2019-20 BP1 Quarter 2 - IMATS Drill 2

Overview:

This drill will provide LHDs the opportunity to review existing inventory associated with your updated Primary and Secondary Distribution Nodes. You will also be tasked with clearing your current assets associated with these DNs.

Objectives:

Objective 1: Drill 2 will have you locate and review the inventory lists from the IMATS Training Site only. There will be **no activity on the Live Site for this drill**.

Objective 2: You will be creating pick lists and shipping documents to clean up historical inventory data that is no longer pertinent to your IMATS Training Site.

Prior to staring the drill:

- Log into the IMATS Site at https://sams.cdc.gov to complete this drill. Select the **IMATS Training Site** using **Internet Explorer**.
  - ➢ Some users have reported that they are unable to access SAMS. If you are unsuccessful at logging in three times in a row, your account will be locked, and you will need to contact CTS directly. To avoid locking your account, select Forgot Password. You will be prompted to complete your preestablished security questions and will need to change your password; however, this will save you contacting CTS for assistance.
- This drill is **specific to your Primary and Secondary Distribution Nodes**.
- All sites should have your health department name in the jurisdictions field and the county in the county field. (Setup-Facility-Search Facility)
- All sites should have a storage location type and storage location identified (Setup-Facility- Search Storage Location).
- Reminder when navigating the IMATS Site, there may be delays to connectivity. Please be patient to allow the platform to process the action.

Reference to complete drill:

- ➢ CTS IMATS Manual - Located on MIHAN https://michiganhan.org (Documents tab, Document Library > Local Health > SNS > IMATS > 2019-20 BP1 IMATS Drills) CTS IMATS Manual-User Guide 2019.pdf
- ➢ Contact Jeannie Byrne at byrnej2@michigan.gov for any other questions not identified in the manual.

Objective 1:

1. To determine the inventory for your facility from the **Inventory Management** menu, choose **Inventory**, then **Search Inventory**.
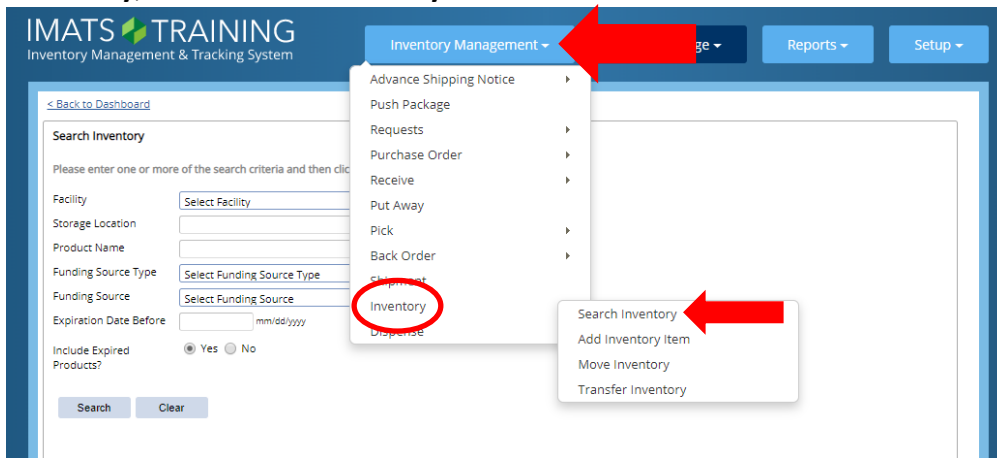
> From the **Facility** drop down list, find your Primary Distribution Node, select the box, then select search.
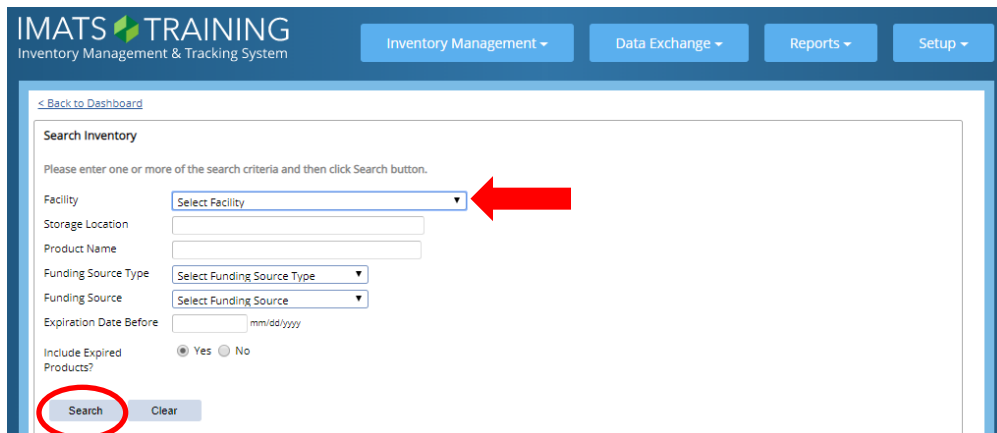

