CARDS
Education Guide

Education Guide Content

CARDS =
Create Amend Report Deactivate Sourcing

- CARDS is the website you will need to use to communicate with SSW Data to have new items or new vendor created within CARE4 Expanse – it is also utilized to amend any existing Items or Vendors.

- This is a private secure website, so each of your IT departments has been engaged to ensure the access is set up before Go Live on September 18th 2021

- The URL is: https://www.ssw-mdm.com/care4

Please complete your information under **Requestor** to validate a CARDS request :

Requestor Info:

Name *

First and Last name

Email *

name@domain.ca

Phone *

905-555-5555

Ext.

1234

Hospitals *

☐ Collingwood General
☐ Georgian Bay General
☐ Headwaters Healthcare
☐ Royal Victoria

Requested Completion Date *

Please be aware Reports and Contract Pricing Update Request are typically 5 business day to complete. Requests to Create or Amend item or vendors are typically 1-2 business days for completion from the time all the required information is submitted. Typical timeframes are offered as a guideline. Actual completion timing is dependent upon the complexity and volume of the request.

Continue

Please note: It is important to fill the Requestor information before you fill any field on the request tabs, because adding your requestor details <u>after</u> completing the request may delete what you have already entered or files attached.

CREATE ITEM

Once you have completed the Requestor information, navigate to the Item Create tab by clicking on the applicable headings.

Any field marked with a red asterisk is mandatory for Item set up.

The Submit button will not function if a mandatory field is left blank.

Using N/A or Not Available for a mandatory field will only delay processing of your request and is strongly discouraged.

CREATE ITEM

To submit a **New Item** request you must provide an approval letter from a Vendor stating the Item description, Vendor Catalogue#, Manufacture#, Packaging String with Unit of Purchase and Price per UOP (Unit of Purchase).

Letters or documents from the Vendor can be attached if desired, as well as any additional comments can be added within Comments field.

Any field marked with a red asterisk is mandatory for Item set up; the Submit button will not function if a mandatory field is left blank.

CREATE ITEM - Mandatory fields

- **Replacing item** (Y/N) if yes what is the item # that this new item is replacing ?
- **Item Description** : we are following the GS1 naming conversion for Items (Noun first then descriptors eg. GLOVE EXAM VINYL LARGE (not VINYL EXAM GLOVE LARGE). Any submission that does not follow the naming conversion will be amended by SSW Data
- **Item stocked** (Y/N)

    If yes, we need to know which inventory it is to be added to.

    SSW Data does not set up Min /Max levels etc only add the item to the inventory.
- **Vendor Name or Expanse vendor #**
- **Manufacturer Name**
- **Manufacturer catalogue #**
- **UOP** (Unit of Purchase) (eg Each, Box , Case)
- **Packaging String** (e.g. case/12 boxes/10 each)
- **Price**
- **EOC** (Expense Object Code) : if you are uncertain of the EOC please discuss with your manager or hospital finance.
- **Implantable** (Y/N)
- **Contains Latex** (Y/N
- **Safety Engineered** (Y/N)
- **Taxable** (Y/N)

CREATE ITEM – Other Fields

Non Mandatory fields include

Cat. (UNSPSC) : if you know the Meditech category for the item being requested please input it here; if not this will be populated by SSW.

Procedure code (Proc) : typically not used by CARE4 and can be left blank

Contract # - if you know the contract # that the item is on please enter it here. Once a contract # is entered the contract Expiry date will be required; if you do not know the expiry date enter today date and the Data Steward will research and confirm.

GTIN ; GTIN UOM ; GTIN Price :- typically not used by CARE4 and can be left blank.

