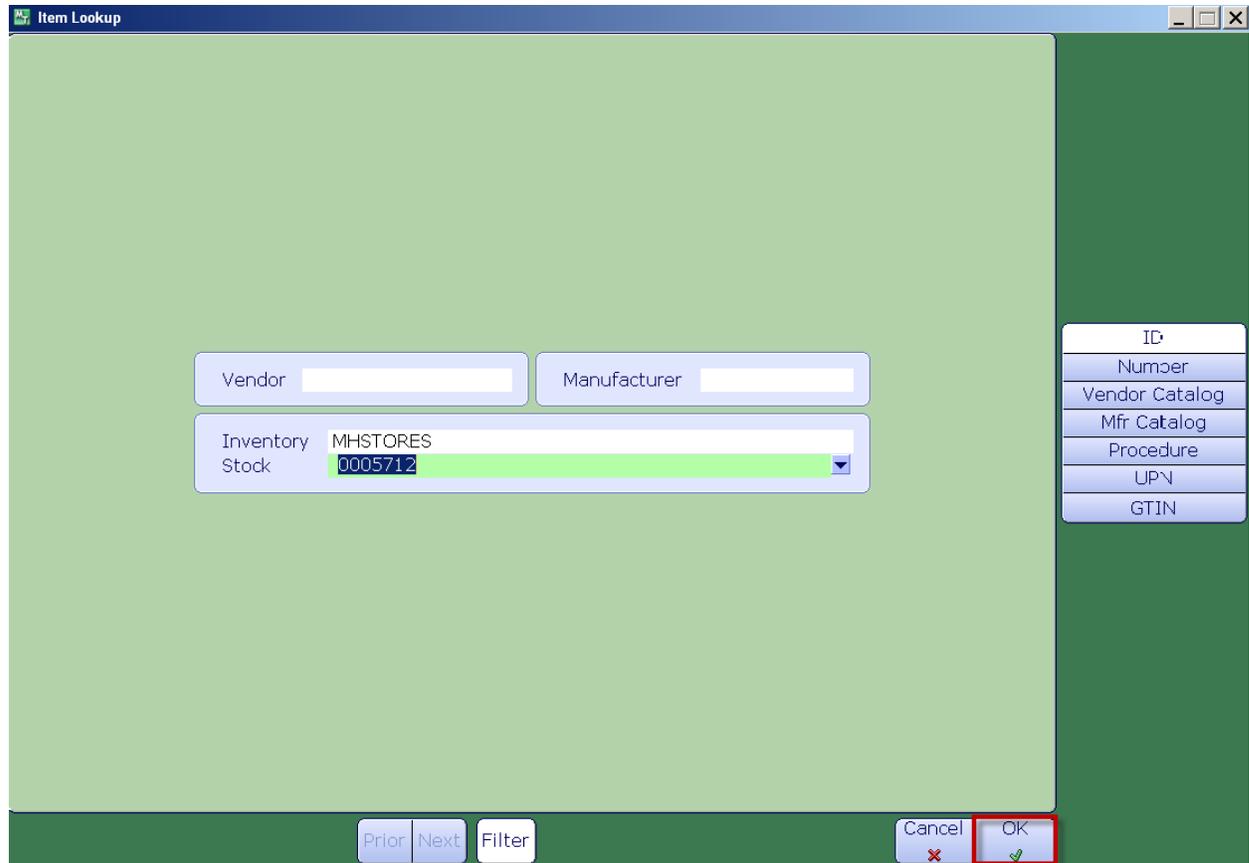
Description: PAD INCOUNT LIGHT ABOSRB WHITE

Primary Vendor	L024950	Allergen/Hazards	
Vendor Catalog	PROM62314		1
Manufacturer	SCAHP		2
Mfr Catalog	62314		3

Prior Next Cancel

The *Item Lookup* window will appear along with the Stock Number selected.

17. Click on *OK*.



The screenshot shows the 'Item Lookup' window with a light green background. It features several input fields and a list of options on the right side. The 'Inventory Stock' field is highlighted in green and contains the value '0005712'. The 'OK' button is highlighted with a red box.

ID:
Number
Vendor Catalog
Mfr Catalog
Procedure
UPN
GTIN

Prior Next Filter Cancel OK

Review the Stock Number information and ensure that the Stocked flag = Y (See bottom left hand corner)

18. Click on the *Stock Item* to add it to your Item Requisition.

Item Lookup

Filtered By Stocked in Inventory MHSTORES

Stock Num...	Number	Name	Description	Allergen/Hazard
7079	0005712	CONN RAPID FILL LL...	CONNec SYR RAPID FILL LL TO LL	

Description: CONNec SYR RAPID FILL LL TO LL

Primary Vendor	BAXTER CORP
Catalog Number	H93813901
Manufacturer	BAX
Mfr Catalog	H93813901
Stocked	<b>Y</b>

Allergens	
1	
2	
3	
4	

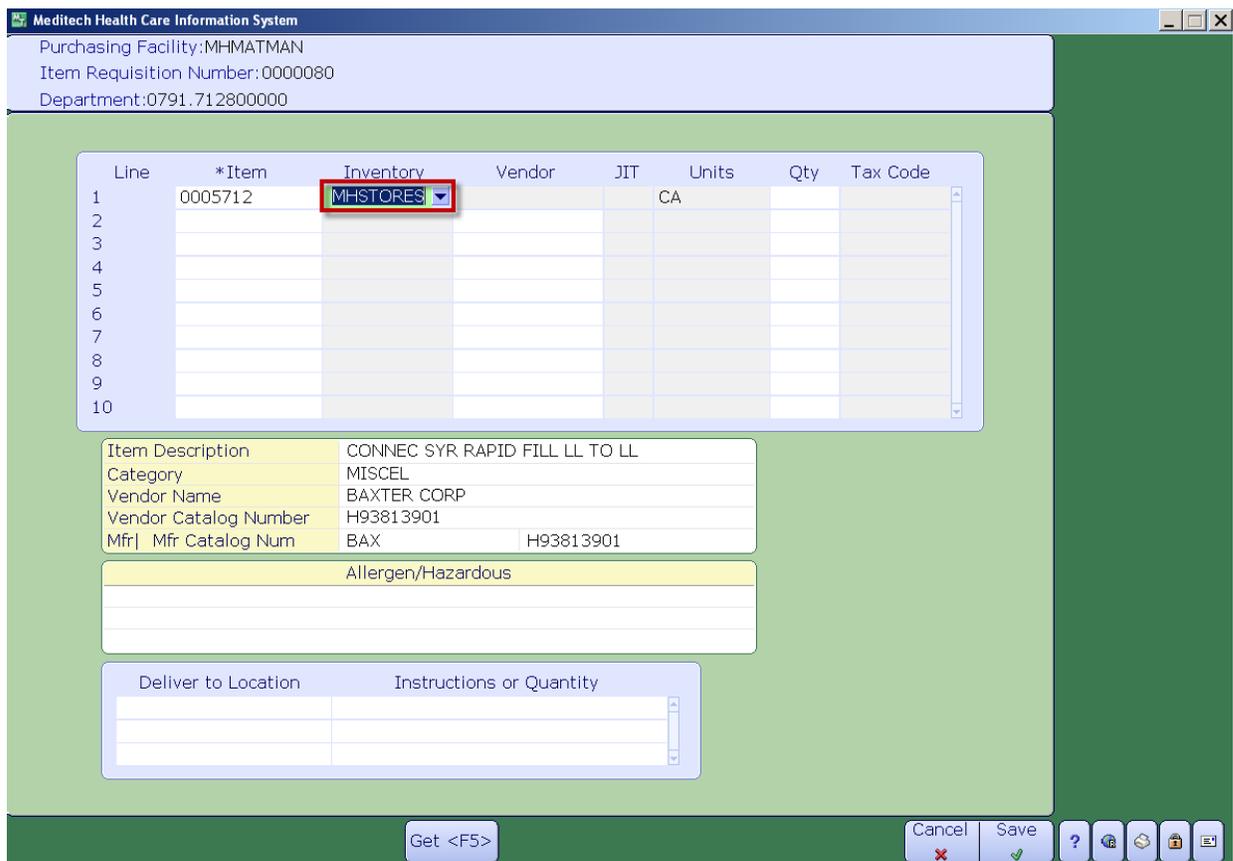
Prior Next Filter Cancel

The Stock Number will be inserted into the *Item* field.

If the Stock Item only resides in one CPSM Inventory, the *Inventory* field will default.

19. If the Stock Item resides in more than one CPSM Inventory, select the appropriate Inventory by using dropdown arrow.

Please note that the *Inventory* field must be populated in order to send your Item Requisition to the CPSM Inventory for processing.



Meditech Health Care Information System

Purchasing Facility:MHMATMAN  
Item Requisition Number:0000080  
Department:0791.712800000

Line	*Item	Inventory	Vendor	JIT	Units	Qty	Tax Code
1	0005712	MHSTORES			CA		
2							
3							
4							
5							
6							
7							
8							
9							
10							

Item Description: CONNec SYR RAPID FILL LL TO LL  
Category: MISCEL  
Vendor Name: BAXTER CORP  
Vendor Catalog Number: H93813901  
Mfr| Mfr Catalog Num: BAX | H93813901

Allergen/Hazardous

Deliver to Location: Instructions or Quantity

Get <F5> Cancel Save ?

Note the CPSM Warehouse, Unit of Issue, located in the Units field.