> Your assets for this facility will be displayed on the screen. If there are no assets in your inventory, the screen will display:
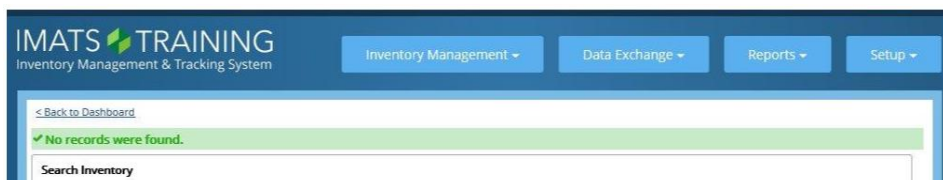

If **no records are found**, return to #1 and repeat steps for your secondary DN.
If no records are found for your secondary DN, then you may follow the process for your alternate facilities. If you do not have inventory within the IMATS Training Site, please contact Jeannie Byrne at byrnej2@michigan.gov.

2. **For records found,** create an Inventory Report. Go to the **Reports Menu**, select **Inventory Report.**
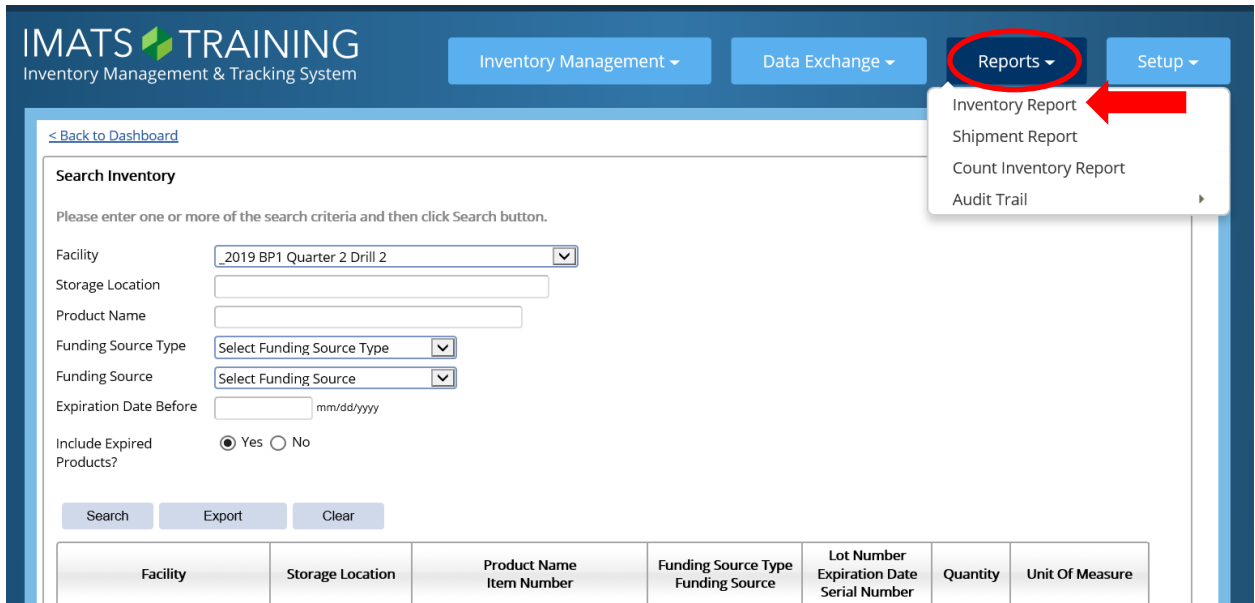
> There are four report options to choose from. For this drill search **Inventory by County** (selected by default) and locate your **Facility** in drop down box.
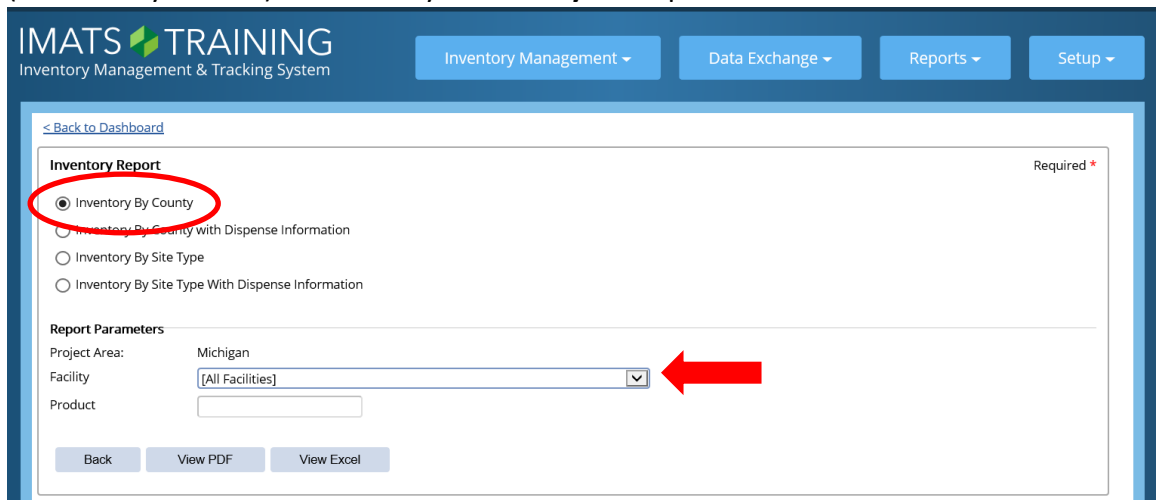
> Select View PDF or View Excel
> *(the format that you prefer, the data will be the same regardless of which option you choose to view).*
> Save the report for further reference as you will use this in Objective 2 activities.

You are now ready to proceed to Objective 2.

Objective 2:

1. From the **Inventory Management menu,** create a pick list. Select **Pick** and **Add Pick Lists.**
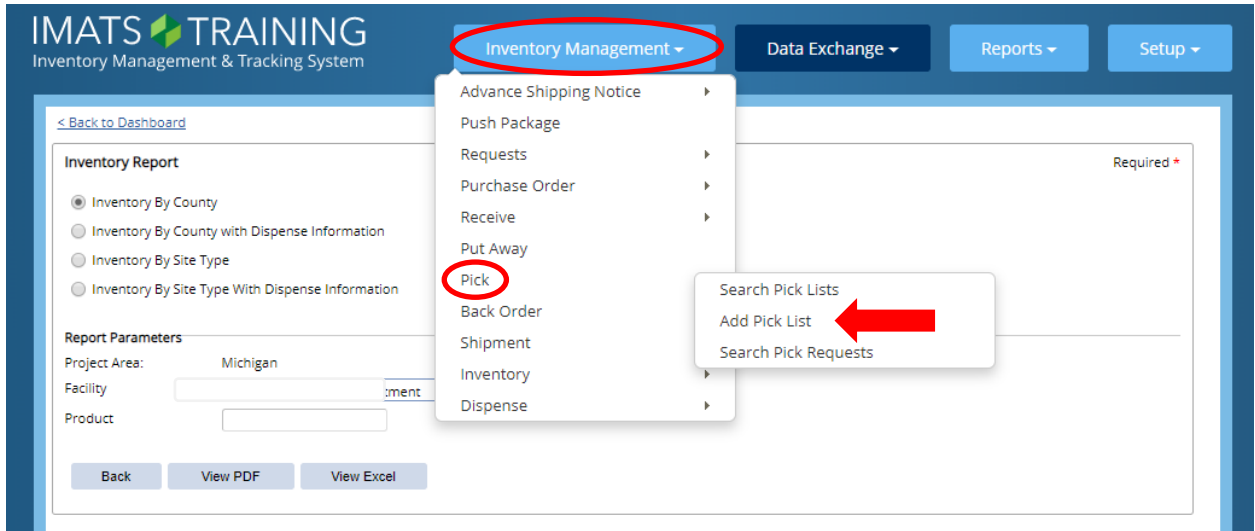
> From the New Pick List Dashboard, complete the required fields:
> - ✱ Select Facility (DN from the Inventory Report created in Objective 1).
> - ✱ The order date will be pre-populated.
> - ✱ Ship To (from the drop-down list), select **_2019 BP1 Quarter 2 Drill.**
> - ✱ Select Next.
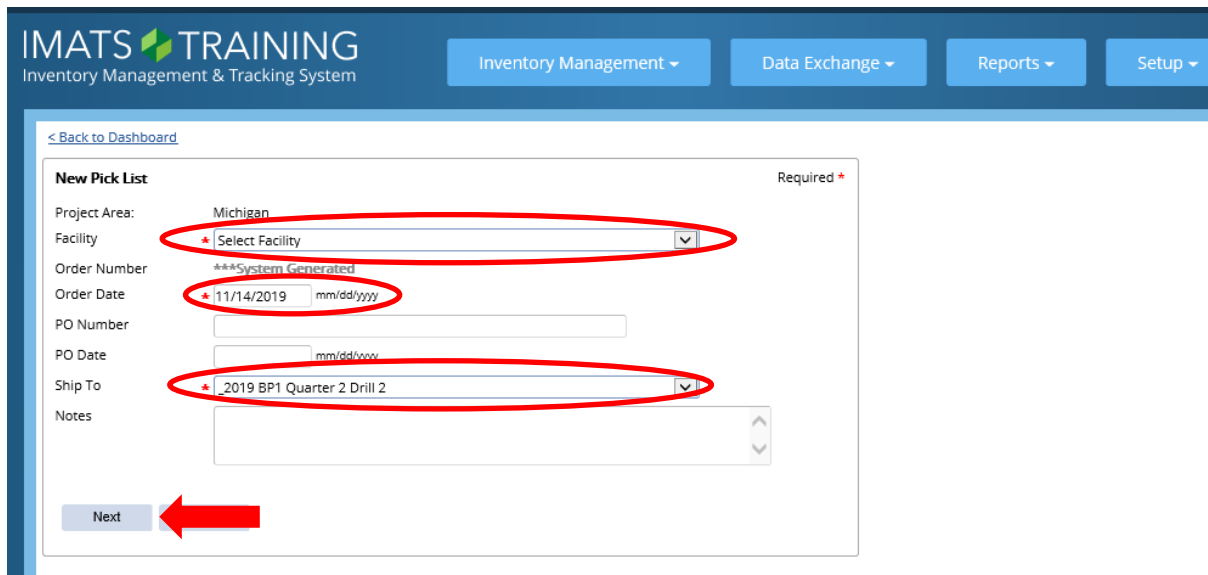
➤ From the New Pick List Item Dashboard, Product Name
  ✳ Start typing a product name or number… refer to the Inventory Report (Objective 1) for the product(s) to pick. Note: Only product listed in the available inventory will populate this field.

  ✳ Once you locate the product that matches your inventory, select the product.

  Duplicate products may appear, for additional instruction.

