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# Materials Management Requisitions

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Hôpital général de la baie Georgienne GEORGIAN BAY General Hospital

HEADWATERS Health Care Centre

RVH Royal Victoria Regional Health Centre

# 3 Types of Requisitions

1. **Item Requisitions:** A combination of a Purchase Requisition and an Inventory Requisition. The end user does not need to know which items are stocked or which items are direct purchase. Expanse will separate these items when the requisition is processed by Materials Management.
2. **Purchase Requisitions:** For items purchased as needed and not stocked in the warehouse. Also referred to as direct purchases.
3. **Inventory Requisitions:** for items stocked in hospital Stores.

**Note:** Item Requisitions are best practice and will be the focus of this training module.

# How To Create Item Requisitions

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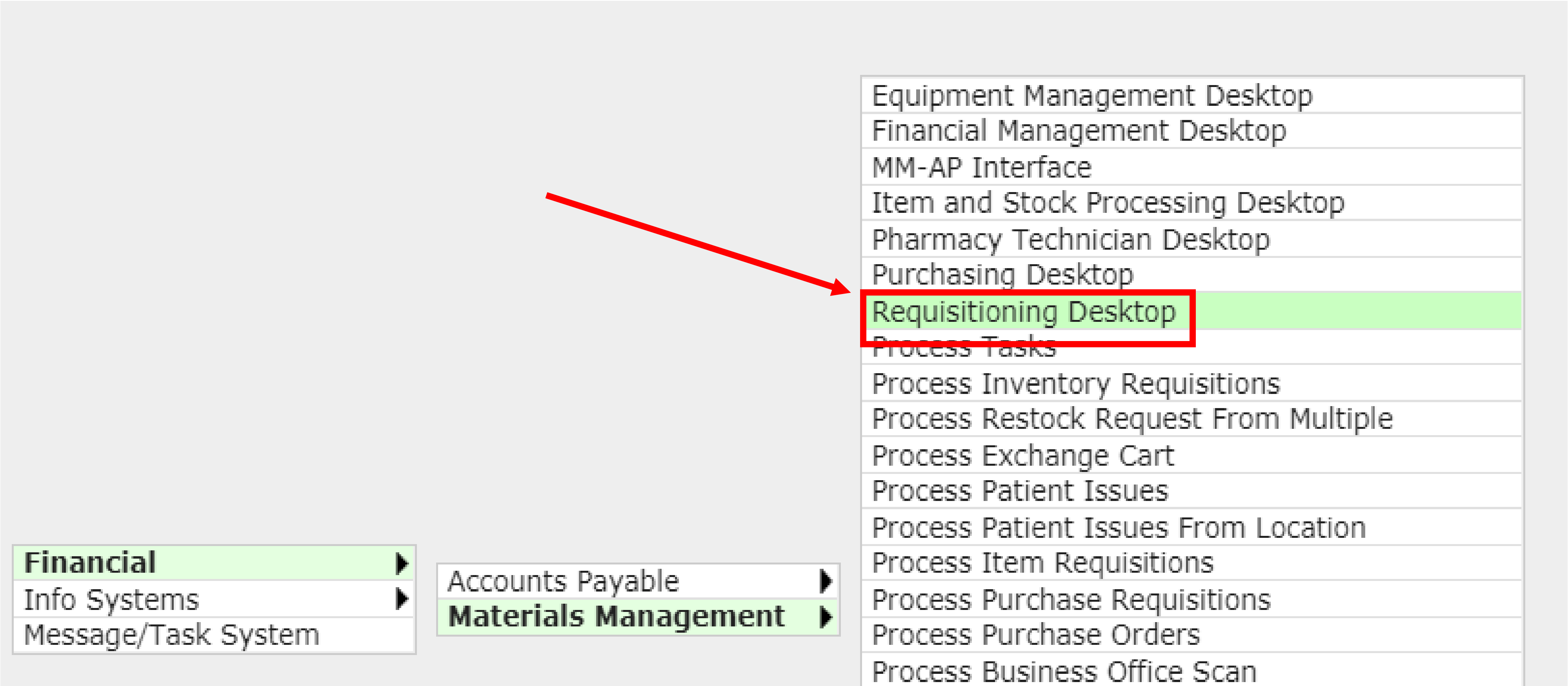
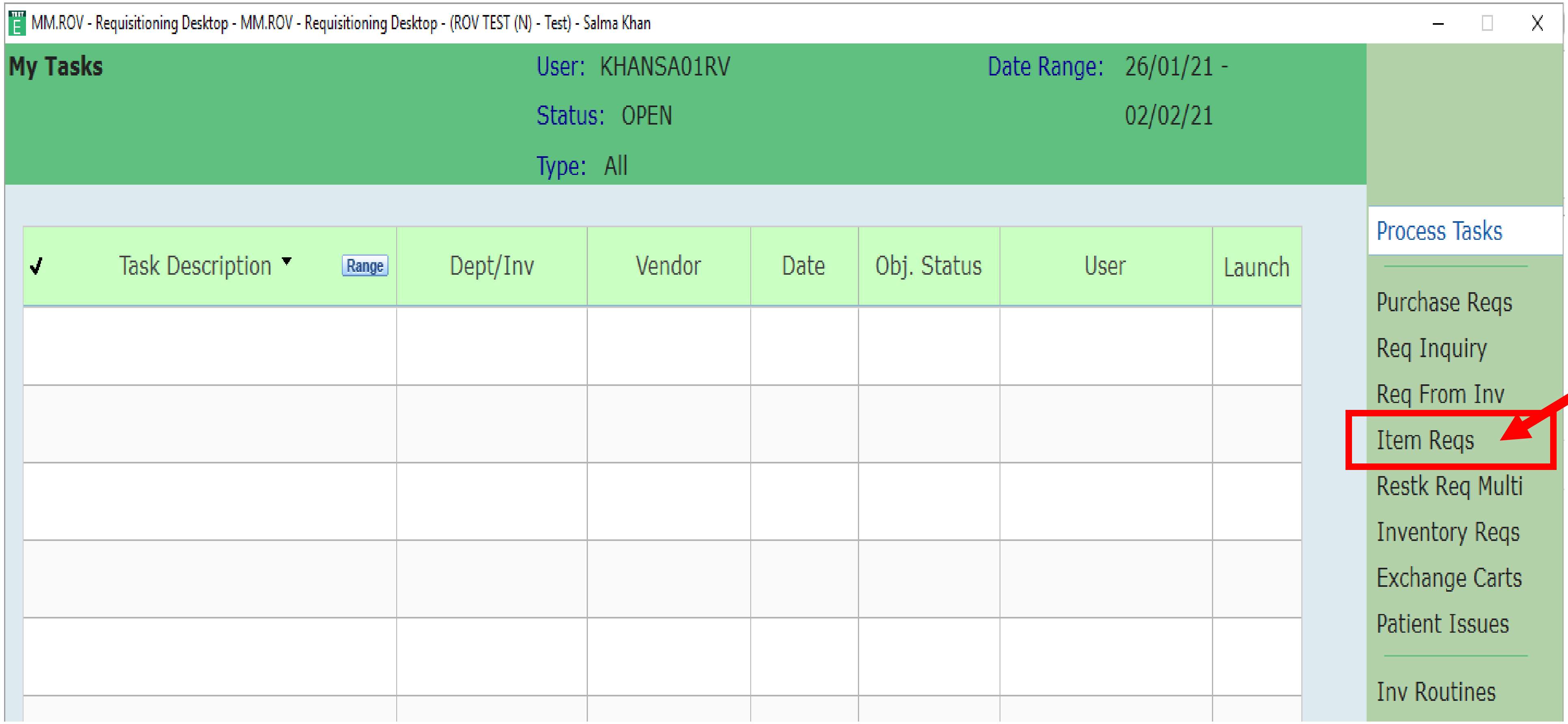
# Accessing Requisitions

