Pharmacy Information System (PhIS) and Clinic Pharmacy System (CPS)

User Manual
Pharmacy Inventory - Contract

Version	**: 8th Edition**
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Table of Contents

1.0   Introduction

1.1   Overview of PhIS

Pharmacy Information System or better known as PhIS is a complete and comprehensive system that integrates pharmacy related services that geared toward pharmacy excellence. This implementation would transform most of the current manual process to electronic system would benefit facility end user in the health care sector.

There are twelve (12) modules to assist service delivery by the health care sector which comprises of:

1.   Order Management

2.   Inpatient Pharmacy

3.   Outpatient Pharmacy

4.   Medication Counselling

5.   Ward Pharmacy

6.   Pharmacy Inventory

7.   Manufacturing of Cytotoxic Drug Reconstitution, Parenteral Nutrition, IV Admixture & Eye Drop, Radiopharmaceuticals and Extemporaneous

8.   Adverse Drug Reaction & Drug Allergic Card (ADR & DAC)

9.   Clinical Pharmacokinetics Services (TDM)

10.   Drug Information & Consumer Education (DICE)

11.   Medication Therapy Adherence Clinic (MTAC)

12.   Data Mining (PhARM)

1.2   Purpose and Objectives

This user manual outlines the Pharmacy Inventory (Contract) sub-module and its key features and functionalities. The primary objective is to guide users through the process of completing PhIS application process.

User will understand the following activities in details:

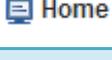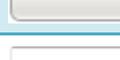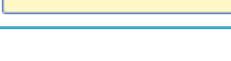- Proposed Contract Item
- Contract Facility

1.3   Organised Sections

These are the sections within this document:

- Section 1 : Introduction
- Section 2 : Application Standard Features
- Section 3 : Inventory Contract
- Section 4 : Acronyms

2.0 Application Standard Features

2.1 PhIS Legend

Standard Legend			
LOGIN	Login to PhIS	Logout	Logout from PhIS
Change Password	Change Login Password	C	Reset Login Screen
+	Expand Menu	−	Collapse Menu
Home	Display Home Tab	▷	Expand Module
◢	Collapse Module	☒	Close All Open Tabs
↻	Refresh Screen	Q Search	Search Record
+	Add/Create New Record	i	Show Help
🖨	Print	*	Mandatory Field
📅	Calendar Icon	🔍	Search Icon
X	Close Window	◯	Radio Button
☐	Checkbox	✏	Edit Record
⊘	Cancel	🗑	Delete Record
💾	Save	Export to Excel	Export and Open Report in Excel Format
+ Add Item	Add Item to the list	🗑 Delete	Delete Item from the list
Request	Request for Approval	Cancel Request	Cancel the Request
Approve	Approve Transaction	Reject	Reject Transaction
Send for Approval	Send for Approval	▼	Dropdown Box
	Automatically Display/Retrieve Box		Empty Text Box

Inventory Contract Module Legend

⬇ Retrieve	Retrieve transaction		

<u>*Note*</u>

- *To learn more about Login Information, kindly click <u>Login Information</u> Modules for descriptive step.*

2.2 Latest Enhancement and Updates

Latest Functions	Page
New searching fields added (2): - Search by: Item Group, Drug/Non-Drug Name, Contract No	60

3.0   Contract

Overview

Contract Items is the estimated annual purchase amount that is more than RM500K. System identifiesitems to be purchased based on the accumulative amount. This transaction is made by the user from Main Store (Level 1).

Contract Facility is the project from HQ for the respective facility. The detailed information for a Contract Facility is controlled at HQ level. At the facility level, the users will be able to retrieve the information from HQ. However, the users at the facility level will not be able to key in the contract information through PhIS system as everything pertaining to Contract Facility will be controlled at HQ.

