

## TRAINING UPDATE

**Lab Location:** GEC, SGMC & WOMC  
**Department:** All staff

**Date Distributed:** 3/17/2020  
**Due Date:** 4/7/2020  
**Implementation:** 4/7/2020

### DESCRIPTION OF REVISION

<b>Name of procedure:</b>
<b>Supply Ordering, Receiving and Restocking SGAH.L54 v3 Product Exchange Log AG.F502.1</b>
<b>Description of change(s):</b>
<b>SOP:</b> Header: changed WAH to WOMC Section 5: Removed WAH Micro storage; Added lending process Section 6: Added exchange log  <b>Form:</b> 'old' form placed under document control and updated to match SOP  <b>Revised SOP and FORM will be implemented April 7, 2020</b>

Document your compliance with this training update by taking the quiz in the MTS system.

Non-Technical SOP

<b>Title</b>	<b>Supply Ordering, Receiving and Restocking</b>	
<b>Prepared by</b>	Robert SanLuis	Date: 8/26/2013
<b>Owner</b>	Robert SanLuis	Date: 8/26/2013

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

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**1. PURPOSE**

This procedure provides instructions for determining inventory levels, ordering and receiving supplies into the laboratory.

**2. SCOPE**

The procedure includes:

- Method for counting inventory
- Method for ordering supplies
- Receipt verification
- Restocking of delivered supplies
- Storage requirements
- Electronic confirmation of receipt of supplies

### 3. RESPONSIBILITY

Staff may be assigned to perform physical inventory, restocking, and storing of supplies within the lab and designated laboratory store rooms.

Designated personnel will be assigned to do the physical inventory, order and receive supplies in the electronic system.

### 4. DEFINITIONS

**PeopleSoft:** Software system for ordering and receiving supplies.

**Packing slip:** The shipping document accompanying the supplies, which includes an itemized list of materials pertaining to the contents of a shipment. The slip can be found either the inside or outside of a box.

**PO:** Purchase order number, located on packing slip. It is a 10 digit number that starts with 6715.

**Manual Inventory Count Sheets:** A list of supplies kept in the laboratories inventory in PeopleSoft.

**Client Supply:** Orders for Materials Management, and Emergency Departments. Ordering process is identical to lab supplies.

**Standing Order:** Orders placed to blanket over a set amount of time, for example 6 months to 12 months. These are reserved for items in which a specific lot is needed for a long duration of time.

### 5. PROCEDURE

#### A. Weekly/Monthly Physical Inventory with Min/Max Ordering

Overview of process:

- Supplies are counted by a designee and recorded on a paper inventory count sheet. The designee gives the inventory count sheets to the person that orders supplies.
  - When counting the tech must verify the unit of measure is correct for each item (**EA=Each, CA=Case, CT=Carton, KT=Kit, PK=Pack, GS=Gross, BG=Bag, ST=Set**).
  - If a box or carton is open, it is considered in use and is not counted (crucial for proper inventory). For blood bank antisera, the bottle is counted as 1 if it is  $\geq$  half full and 0 if it is  $<$  half full.
  - Blood bank uses a separate sheet for weekly inventory to avoid over ordering of standing items.
- The person ordering supplies first creates a count event in People Soft, and then creates the count sheet to enter values from the physical inventory sheets. Note: The count event and sheet may be created and printed to use for physical inventory.
- Once the values are entered, the counts are saved and posted. The system generates a requisition for items to be ordered based on the min and max values of

each product. The user can choose to reorder items or add or remove items that do not need to be ordered.

- The actions listed below occur once a week, and on the last day of the month.