To access any requisition go to the **Requisitioning Desktop**:

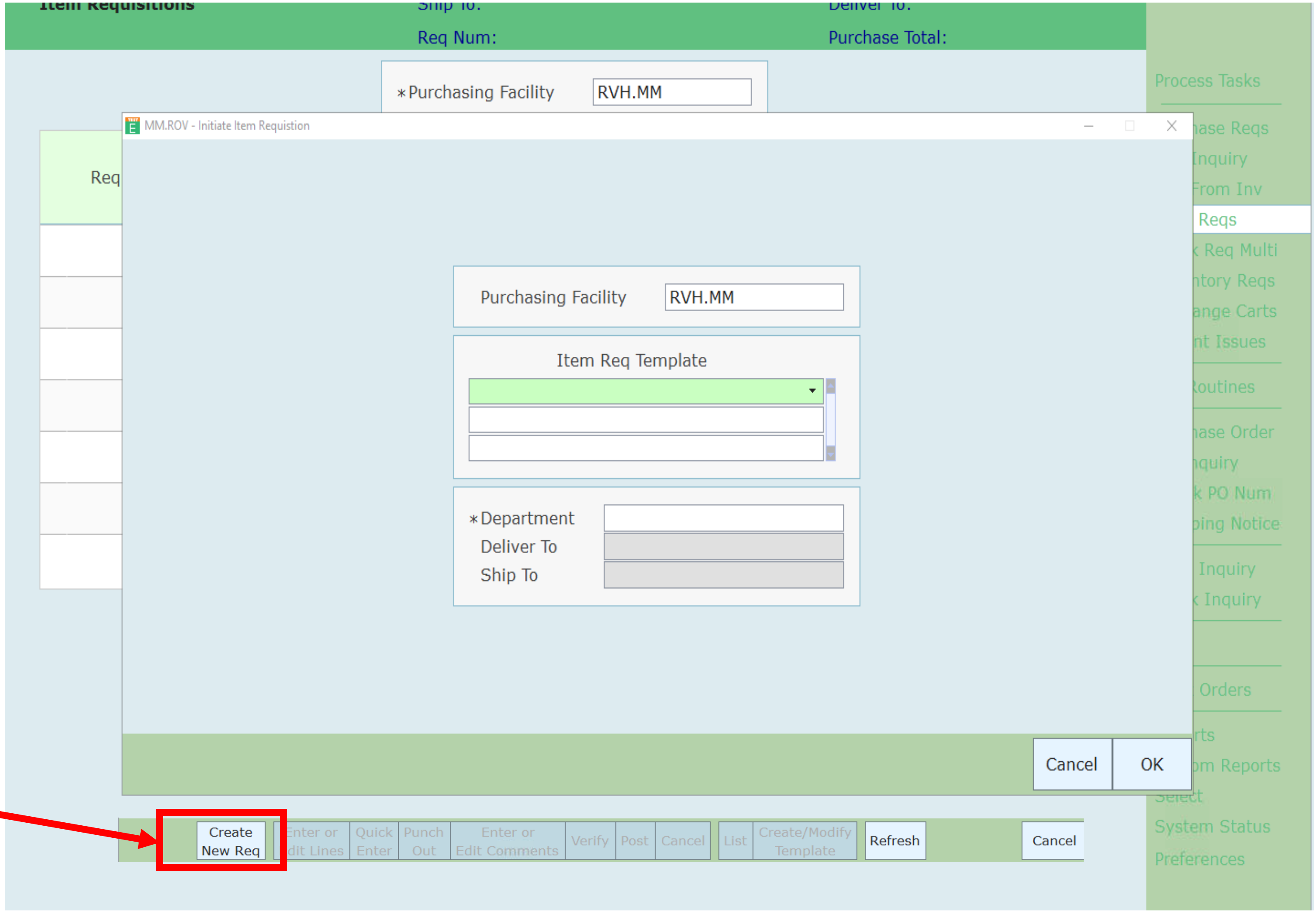


# Step 1: Create an “Item Requisition”



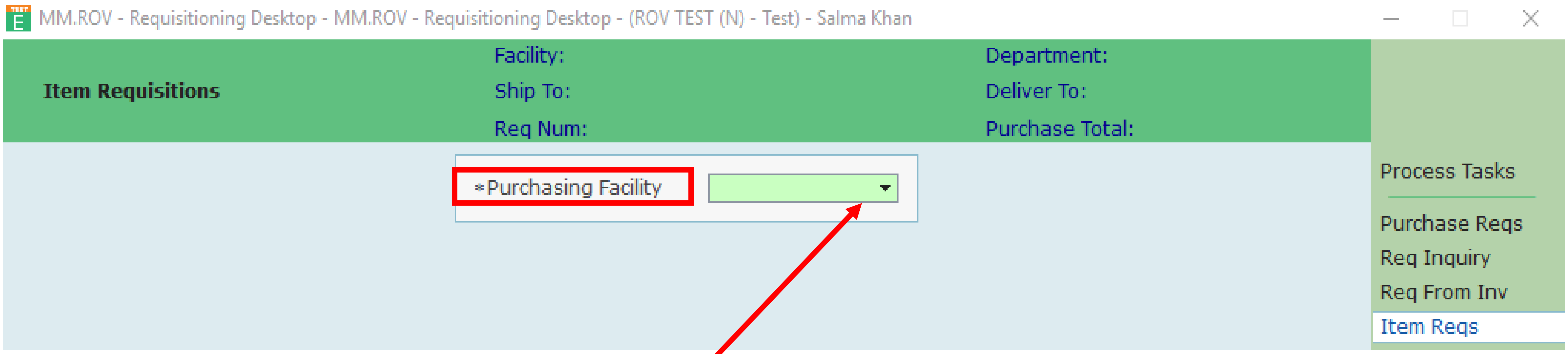

Select ‘Item Reqs'

# Step 2: Create a New Requisition




Select 'Create New Req'

# Step 3: Select a Purchasing Facility




**Use drop-down menu to select purchasing facility**

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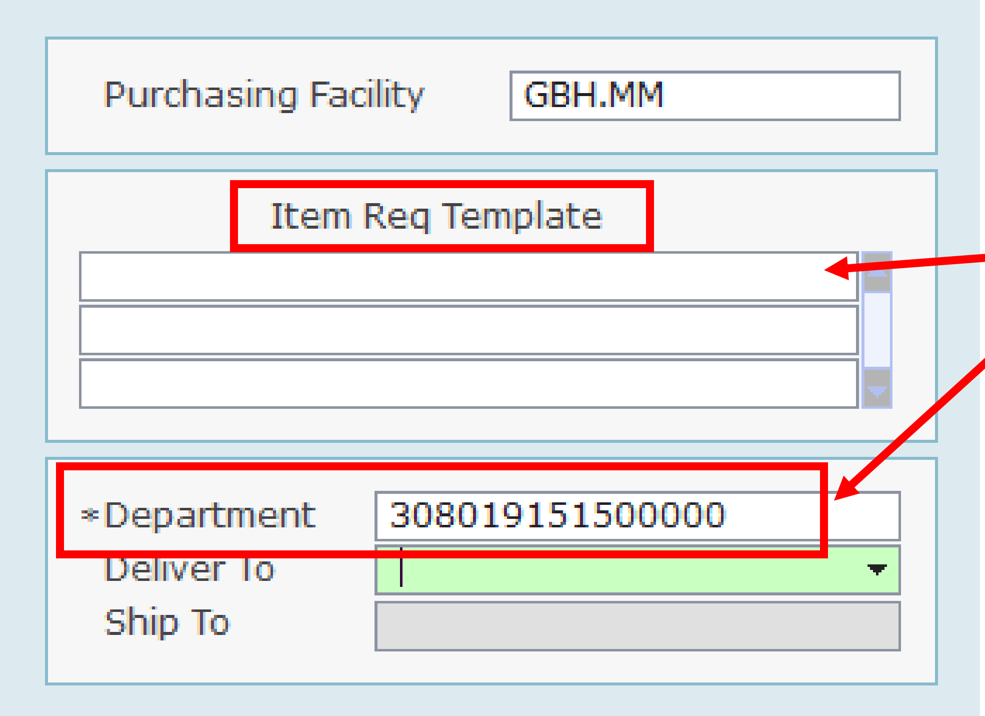
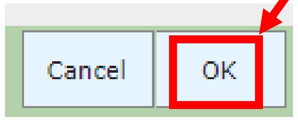
# Step 4: Select Requisition Template