User Group

This module is intended for Pharmacist and Assistant Pharmacist (Subject to user assign by the facility)
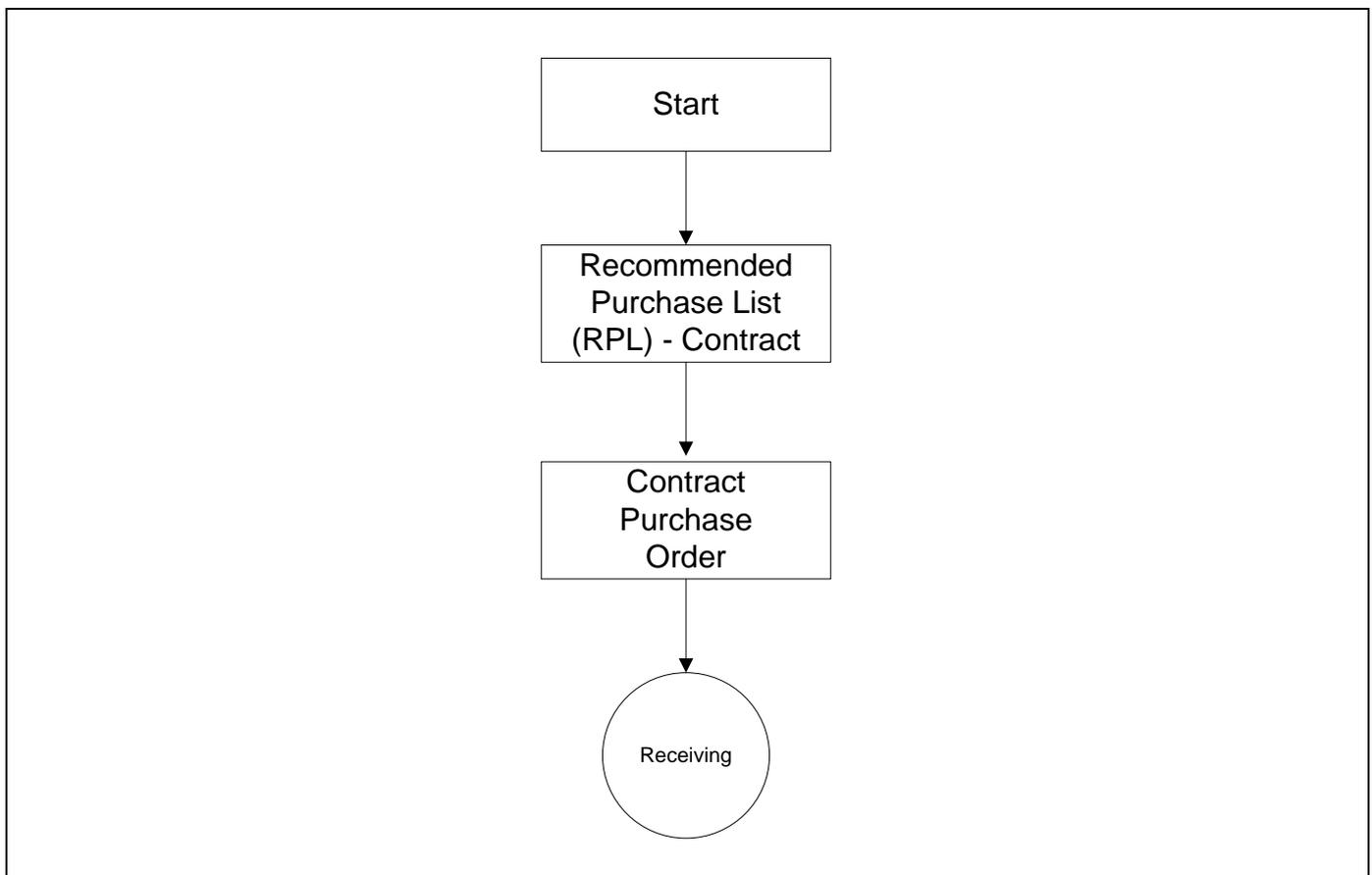
Functional Diagram
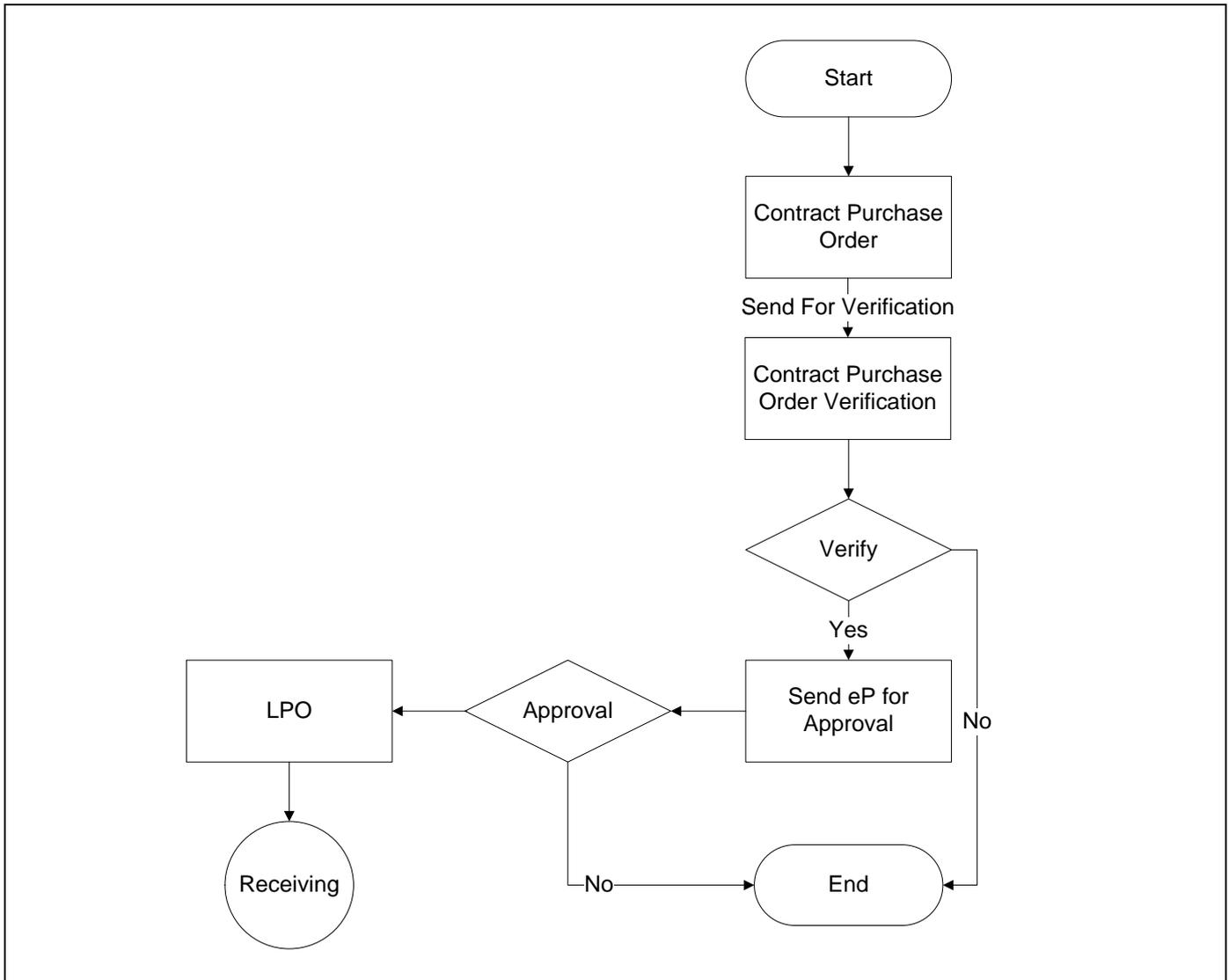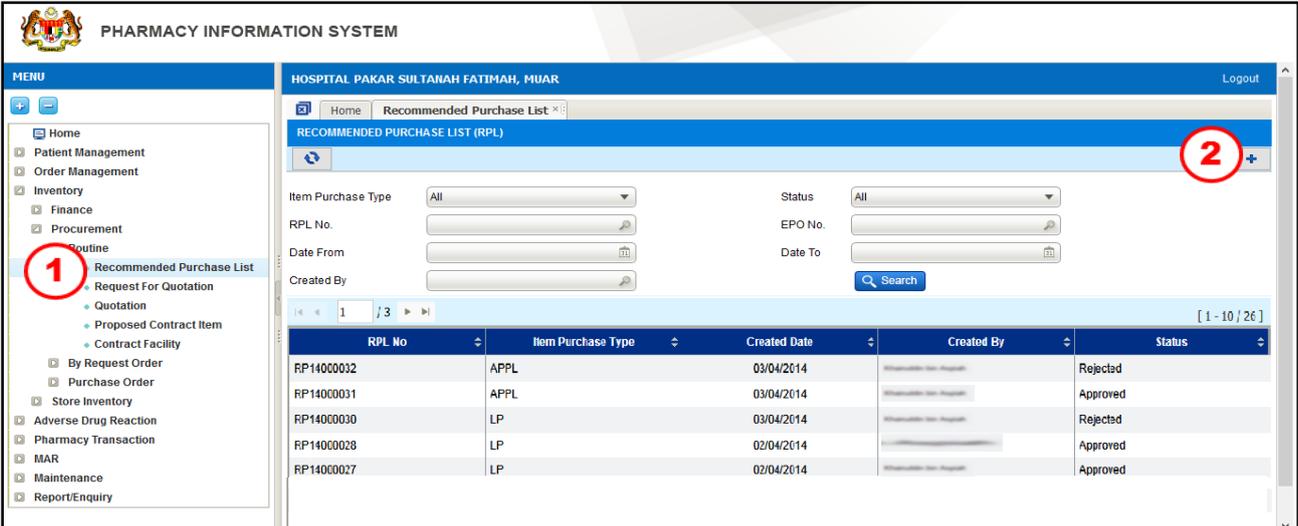