➤ Notice the required fields:
  ✳ Product Name (already populated)
  ✳ **Quantity to Pick** under New Pick List Item
  ✳ **Unit of Measure**
  ✳ **Qty Picked** within the Storage Locations area
  Note: **Available Qty** within Storage Locations area is the available inventory for picking.
  ✳ Enter the **Available Qty** amount in both **Quantity to Pick** and **Qty Picked** asterisked boxes. If there are multiple lines for the product, .

See example below with the required fields complete:

* **Units of Measure** will pre-populate. If multiple lines of the same product, note the UOM. You will need to complete separate entries for these. See page 12 for additional instruction.

* Select Add.
Note: if you receive the error
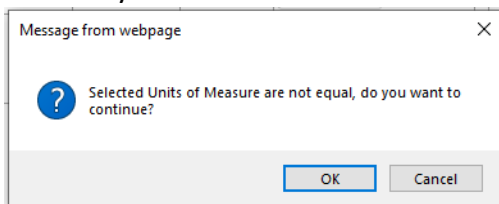
and the UOM are similar (Each/Each of 1), select OK to continue.

➢ You will receive a success banner and can continue adding items to your pick list until all inventory has been added from your inventory report. As you enter product, they will list on the right side under Recent Items. Be mindful to note which product you have already added as the product is not removed from the Product Name list once it is added to the Recent items.
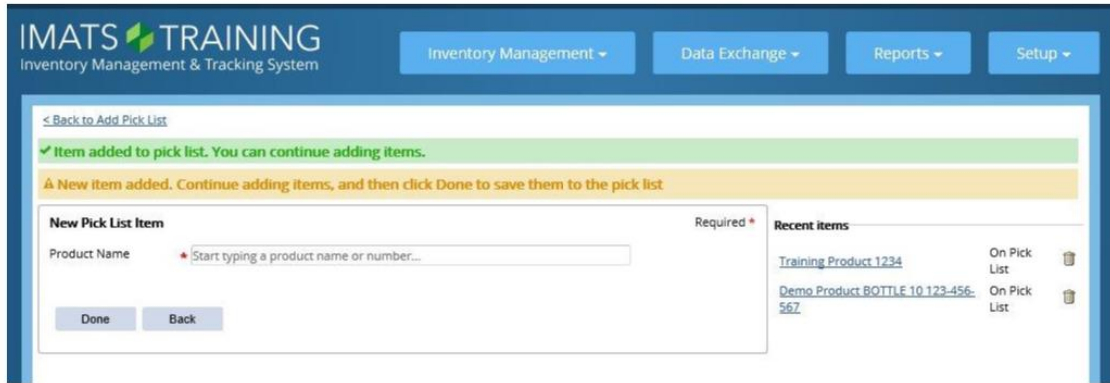
➢ When finished adding your product(s), select **Done**. You **MUST** select Done to save!