THP – Proc Code : this field is specific to one of our members (Trillium Health Partners) and should be not used by CARE4
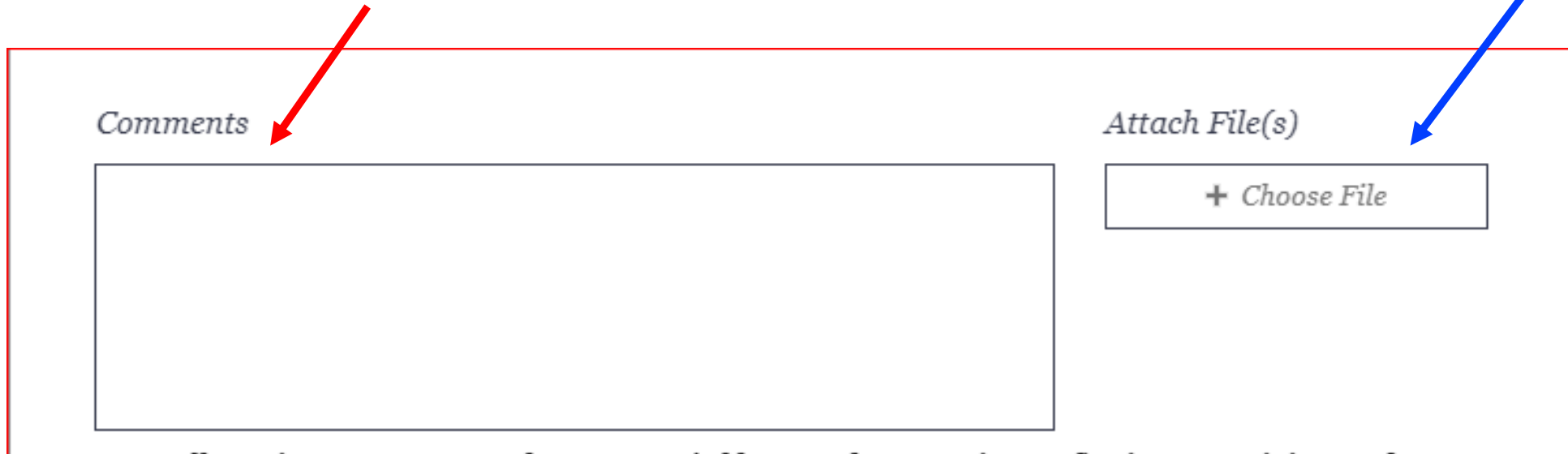
Comments : please enter in the field any additional information that you feel is important for us to know.

CREATE ITEM

To submit a **New Item** request you must provide an approval letter from a Vendor stating the Item description, Vendor Catalogue#, Manufacture#, Packaging String with Unit of Purchase and Price per UOP.

Letters or documents from the Vendor can be uploaded to the request in the Files box, as well as comments if you need to communicate some more detail.

Comments

Attach File(s)

+ Choose File

Create Item	Create Vendor

Create Item

Replacing Item? *

Select one...

Item Description *

Item Description Line 1

Item Description Line 2

Item Stocked *

Select one...

Vendor Name/# *

Manuf. Name *

Vend. Cat. # *

Manuf. Cat. # *

UOP *

Package String *

Price *

EOC *

Cat. (UNSPSC)

Procedure Code

THP-PROC Code

Select one...

Implantable *

Select one..

Contain Latex *

Select one...

Safety Engineered *

Select one...

Taxable *

Select one...

Contract #

GTIN

GTIN UOM

GTIN Price

1) Fill in all mandatory fields

2) Attach a letter from the Vendor

3) Add comments if desired

Comments

Attach File(s)

+ Choose File

CREATE ITEM

When all fields have been entered click "**Submit**"
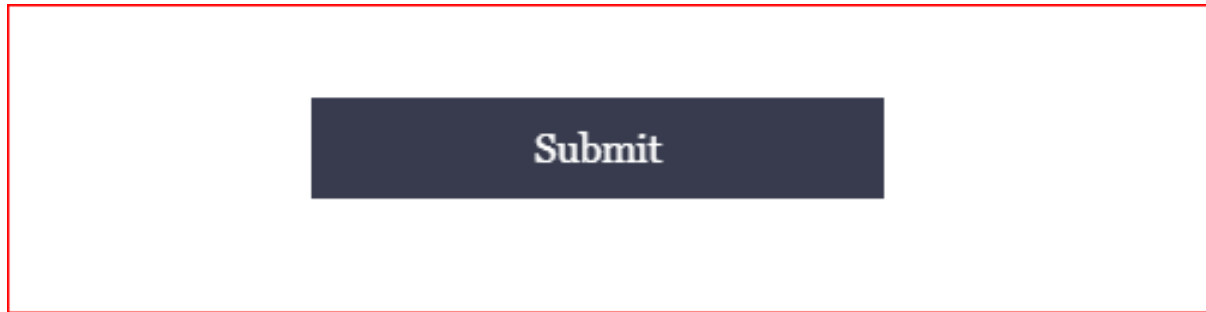
You will receive a "Successfully Submitted " message pop up and will be advised by the Data Steward once your request has been completed.