Once the Purchasing Facility is selected, it will populate the drop-down menu of the **Item Requisition Templates** available.

The end user has the option to **select a template** or enter their **department code** and select items without the use of a template.

Once the information has been populated, click **'OK'**



# Step 4: Select Requisition Template

## Item Requisition Template

If you want to utilize an item requisition template, specify the template mnemonic here. Multiple requisitions templates can be used on one requisition. If the user that is creating the item requisition has limited access, then their lookups will be limited to templates that have their department(s), or are left blank. This is not a required field, so you can bypass it and add in lines manually if preferred.

## Department

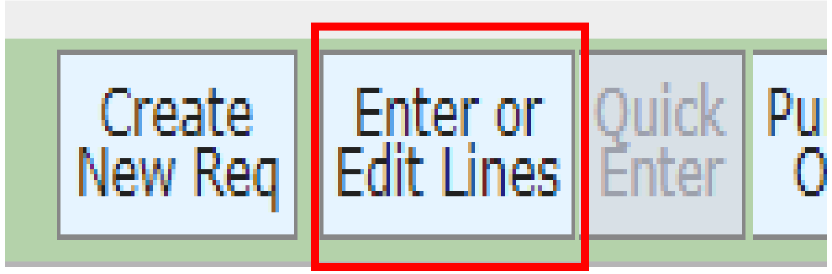
Enter the department the item requisition will be created for. A lookup for the departments you have access to will appear. If you have pulled in a template, the department field is populated with the department that is associated with that template

## Deliver To

This looks up to the Deliver To dictionary

# Step 5: Editing the Requisition

After selecting **'OK'**, you can now enter or edit the lines for this requisition




**Click 'Enter or Edit Lines'**

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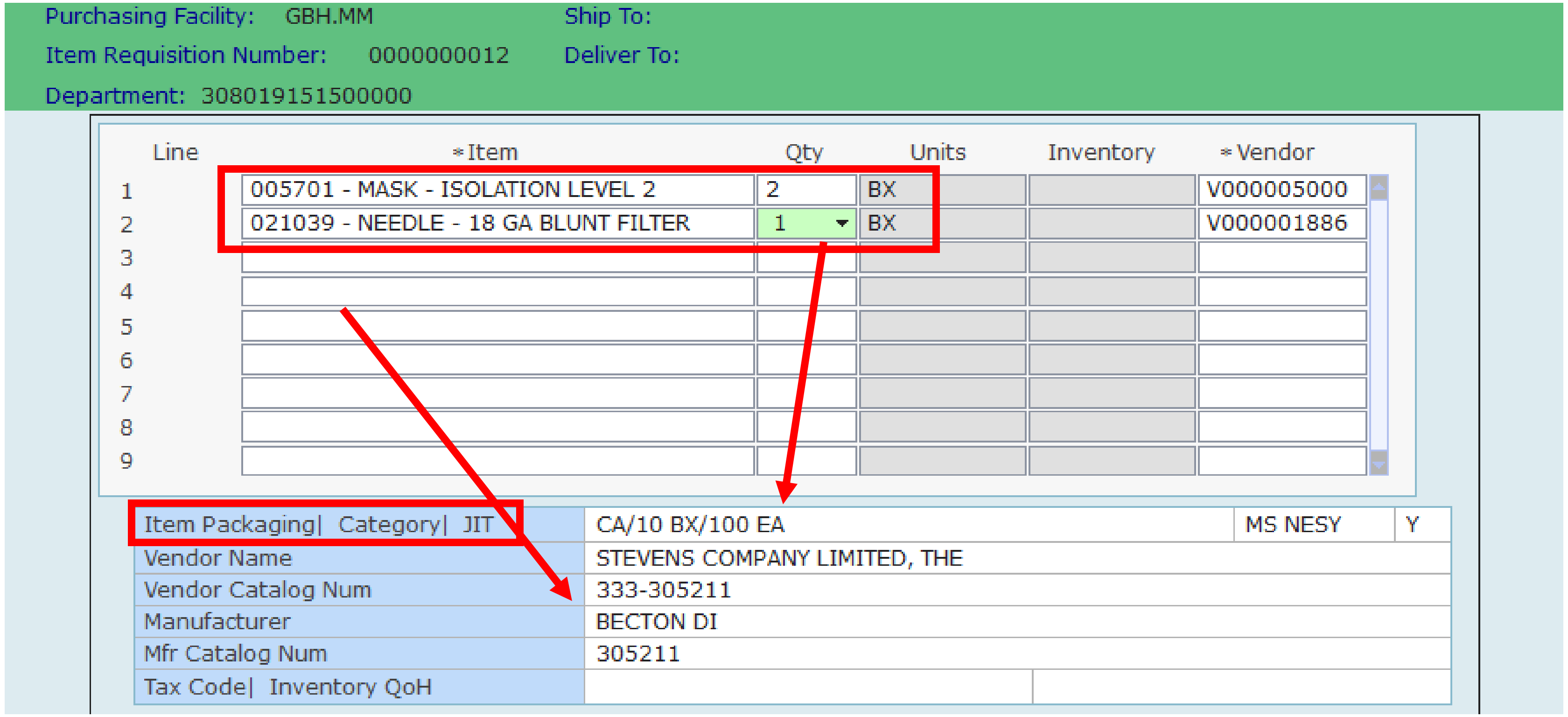
# Step 6: Entering Items and Quantities

Enter your items and quantities – again you will see the item packaging information on each item as you review



Purchasing Facility: GBH.MM
Item Requisition Number: 0000000012
Department: 308019151500000
Ship To:
Deliver To:

| Line | *Item | Qty | Units | Inventory | *Vendor |
|---|---|---|---|---|---|
| 1 | 005701 - MASK - ISOLATION LEVEL 2 | 2 | BX | | V000005000 |
| 2 | 021039 - NEEDLE - 18 GA BLUNT FILTER | 1 | BX | | V000001886 |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |

| | | | |
|---|---|---|---|
| Item Packaging\| Category\| JIT | CA/10 BX/100 EA | MS NESY | Y |
| Vendor Name | STEVENS COMPANY LIMITED, THE | | |
| Vendor Catalog Num | 333-305211 | | |
| Manufacturer | BECTON DI | | |
| Mfr Catalog Num | 305211 | | |
| Tax Code\| Inventory QoH | | | |