20. Tab over to the Qty field and enter the quantity to order.

Meditech Health Care Information System

Purchasing Facility:MHMATMAN  
Item Requisition Number:0000080  
Department:0791.712800000

Line	*Item	Inventory	Vendor	JIT	Units	Qty	Tax Code
1	0005712	MHSTORES			CA		
2							
3							
4							
5							
6							
7							
8							
9							
10							

Item Description: CONNEC SYR RAPID FILL LL TO LL  
Category: MISCEL  
Vendor Name: BAXTER CORP  
Vendor Catalog Number: H93813901  
Mfr| Mfr Catalog Num: BAX | H93813901

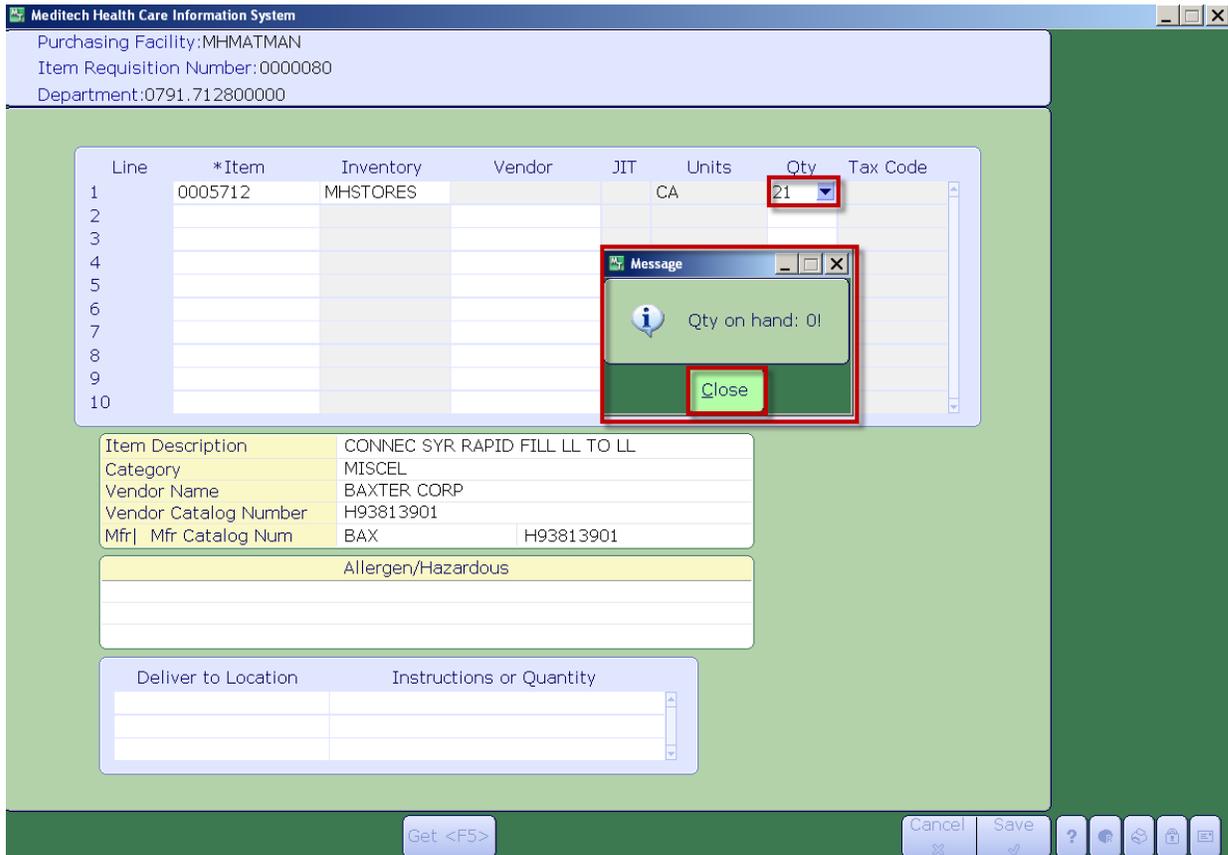
Allergen/Hazardous

Deliver to Location: Instructions or Quantity

Get <F5>      Cancel   Save   ?   ?   ?   ?   ?

If the quantity exceeds the quantity requested in the warehouse a Pop Up window will appear. If so, please only order the quantity available and contact the local CPSM Inventory for further information.

21. Click on the Pop Up *Close* button.



The screenshot shows the Meditech Health Care Information System interface. At the top, the window title is "Meditech Health Care Information System". Below the title bar, the following information is displayed:

- Purchasing Facility:MHMATMAN
- Item Requisition Number:0000080
- Department:0791.712800000

The main area contains a table with the following columns: Line, \*Item, Inventory, Vendor, JIT, Units, Qty, and Tax Code. The first row (Line 1) shows Item 0005712, Inventory MHSTORES, Units CA, and Qty 21. The Qty field is highlighted with a red box. A "Message" pop-up window is overlaid on the table, displaying the message "Qty on hand: 0!" and a "Close" button, both highlighted with red boxes. Below the table, there is a section for item details:

Item Description	CONNEC SYR RAPID FILL LL TO LL
Category	MISCEL
Vendor Name	BAXTER CORP
Vendor Catalog Number	H93813901
Mfr   Mfr Catalog Num	BAX   H93813901

Below this is an "Allergen/Hazardous" section with a table:

Allergen/Hazardous	

At the bottom, there is a "Deliver to Location" and "Instructions or Quantity" section with a table:

Deliver to Location	Instructions or Quantity

The bottom of the interface features a "Get <F5>" button and a "Cancel" button, along with a "Save" button and several utility icons.

Repeat the process for each Stock Item to order.

22. Once all of the Stock Items are on the Item Requisition, **click** on the *Save* button.

Meditech Health Care Information System

Purchasing Facility:MHMATMAN  
Item Requisition Number:0000080  
Department:0791.712800000

Line	*Item	Inventory	Vendor	JIT	Units	Qty	Tax Code
1	0005712	MHSTORES			CA	10	
2	0001500	MHSTORES			BX	1	
3	0012300	MHSTORES			EA	2	
4							
5							
6							
7							
8							
9							
10							

Item Description  
Category  
Vendor Name  
Vendor Catalog Number  
Mfr| Mfr Catalog Num

Allergen/Hazardous

Deliver to Location      Instructions or Quantity

Get <F5>      Cancel      Save      ?      [Icons]



This will now place the Item Requisition in an *Open* status.

- Review the header information one more time and if ready to send the Item Requisition to the CPSM Warehouse, **click** the *Post* button.

Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Item Requisitions      Req Num: 0000080      Department: 0791.71280000  
Purchasing Facility:MHMATMAN      Lines: 3

\*Purchasing Facility    MHMATMAN

Req Number ^	Status	Template	Department	Initiated By	Number Lines
0000079	WORKING		0791.712800000	MMREQ	
0000080	<b>OPEN</b>		0791.712800000	MMREQ	3

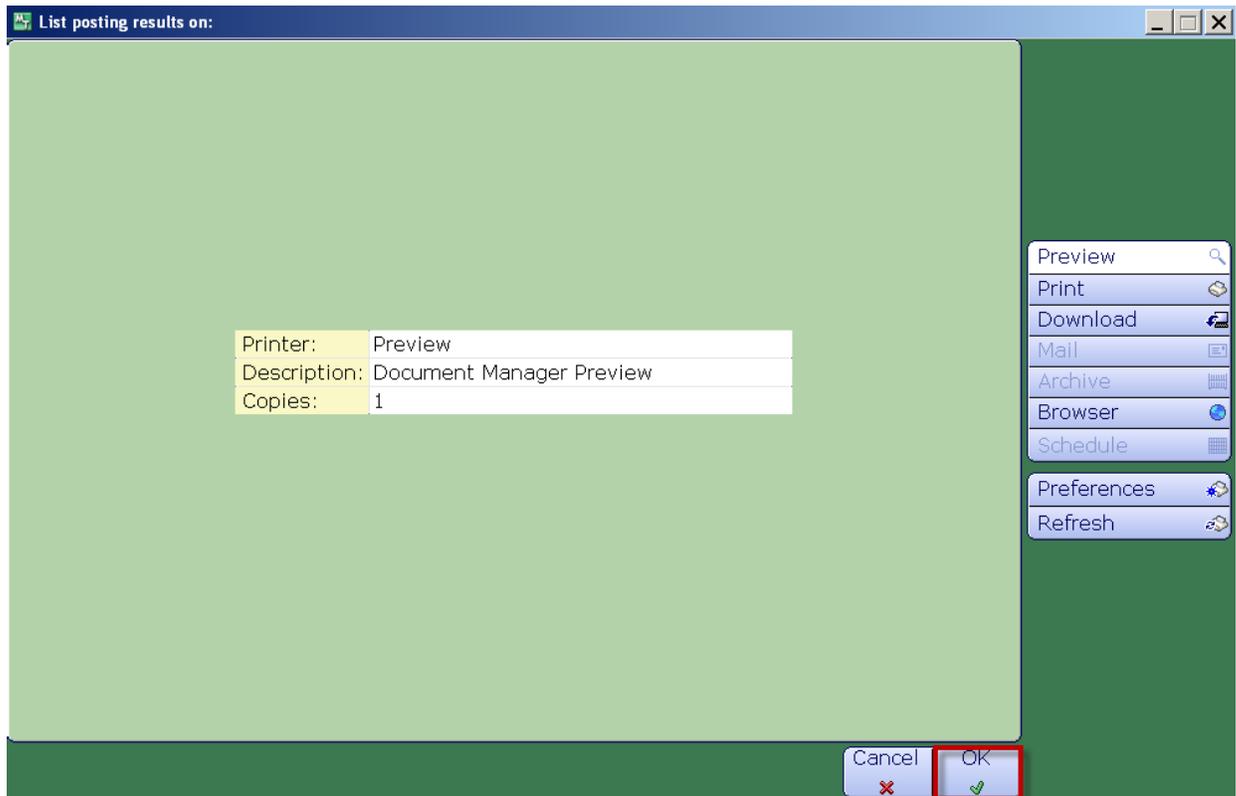
	User	Date	Device
Initiated By	MMREQ	01/04/15	M343866
Last Edit By	MMREQ	01/04/15	M343866
Posted By			

Item Reqs  
Inventory Reqs  
PO Inquiry  
Check PO Num  
Item Inquiry  
Stock Inquiry  
Select

Create New Req    Enter or Edit Lines    Quick Enter    Enter or Edit Comments    Verify    **Post**    Cancel    List    Refresh    Cancel

The List Posting Results on window will appear.

