

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 starting the drill:

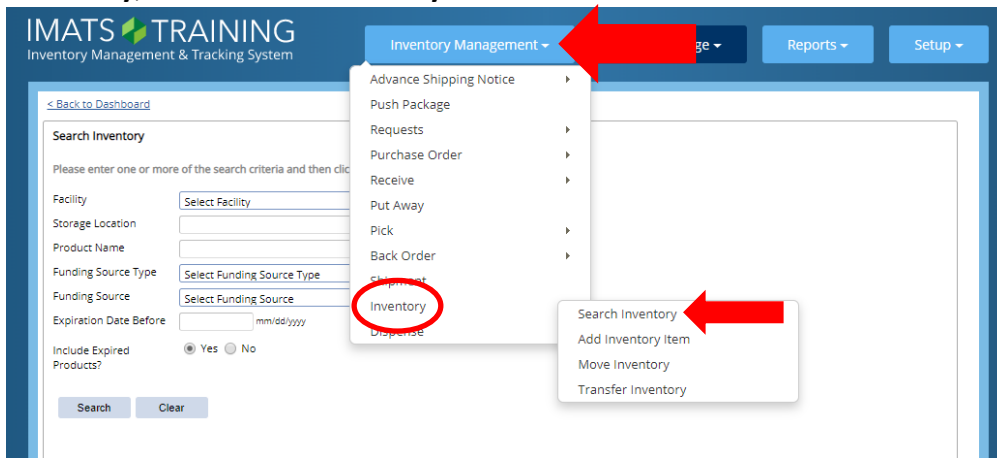
- Log into the IMATS Site at <https://sams.cdc.gov> to complete this drill. Select the **IMATS Training Site** using **Internet Explorer**.
 - Some users have reported that they are unable to access SAMS. If you are unsuccessful at logging in three times in a row, your account will be locked, and you 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:

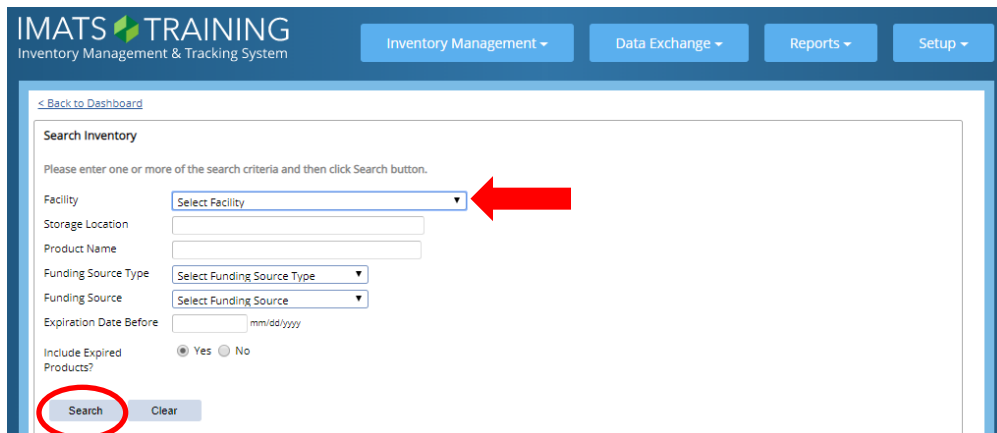
- CTS IMATS Manual - Located on MIHAN <https://michiganhan.org> (Documents tab, Document Library > Local Health > SNS > IMATS > 2019-20 BP1 IMATS Drills) CTS IMATS Manual-User Guide 2019.pdf
- Contact Jeannie Byrne at byrnej2@michigan.gov for any other questions not identified in the manual.

Objective 1:

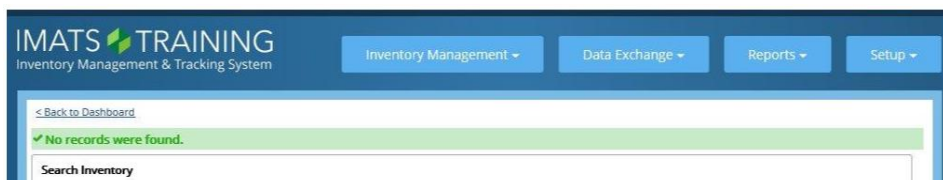
1. To determine the inventory for your facility from the **Inventory Management** menu, choose **Inventory**, then **Search Inventory**.