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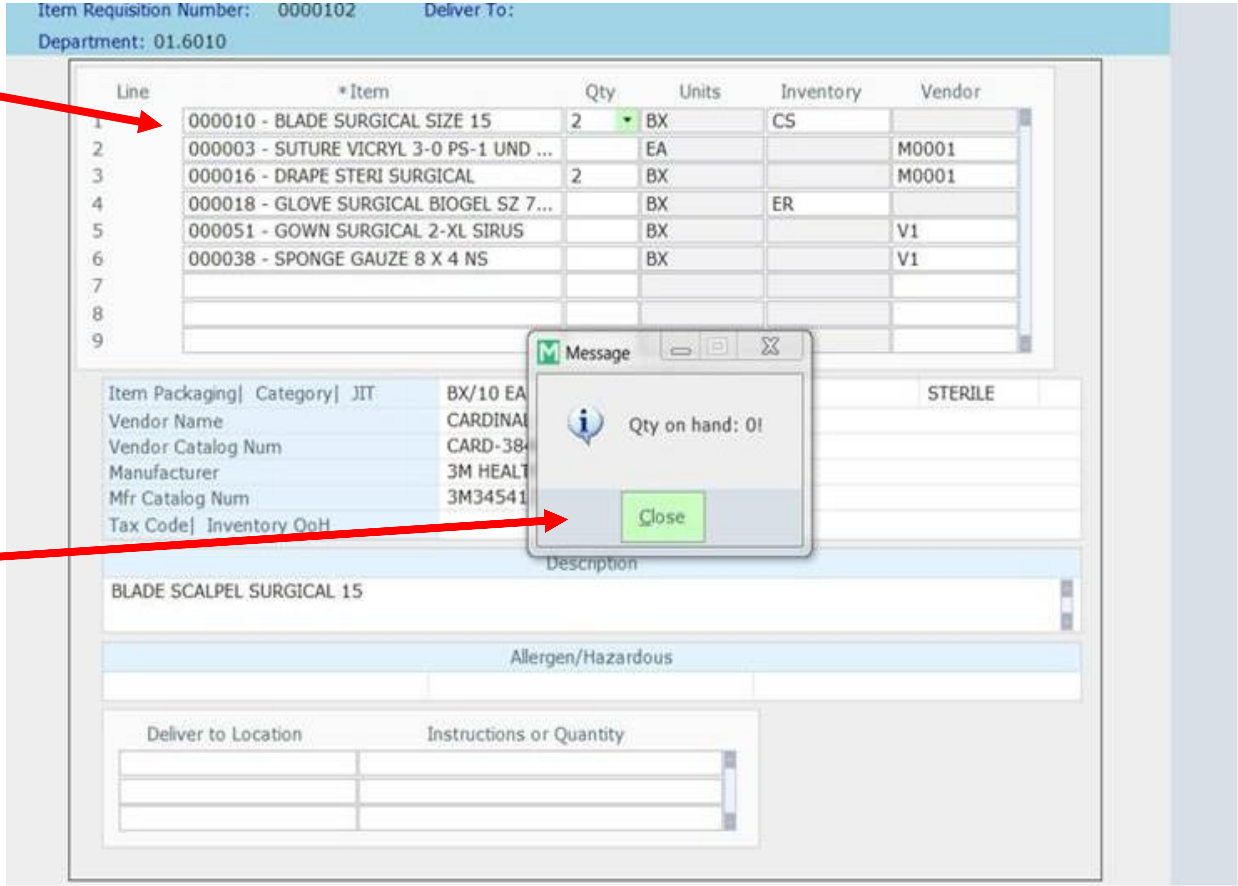
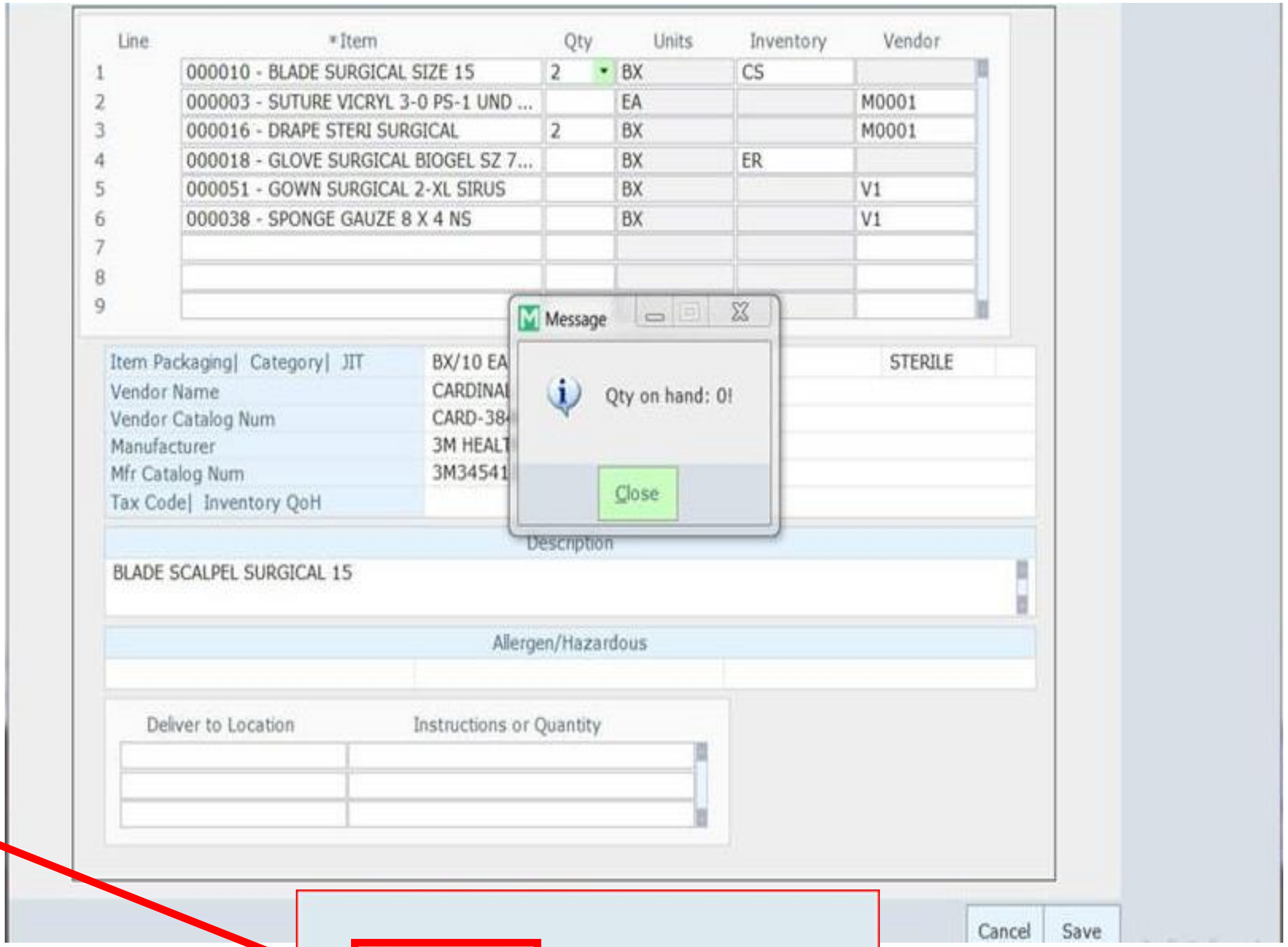
# When Entering a Quantity

- Under the **Item field**, if a template was used, the items that were on the template(s) that was chosen fills in – users can add or remove items
- They will also add in the quantity for items that they want to request
- By selecting an inventory, the system will generate an inventory requisition upon posting the item requisition
- If they request an item from an inventory, and there are not enough on hand, you will get a soft warning: **Qty on Hand: X!** The quantity will stay the same unless the user decides to move it, and it will go on to be added to the Inventory Requisition
- By bypassing the inventory and selecting a vendor, the system will generate a purchase requisition.