25. Click on *OK*.

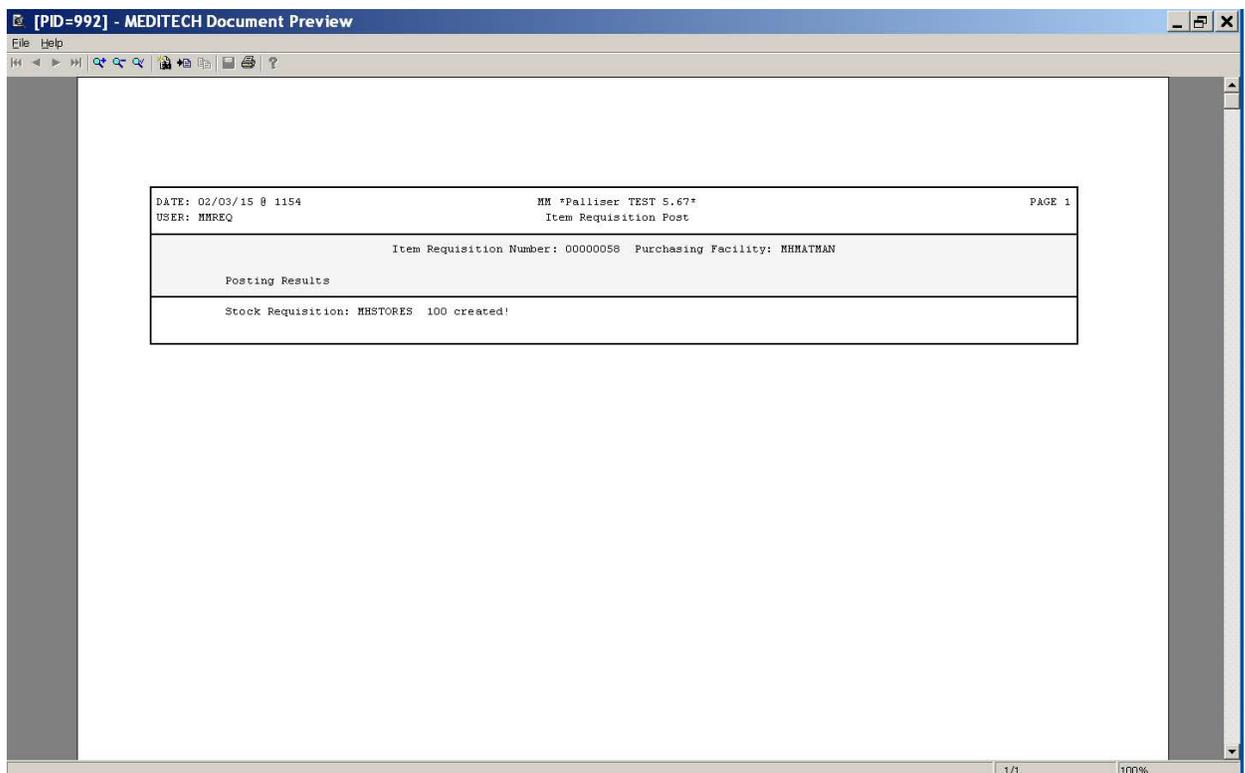


The following preview indicates the Item Requisition Number and the corresponding Stock Requisition number that is sent to the CPSM Warehouse to process your order.

At this point Meditech validates the GL Code Combinations and will indicate whether or not all of the template lines have been loaded and/or if there are any errors.

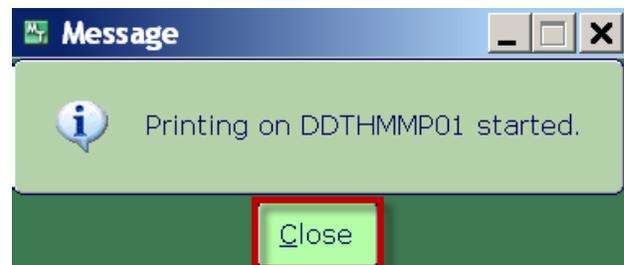
If any errors are listed, print the document by clicking on the Printer icon which is located on the header and contact your local CPSM Department to resolve the errors.

26. **Click** the X located in the top right to close the window.



After posting, a copy is sent to the local CPSM Warehouse where it is auto printed.

27. **Click** Close.



The Status of the Item Requisition is Closed.

Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Item Requisitions      Req Num: 0000081      Department: 0791.71280000  
Purchasing Facility:MHMATMAN      Lines: 3

\*Purchasing Facility    MHMATMAN

Req Number	Status	Template	Department	Initiated By	Number Lines
0000079	WORKING		0791.712800000	MMREQ	
0000081	CLOSED		0791.712800000	MMREQ	3

	User	Date	Device
Initiated By	MMREQ	01/04/15	M343866
Last Edit By	MMREQ	01/04/15	M343866
Posted By	MMREQ	01/04/15	M343866

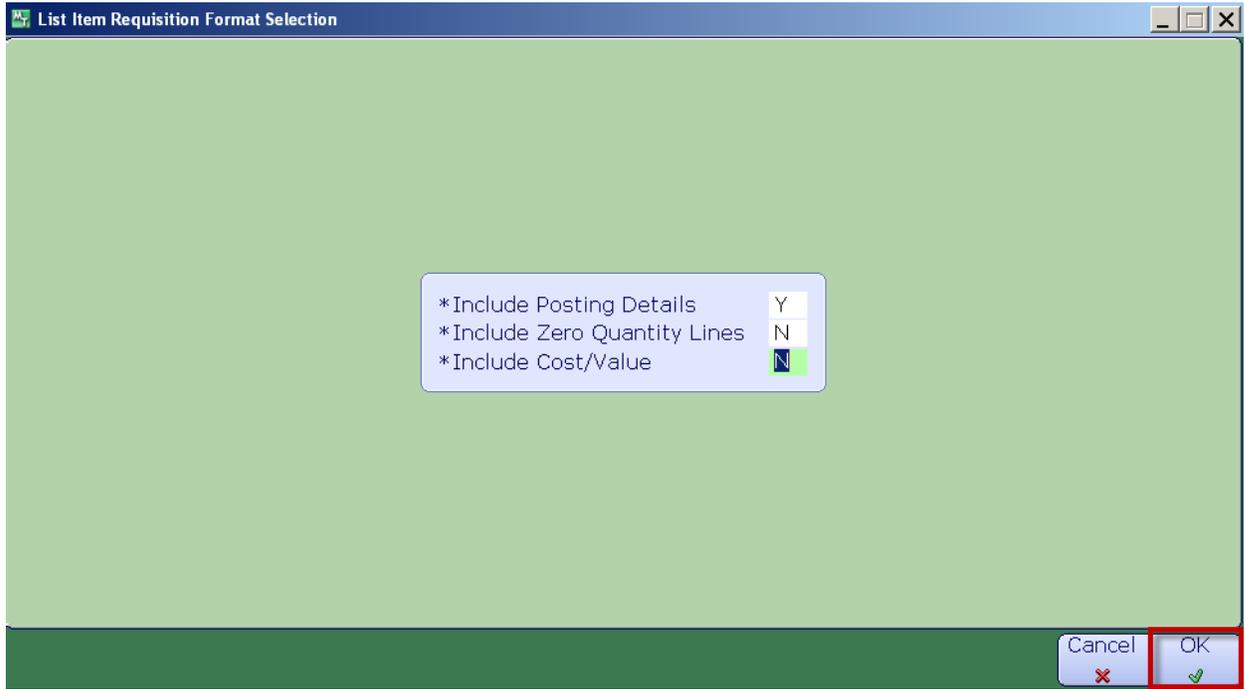
Item Reqs  
Inventory Reqs  
PO Inquiry  
Check PO Num  
Item Inquiry  
Stock Inquiry  
Select

Create New Req    Enter or Edit Lines    Quick Enter    Enter or Edit Comments    Verify    Post    Cancel    List    Refresh    Cancel

28. To Print the Item Requisition, **click** on the *List* footer button.

The *List Item Requisition Format Selection* window will be displayed.

29. **Tab** through the fields and **click** on *OK*.