➢ You will receive a success banner indicating your Pick List Order Number has been created (see example below). Next is to Pick the products. You may have more than one entry within your Pick tab, so be mindful of the Order P###### that was generated. Select Back to Dashboard.
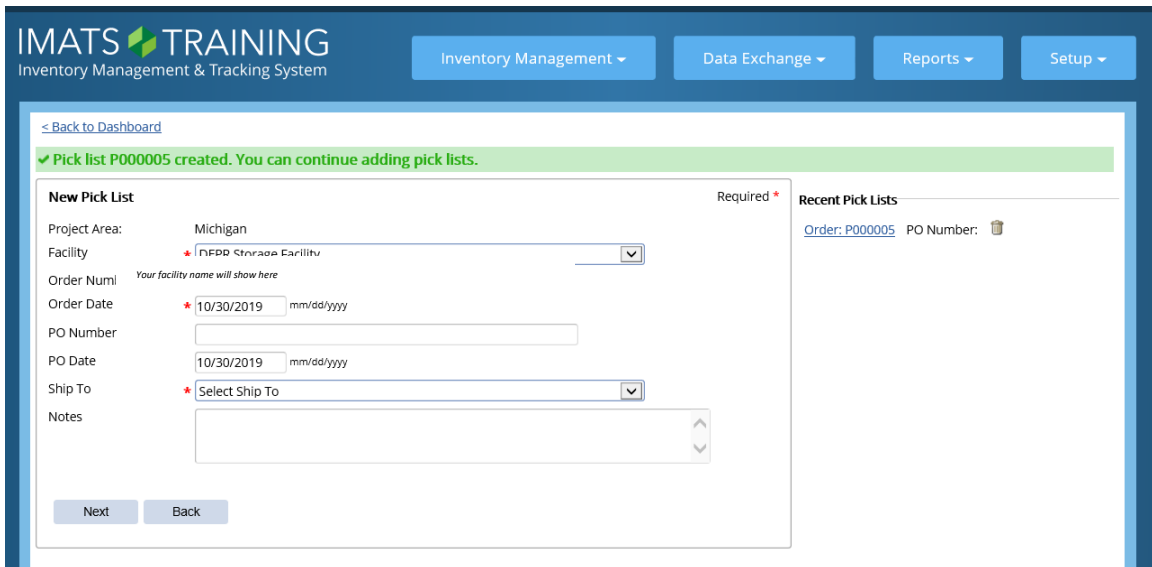
2. Pick the Requested Assets
   ➢ Use the Pick tab to locate your Order/Request Number for shipping.
   ➢ Select Pick under Action
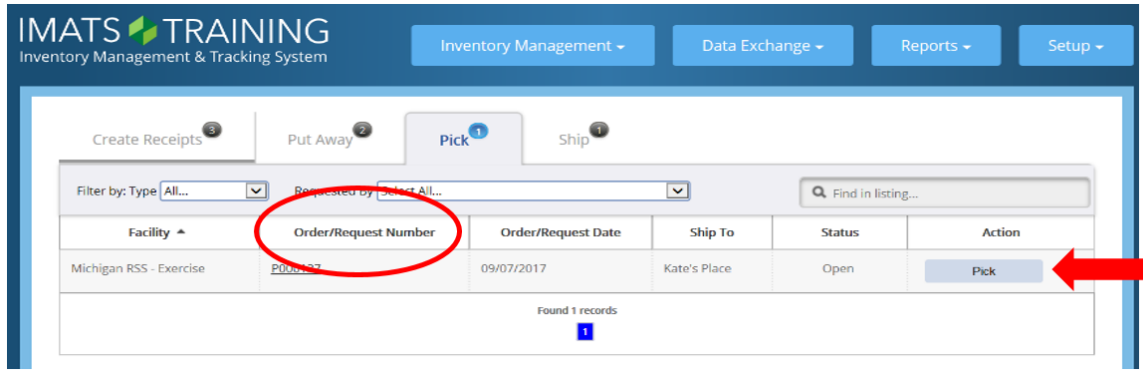