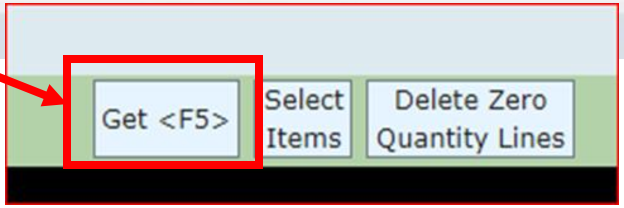


# Step 7: Adding Items not on the Template

## *Get <F5> Routine*



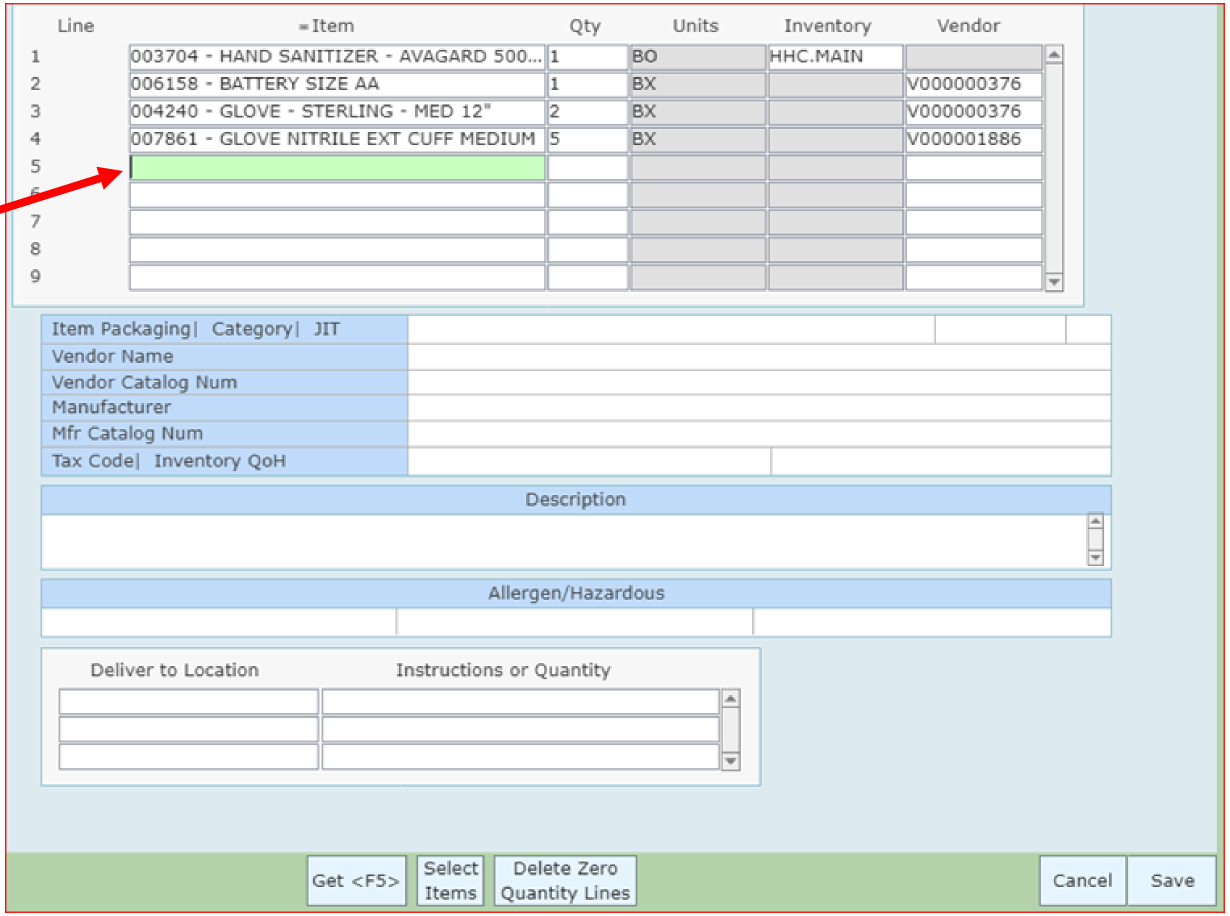

**Get <F5>** Use this routine to do a search for an item within a template to adjust the quantity



# Step 7: Adding Items not on the Template

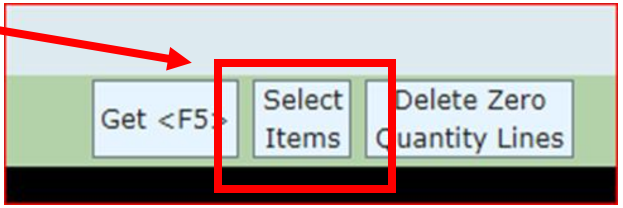
## *Select Items*

Users can ultimately add an Item to the Requisition from their template by selecting the next (blank) line and initiate a search by Item# if they know the exact number, or search by key-word to add it.




### Select Items

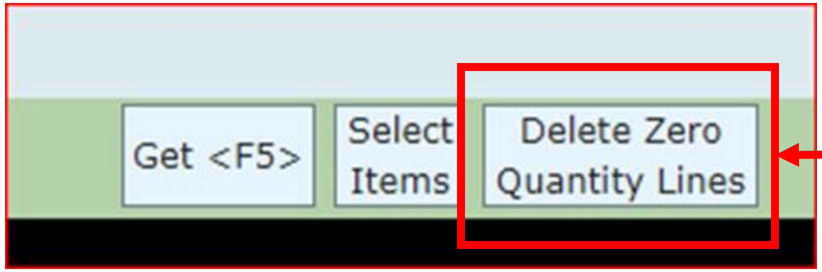
Use this routine to select items that you want to add to the selected requisition



# Step 7: Adding Items not on the Template

## *Zero Quantity Lines*

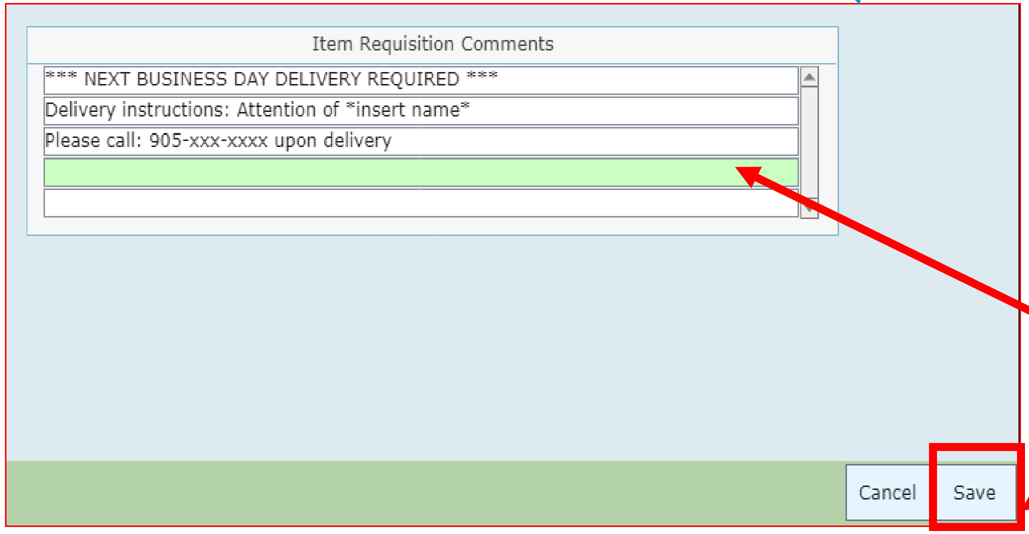
Before you can save the requisition, users must **delete** the **Zero Quantity Lines** to remove any of the items that they did not request with a quantity.