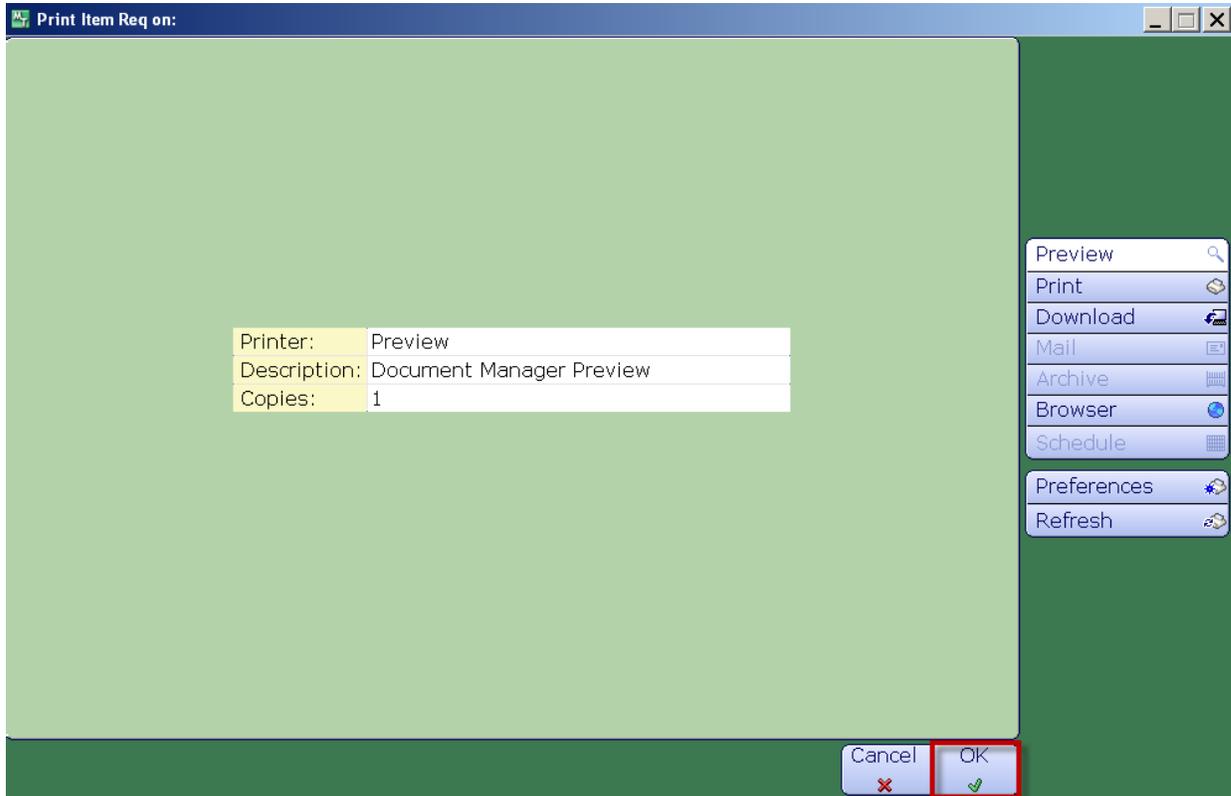


List Item Requisition Format Selection

*Include Posting Details	Y
*Include Zero Quantity Lines	N
*Include Cost/Value	N

Cancel OK

30. The Print Preview window will appear, **click on OK.**



Details of the Item Requisition order will be displayed.

31. To Print the Item Requisition, **click** on the Printer icon that is located on the header.

Contact your local CPSM Warehouse should you have any questions

[PID-20124]Item Requisition - MEDITECH Document Preview

File Help

DATE: 01/04/15 @ 1405 MM \*Palliser TEST 5.67\* PAGE 1  
 USER: MMREQ Item Requisition

Number	Pur-Fac	Status	Department/ Templates	Initiated by	from	on
0000081	MHMATHAN	CLOSED	0791.712800000	MMREQ	M343866	01/04/15

Ln	Item # Vendor	Description Ven Ctig #	Inventory	JIT	Tx Cd	Units	Qty
1	0005712	CONNEX SYR RAPID FILL LL TO LL	MHSTORES			CA	10
	Stock Req. Inv:	MHSTORES	Stock #:				
	#:	128	0005712				
2	0001500	APPLI PLAIN 6"	MHSTORES	*		BX	1
	Stock Req. Inv:	MHSTORES	Stock #:				
	#:	128	0001500				
3	0012300	BAND ELASTIC SZ 5 25YD L/F	MHSTORES			EA	2
	Stock Req. Inv:	MHSTORES	Stock #:				
	#:	128	0012300				

Requisitions and Purchase Orders			
Inventory			
MHSTORES	Stock Requisition	128	Created!

1/1 100%

## CPSM – Inventory Requisition

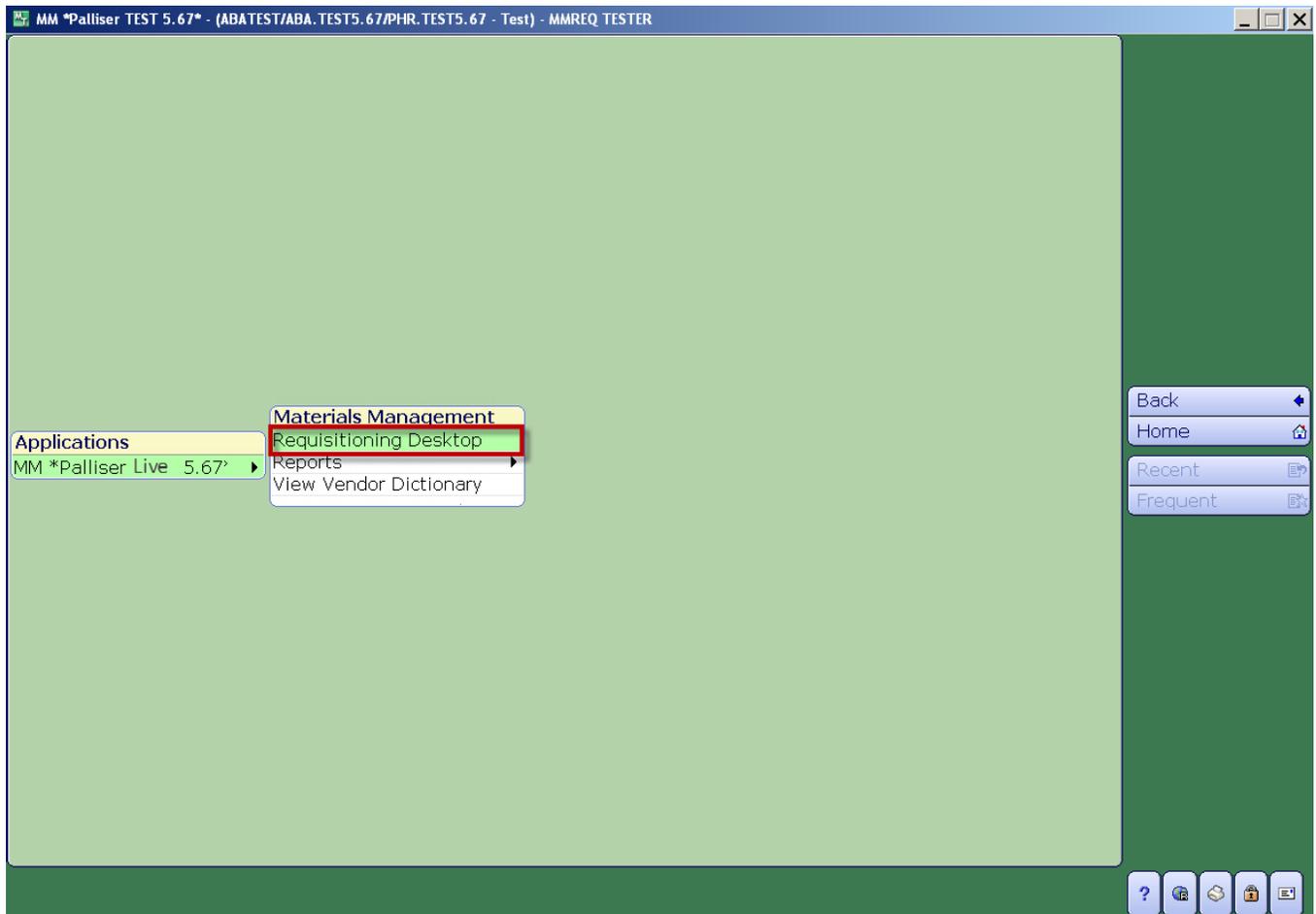
### Options Process an Inventory

#### Requisition

**Purpose:** Use this routine to create an Inventory Requisition for the Department by using Meditech Department Cost Centre. Then manually select from a list of Items that are available from the local CPSM Inventory.

**NOTE:** Profiles will vary between users. The first menu will be *Applications* followed by *Role* based (e.g. Nursing, Diagnostic Imaging etc.), at this point a user will select *MM Inventory Requisition*. The next menu will be *Materials Management*. The screen shots in this document show from Application menu to Materials Management Menu leaving out the *Role* based menu.

1. Click the *Requisitioning Desktop*.



2. Click on *Inventory Reqs* located on the right hand side menu.

Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Item Requisitions      Req Num:      Department:  
                                  Purchasing Facility:MHMATMAN      Lines:

\*Purchasing Facility    MHMATMAN

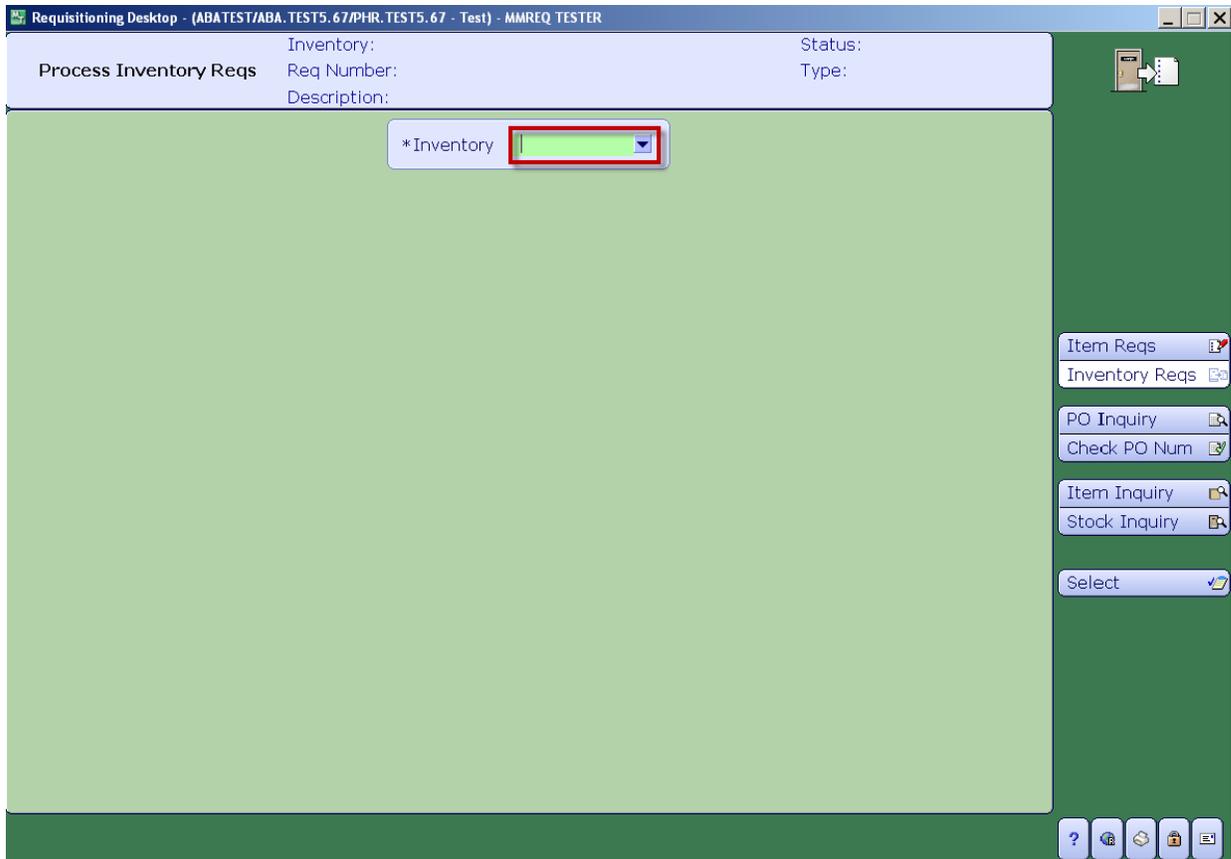
Req Number	Status	Template	Department	Initiated By	Number Lines

	User	Date	Device
Initiated By			
Last Edit By			
Posted By			

Item Reqs  
**Inventory Reqs**  
 PO Inquiry  
 Check PO Num  
 Item Inquiry  
 Stock Inquiry  
 Select

Create New Req    Enter or Edit Lines    Quick Enter    Enter or Edit Comments    Verify    Post    Cancel    List    Refresh    Cancel

3. **Type** in the local *CPSM Inventory* or search for the local *CPSM Inventory* by **clicking** on the dropdown arrow. This may default for some users.