- From the **Facility** drop down list, find your Primary Distribution Node, select the box, then select search.



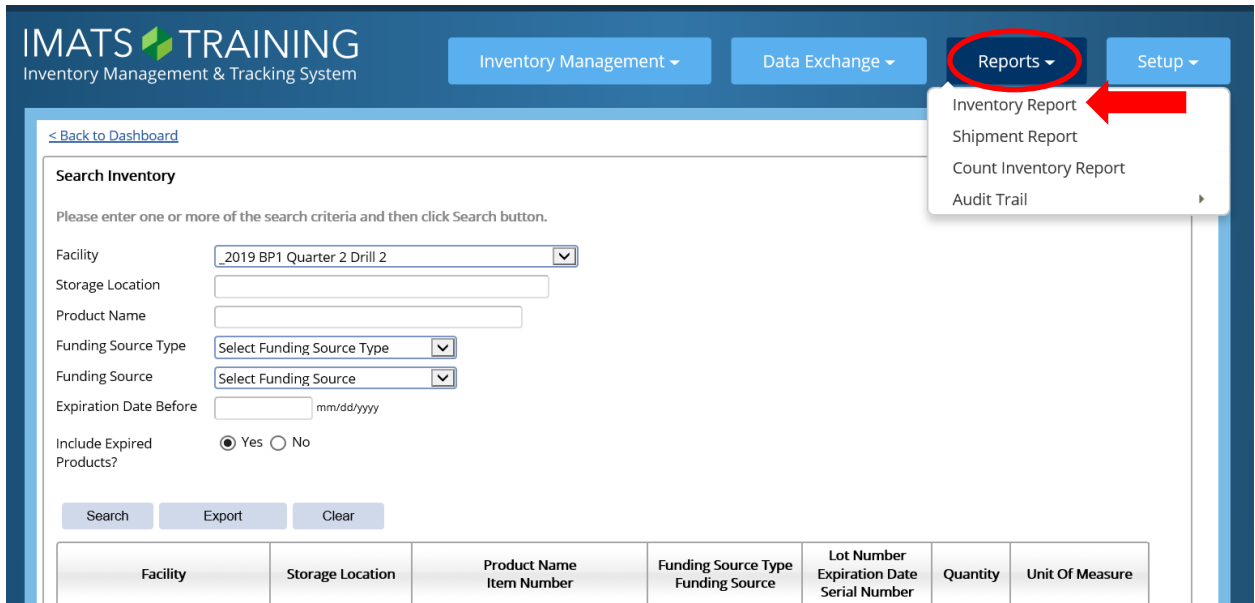
- Your assets for this facility will be displayed on the screen. If there are no assets in your inventory, the screen will display:



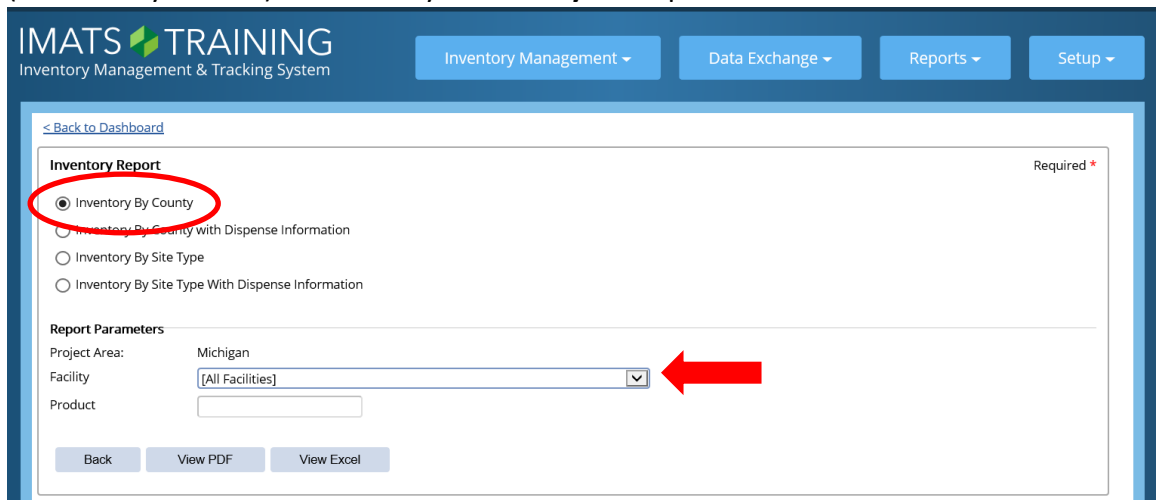
If **no records are found**, return to #1 and repeat steps for your secondary DN.

