Meditech Expanse MM Tip Sheet

GLOSSARY

Requisitioning Desktop	The desktop where all Requests to have items purchased are processed.
Items (non-stock)	Items catalogued not maintained in an inventory with the intention to purchase
Stock Requisition	Items assigned to an Inventory
Item or Purchase Requisition	A request by a Department for product replenishment
Purchase Order Type	Request for a purchase, typically by a department for non-stock items
Purchase Order	Appropriate order assigned to categorize Service, Inventory or Capital. Controls the purchasing of products and services from external suppliers
Service Repair	Request for a service or repair using a Purchase Requisition, identifying it as Service.
Enter/Edit Template	Allows you to manage “favourites” for regular ordering and to create a new template for your department for non-stock items.
Approval Matrix	4 (four) levels of approval workflow for Requisitions or Purchase Orders.
Managers’ Task List	Process Tasks populates a ‘Task List’ with Requisitions that require next level of approval.
Reassign	Appoint (someone) a Requisition for the next level of approval.
Adobe Sign (EchoSign)	E-Signature instrument for additional levels of approval.

FREQUENTLY USED KEYBOARD & SHORTCUTS

<F1>	Access online Help for the current screen.
<Shift>+<F1>	Access online Help for the selected field.
<F2>	Access your Reference List.
<Shift>+<F2>	Access your E-mail.
<F3>	Perform a screen-specific function, if available.
<Shift>+<F3>	Perform a screen-specific function, if available.
<Print Scrn>	Print the current screen.
<F5>	Insert saved or predefined data or text at the cursor.
<Shift>+<F5>	Save an Error Snapshot.
<F6>	Move your focus to the next screen component. *(set of fields).*
<Shift>+<F6>	Move your focus to the previous screen component.
<F7>	Move your focus to the next page.
<Shift>+<F7>	Move your focus to the previous page.
<F8>	Move your focus to the next screen region.
<Shift>+<F8>	Move your focus to the previous screen region.
<F9>	Look up entries available at the selected field.
<Shift>+<F9>	View screen information.
<F11>	Perform a screen-specific function, if available.
<Shift>+<F11>	Perform a screen-specific function, if available.
<F12>	Save entered information.
<Shift>+<F12>	Suspend the MEDITECH session.
Arrow keys	Move the green highlight within the selected field or button region.
<Enter>	Choose the selected button.
<Alt>+<B>	Move directly to the body buttons.
<Alt>+<M>	Move directly to the menu buttons.
<Alt>+<F>	Move directly to the footer buttons.
<Alt>	Move directly to the screen body.
<Ctrl>+<Home>	Move to the top of a list.
<Ctrl>+<End>	Move to the end of a list.
<Ctrl>+<Insert>	Insert an item above the selected in an ordered multiple-type field.
<Ctrl>+<Delete>	Remove the selected item in a multiple-type field.
<Ctrl> +<Up Arrow>	Move the selected item up in an ordered multiple-type field.
<Ctrl> +<Down Arrow>	Move the selected item down in an ordered multiple-type field.
<Tab>	Move to the next field.
<Alt>+<Tab>	Move to the previous field.
The spacebar	Toggle the selected check mark or option button on or off.

MATERIAL MANAGEMENT

Assigning numbers when creating:

- Requisitions (Item, Inventory or Purchase)
- Purchase Orders

1. Enter **N**
2. The system will assign the next sequential number

Inputting Dates
Dates must be in the format:
DD/MM/YYYY – 01/01/2021

Date Conventions (*n* = the number of days)

- **T** = Today
  -minus number of days
  +additional number of days
- **T - n** (i.e.: T-15 → Past 15 days)
- **T + n** (i.e.: T+15 → Future 15 days)

MATERIAL MANAGEMENT *(cont.)*

Requisitions:

Types	Statuses
Item	Working
Inventory	Open
Purchase	Verified
Service	Cancelled
	Closed

Key steps for Creating Item Requisitions:

1. Requisitioning desktop
2. Create Req Lines
3. Choose Item REQ Template
4. Enter or Edit Lines
5. Enter Quantities for items needed
6. Remove Zero Quantity lines
7. Save
8. Verify
9. Post
   9.1 For requisitions containing non-stock items, an additional step is required to Verify Purchase Requisition.
   9.2 Print Review to ensure all items (*stock & non-stock)* are saved.

CARDS Request

Create or change an Item or Vendor:

1. Navigate to https://www.ssw-mdm.com/care4
2. Provide your contact information
3. Select type of request
4. Complete all form field details
5. Submit form.
6. SSW Data Management will complete the task and follow-up confirming the changes.

LOOK UP CONVENTIONS

Searching in Expanse:

1. Must be in the Item or Vendor # field
2. Enter description or name in upper case in the search box
3. Enter a comma(,) as wildcard and press <**F9**>
   - e.g. GLOVE,

Item Inquiry

Item Dictionary

Vendor	V\F9
Inventory	S\F9
Vendor Catalogue#	VC\F9
Manufacturer	M\F9
Manufacturer Cat#	MC\F9

Stock Dictionary

Item Descriptions	I\F9
Procedure Code	P\F9
Stock UPN	I\U\F9
Vendor	I\V\F9
Vendor Catalogue #	I\V\C\F9