4. Click on the *Create New Req* footer button.

Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Process Inventory Reqs    Inventory: MHSTORES - CENTRAL STORES    Status: WORKING  
 Req Number: 121    Type: DEPT  
 Description: Item Req. 00000078

\*Inventory    MHSTORES

Number	Date	Status	Description	Type	Restock Inventory	Department
121	23/03/15	WORKING	Item Req. 00000078	DEPT	0791.712800000	
120	23/03/15	WORKING	Item Req. 00000077	DEPT	0791.712800000	
119	23/03/15	WORKING	Item Req. 00000076	DEPT	0791.712800000	
118	23/03/15	WORKING	Item Req. 00000075	DEPT	0791.712800000	

User    MMREQ

Restock for Inventory  
 For Work Order| Equipment| Type  
 For Department    0791.712800000    GAU\*MHRH GERIAT ASSESS & REHAB

Recurring Requisitions and Surgical Case Carts

B/AR Database  
 Pt  
 Service Date  
 Revenue Site

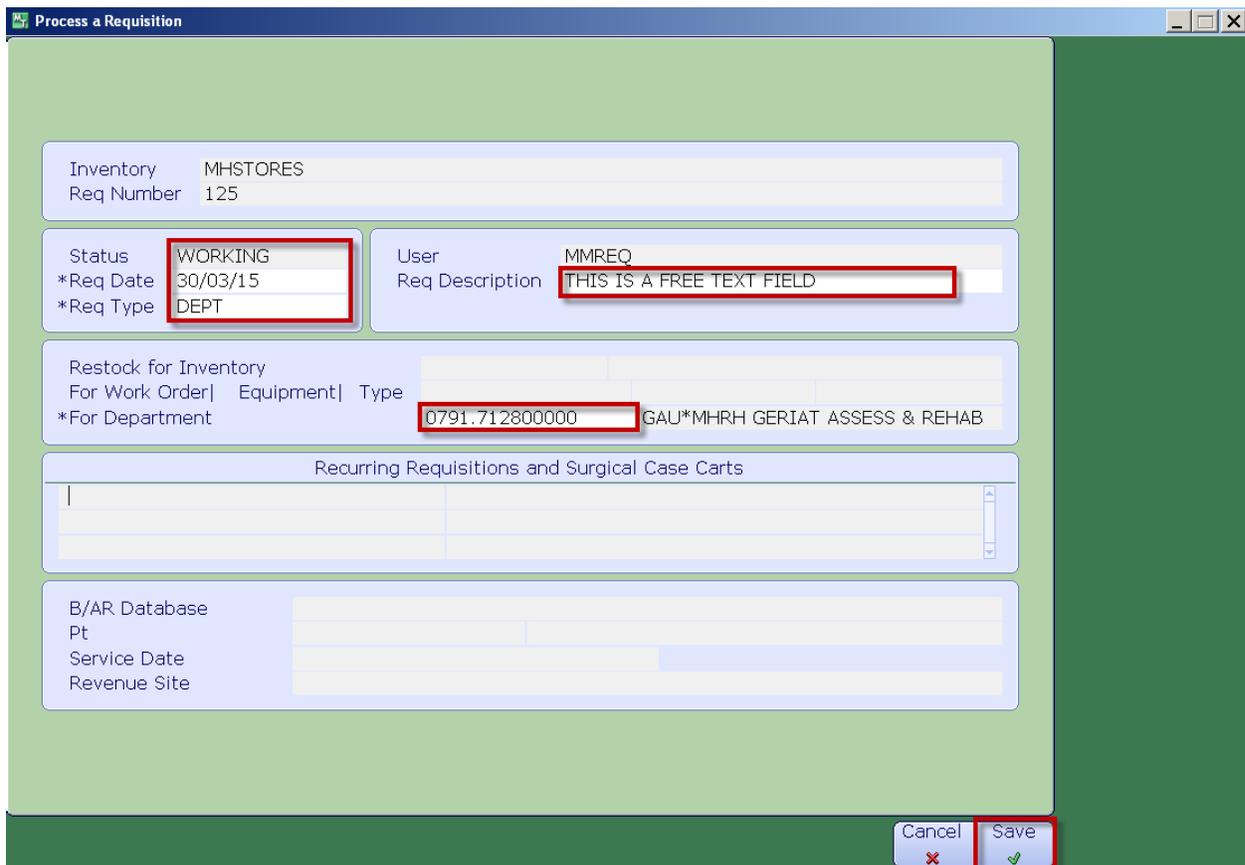
Stock Items| Stock Items Backordered    5

Create New Req    Enter or Edit Stock    Cancel Requisition    Reports    Refresh    Cancel

Item Reqs  
 Inventory Reqs  
 PO Inquiry  
 Check PO Num  
 Item Inquiry  
 Stock Inquiry  
 Select

An Inventory Requisition Number will be generated and the Status of the Inventory Requisition will be *Working*.

5. **Click** in the *Req Date* field and **type** in today's date. Use **T** for Today or **select** the date from the *calendar* by **clicking** the dropdown arrow.
6. **Click** in the *Req Type* field and **select** *DEPT*.
7. **Click** in the *Req Description* field and **type** in a free text description up to 30 characters.
8. **Click** in the *\*For Department* field and **type** in the Meditech Department Code or **select** the Meditech Department Code by **clicking** on the dropdown arrow.
9. **Click** on the *Save* button.



Process a Requisition

Inventory	MHSTORES
Req Number	125

Status	WORKING	User	MMREQ
*Req Date	30/03/15	Req Description	THIS IS A FREE TEXT FIELD
*Req Type	DEPT		

Restock for Inventory			
For Work Order	Equipment	Type	
*For Department	0791.712800000		GAU*MHRH GERIAT ASSESS & REHAB

Recurring Requisitions and Surgical Case Carts

B/AR Database	
Pt	
Service Date	
Revenue Site	

Cancel Save

The Inventory Requisition header will be displayed.

Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Process Inventory Reqs    Inventory: MHSTORES - CENTRAL STORES    Status: WORKING  
 Req Number: 126    Type: DEPT  
 Description: THIS IS A FREE TEXT FIELD

\*Inventory    MHSTORES

Number	Date	Status	Description	Type	Restock Inventory	Department
121	23/03/15	WORKING	Item Req. 00000078	DEPT		0791.712800000
120	23/03/15	WORKING	Item Req. 00000077	DEPT		0791.712800000
119	23/03/15	WORKING	Item Req. 00000076	DEPT		0791.712800000
118	23/03/15	WORKING	Item Req. 00000075	DEPT		0791.712800000
126	30/03/15	WORKING	THIS IS A FREE TEXT FIELD	DEPT		0791.712800000

User: MMREQ

Restock for Inventory  
 For Work Order| Equipment| Type  
 For Department                      0791.712800000    GAU\*MHRH GERIAT ASSESS & REHAB

Recurring Requisitions and Surgical Case Carts

B/AR Database  
 Pt  
 Service Date  
 Revenue Site

Stock Items| Stock Items Backordered

Create New Req    **Enter or Edit Stock**    Cancel Requisition    Reports    Refresh    Cancel

Item Reqs  
 Inventory Reqs  
 PO Inquiry  
 Check PO Num  
 Item Inquiry  
 Stock Inquiry  
 Select

10. Click on the *Enter or Edit Stock* footer button.

11. **Type** in the *Stock Number* or search for a Stock Number by **clicking** on the dropdown arrow.

