

Exchange Cart Process Training Manual

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Step 1 – Navigate to Requisitioning Desktop

			Equipment Management Desktop
			Financial Management Desktop
			MM-AP Interface
			Item and Stock Processing Desktop
			Pharmacy Technician Desktop
			Purchasing Desktop
			Requisitioning Desktop
Clinical	•		Process Tasks
Administrative	-		Process Inventory Requisitions
Ancillary	Accounts Payable	•	Process Restock Request From Multiple
Financial	Cost Accounting	Þ	Process Exchange Cart
Ambulatory	Fixed Assets	•	Process Patient Issues
Info Systems	General Ledger	Þ	Process Patient Issues From Location
Message/Task System	Human Resources	Þ	Process Item Requisitions
CGMH Reports	Materials Manageme	nt 🕨	Process Purchase Requisitions
GBGH Reports	Patient Accounting	Þ	Process Purchase Orders
HHCC Reports	Payroll	Þ	Process Business Office Scan
RVH Reports	Staffing and Schedulin	j ▶	MM-AP Interface
Enter/Edit Temporary Location	-		MM-SUR Interface
Enter/Eur Temporary Location			Purchasing and Receiving
			Inventory
			Equipment Management
			Electronic Data Interchange
			Handheld Interface
			System Management
			Dictionaries
			Custom Reports

In the Requisitioning Desktop, click on Exchange Carts on the right hand side

ocess Exchange Carts			
		Process Ta	sks
Inventory	▼	Purchase F	Regs
Record Number		Req Inquir	у
Inventory Type		Reg From	Inv
Department		Item Reqs	
PT Chg Dept		Restk Req	Multi
	Cart Record	Inventory	Reqs
Record Date		Exchange	Carts
Record Type		Patient Iss	ues

Step 2 – Select the Inventory you will be filling this Exchange Cart for Enter "N' for next record number

Cart Record Date Inventory Regs Record Date Exchange Cart Record Status Exchange Cart Record Status Inv Routines Record Status Cart From CGM.MAIN Restock Cart From CGM.MAIN Reg Date CGM.MAIN Reg Type Items Reg Date Stock Inguiry Reg Status Stock Inguiry Reg Date Stock Inguiry Reg Date HHT Backorder Items	Process Exchange Carts			
Record Number Putronse nega Inventory Type DEPT Department 10701260000000 PT Chg Dept Item Req Nult Cart Record Rest Req Mult Record Jate Record Jate Record Status Inventory Req Exchange Cart Stock Items Putronse nega Record Date Record One Record Status Inventory Req Cart Record Date Record One Record Status Inv Routines Stock Items Putronse nega Record Date Rep Onte Record Date Rep Onte Record Date Shipping Notice Record Date Shipping Notice Record Date Shipping Notice Record Date Shipping Notice Req Date Shipping Notice Req Description Stock Inquiry Req Description Stock Inquiry Req Description Stock Inquiry Req Description HIT				Process Tasks
Inventory Type DEPT Req From Inv Department 10701260000000 Rest Req Mill PT Chg Dept Cart Record Rest Req Mill Record Date Cart Record Exchange Carts Record Status Record Status Record Status Record Description Inventory Req Purchase Order Stock Items Purchase Order Purchase Order Req Date Restock Cart From CGM.MAIN Req Date Req Date Shipping Notice Req Status Restock Inguiry Stock Items			CGM.SURBLK	Purchase Regs
Inventory Type DEP1 Department 10701260000000 PT Chg Dept Cart Record Record Date Record Status Record Status Restock Cart From CGM.MAIN Restock Cart From CGM.MAIN Restock Cart From Restock Cart From CGM.MAIN Restock Cart From Restock Cart From CGM.MAIN Restock Cart From Restock Cart From CGM.MAIN Restock Cart From CGM.MAIN Restock Cart From Stock Items HIT		Record Number	N	Reg Inquiry
Department 10701260000000 Item Reqs PT Chg Dept Rest& Req Mult Cart Record Rest& Req Mult Record Date Exchange Carts Record Type Patient Issues Record Description Invertines Stock Items Purchase Order Req Date Shipping Notice Req Status Req Status Req Date Shipping Notice Req Status Reg Status Req Status HHT				Reg From Inv
PT Chg Dept Restk Reg Multi Cart Record Inventory Regs Record Date Exchange Carts Record Type Patient Issues Record Date Inv Routines Record Date (pin) Inv Routines Stock Items Purchase Order Restock Cart From COM.MAIN Req Date Shipping Notice Reg Status Stock Inquiry Reg Status Stock Inquiry Reg Description Stock Inquiry Reg Status HHT Backorder Items HHT				Item Regs
Cart Record All Inventory Regs Record Date Record Date Record Opte Record Status Record Status Record Status Record Description Restock Cart From CCM.MAIN Restock Cart From Restock Restock Resultion Restock Cart From Restock Resto				Restk Reg Multi
Record Date Exchange Carts Record Status Patient Issues Record Description Inv Routines Stock Items Purchase Order Restock Cart From CGM.MAIN Req Date Shipping Notice Req Status Shipping Notice Req Status Shipping Notice Req Status Shipping Notice Req Status Backorder Items			Out Down	Inventory Reqs
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Restock Cart From CGM.MAIN Check PO Num Req Number Shipping Notice Req Date Shipping Notice Req Type Item Inquiry Req Status Stock Inquiry Stock Items HHT		Stock Items		Purchase Order
Restock Cart From CGM.MAIN Check PO Num Req Number Shipping Notice Req Date Shipping Notice Req Type Item Inquiry Req Status Stock Inquiry Stock Items HHT			Restock Requisition	PO Inquiry
Raq Number Shipping Notice Raq Date Shipping Notice Raq Type Item Inquiry Raq Status Stock Inquiry Stock Items HHT		Restock Cart From		
Req Type Req Type Req Status Req Status Stock Inquiry Stock Items Backorder Items		Reg Number		
Reg Status Item Inquiry Reg Description Stock Inquiry Stock Items HHT Backorder Items HHT				Shipping Notice
Reg Status Stock Inguiny Stock Items HHT Backorder Items HHT				Item Inquiry
Req Description Stock Items Backorder Items				
Backorder Items H11				
				HHT
		Backorder Items		Work Orders