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.

- 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.

Inventory Management & Tracking System (Training)

Inventory Report

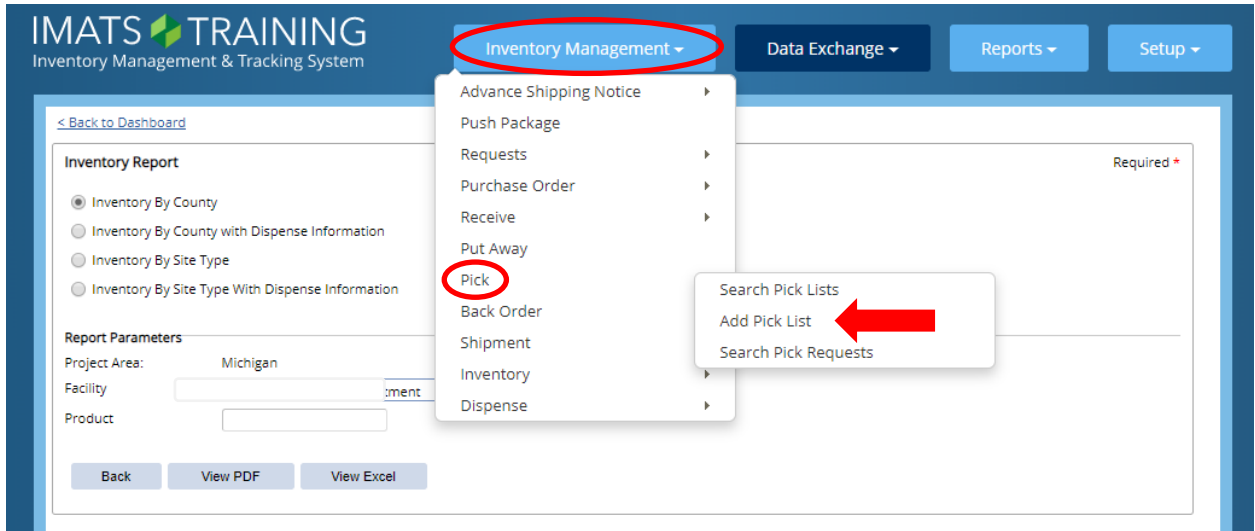
County	ZIP Code	Facility	Product Name	Item Number	On Hand	UOM
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product A 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product B 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product C 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product D 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product E 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product F 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product G 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product H 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product I 500mg 100mg	100	100	EAH
MI	48067	2019 BP1 Quarter 2 Drill 2	2019 BP1 Product J 500mg 100mg	100	100	EAH

Printed on 10/10/2019 10:30 EDT

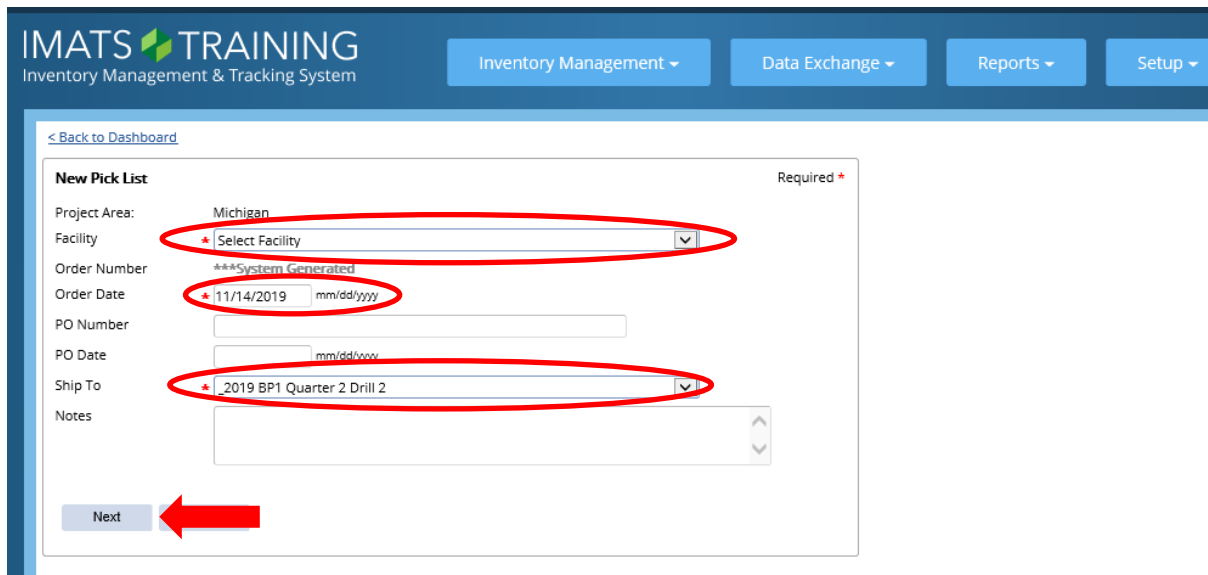
You are now ready to proceed to Objective 2.