Meditech Health Care Information System

Inventory: MHSTORES - CENTRAL ST...      Status: WORKING      Restock for Inventory:  
 Req Number: 126      Type: DEPT      For Work Order:  
 Description: THIS IS A FREE TEXT FIELD      Date: 30/03/15      For Department:0791.71280000

Stock Number	Quantity Requested	Quantity Issued	Units	Item Description
<input type="text"/>				

Current Packaging

Allergen/Hazardous

1	
2	
3	

Deliver to Locations	Instructions or Quantity

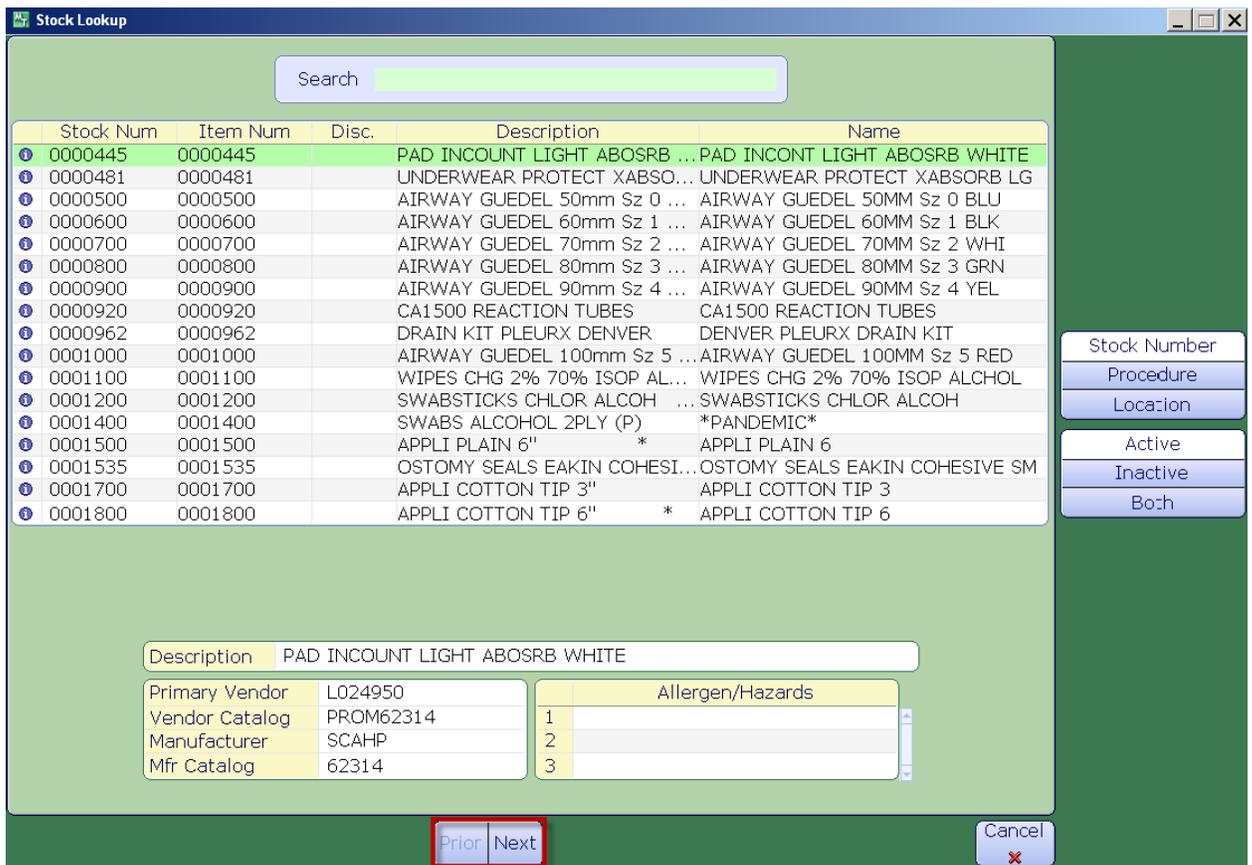
Sort    Get <F5>

Cancel    Save    ?    [Home]    [Back]    [Forward]    [Print]

Note: If performing a search, the Stock Lookup screen will appear. Searching by Description cannot be done from this screen.

Navigate through the listing by using the keyboard *Page Up and Down Keys* or by using the Meditech *Next and/or Prior* footer buttons.

12. Locate the *Stock Number* and **click** on it to select.



The screenshot shows the 'Stock Lookup' application window. At the top, there is a search bar. Below it is a table listing various medical supplies. The selected item is 'PAD INCONT LIGHT ABOSRB WHITE' with Stock Num 0000445 and Item Num 0000445. Below the table, there is a detailed view for the selected item, including fields for Description, Primary Vendor, Vendor Catalog, Manufacturer, Mfr Catalog, and Allergen/Hazards. At the bottom, there are 'Prior' and 'Next' buttons, with 'Next' highlighted in red, and a 'Cancel' button.

Stock Num	Item Num	Disc.	Description	Name
0000445	0000445		PAD INCONT LIGHT ABOSRB ...	PAD INCONT LIGHT ABOSRB WHITE
0000481	0000481		UNDERWEAR PROTECT XABSO...	UNDERWEAR PROTECT XABSORB LG
0000500	0000500		AIRWAY GUEDEL 50mm Sz 0 ...	AIRWAY GUEDEL 50MM Sz 0 BLU
0000600	0000600		AIRWAY GUEDEL 60mm Sz 1 ...	AIRWAY GUEDEL 60MM Sz 1 BLK
0000700	0000700		AIRWAY GUEDEL 70mm Sz 2 ...	AIRWAY GUEDEL 70MM Sz 2 WHI
0000800	0000800		AIRWAY GUEDEL 80mm Sz 3 ...	AIRWAY GUEDEL 80MM Sz 3 GRN
0000900	0000900		AIRWAY GUEDEL 90mm Sz 4 ...	AIRWAY GUEDEL 90MM Sz 4 YEL
0000920	0000920		CA1500 REACTION TUBES	CA1500 REACTION TUBES
0000962	0000962		DRAIN KIT PLEURX DENVER	DENVER PLEURX DRAIN KIT
0001000	0001000		AIRWAY GUEDEL 100mm Sz 5 ...	AIRWAY GUEDEL 100MM Sz 5 RED
0001100	0001100		WIPES CHG 2% 70% ISOP AL...	WIPES CHG 2% 70% ISOP ALCHOL
0001200	0001200		SWABSTICKS CHLOR ALCOH ...	SWABSTICKS CHLOR ALCOH
0001400	0001400		SWABS ALCOHOL 2PLY (P)	*PANDEMIC*
0001500	0001500		APPLI PLAIN 6"	APPLI PLAIN 6
0001535	0001535		OSTOMY SEALS EAKIN COHESI...	OSTOMY SEALS EAKIN COHESIVE SM
0001700	0001700		APPLI COTTON TIP 3"	APPLI COTTON TIP 3
0001800	0001800		APPLI COTTON TIP 6"	APPLI COTTON TIP 6

Description: PAD INCONT LIGHT ABOSRB WHITE

Primary Vendor	L024950	Allergen/Hazards	
Vendor Catalog	PROM62314		1
Manufacturer	SCAHP		2
Mfr Catalog	62314		3

Prior Next Cancel

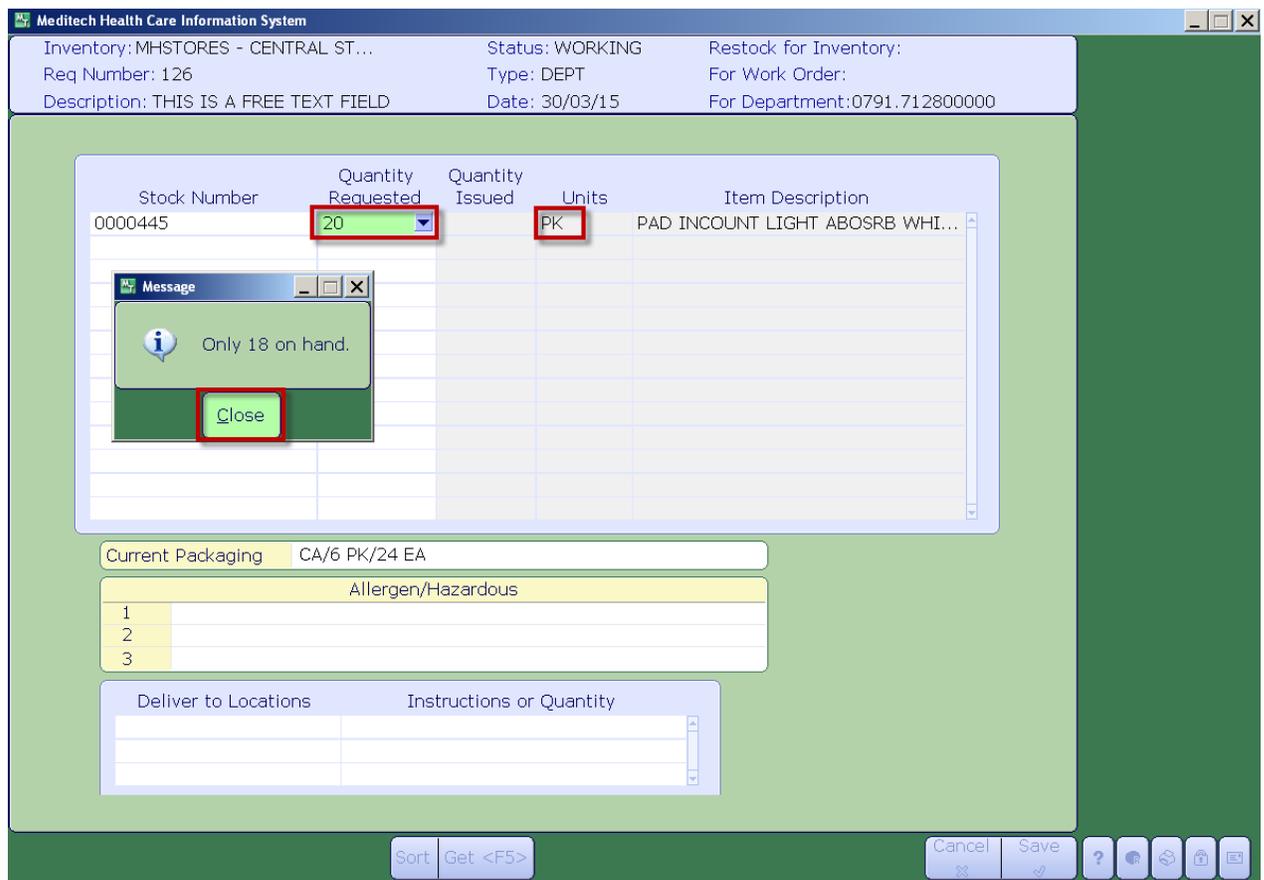
The Stock Number will be inserted into the Stock Number field.

**Note:** The Units field for the Stock Item being requested is how the local CPSM Warehouse issues that particular item. PK = package. In the example below 20 Stock Item 0000445 have been requested but only 18 are on hand.