**Click ‘Delete Zero Quantity Lines’**

# Step 8: Adding Comments or Notes

Comments / Notes can be added to the Requisition
(i.e., special instructions for the delivery and/or to the attention of a specific user.)


- Once notes are entered, click **‘SAVE’**
- Notes will automatically appear on the Purchase Order.

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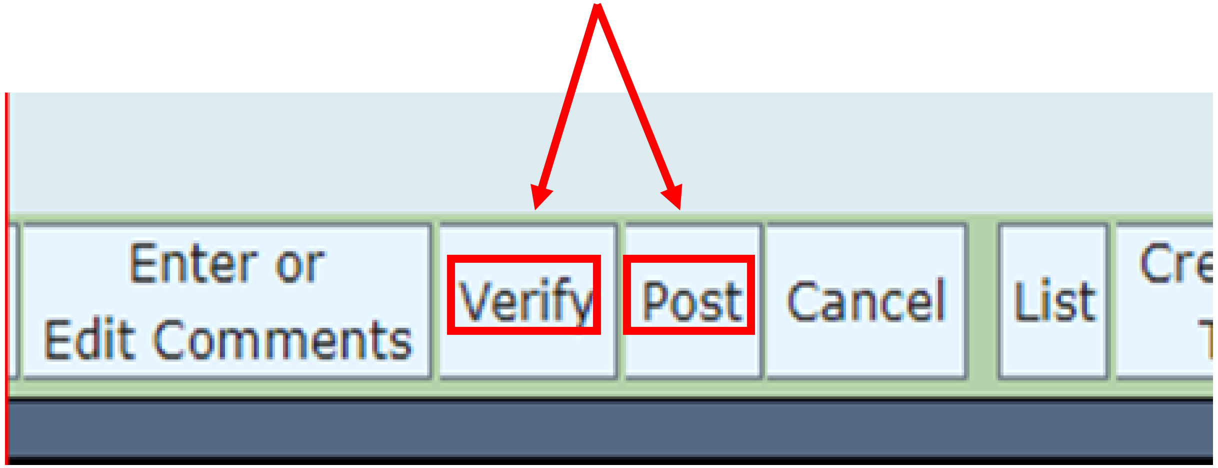
# Step 9: Review and Verify Requisition

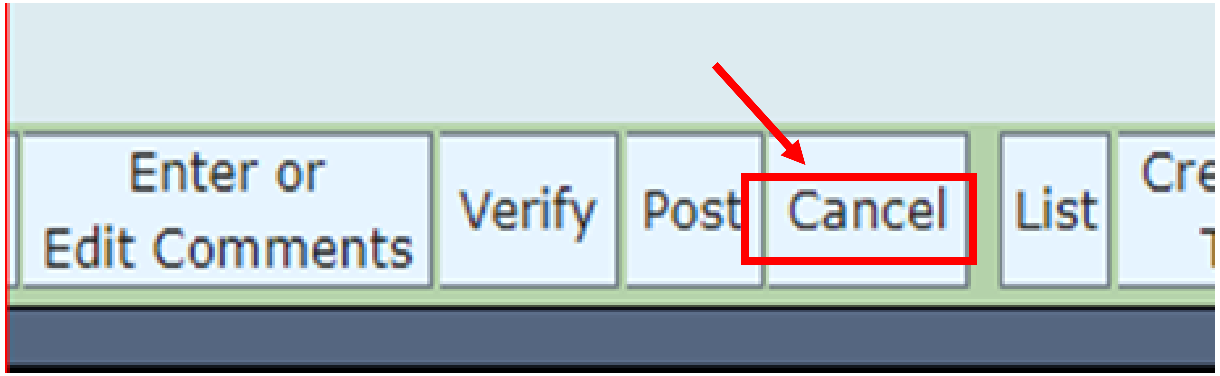
- Review your requisition prior to **verifying** and **posting**.
- Once your review is complete, the Requisition must be first “**VERIFIED**” by the authorized staff member (yourself or Department Manager User) and then successively “**POST**” it to ensure items are transmitted into a Purchase Order.
- When the requisition is in the Verified/Open status you can no longer add lines and/or comments as the information has been transmitted to the Purchasing Dept.



# How to Cancel your Requisition

Click to change the status of the selected item requisition from either WORKING or OPEN status to CANCELLED

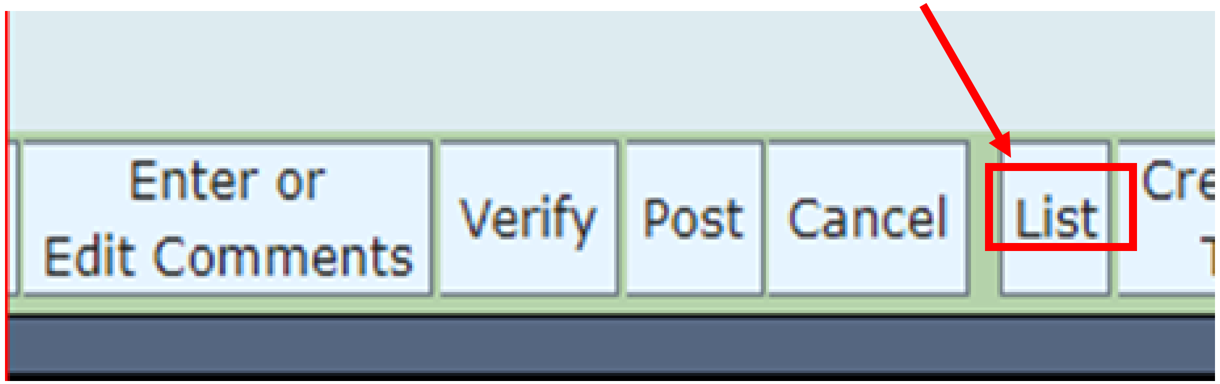
You can **cancel** your requisition as long as it has not been converted to a Purchase Order (PO). Therefore, **cancel** before a requisition is posted.



