MM Requisitions
Training Manual

Version Date: April 2021

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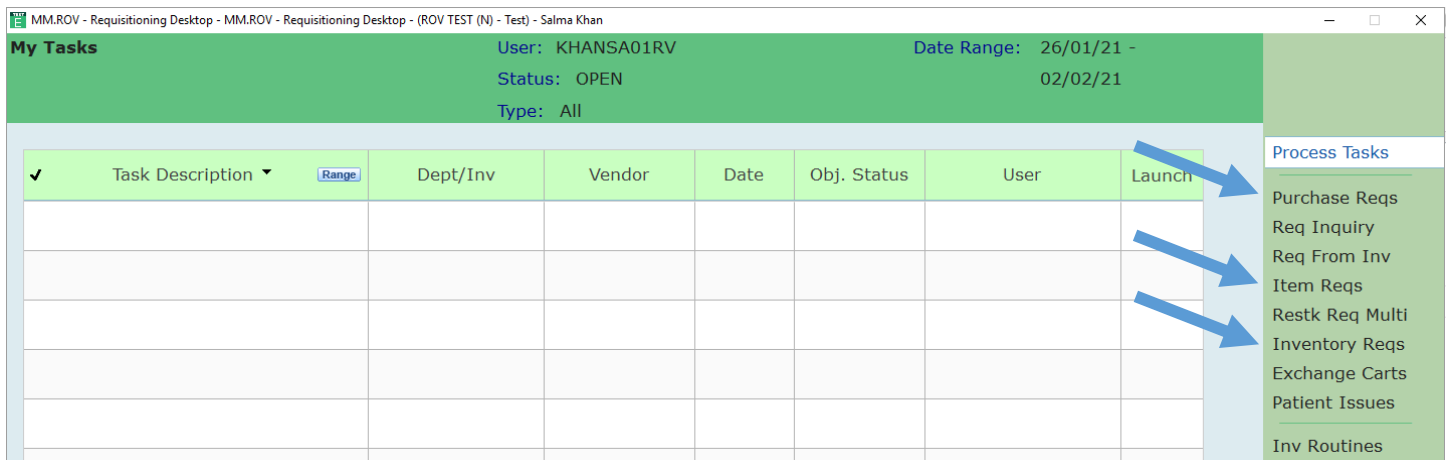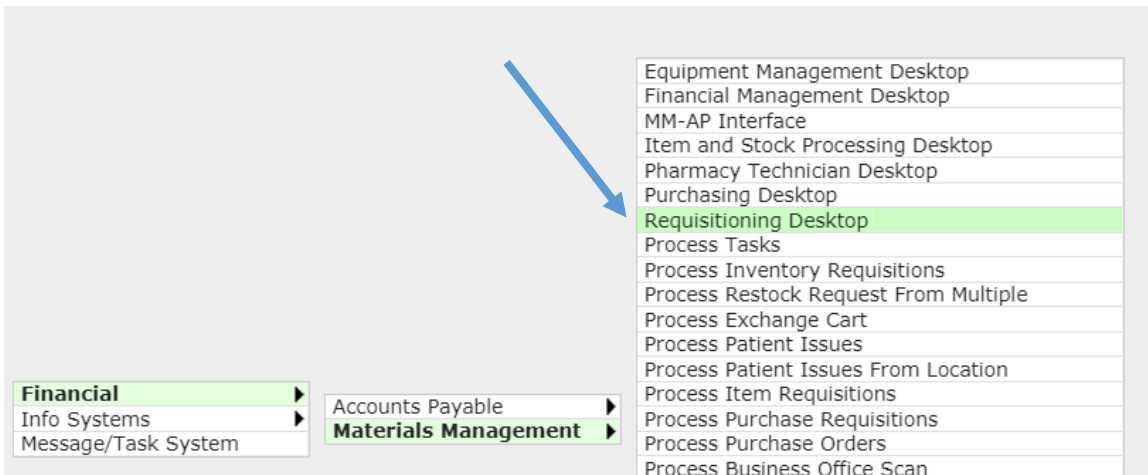
Requisitions

There are a number of types of Requisitions that we will review in this module;

1- Purchase Requisitions are for items purchased as needed and not stocked in the warehouse. Also referred to as direct purchases.