13. **Tab** over to the *Quantity Requested* field and enter the quantity to order.

A message window will pop up if the quantity requested exceeds the quantity available in the Warehouse. The system will not allow the request to exceed quantity available.

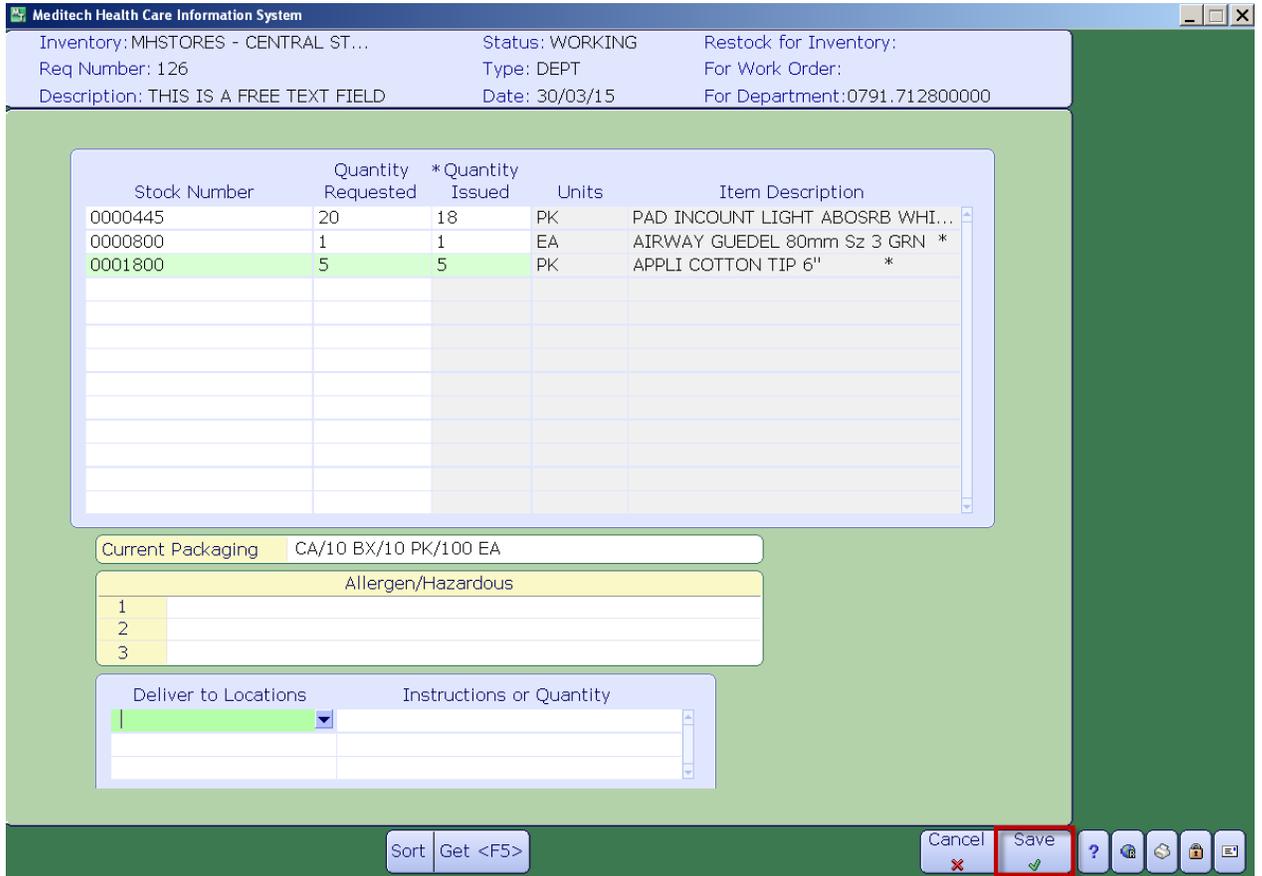
14. **Click** on the *Close* button.



The screenshot shows the Meditech Health Care Information System interface. At the top, there is a header bar with the following information: Inventory: MHSTORES - CENTRAL ST..., Status: WORKING, Restock for Inventory: For Work Order: For Department: 0791.712800000, Req Number: 126, Type: DEPT, Date: 30/03/15, and Description: THIS IS A FREE TEXT FIELD. Below the header is a table with columns: Stock Number, Quantity Requested, Quantity Issued, Units, and Item Description. The first row contains the stock number 0000445, a quantity of 20 (highlighted with a red box), the unit PK (highlighted with a red box), and the item description PAD INCOUNT LIGHT ABOSRB WHI... A message dialog box is open over the table, displaying the message "Only 18 on hand." and a "Close" button (highlighted with a red box). Below the table, there are several input fields: "Current Packaging" with the value "CA/6 PK/24 EA", "Allergen/Hazardous" with a list of 1, 2, and 3, and "Deliver to Locations" and "Instructions or Quantity" fields. At the bottom of the interface, there are buttons for "Sort", "Get <F5>", "Cancel", and "Save", along with several utility icons.

Repeat the process for each Stock Number you wish to order.

15. Once everything is entered **click** on the *Save* button.



Meditech Health Care Information System

Inventory: MHSTORES - CENTRAL ST...      Status: WORKING      Restock for Inventory:  
 Req Number: 126      Type: DEPT      For Work Order:  
 Description: THIS IS A FREE TEXT FIELD      Date: 30/03/15      For Department: 0791.71280000

Stock Number	Quantity Requested	*Quantity Issued	Units	Item Description
0000445	20	18	PK	PAD INCOUNT LIGHT ABOSRB WHI...
0000800	1	1	EA	AIRWAY GUEDEL 80mm Sz 3 GRN *
0001800	5	5	PK	APPLI COTTON TIP 6" *

Current Packaging CA/10 BX/10 PK/100 EA

Allergen/Hazardous

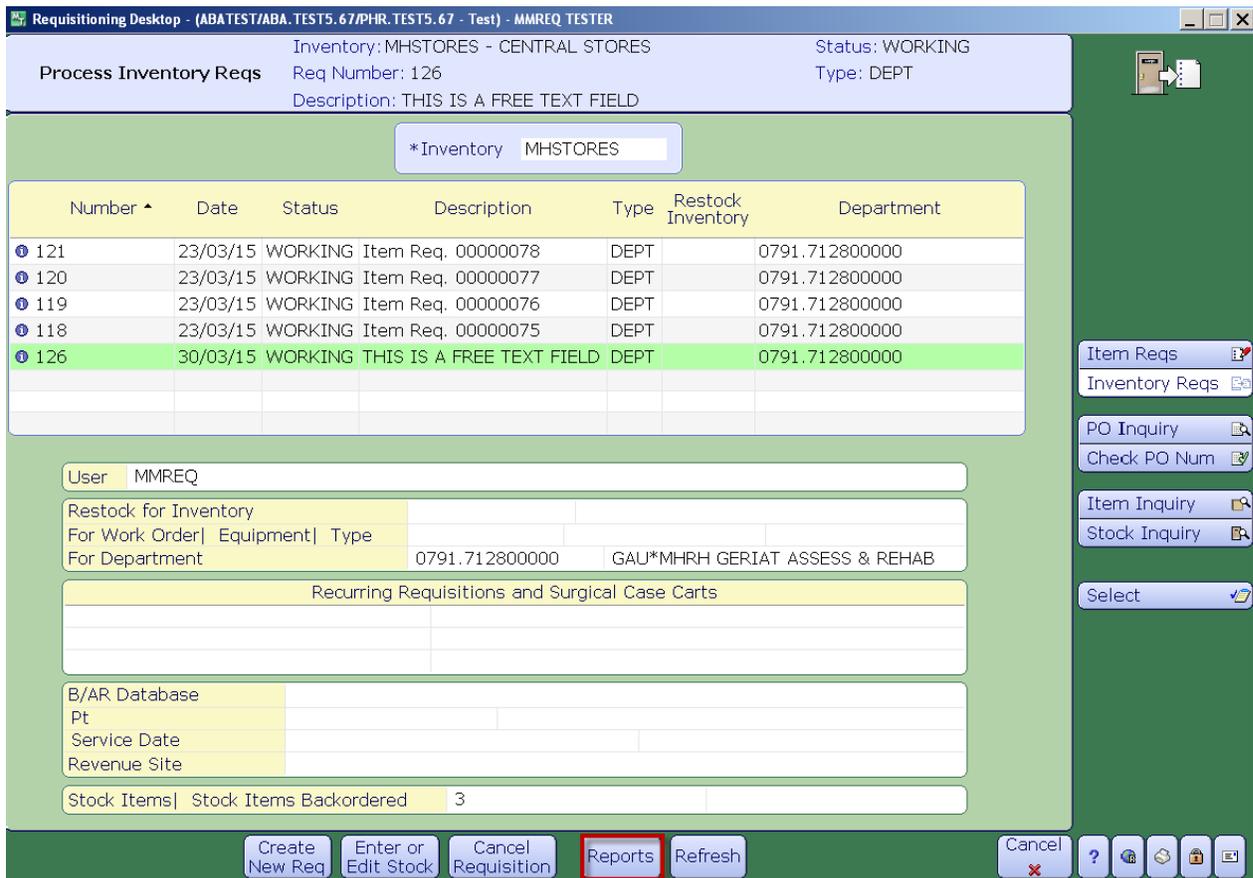
1	
2	
3	

Deliver to Locations      Instructions or Quantity


Sort    Get <F5>      Cancel    **Save**    ?    [Icons]

Once Saved, the Inventory Requisition Header will be displayed and the Requisition will be now made available to local CPSM Warehouse staff where it will be processed.