# How to Review a Requisition List

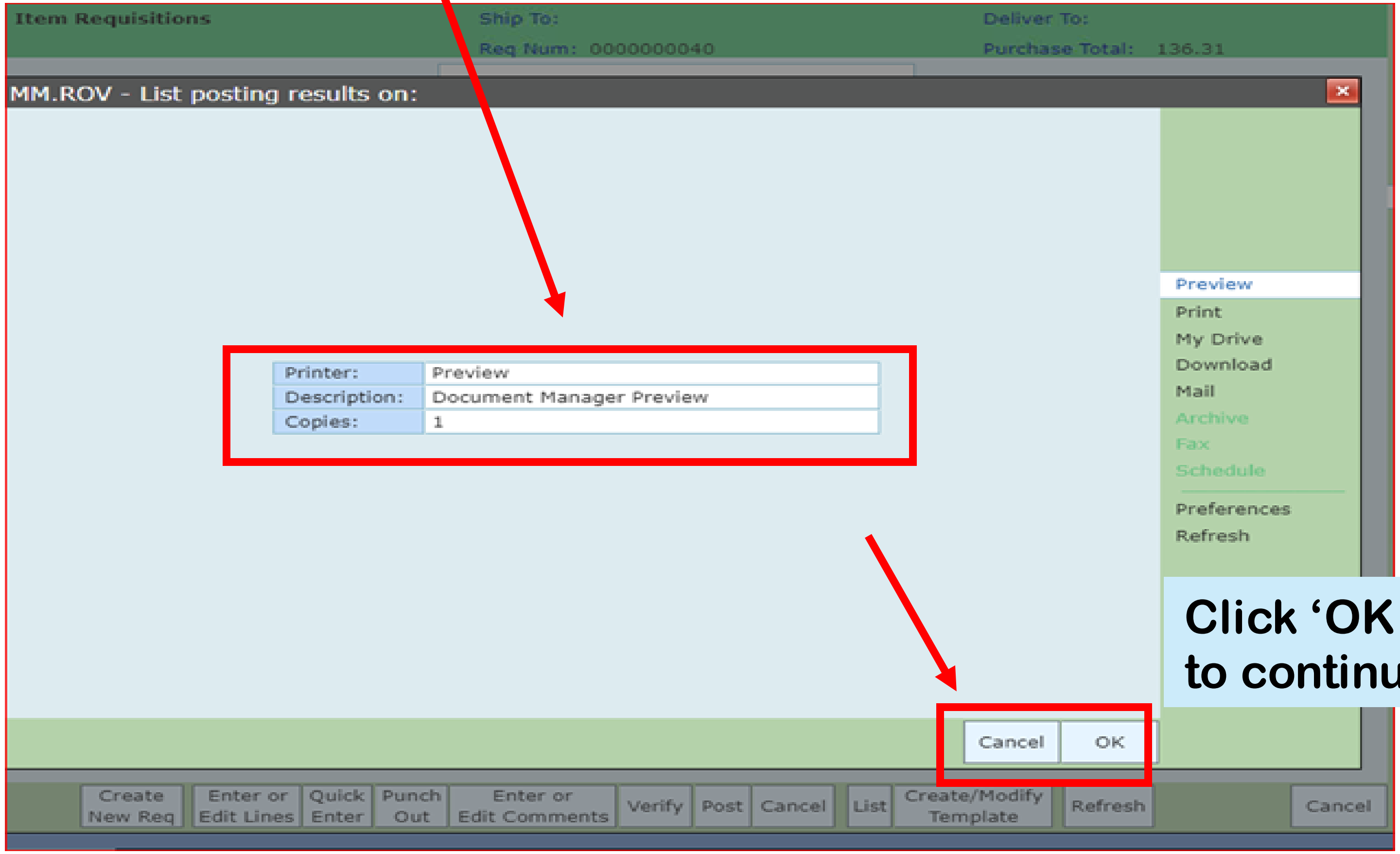
Use the '**List**' routine to include specific information on the Item Requisition Report.

This report can be used to list the purchase and/or inventory requisitions that were created from the selected item req.



# Step 10: After Posting a Requisition

When posted, a preview message will automatically appear on your screen with a confirmation of your new Requisition:




**Click 'OK' or 'Cancel' to continue**

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# Step 11: Confirmation of New Requisition

After clicking **'OK'**, you can view the confirmation and details of your new Requisition (outlined in the **Item Requisition Post** below)

DATE: 16/04/21 @ 1303 Care4 MM - TEST PAGE 1
USER: ATTERO01RV Item Requisition Post

Item Requisition Number: 0000000040 Purchasing Facility: HHC.MM

Posting Results

Purchase Requisition: 0000000033 Purchasing Facility: HHC.MM created and verified!

Stock Requisition: HHC.MAIN 19 created!

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# Materials Management (MM) Requisitions

## Training – Manager / Director Approvals

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HEADWATERS Health Care Centre

RVH Royal Victoria Regional Health Centre

# MM Requisitions

## *Manager / Director Approvals*

This training is for Managers / Directors and others who may be required to approve an Item Requisition created by someone with a lower dollar value approval level.

# 3 Types of Requisitions

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2. **Purchase Requisitions:** For items purchased as needed and not stocked in the warehouse. Also referred to as direct purchases.
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**Note:** Item Requisitions are best practice and will be the focus of this training module.

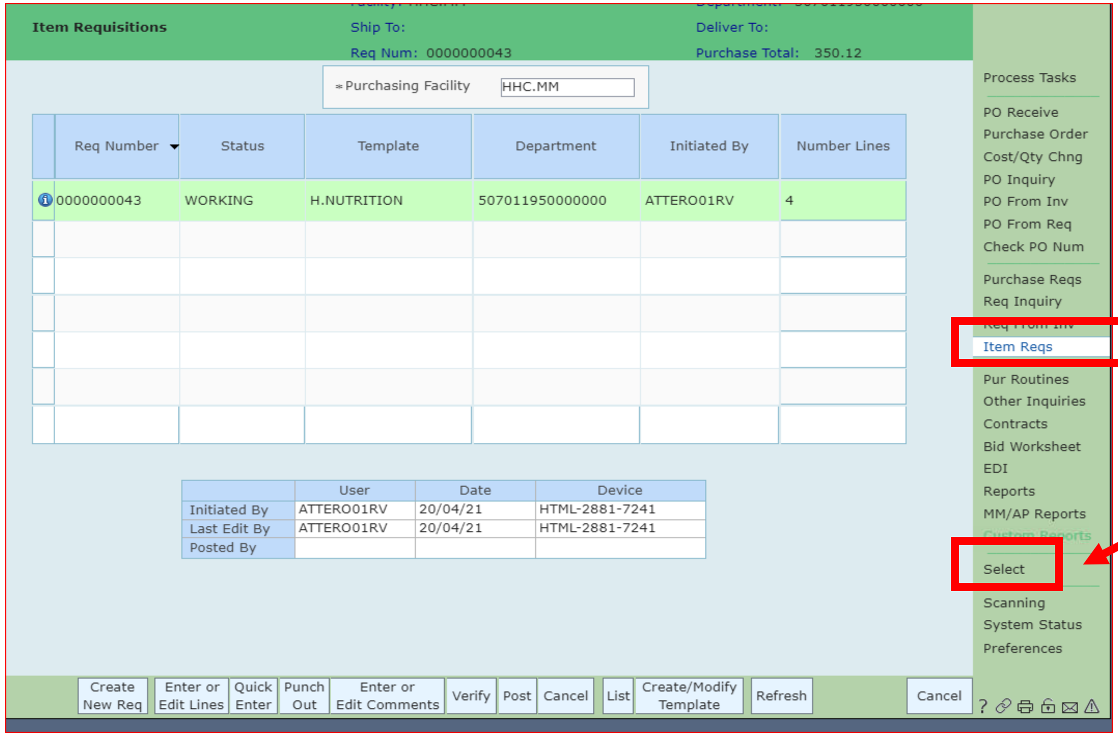
# Accessing Requisitions

To access any requisition go to the **Requisitioning Desktop**:

# Step 1: Verify and Submit an Existing Requisition

## Managers and Directors Verification of ITEM REQs

Managers/Directors that are required to verify and submit an existing Requisition must go to the **Requisitioning Desktop**, click on the **Item Reqs** button on the right hand side – then click ‘**Select**’