AMEND ITEM

To amend an existing Item you will need to fill the required fields with the updated and approved information letter provided by the Vendor, attach the file and add comments as desired:

Amend Item

Meditech Item Number *

Vendor Name / Vendor #

Item Description   **Add Vendor Name / Number**   **Remove Vendor Name / Number**

Vendor Catalogue #   **Manufacturer Name**   **Contain Latex**   **Safety Engineered**

Select one... ⌄   Select one... ⌄

Contract / Initiative #   **Taxable Status**

Select one... ⌄

EOC   **Price**   **THP-PROC Code**   **GTIN**

Select one... ⌄

GTIN UOM   **GTIN Price**   **Unit of Purchase**   **Package String**

Comments

Attach File(s)

[+ Choose File]   *All amend item requests must be accompanied by a vendor quotation.*

AMEND ITEM

Requests involving a change to the vendor or manufacturer catalogue number require the SSW Data Management Manager approval.

Please ensure an explanation for the change is included in the request.

Some catalogue # changes involving significant change to the product may result in a new Item # being created instead of an amendment.

AMEND ITEM

When all fields have been entered click "**Submit**"
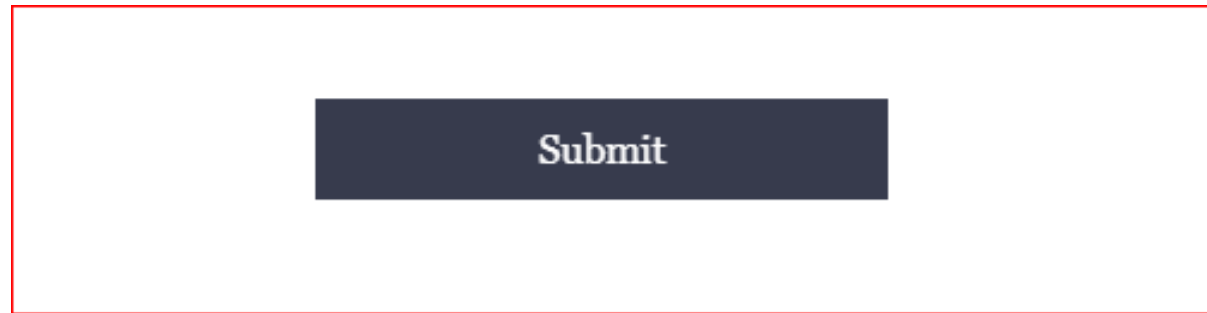
Submit

You will receive a "Successfully Submitted " message pop up and will be advised by the Data Steward once your request has been completed.

DEACTIVATE ITEM

To **deactivate** an existing Item you must provide a written approval from the Hospital designated individuals for the coordination of acceptances for product evaluation/conversion/substitution and upload the approval in the Files box:

Deactivate Item	Deactivate Vendor

Deactivate Item

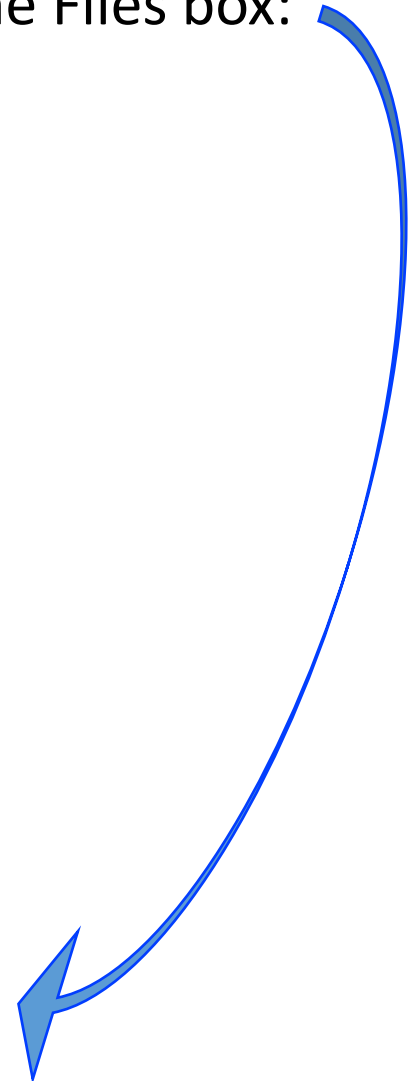Stocked Item? *   Meditech Item Number *   Replaced by Item #

Select one... ∨

Reason Code *

Select one... ∨

Comments

Attach File(s)

+ Choose File

All requests to deactivate an item must be accompanied by written approval from the applicable hospital designated individuals for the coordination of acceptances for product evaluation/conversion/substitution.

DEACTIVATE ITEM

A reason must selected from the drop down for any deactivation.

In order to complete a deactivation, there can be no active PO's, no e-requisitions pending and for stock items no quantity on hand.
If any of these exist it will delay the request from being completed.