16. To print the Item Requisition, **click** on the *Reports* footer button.



Requisitioning Desktop - (ABATEST/ABA.TEST5.67/PHR.TEST5.67 - Test) - MMREQ TESTER

Process Inventory Reqs    Inventory: MHSTORES - CENTRAL STORES    Status: WORKING  
 Req Number: 126    Type: DEPT  
 Description: THIS IS A FREE TEXT FIELD

\*Inventory    MHSTORES

Number	Date	Status	Description	Type	Restock Inventory	Department
121	23/03/15	WORKING	Item Req. 00000078	DEPT	0791.712800000	
120	23/03/15	WORKING	Item Req. 00000077	DEPT	0791.712800000	
119	23/03/15	WORKING	Item Req. 00000076	DEPT	0791.712800000	
118	23/03/15	WORKING	Item Req. 00000075	DEPT	0791.712800000	
126	30/03/15	WORKING	THIS IS A FREE TEXT FIELD	DEPT	0791.712800000	

User: MMREQ

Restock for Inventory  
 For Work Order | Equipment | Type  
 For Department: 0791.712800000    GAU\*MHRH GERIAT ASSESS & REHAB

Recurring Requisitions and Surgical Case Carts

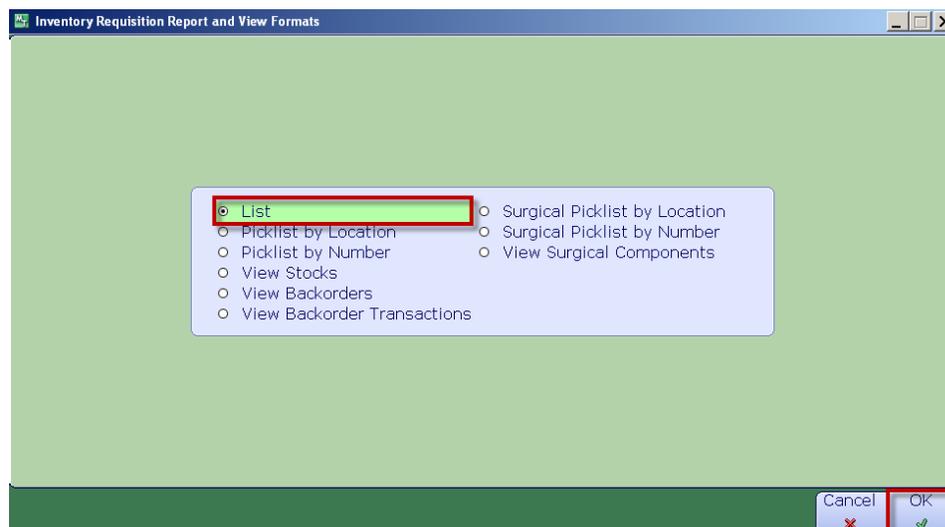
B/AR Database  
 Pt  
 Service Date  
 Revenue Site

Stock Items | Stock Items Backordered: 3

Buttons: Create New Req, Enter or Edit Stock, Cancel Requisition, **Reports**, Refresh, Cancel

The Inventory Requisition Report and View Formats window will be displayed

17. **Click** on the *List* button and then **click** on the *OK* button.



Inventory Requisition Report and View Formats

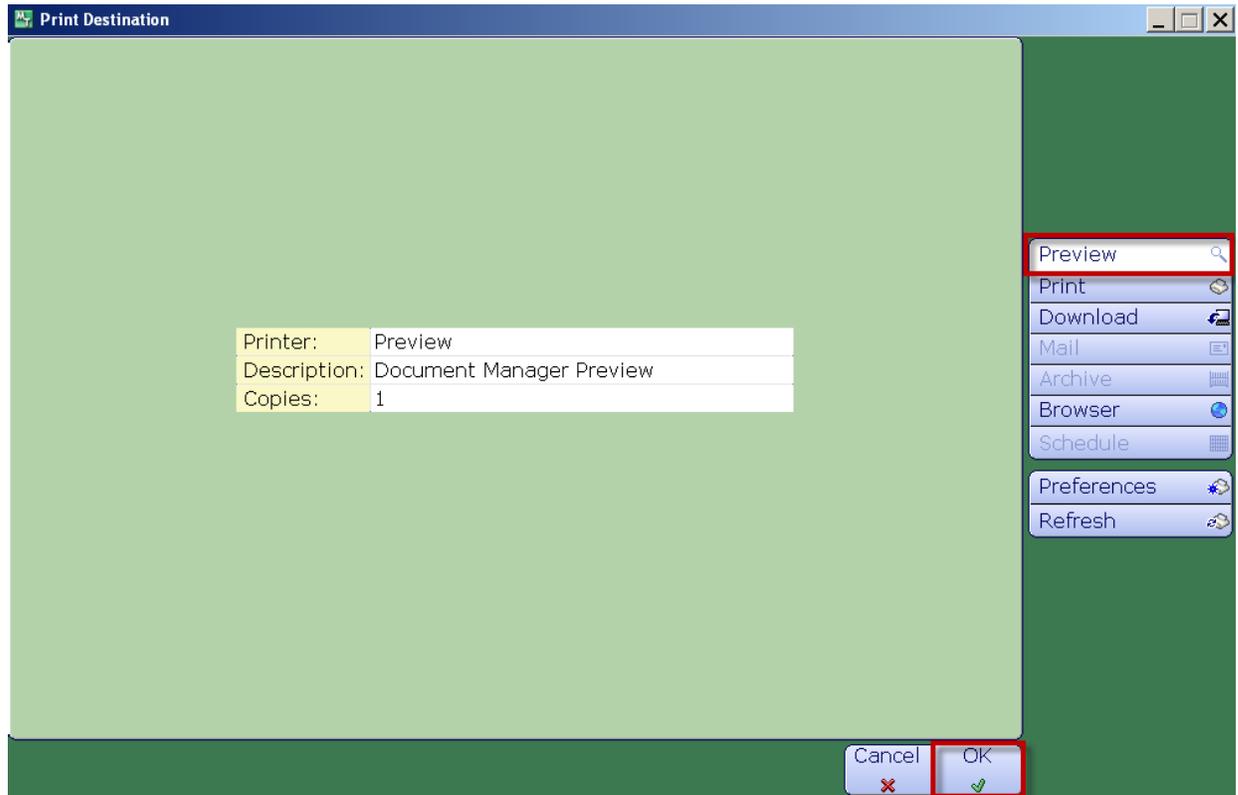
- List
- Picklist by Location
- Picklist by Number
- View Stocks
- View Backorders
- View Backorder Transactions
- Surgical Picklist by Location
- Surgical Picklist by Number
- View Surgical Components

Buttons: Cancel, **OK**

The Print Destination window will be displayed.

18. **Click** on the *Preview* button located on the right hand menu listing.

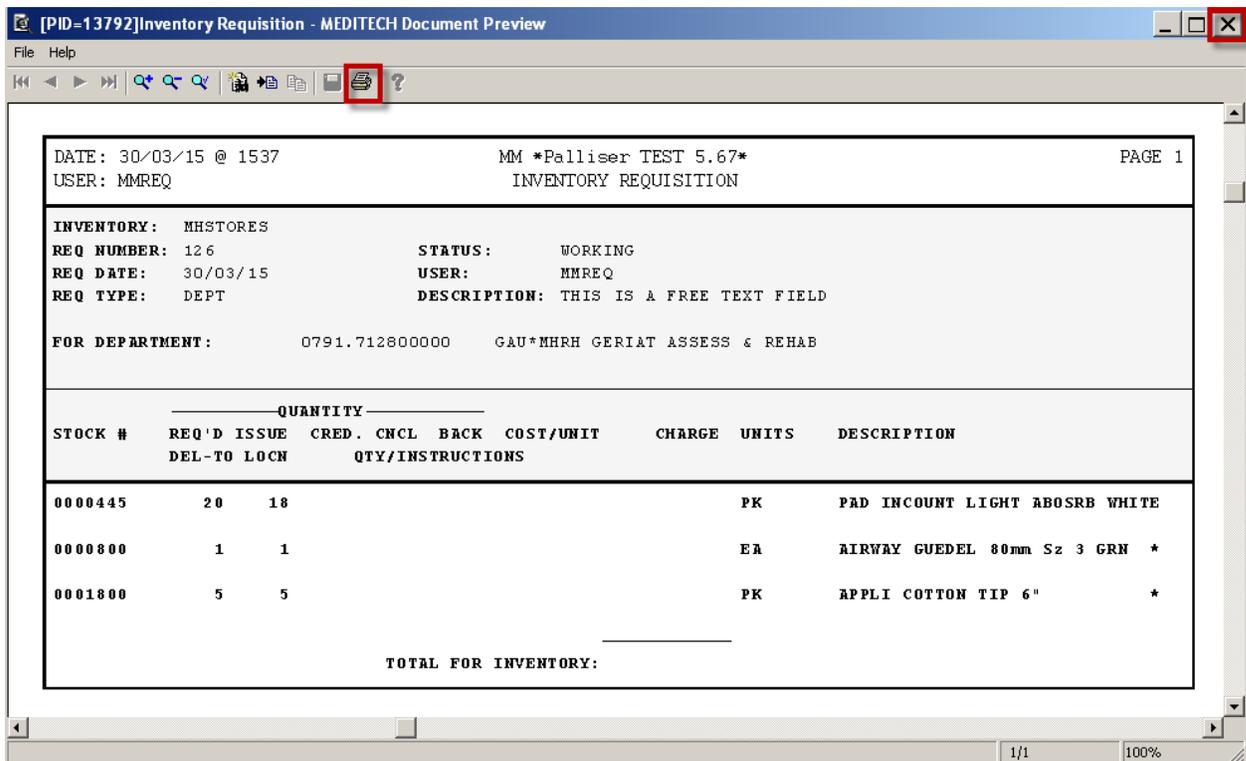
19. **Click** on *OK*.



Details of your Inventory Requisition order will be displayed.

20. To Print the Inventory Requisition, **click** on the *Printer* icon located on the header.

Contact the local CPSM Warehouse for any questions.



21. Close the window by **clicking** on the X located on the top right hand corner.

22. On the Process Inventory Requisition Screen, **click** on the *Cancel* button.

23. Close the window by **clicking** on the X located on the top right hand corner.

You should now be back at the Requisition Desktop.