Figure 3.1

Figure 3.2

3.1 View Recommended Purchase List (RPL) Contract Listing Page

To view existing Recommended Purchase List record, perform the steps below:

Figure 3.1-1 Recommended Purchase List (RPL) Listing Page

Recommended Purchase List (RPL) is a list generated by the system based on buffer level to help user to proceed with the purchases
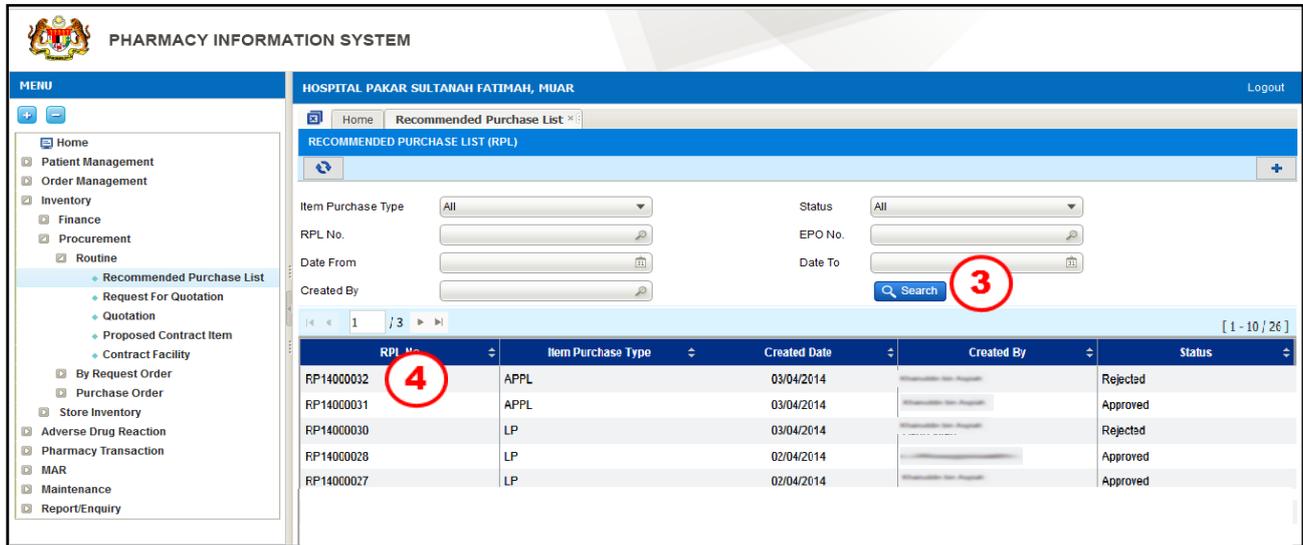
STEP 1
Click on the 'Inventory menu' followed by 'Procurement', 'Routine' and click on 'Recommended Purchase List (RPL)'

STEP 2
To search for existing 'Recommended
Purchase List (RPL)' transaction, this search
criteria can be used:
  a) Item Purchase Type:
      - All
      - APPL
      - Contract
      - LP
  b) Status
      - All
      - Approved
      - Cancelled
      - Close
      - Open
      - Pending For Approval
      - Pending For Verification
      - Rejected
  b) RPL No
  c) EPO No
  d) Date From
  e) Date To
  f) Created By

Figure 3.1-2 Recommended Purchase List (RPL) Listing Page

STEP 3

Click on the [🔍 Search] button after input criteria and the result display will be based on the criteria entered as shown in Figure 3.1-2

Note
In circumstances of no criteria is input, the entire list of previous transaction will be displayed.

