

Exchange Cart Process Training Manual

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Accountable Author: Jo-Ann Ross











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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 |
| Record Status Inv Routines Record Description Purchase Order Stock Items Purchase Order Restock Cart From CGM.MAIN Req Number Shipping Notice Req Type Item Inquiry Req Status Stock Inguiry Stock Items HHT | | Record Date | Cart Record | Exchange Carts |
| Record Description Inv Routines Stock Items Purchase Order Restock Cart From CGM.MAIN Req Date Shipping Notice Req Date Shipping Notice Req Status Backorder Items | | Record Type | | Patient Issues |
| Rector description Purchase Order Stock Items Purchase Order Restock Cart From CGM.MAIN Req Number Check PO Num Req Date Shipping Notice Req Status Stock Inguiry Stock Items HHT | | Record Status | | |
| Restock Cart From CGM.MAIN Read Number Check PO Num Req Date Shipping Notice Req Status Item Inquiry Req Status Shock Inquiry Stock Items HHT | | | | Inv Routines |
| 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⊠∆ |



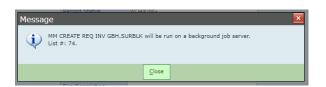
The items for the inventory will now display and you will need to enter the on-hand amounts

| | 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 |
|-------------------------------------|----------------------|
|-------------------------------------|----------------------|

| 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.