### To Create a Count Event

Step	Action
1	Login to PeopleSoft
2	On the home page there are two drop down menus : Favorites & Main Menu
3	Click on Main Menu →Inventory →Quest Department Inventory →Quest Create Dept Count Event
4	On the Quest Count Dept Page there are two tabs: Find an Existing Value and Add a New Value a. First Time Users - Click the <b>Add a New Value</b> tab. Enter your name in the Run Control ID box and click <b>add</b> . This will take you to the Quest Create Count Event Page b. Returning Users - Remain on the <b>Find an Existing Value</b> tab and click <b>Search</b> . A box will populate with user names. Click on your user name and the Quest Create Count Event Page will open
5	The business unit number is prefilled based on the user's set up
6	Next to the box labeled <b>Area</b> , query with the magnifying glass. From the drop down selections, choose the area that you want a count sheet for
7	Click <b>save</b>
8	Click the <b>Run Button</b> and a Process Scheduler Request Screen appears. Click <b>OK</b> and you return to the Quest Create Count Event page.
9	Next to the Run Button is a button labeled Process Monitor. Click <b>Process Monitor</b> and the system displays a screen to show your request
10	Click the <b>refresh</b> button above the process list to update your request. Once you see "Success" by your request, proceed to enter count values.
11	The row with QPRNTCT creates the count sheet. a. Click the Details link next to the process QPRNTCT. b. Click the View Log/Trace link under Actions. c. Click the link that ends in .PDF to view and/or print the count sheet.

### To Create Count Sheets after the Count Event

Step	Action
1	Click on Main Menu →Inventory →Quest Department Inventory →Quest Count Dept Update

Step	Action
2	The business unit is prefilled
3	Click <b>Search</b>
4	The page that opens is your count sheet, fill in the counts based on what is on the page. Note: The system times out after 20 minutes of no activity so if you cannot fill in all your counts you can save your work and come back to your count sheet
5	Once all the counts are entered, click <b>save</b>
6	Click <b>Post Count/Create Reqs</b>
7	Click <b>Process Monitor</b> . This takes you to the processing screen and you see the word "Processing" next to your request. If you click the "refresh" button on the page, the process will update to "posted" once it has completed
8	Once the process says "posted", click on the word " <b>Details</b> " next to success.
9	The Process detail screen appears. Click <b>Message Log</b> at the bottom and it takes you to the Message Log screen. Record the requisition number shown on this screen (usually begins with 6715)
10	After recording the requisition number, proceed to the next step of updating the requisition

### To View and Update the Requisition or Submit for Ordering

Step	Action
1	Click on Main Menu →Purchasing→Requisitions→Add/Update Requisitions
2	On the Requisitions page click <b>Find an Existing Value</b> tab
3	The business unit is prefilled. Enter the requisition number obtained from your count sheets in the box next to Requisition ID and click <b>Search</b>
4	Your requisition appears on this page and you can <ul style="list-style-type: none"> <li>• remove items that you do not want to reorder by clicking the 'minus' box to the far right of the item</li> <li>• add additional items by clicking the 'plus' box (next to the minus box)</li> </ul>
5	If the requisition is ready for approval. click <b>Save</b> at the bottom of the page

### Submit Requisition for Approval

Step	Action
1	Click on Main Menu →Purchasing→Requisitions→ Approve Chartfields

Step	Action
2	The requisition that you saved should appear on this page. If all of the items are correct, then click <b>Save</b> at the bottom and the requisition will be sent to your approver

### B. Ad hoc Supply Order Process

Any time that supplies are needed, a supply person can log into PeopleSoft and create a requisition for a supply.

**Note:** Refer to appendix A to order an item that is not available in PeopleSoft

Step	Action
1	Click on Main Menu →Purchasing→Requisitions→Add/Update Requisitions
2	On the Requisitions page, choose the <b>Add a New Value</b> Tab and then click <b>add</b> , the business unit should already be filled in
3	On the Maintain Requisition page, enter the item number and the quantity of the item that you want to order. The plus and minus boxes located to the far right will allow the user to add or delete items.
4	Once the ordering is complete, click <b>Save</b> at the bottom of the page
5	Submit requisition for approval: Click on Main Menu →Purchasing→Requisitions→ Approve Chartfields
6	The requisition that you saved should appear on this page. If all items are correct, click <b>Save</b> at the bottom and the requisition will be sent to your approver.

### C. Supply Receipt Process

1. When the supplies are delivered, remove the packing slip(s). These may be located:
  - a. On the outside of the box.
  - b. Inside the box of supplies.
2. Verify the delivered supplies match with the packing slip and check for additional paperwork in each box. Save all paperwork with the packing list.
  - a. Ensure the number and quantity of items is correct.
  - b. If the supplies received match the packing slip, indicate the match by checking off the item line.
  - c. Make any necessary changes on the packing slip, like changing the quantity of an item received. For example, if the packing slip stated 1 of a product was delivered and instead 3 were delivered make a note on the actual packing slip with your initials and date.
  - d. “back ordered” items should be indicated on the slip.
3. Once all of the items have been verified, initial and date the packing slip at the bottom of the page. Place in designated drop box located in the lab.