STEP 4
Double click on the selected record and the details will be displayed

3.2 Create New Recommended Purchase List (RPL) Contract

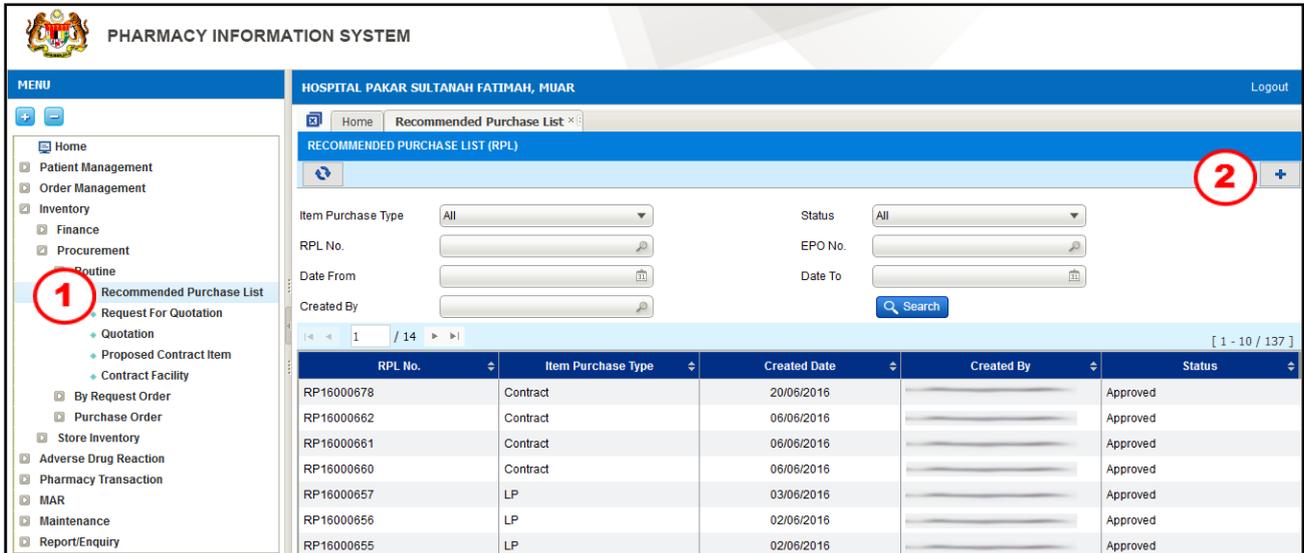To generate a Recommended Purchase List Contract record, perform the steps below:

Figure 3.2-1 New Recommended Purchase List (RPL)

The purpose is to generate a list of items where the purchasing is meant for Facility used and not for specific department

STEP 1
Click on the ' Inventory' menu followed by 'Procurement' and 'Routine', and select 'Recommended Purchase List (RPL)'

STEP 2
Click on the [+] button and the 'Recommended Purchase List' screen will be displayed as shown in the Figure 3.2-2
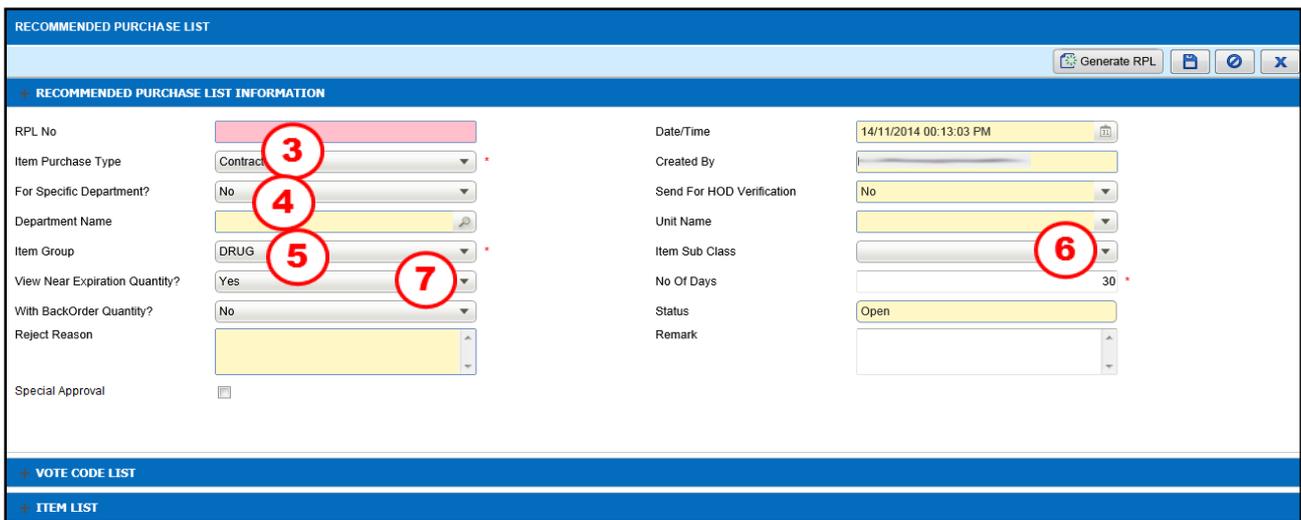