2- Inventory Requisitions which are for items stocked in our warehouse.

3- Item Requisition is 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 Materiel Management.

To access any of these requisitions go to the Requisition Desktop

Purchase Requisitions

Select your Purchasing Facility

Create and New Requisition   'N' for Next
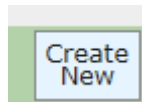
Then enter the Type of Requisition, in this case it will be a 'Purchase' Requisition following by your department number (where the cost for the purchase will be expensed to), then order date 'T' for today, and your user name.

When all necessary information is entered 'Save' the requisition,

Cancel	Save

Once this file is saved the new Purchase Number will appear on the bottom of your list.

Items can be added through a Non Stock Requisition – Items preselected for a specific department

Create New	General Data	Lines	Punch Out	Delete Line	Finalize Lines	Verify	Print	Create From NonStock Req	Inquiry	Other Functions	Refresh
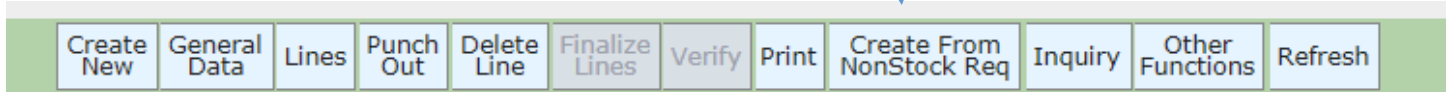
Select the Non Stock Requisition created for your department and how you would like to review these items (by worksheet, item number or requisition)

The items that have been made available for you are listed. As you view each item the item's packaging information is displayed at the bottom of the screen for your reference.

At this point enter the quantities you are requesting on each item as needed

Req Num: 0000000007   Department: 308019151500000 GBH Ward Rehab
Purchasing Facility: GBH.MM   Ship To:
Status: WORKING

Use Non Stock Req	REHAB
*Sort Order for Items	

	Item Number	Item Description	*Qty	*Unit	Tax Code
1	021912	DRESSING TEGADERM 15X20CM	1	BX	
2	004285	DRESSING - ALLDRESS 10 X 10 CM	2	BX	HST
3	016493	MASK - REUSABLE FACE SIZE 5	1	EA	HST
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					

Current Packaging	CA/8 BX/10 EA
Vendor Number| Name	V000005000 CARE4 MASTER VENDOR PLACEHOLDER
Vendor Catalog Number	M1628
Allergen/Hazardous 1	
Allergen/Hazardous 2	

*Copy Zero Quantity Items	N
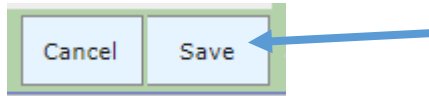
Once complete 'Save' the Requisition

The Requisition is now available to 'Verify' by the authorised staff member.
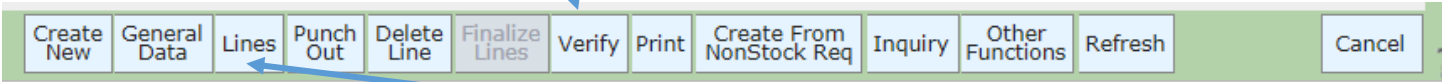
Depending on your access items can be added using the 'Lines' tab. These are items that are not on your pre-defined requisition template.

On the next screen enter 'N' at the Line Number prompt for the next line number and press enter.
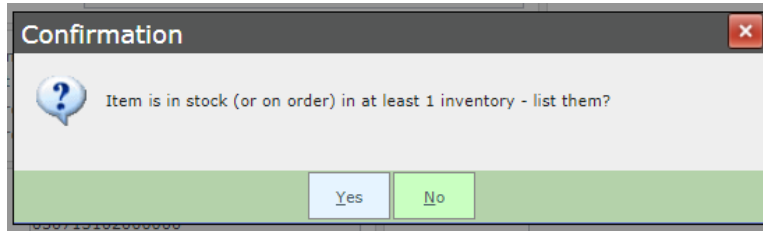
Req Number	0000000007 WORKING
Line Number	N

At the Item number field you can either enter the Expanse item number if you know the number, or do a Vendor Catalogue search, or do an item description name search.