Reason codes:
Discontinued
Duplicate item
Reason for use no longer exists
Technology change
Manufacturer has changed
No longer preferred (special circumstances.)
Off contract item that has been replaced by a contract item

Deactivate Item	Deactivate Vendor

Deactivate Item

Stocked Item? *   Meditech Item Number *   Replaced by Item #

Select one...

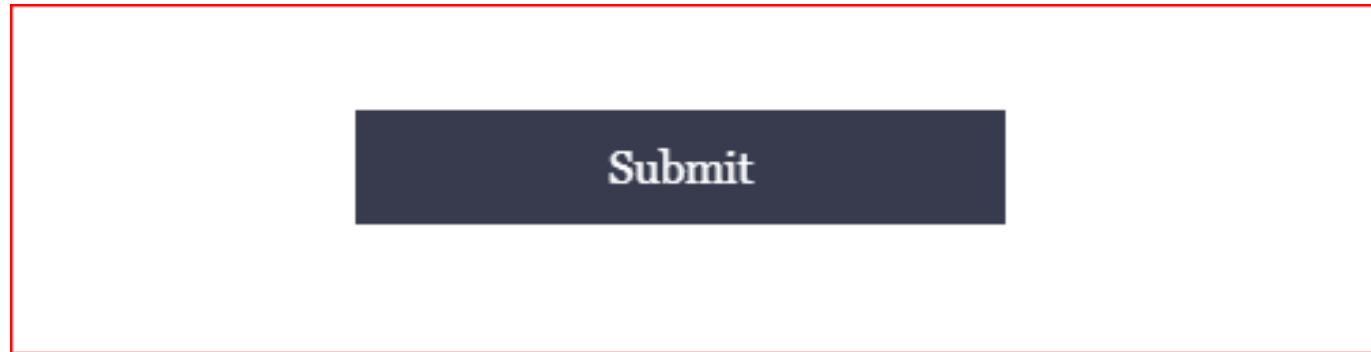Reason Code *

Select one...

Comments

Attach File(s)

+ Choose File

All requests to deactivate an item must be accompanied by written approval from the applicable hospital designated individuals for the coordination of acceptances for product evaluation/conversion/substitution.

DEACTIVATE ITEM

When all fields have been entered click "**Submit**"

Submit

You will receive a "Successfully Submitted " message pop up and will be advised by the Data Steward once your request has been completed.

VENDOR CREATE

Once you have completed the Requestor information, navigate to the Vendor Create tab by clicking on the applicable headings.

Create > Create Vendor

You are also required to declare that you have no conflict of interest with the Vendor you are asking be created/amended. This is require for anti-fraud purposes.

CREATE VENDOR

To submit a New Vendor requests you must provide a signed letter from the Vendor confirming their full Address, Remittance information, Tax ID number, Contact name, E-mail and Phone number:

Create Item	Create Vendor

Create Item

Replacing Item? *
Select one...

Item Description *

Item Description Line 1

Item Description Line 2

Item Stocked *
Select one...

Vendor Name/# *

Manuf. Name *

Vend. Cat. # *

Manuf. Cat. # *

UOP *

Package String *

Price *

EOC *

Cat. (UNSPSC)

Procedure Code

THP-PROC Code
Select one...

Implantable *
Select one..

Contain Latex *
Select one...

Safety Engineered *
Select one...

Taxable *
Select one...

Contract #

GTIN

GTIN UOM

GTIN Price

1) Fill all the mandatory fields

2) Attach a letter from the Vendor

3) Add comments if desired

Comments

Attach File(s)
+ Choose File

VENDOR CREATE – Mandatory Fields

- **Vendor name**: This is to be the full company legal name
  (e.g.: Cardinal Health Canada Inc – not just Cardinal Health)
- **Order from Address**: this is the address that all PO's should be addressed to and may or may not be the same as the remittance address. In the instance of a employee this may be a department name with City/Prov/PC as N/A
- **City - Province - Postal Code:** same as address
- **Vendor Type** – this is a key field for CARE4 as it indicates which vendor prefix will need to be set up.
- **Payment terms** - example : net 30 days ; or 2%10days net 30
- **Phone #**
- **Email address**
- **HST Tax ID** is not mandatory at this time but is highly recommended to be provided