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, [see page 10](#) 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 page 11](#).

Location	Funding Source	Lot No	Exp Date	Serial No	Available Qty	UOM	* Qty Picked
Warehouse	Federal	123456	12/31/2040		629	Each of 1	

See example below with the required fields complete:

Quantity to Pick and Qty Picked = (total of) Available Qty

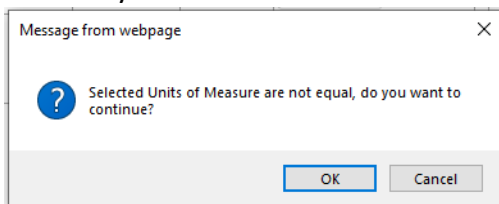
Location	Funding Source	Lot No	Exp Date	Serial No	Available Qty	UOM	* Qty Picked
Warehouse	Federal	123456	12/31/2040		629	Each of 1	629

* **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.

Location	Funding Source	Lot No	Exp Date	Serial No	Available Qty	UOM	* Qty Picked
Warehouse	Federal	123456	12/31/2040		629	Each of 1	

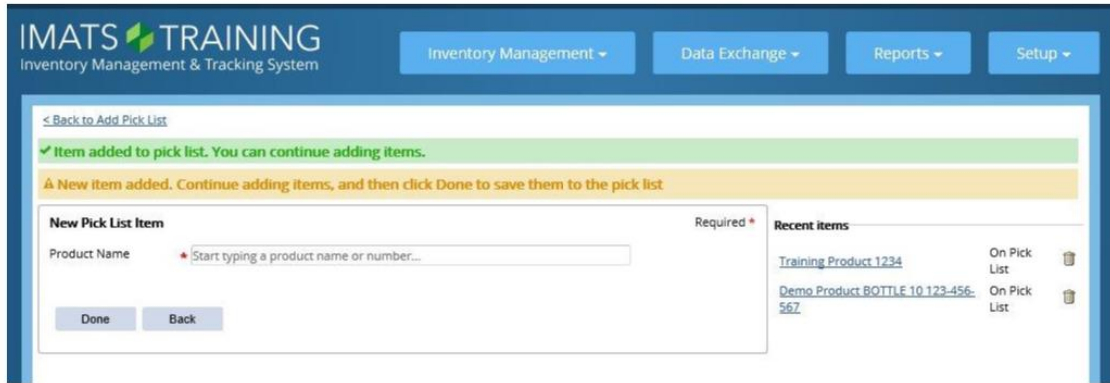
* Select Add.