   ➢ Pick date will prepopulate with the current date. Mark the assets to pick (place a check mark in the Select/Deselect all box) and select Picked.
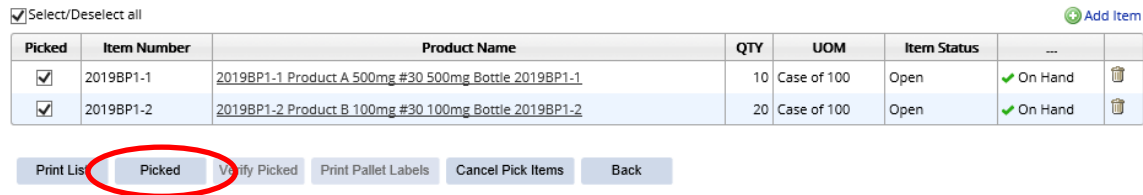
   ➢ Item Status will change to Picked, Not Verified. Select Verify Picked.
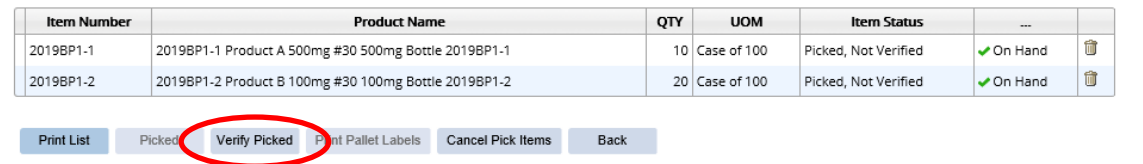
   ➢ Mark the assets verified (Select/Deselect all) and select Verified
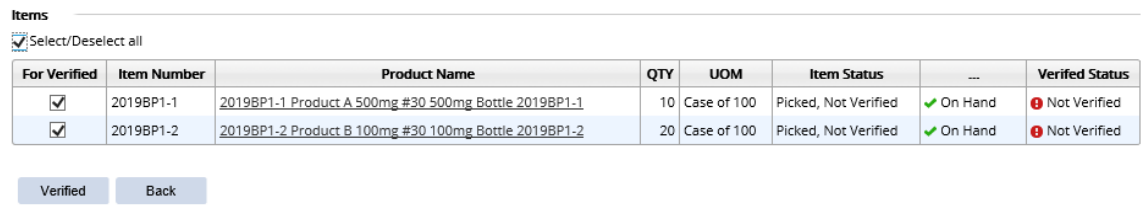
   ➢ The Item Status will update to Closed, Verified:
   ➢ Select Back