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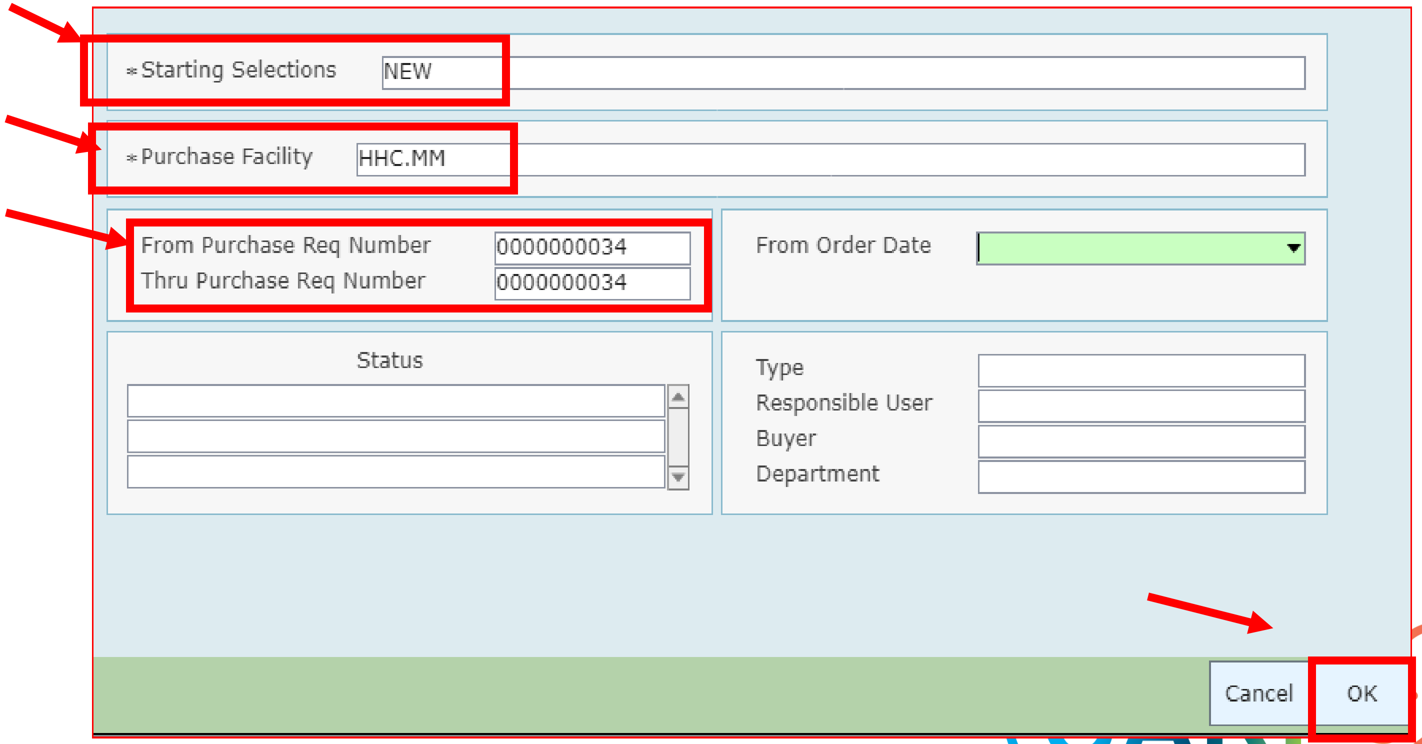
# Step 2: Selecting the Requisition

To populate the Requisition on your main screen, complete the following:

- In the **Starting Selections** field type ‘**New**’.
- Select/enter the **Purchasing Facility**
- Enter the requisition number in the **From Purchase Req Number** & **Thru Purchase Req Number** fields
- Click the **OK** button

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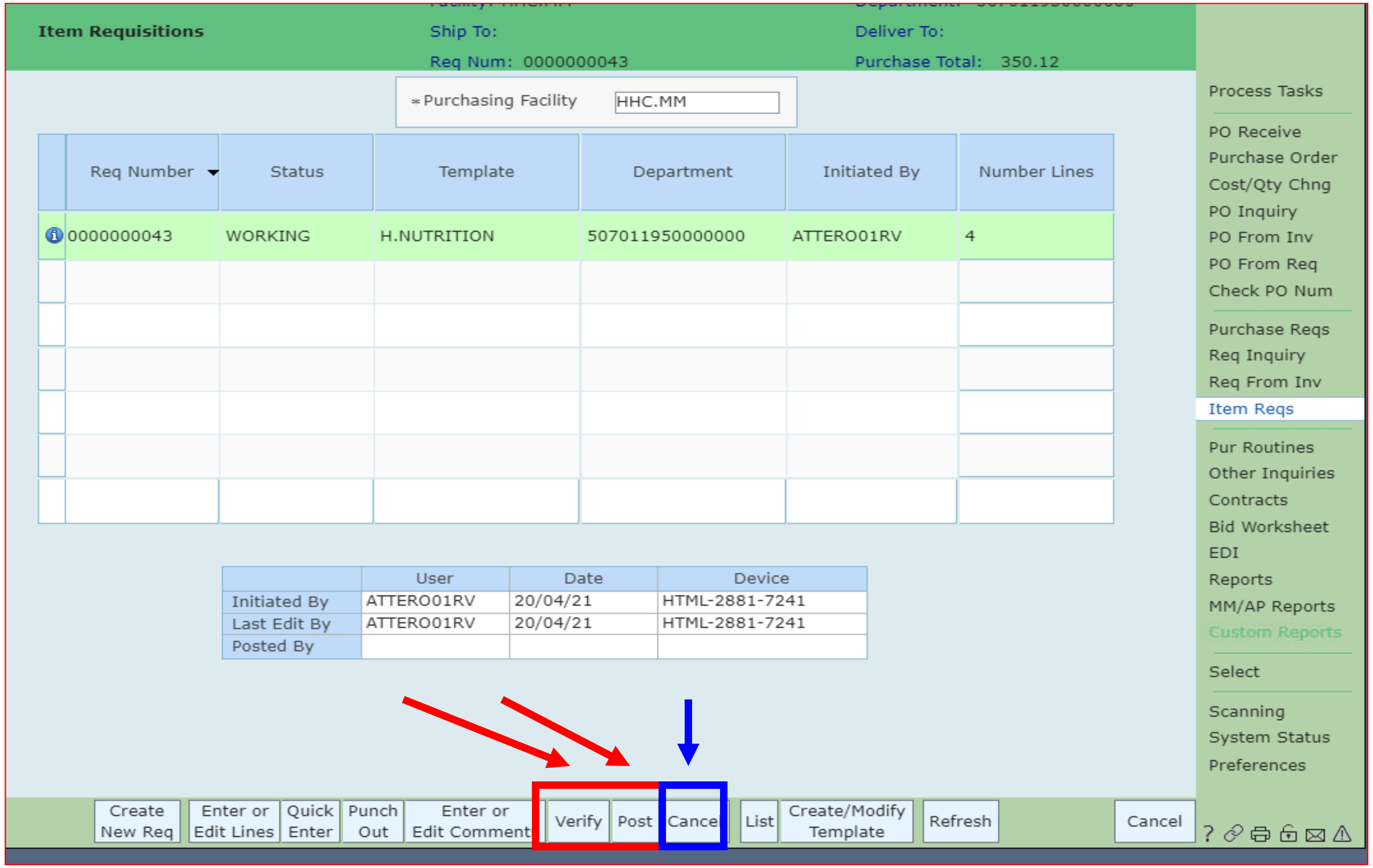
# Step 3: Verifying and Posting your Requisition

**Please note:** Based on the **Verify-Level groups access**, you will have the ability to **Print / Cancel**. Once reviewed, you must **Verify** and **Post** your requisition.

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