Enter Date and click OK

A description can also be added here but is not a requirement and the field can be left blank

MM.RO	OV - Proces	s Exchange Cart Record		×
[*Date Description	27/05/21 TEST		
			Cancel	ок

<u>Step 3</u> – Review and Updating of Inventory On-Hand

Select 'Enter or Edit Stock' from the bottom of the screen.

Process Exchange Carts			
		1	Process Tasks
Inventory	GBH.SURBLK		Purchase Regs
Record Number	3		Reg Inquiry
		1	Reg From Inv
Inventory Type	DEPT		Item Regs
Department	30701262000000		Restk Reg Multi
PT Chg Dept			Inventory Regs
	Cart Record		
Record Date	27/05/21		Exchange Carts
Record Type	CART RECORD		Patient Issues
Record Status	WORKING		Inv Routines
Record Description Stock Items	183		
Stock Items	185]	Purchase Order
	Restock Requisition		PO Inquiry
Restock Cart From	GBH.MAIN	ĵ	Check PO Num
Reg Number			Shipping Notice
Req Date			
Req Type			Item Inquiry
Reg Status Reg Description			Stock Inquiry
Stock Items			
Backorder Items			HHT
			Work Orders
			Reports
			Custom Reports
			Select
			System Status
			Preferences
		_	
Enter or Edit Stock C ncel Post Lists	Create Start Edit Post Create Post Post	Cancel	?∂⊕6⊠∆