CREATE VENDOR

When all fields have been entered click "**Submit**"
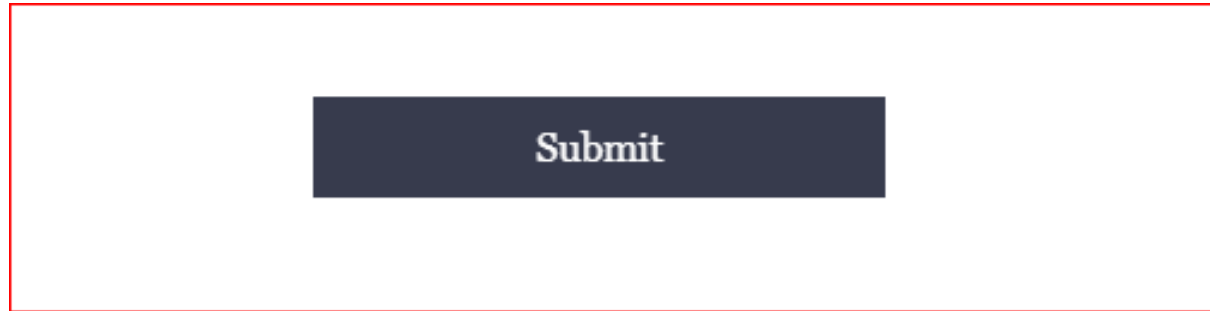
You will receive a "Successfully Submitted " message pop up and will be advised by the Data Steward once your request has been completed.

AMEND VENDOR

To amend a Vendor you will need a confirmation letter from the Vendor stating the correct information. You can upload the approval letter through the Files box.

Please fill in only the field that require an amendment.

Amend Vendor

Vendor Name *

Meditech Vendor Number *

Order from Address	Payment Terms	Customer Account #	HST / Tax ID Number

Order Phone Number	Order Email	Order Fax	EDI Field

Attach File(s)

+ Choose File
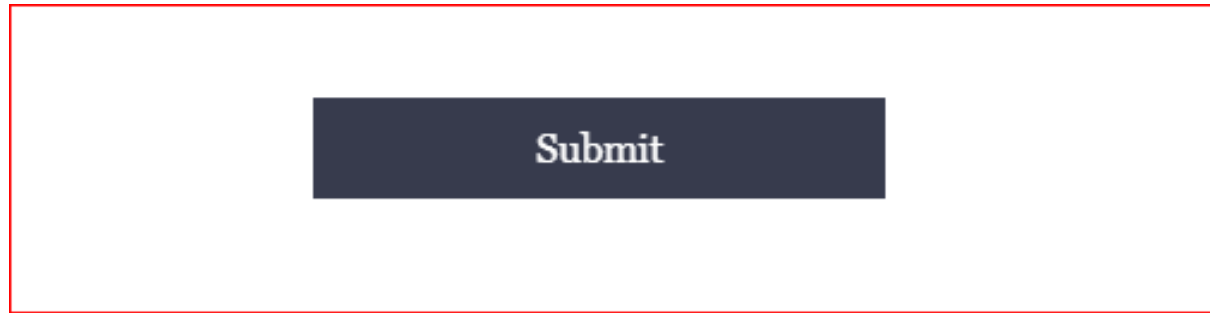
☐ I agree that by checking this box, and submitting this CARDS request, I declare that I have no conflict of interest with this vendor

Comments

AMEND VENDOR

When all fields have been entered click "**Submit**"

You will receive a "Successfully Submitted" message pop up and will be advised by the Data Steward once your request has been completed.

DEACTIVATE VENDOR

To submit a request to deactivate a vendor, you must provide an authorization letter from the Hospital Department Manager assigned, with a valid clarification for the reason the vendor is no longer in use:

All Vendor deactivation or blocking needs to be confirmed with hospital finance before being acted upon to ensure there are no pending financial transactions.
This may lengthen the time for completion of these requests.

DEACTIVATE VENDOR

When all fields have been entered click "**Submit**"

Submit

You will receive a "Successfully Submitted" message pop up and will be advised by the Data Steward once your request has been completed.

Expected Turnaround Time for Request Completion

This statement to the left appears on the CARDS portal.

At this time our completion time for basic Create or Amend requests is less than 24 hours.

Requests are processed on a FIFO basis - Adding URGENT within the Comments is not visible to the Data Steward until the Request is opened so does not expedite your request.

If your request is URGENT requiring less than this typical turnaround time you still must submit through CARDS but then advise the Data Manager jo-ann.ross@ssw.ca and explain the urgency. She can expedite with her staff for you.

Please ensure ALL mandatory info has been provided

Please be aware Reports and Contract Pricing Update Request are typically 5 business day to complete. Requests to Create or Amend item or vendors are typically 1-2 business days for completion from the time all the required information is submitted. Typical timeframes are offered as a guideline. Actual completion timing is dependent upon the complexity and volume of the request.

Questions ?

If you have additional questions please contact
Jo-Ann Ross, SSW Manager, Data Management
jo-ann.ross@ssw.ca

Thank you.