   See page 13 if you receive an error.
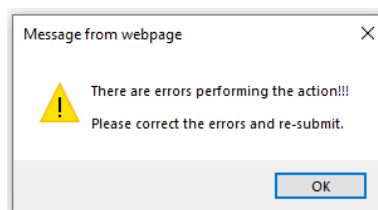
3. Ship the Product
   - Use the Ship tab and locate your Order Number
   - Select Ship under Action
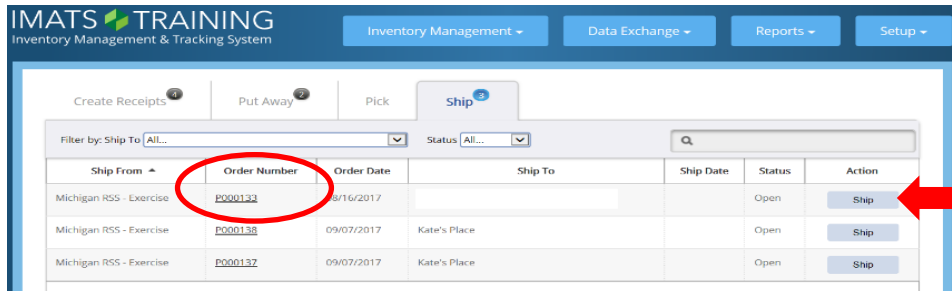
   - Update the Status to Shipped: Status * [Shipped ▾]

   - Enter the number of pallets
   - Enter the Shipment Date
   - Select Shipped Via Government Vehicle

Select Save to save your shipment information. If you do not select Save, your items will NOT be saved. Select Back to return to the Dashboard

Product	Item Number	Lot Number	Expiration Date	Quantity *	UOM
2019BP1-1 Product A 500mg #30 500mg Bottle 2019BP1-1	2019BP1-1	BP12019-1	2040-12-31	10	Case of 100
2019BP1-2 Product B 100mg #30 100mg Bottle 2019BP1-2	2019BP1-2	BP12019-2	2040-12-31	20	Case of 100

Save   Save As PDF   Print Pallet Labels   Print Shipping Document   Back
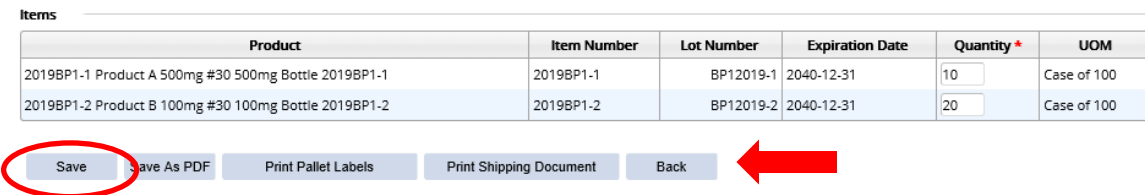
Repeat the same procedures for your Secondary Distribution Node.