Note: if you receive the error

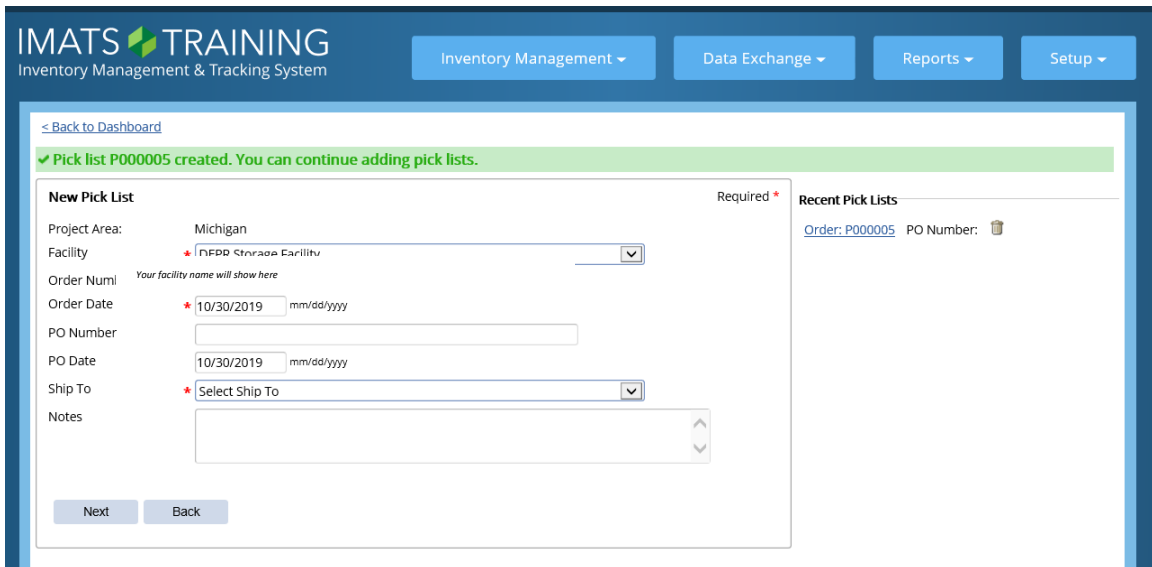


and the UOM are similar (Each/Each of 1), select OK to continue.

- 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.

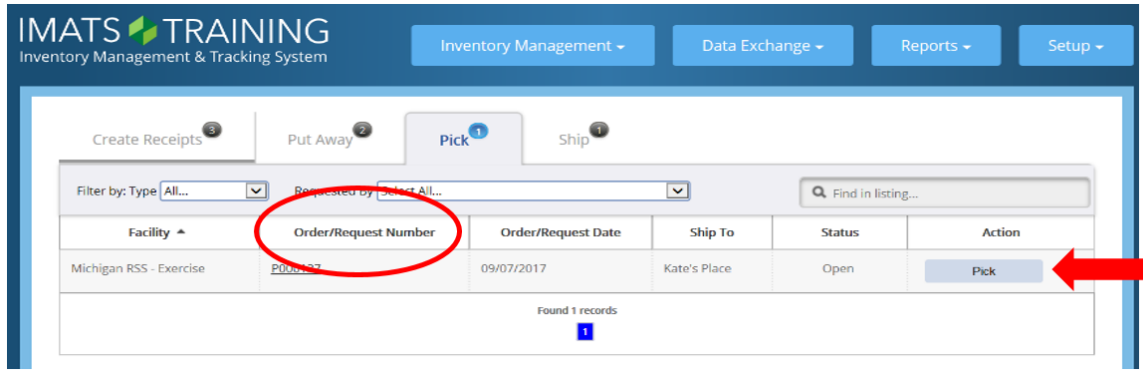


- When finished adding your product(s), select **Done**. You **MUST** select Done to save!
- You will receive a success banner indicating your Pick List Order Number has been created (see example below). Next is to Pick the products. You may have more than one entry within your Pick tab, so be mindful of the Order P##### that was generated. Select Back to Dashboard.

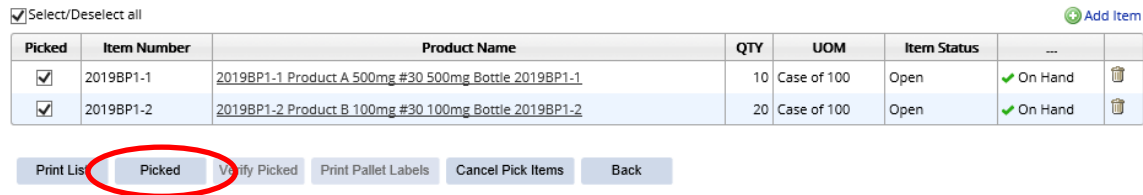


2. Pick the Requested Assets

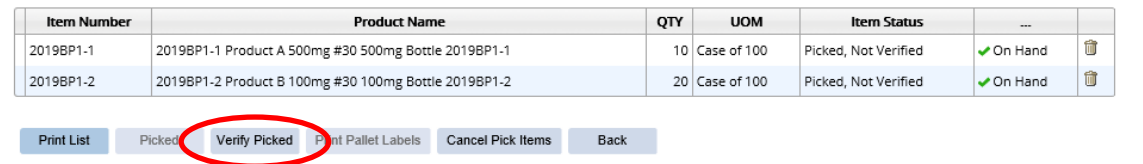
- Use the Pick tab to locate your Order/Request Number for shipping.
- Select Pick under Action