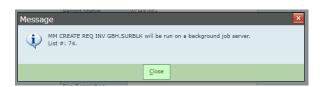
The items for the inventory will now display and you will need to enter the on-hand amounts

	entory CGM.SURBLK mber 1 25/05/21				
	Stock Number	Qty Left	Units	Item Description	
1	000921	-	BX	SUTURE ANCHOR 5.5MM BLUE	
2	001296		EA	CAVILON WIPE	
3	001716		BX	CUFF PRESSURE TUBING	
4	001728		BX	ENDOCLOSE	
5	001770	î	BX	SWIVELOCK 5.5MM W/FIBRETAPE	
6	001779		BX	PROTACK STAPLER	
7	002611	Î	BX	PROX STAPER 3.5MM	
8	002707		EA	ABL 800-S1820 CAL 1 SOLUTIO	
9	002825		EA	FIBERTAPE 2MM	
10	004094		CA	VOLUVEN 500 ML	
11	004564		BX	STERIS MONITORING STRIPS	
12	004831		BX	GLIDESCOPE STYLETS	
13	005031		EA	REFERENCE MEMBRANE	
14	005516		BX	GLOVE - GAMMEX 8.5	

Once you have finished entering the quantities, Click Save in the bottom right.

Inv	entory GBH.SURBLK				
Nur	mber 4				
Dat	e 27/05/21				
		Qty			
	Stock Number	Left	Units	Item Description	
1	000127	0	EA	FILTER SAVER, INTELLIARE	<u></u>
2	000905	0	BX	NEEDLE - SPINAL 22 GA X 5"	
3	002319	0	CA	5-0 FAG PL PC-1	
4	003959	0	EA	#6 DISP. CANNULA CUFFED TR	
5	003960		▼ EA	#8 DISP CANNULA CUFFED TR	
6	004022	1	EA	NEPTUNE 2 FOUR PART MANIFO	
7	006138	1	EA	BANDAGES BANDAID STRIP 1	×
3	006139		EA	SURE LOK ZIP BAG 8 X 10 IN	
9	006140		EA	SURE LOK ZIP BAG 10 X 13	
10	006336		EA	SEAL CRASH CART SECURITY	
11	006356		BX	SUTURE POLYSORB	
12	006376		BX	SUTURE POLYSORB 0	
13	006378		BX	SUTURE POLYSORB 1	
14	006380		BX	SUTURE POLYSORB 1	
~	I Ballacia I anno				
	rrent Packaging Loc nufacturer Catalog Number	BX/1 EA		*	<none></none>
Mai	Catalog Number				
		Allerg	en/Hazardou	5	
1					
2					
		Get <f5></f5>			Cancel

You will receive a pop up message indicating the process is being run. Click Close to move to the next step.





Process Exchange Carts			
			Process Tasks
	Inventory	GBH.SURBLK	Purchase Regs
	Record Number	5	Reg Inquiry
			Reg From Inv
	Inventory Type	DEPT 307012620000000	Item Regs
	Department PT Chg Dept	30/01262000000	Restk Reg Multi
	PT Chg Dept		Inventory Regs
		Cart Record	Exchange Carts
	Record Date	27/05/21	Patient Issues
	Record Type	CART RECORD	Patient Issues
	Record Status Record Description	WORKING	Inv Routines
	Stock Items	183	
	Stock Items		Purchase Order
		Restock Requisition	PO Inquiry
	Restock Cart From	GBH.MAIN	Check PO Num
	Reg Number		Shipping Notice
	Reg Date Reg Type		
	Reg Status		Item Inquiry
	Reg Description		Stock Inquiry
	Stock Items		ннт
	Backorder Items		
			Work Orders
			Reports
			System Status
			Preferences
Enter or Edit	Cancel Post Lists	Create Start Edit Post Create Reports Cancel	
Stock		Restock Pick Restock PO	?∂⊜ɓ⊠∆

Click Post on the bottom menu

The Record Status will change to 'C	Closed' from Working
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Inventory Record Number	GBH.SURBLK 2	
	DEPT	
Department PT Chg Dept	307012620000000	_
	Cart Record	
Record Date	27/05/21	
Record Status Record Description	CLOSED TEST1	
Stock Items	183	
	Restock Requisition	
Restock Cart From	GBH.MAIN	
Req Number		
Reg Date		
Reg Type		_
Reg Status Reg Description		_
Stock Items		_
Backorder Items		-

The system will split the posted Exchange Cart into items that need to be ordered direct from vendors and those that will be supplied from Stores.