4. Review the package insert for each reagent received.
  - a. Ensure that the version and revision date of the current package insert (located in the package insert binder) match the version and revision date of the new package insert.
  - b. Document the checking of the package insert revision date by inserting Y or N on the appropriate receipt log (see step 11).
  - c. If the package insert is different, make a copy of the current and new inserts and forward to the technical specialist or supervisor for review and SOP update as necessary.
5. Stamp / Tag each box with the date the supplies were received
  - a. **Blood Bank** – All deliveries are made directly to Blood Bank and are inspected and verified by blood bank staff members per procedure, “Reagent Receipt and Acceptance”.
  - b. **Chemistry** – Each reagent and calibrator box requires an orange “**Do not use this lot**” label which designates the item is a new lot and/or new shipment of existing lot and requires further testing. Rotate new stock behind the old lots stock.
  - c. **Microbiology**
    - 1) Each box of Microbiology plates require an orange “**Do not use this lot**” label.
    - 2) Store refrigerated items in the walk-in refrigerator on designated shelves and record expiration date on the side of each box.
    - 3) QC forms or other package inserts which are received with the packing slip must be kept and given to the designated Micro tech to file.
    - 4) Any media placed in the laboratory refrigerator requires a “**Do not use this lot**” label, to indicate further testing is necessary before use.
6. Store and shelve the supplies according to requirements, in designated location.
  - a. Frozen items should be stored first, ensuring they are stored at appropriate temperature. There are 2 different freezers at all 3 sites.
  - b. Refrigerated items stored next
  - c. Room temperature supplies are stored last.
7. Supplies should be shelved / stored to rotate stock, meaning older supplies moved to the front and newer items placed behind.
8. Allow 18 inches clearance from ceiling when stocking supply shelves. Hematology Diluents cubes, 20L saline cubes, and NERL water boxes may only be stacked a total of 4 each high.
9. Notify the Supervisor or Group Lead staff verbally, that the supplies are ready to be stored and/or shelved.
10. While restocking a new product, you must check the expiration dates of the older stock on hand to ensure nothing expired ever gets into use. Dispose of all expired products and notify supervisor and inventory control group lead so counts can be adjusted.

11. Documentation

- a. Complete the appropriate electronic check-in spreadsheet (see Related Documents) with all required information.
- b. Write all supplies requiring cross checks and lot to lot verification onto the designated white board located in the lab.

**Special Instruction: (QC Lot Verification) If an unexpected or new QC lot is received, immediately notify the lab’s technical specialist, inventory group lead, and supervisor and they will advise you on how to proceed.**

**D. PeopleSoft Receipt Process performed by designated staff with access.**

Step	Action
1	Login to PeopleSoft
2	Go to Main Menu →Purchasing →Receipts →Add/Update Receipts
3	Change the Business Unit Number to your Designated Business Unit 67103 SGAH 67102 WAH 67104 GEC
4	Click <b>Add</b>
5	In the ID box on the next screen, enter the PO (Purchase Order) number which can be found on a packing slip. For all sites it usually starts with 6715
6	Click <b>Search</b>
7	The open items for that Purchase Order will appear. If no items display, then there isn’t anything to receive on the PO you entered
8	Click a <b>check mark</b> in the box next to the item that corresponds to the items on the packing slip that arrived in your lab. Click <b>OK</b> <b>Note:</b> Do NOT receive any items that are not physically in your lab.
9	Enter the amount of the item received in the “Receipt Qty” column. <b>Note:</b> If there is a grayed out box with a check in it in the “Lot Control” column, click on the word <b>Pending</b> next to the box. On the next screen enter the Lot ID, and the same ID will populate on its own under Vendor Lot. Also enter the Expiration date for the item
10	Click <b>OK</b> and you return to the previous page
11	Click <b>Save</b>
12	“Fully Received” will appear next to the red “X” at the top of the page
13	Repeat these steps for each packing slip



Step	Action
14	The packing slips will be boxed for storage at Iron Mountain. They are retained onsite for 1 year, and then sent for offsite storage for an additional 6 years (total storage 7 years).
15	Verify there are no pending purchase orders to be received: <ul style="list-style-type: none"> <li>• Go to Main Menu →Purchasing →Receipts →Add/Update Receipts</li> <li>• Click on <b>Find an Existing Value</b> tab</li> <li>• Select the <b>Ship to location</b> – Receipt Status: <b>open</b> – Search</li> </ul> This must be performed at least once per week and before the end of the month count.