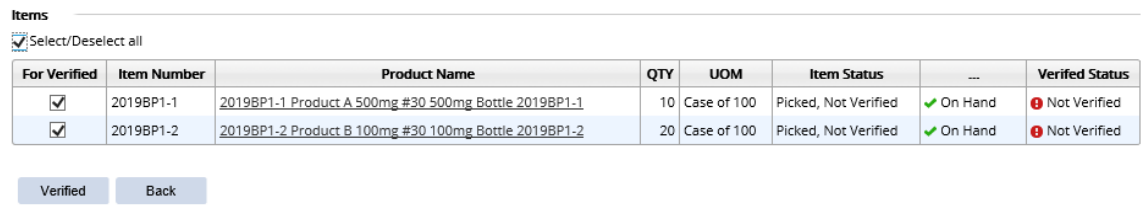
- Pick date will prepopulate with the current date. Mark the assets to pick (place a check mark in the Select/Deselect all box) and select Picked.



- Item Status will change to Picked, Not Verified. Select Verify Picked.



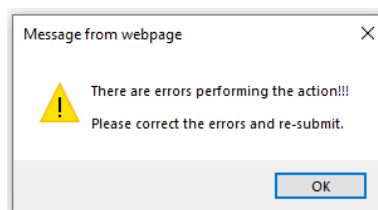
- Mark the assets verified (Select/Deselect all) and select Verified



- The Item Status will update to Closed, Verified:
- Select Back

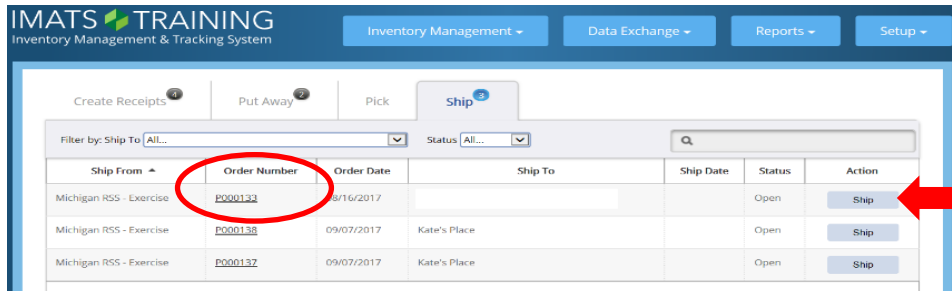
Item Status	...
Closed, Verified	✓ On Hand

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 *

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

Shipment Information

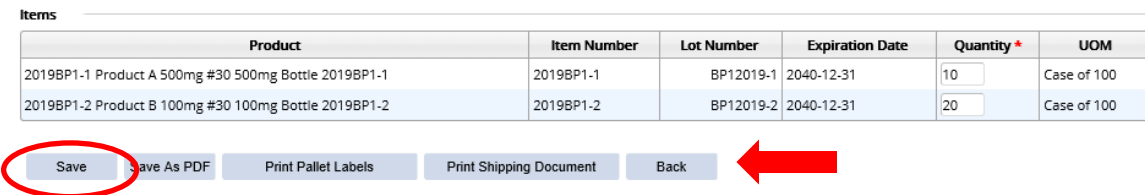
Customer Pickup

Total No Pallets

Shipment Date *

Shipped Via *

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



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:

The screenshot shows the IMATS TRAINING 'New Pick List Item' form. The 'Product Name' field contains 'doxy' and is marked as 'Required *'. A dropdown menu is open, displaying three search results: '_MI-TED Doxycycline 100mg oral tablet #20 tab unit of use BOTTLE 20 0172-3626-42', 'Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20', and 'Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65'. A 'Back' button is visible below the dropdown.

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)

This screenshot shows the 'New Pick List Item' form with the 'Recent items' list. The 'Product Name' field still contains 'doxy'. The dropdown menu is open, and the third option, 'Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65', is highlighted. The 'Recent items' list on the right contains one item: 'Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20', which is marked as 'On Pick List'.

This screenshot shows the 'New Pick List Item' form with the 'Recent items' list. The 'Product Name' field still contains 'doxy'. The dropdown menu is open, and the third option, 'Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65', is highlighted. A red arrow points from this highlighted option to the 'Recent items' list, which now contains two items: 'Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65' and 'Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20'. Both items are marked as 'On Pick List'.

Additional Guidance

Duplicate Product in New Pick List Item Continued

IMATS will allow entry of the same product.