Drill 2 is Complete
Completion of this drill due by January 31, 2020

Additional Guidance

Duplicate Product in New Pick List Item

When typing a product name or number, multiple products may appear:

Be mindful to note which product you select as the product is not removed from the Product Name list once it is added to the Recent items (see below)

Additional Guidance

<u>Duplicate Product in New Pick List Item Continued</u>

IMATS will allow entry of the same product.

<u>Multiple UOM</u>

Available quantity of similar products may display multiple units of measures. These **quantities must be removed separately using the same UOM**.

Additional Guidance

Multiple UOM Continued

    Note the product with the same **UOM**

➢ **Quantity to Pick** under New Pick List Item will be the <u>total</u> of **Qty Picked**

➢ **Reminder to select the Unit of Measure that is the same**

➢ **Qty Picked** within the Storage Locations area is the amount given in the **Available Qty** column

➢ Add products with the same UOM. In the example above, UOM Case of 80 will be added.
  Quantity to Pick (40) is the <u>total</u> of **Qty Picked** (20+20=40) and **Qty Picked** (20) is equal to **Available Qty** (20).

➢ Select Add. You will receive a success banner and can continue adding items to your pick list until all inventory has been added from your inventory report. Be mindful to note which UOM you added. In the example above, you would need to <u>repeat this process</u> for Case of 480 (8+8=16) and again with Case of 40 (20), <u>see page 5</u>.

➢ When finished adding your product(s), select Done. You MUST select Done to save! Return to <u>page 7</u> to Pick your products.

Additional Guidance

Pick List with Duplicate Products
If you receive *The quantity being removed is greater than the quantity on location error*, this could be due to a duplicate entry.

➢ Select OK
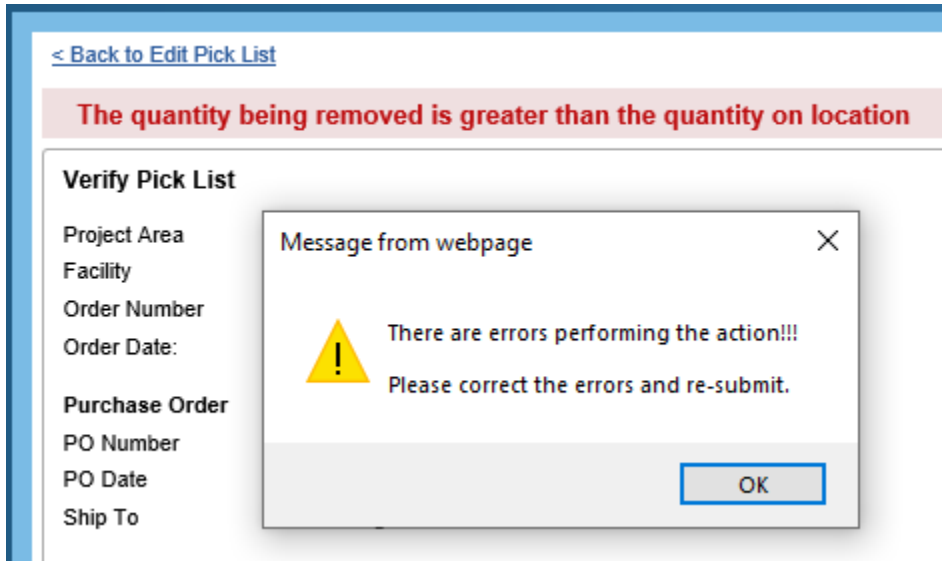
➢ Select Verify Picked and Select only the products that are available to pick.

In the example above, Doxycycline is duplicated; therefore, only select one of the Doxycycline.

Additional Guidance

Pick List with Duplicate Products Continued

➢ Select Verified and you will receive the success banner Item status has been updated:

➢ You can remove the item that you do not need to pick by selecting the waste basket:

Additional Guidance

Pick List with Duplicate Products Continued
- ➢ Select OK

- ➢ Once the item has been removed, select Back. Your order is now ready to be shipped. to continue.