You can continue adding as many line on the requisition by entering 'N' for the next line

If you attempt to order an item that is a stock item you will get a message:

MM Requisitions

Confirmation

Item is in stock (or on order) in at least 1 inventory - list them?

Yes   No

Select 'No' at this prompt, the item information will default in and appear on the screen.
Click on 'Cancel' to back out of the item and follow the procedure to order from inventory instead.
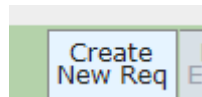
Cancel   Save
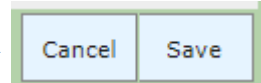
Once you enter all your lines the requisition will need to be 'verified' by an authorized person (yourself or your manager) before items can be placed on a purchase order.

Inventory Requisitions

Process Inventory Reqs

Inventory:
Req Number:
Description:

*Inventory ▼

Select the Inventory this product is stocked in

Create a New Requisition
Req Date 'T' for today
Type of Requisition is 'Recurring'

Create New Req

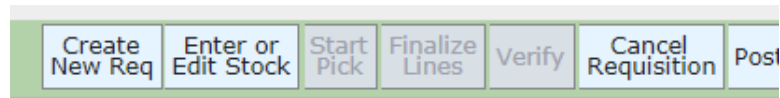| Status	WORKING
*Req Date	31/03/21
*Req Type	RECURRING

Enter your Department number and select the Requisition template for your department

Restock for Inventory
For Work Order| Equipment| Type
*For Department   030712403000000   IP ICU Comb M/S

Recurring Requisitions and Surgical Case Carts

CCU   CRITICAL CARE LEVEL 3

▼

And 'Save'   Cancel   Save
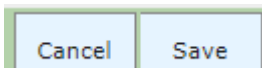
Next 'Enter or Edit Stock

The items attached to your department will be listed, enter your requested quantity in the first column. As you move to the second column the available quantity will automatically populate.

| Req Number: 21 | | | Type: RECURRING | For Work Order: | |
| Description: | | | Date: 17/08/19 | For Department: | 030712403000 |

| Stock Number	Quantity Requested	*Quantity Issued	Units	Item Description
000495	1	1	EA	PAD DEFIBRILLATOR ORANGE
000585			CA	CUTLERY SPOON TEA DISPOSABLE
001031			EA	TUBE ENDOTR UNCUFF 4.0MM
001035			EA	TUBE ENDOTR UNCUFF 4.5MM
002522	1	1	CA	CUTLERY KNIFE DISPOSABLE
014154			PK	TAG SECURITY RED
017850			CA	CUTLERY FORK DISPOSABLE
018020			EA	COLLECTOR PAIL BIOHAZ 5g WHT
021169			SP	WRISTBAND I.D. ALERT PINK
023926	200	0	EA	LID FOR 5 GALLON PAILS MS16
024129	6 ▼	6	PK	PAD DRI-FLO (FOR SKIN IQ)
026735			PK	COVER VEINLITE LED+ DISP PLAS
026858			SP	WRISTBAND TYVEK PURPLE
026859			SP	WRISTBAND TYVEK PURPLE-STRIPED

Current Packaging	CA/6 PK/12 EA
Allergen/Hazardous	
1	

If the quantity you are requesting isn't currently available you will be advised.

"Save' once complete
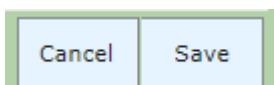
Your Requisition should remain in **'Working Status'** until it is filled by Materiel Management.

Item Requisition

Select your Purchasing Facility

If you have an Item Requisition Template available you can select it now followed by your Department

Press 'OK'

You can now enter or edit the lines for this requisition

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

Before you save it's important that you 'Delete Zero Quantity Lines' on the requisition
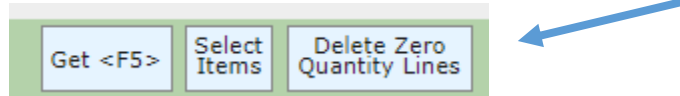
Once complete remember to 'Save'

The Requisition is now available to 'Verify' by the authorised staff member.