IMATS TRAINING
Inventory Management & Tracking System

Inventory Management | Data Exchange | Reports | Setup

< Back to Add Pick List

✓ Item added to pick list. You can continue adding items.

⚠ New item added. Continue adding items, and then click Done to save them to the pick list

New Pick List Item Required *

Product Name * Start typing a product name or number...

Done Back

Recent items

- Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20 On Pick List
- Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65 On Pick List
- Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20 On Pick List

Return to page 5.

Multiple UOM

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

IMATS TRAINING
Inventory Management & Tracking System

Inventory Management | Data Exchange | Reports | Setup

< Back to Add Pick List

New Pick List Item Required *

Product Name * Amoxicillin 500mg oral Capsule uni

Product Item Number 66336-293-30 (National Drug Code NDC)

Quantity to Pick * 76

Unit of Measure * Select Unit of Measure

Notes

Storage Locations

Location	Funding Source	Lot No	Exp Date	Serial No	Available Qty	UOM	* Qty Picked
PPG-00036		A1234			20	Case of 80	20
PPG-00036		A1234			8	Case of 480	8
PPG-00037		A1234			8	Case of 480	8
PPG-00037		A1234			20	Case of 80	20
PPG-00037		A1234			20	Case of 40	20

Add Back

Message from webpage

There are errors performing the action!!!
Please correct the errors and re-submit.

OK

Additional Guidance

Multiple UOM Continued

Note the product with the same **UOM**

- **Quantity to Pick** under New Pick List Item will be the **total** 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

IMATS TRAINING
Inventory Management & Tracking System

Inventory Management ▾ Data Exchange ▾ Reports ▾ Setup ▾

[← Back to Add Pick List](#)

New Pick List Item Required *

Product Name * Amoxicillin 500mg oral Capsule unit of use #30 cap bt 40's 66336-293-30

Product Item Number 66336-293-30 (National Drug Code NDC or Stock#/Model #)

Quantity to Pick * 40

Unit of Measure * Case of 80 Value is required.

Notes

Storage Locations

Location	Funding Source	Lot No	Exp Date	Serial No	Available Qty	UOM	* Qty Picked
PPG-00036		A1234			20	Case of 80	20
PPG-00036		A1234			8	Case of 480	
PPG-00037		A1234			8	Case of 480	
PPG-00037		A1234			20	Case of 80	20
PPG-00037		A1234			20	Case of 40	

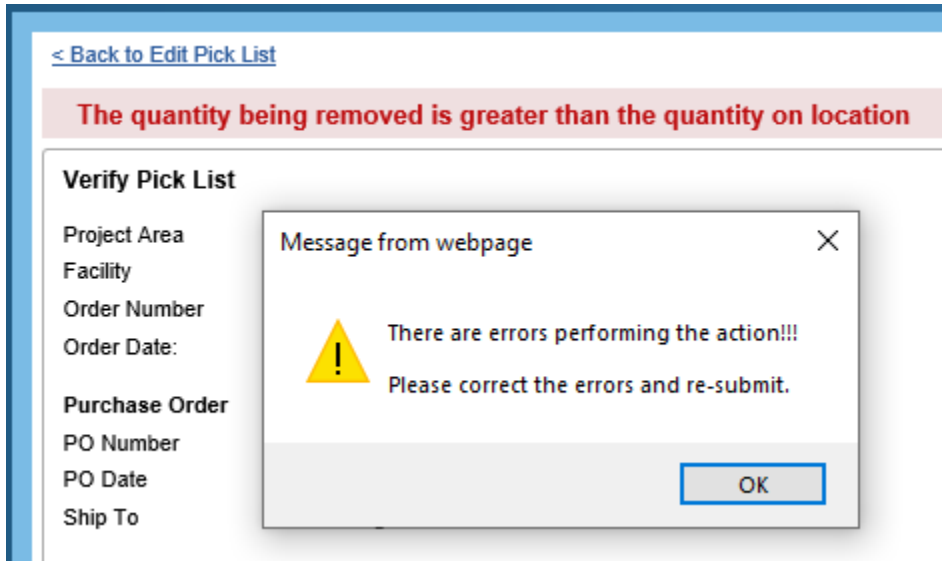
- Add products with the same UOM. In the example above, UOM Case of 80 will be added.
Quantity to Pick (40) is the **total** of **Qty Picked (20+20=40)** and **Qty Picked (20)** is equal to **Available Qty (20)**.
- Select Add. You will receive a success banner and can continue adding items to your pick 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 repeat this process for Case of 480 (8+8=16) and again with Case of 40 (20), [see page 5](#).
- When finished adding your product(s), select Done. You **MUST** select Done to save! Return to [page 7](#) 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.