### E. Supply Lending Process

Step	Action
1	Supplies may be exchanged (borrowed or lent) between Adventist lab sites. <b>Note:</b> Exchanges with other labs or hospitals may be allowed in case of an emergency; this must be approved in advance by the lab services director, manager or supervisor.
2	Document supplies on the Product Exchange Log <ul style="list-style-type: none"> <li>• Each site must complete a log listing items lent / borrowed</li> <li>• Receiving site must also record on the appropriate Receipt and Check-in log if applicable</li> </ul>
3	All supplies must be returned once the product becomes available. The return information must be documented on the exchange log.

### 6. RELATED DOCUMENTS

Chemistry Receipt and Check-in Log (AG.F337)

Coag, Hem and UA Check-in Log (AG.F338)

Serology Kit Check-in Log (AG.F339)

**Product Exchange Log (AG.F502)**

### 7. REFERENCES

None

### 8. REVISION HISTORY

Version	Date	Reason for Revision	Revised By	Approved By
000	8/21/14	Section 5: Item B.4 - Clarified review of package inserts at time of reagent receipt. Add documentation Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13.	C. Bowman	R. SanLuis

<b>Version</b>	<b>Date</b>	<b>Reason for Revision</b>	<b>Revised By</b>	<b>Approved By</b>
1	12/20/16	Header: add other sites Replaced Stock Clerk with PeopleSoft throughout Section 4: Removed Stock Clerk specific and manual request definitions, updated others to PeopleSoft Section 5: Replaced Stock Clerk process with steps for PeopleSoft, removed client supply process, updated supply receipt logging to match practice Section 6: Added logs Section 9: Added appendix	Z. Morrow A. Chini L. Barrett	R. SanLuis
2	3/9/20	Header: Changed WAH to WOMC Section 5: Removed WAH Micro storage; Added lending process Section 6: Added exchange log	L. Barrett	R. SanLuis

**9. ADDENDA AND APPENDICES**

Appendix A: Ordering Items not Available in PeopleSoft

**Appendix A**

**Ordering Items not Available in PeopleSoft**

<b>Step</b>	<b>Action</b>
1	Login to PeopleSoft
2	Click on Main Menu →Purchasing→Requisitions→Add/Update Requisitions
3	Under <b>Add a New Value</b> tab, select the right Business Unit, then select <b>Add</b> .
4	Change the “Requisition Defaults”. Click on <b>Requisition Defaults</b> . Under Default Options select <b>Override</b>
5	Under Distributions change Dept and Location accordingly. Dept would be Core Lab: 1380102 Phlebotomy: 130301 Blood Bank: 138104 Location would be EPE for WAH, EPF for SGMC, JAY for GEC <b>Note: Do NOT change GL Unit</b>
6	Click <b>OK</b> . Back on the main page leave the “Item” section blank. Enter the following: <ul style="list-style-type: none"> <li>• Description</li> <li>• Quantity</li> <li>• UOM (Unit Of Measure)</li> <li>• Category – used to designate which department/area this item cost will appear (<i>example</i>: furniture, office supply, or reagent). For service requests, use code 2310 for parts and 2315 for labor. If you get a req. with both part and labor, see which costs more (labor or part) then use the code for whichever costs more.</li> <li>• Price</li> </ul>
7	Go to <b>Vendor Information</b> tab. Under “Vendor” select the right vendor ID.
8	Go to <b>Item Information</b> tab. Under “Vendor Item ID” enter the Catalog number
9	Go back to “Details” to return to the main page. Go to “Add Comments” and enter all the information you have and attach a copy of the price quote. When complete select <b>Save</b> .
10	Go to “Approve Chart Field” and <b>Save</b> again.