The screenshot shows the IMATS TRAINING web application interface. The top navigation bar includes 'Inventory Management', 'Data Exchange', 'Reports', and 'Setup'. The main content area is titled 'Verify Pick List' and includes a 'Required *' label. The form displays the following information:

- Project Area: Michigan
- Facility: Michigan RSS - Exercise
- Order Number: P000263
- Order Date: 11/18/2019
- Purchase Order: (blank)
- PO Number: (blank)
- PO Date: (blank)
- Ship To: _2019 BP1 Quarter 2 Drill 2

Below the form is an 'Items' section with a 'Select/Deselect all' checkbox. A table lists the items for verification:

For Verified	Item Number	Product Name	QTY	UOM	Item Status	...	Verified Status
<input checked="" type="checkbox"/>	66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Picked, Not Verified	✓ On Hand	⚠ Not Verified
<input checked="" type="checkbox"/>	0069-0970-65	Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65	143	Case of 48	Picked, Not Verified	✓ On Hand	⚠ Not Verified
<input type="checkbox"/>	66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Picked, Not Verified	✓ On Hand	⚠ Not Verified

At the bottom of the items section, there are 'Verified' and 'Back' buttons.

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:

< Back to Add Pick List

✔ Item status has been updated

Edit Pick List Required *

Project Area: Michigan
Facility: Michigan RSS - Exercise
Order Number: P000263
Order Date: 11/18/2019
Pick Date: 11/18/2019
Total No Pallets:

Purchase Order

PO Number:
PO Date:
Ship To: _2019 BP1 Quarter 2 Drill 2

Items Add Item

Item Number	Product Name	QTY	UOM	Item Status	...
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Closed, Verified	✔ On Hand
0069-0970-65	Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65	143	Case of 48	Closed, Verified	✔ On Hand
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Picked, Not Verified	✔ On Hand

Print List Picked Verify Picked Print Pallet Labels Cancel Pick Items Back

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

< Back to Add Pick List

✔ Item status has been updated

Edit Pick List Required *

Project Area: Michigan
Facility: Michigan RSS - Exercise
Order Number: P000263
Order Date: 11/18/2019
Pick Date: 11/18/2019
Total No Pallets:

Purchase Order

PO Number:
PO Date:
Ship To: _2019 BP1 Quarter 2 Drill 2

Items Add Item

Item Number	Product Name	QTY	UOM	Item Status	...
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Closed, Verified	✔ On Hand
0069-0970-65	Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65	143	Case of 48	Closed, Verified	✔ On Hand
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Picked, Not Verified	✔ On Hand

Remove item from pick list

Print List Picked Verify Picked Print Pallet Labels Cancel Pick Items Back

Additional Guidance

Pick List with Duplicate Products Continued

- Select OK

The screenshot displays a web application interface for managing a pick list. A modal dialog box titled "Message from webpage" is centered on the screen, containing a question mark icon and the text: "This item will be removed from the pick list! To confirm press OK, Cancel otherwise." Below the text are "OK" and "Cancel" buttons. The background interface shows the "Edit Pick List" screen with the following details:

- Project Area: Michigan
- Facility: Michigan RSS - Exercise
- Order Number: P000263
- Order Date: 11/18/2019
- Pick Date: 11/18/2019
- Total No Pallets:
- Purchase Order: PO Number, PO Date, Ship To: _2019 BP1 Quarter 2 Drill 2

The "Items" section contains a table with the following data:

Item Number	Product Name	QTY	UOM	Item Status	...
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Closed, Verified	✓ On Hand
0069-0970-65	Doxycycline 25mg/5ml oral suspension, powder, 60ml bottle Case of 48 0069-0970-65	143	Case of 48	Closed, Verified	✓ On Hand
66336-510-20	Doxycycline 100mg oral tablet, 20 tab unit of use bt BOTTLE 20 66336-510-20	111	Case of 100	Picked, Not Verified	✓ On Hand

At the bottom of the screen, there are buttons for "Print List", "Picked", "Verify Picked", "Print Pallet Labels", "Cancel Pick Items", and "Back".

- Once the item has been removed, select Back. Your order is now ready to be shipped. [See page 9](#) to continue.