Figure 3.2-2 Recommended Purchase List (RPL)

STEP 3
Select *Item Purchase Type* as Contract

STEP 4
Select *ForSpecific Department:* NO

Note
If *For Specific Department* is 'NO', function for *Send for HOD Verification* will be disabled. *Department Name* and *Unit Name* are also disabled.

STEP 5
Select *Item Group* from the drop down box:
- Drug
- Non Drug

STEP 6

Select *Item Sub Class* will be retrieved from item sub class master table and will be displayed in a drop down box

STEP 7
Select to *View Near Expiration Quantity?* from the drop down box
- Yes
- No

Note
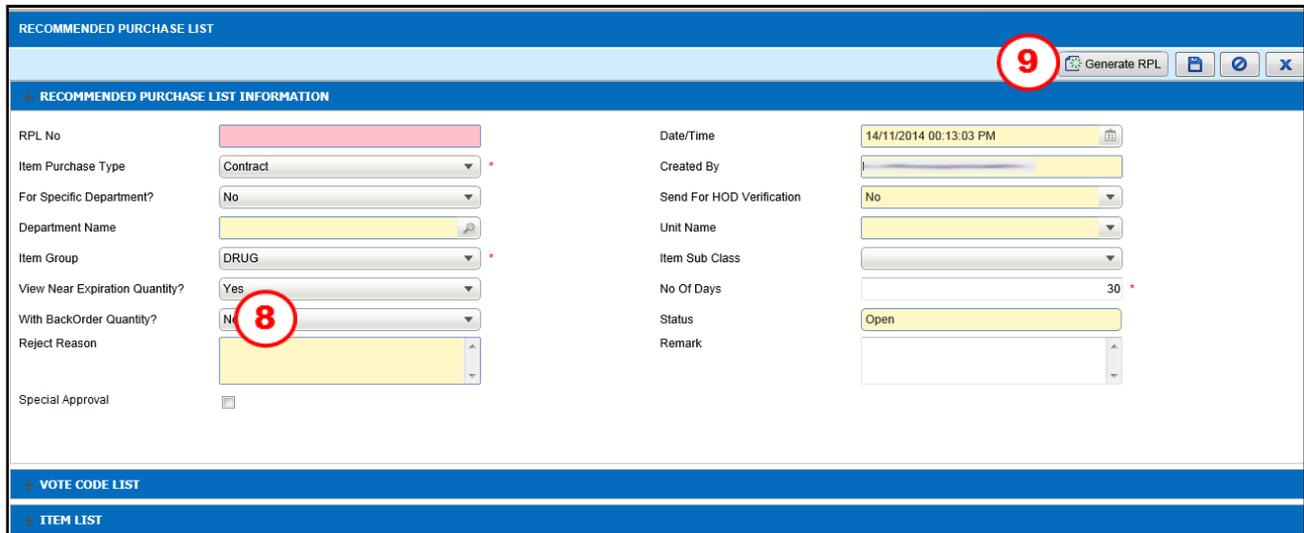If selection is 'Yes', user have to enter number of days in the *No ofDays* field.

Figure 3.2-3 Recommended Purchase List (RPL)

STEP 8
Select to view *With Back Order Quantity?* from the drop down box:
- Yes
- No

Note
Back Order Quantity represents the pending receive quantity that has not been supplied yet by the suppliers.

STEP 9

Click on the [Generate RPL] button to generate item based on selection criteria

Note

- *System is able to generate a list of items where the stock's quantity is less than the buffer level quantity.*

- *Buffer Level Quantity is set in the Item/Product Buffer Level.*

- *Summary information of Vote Code and Item List based on the list generated from the RPL.*

- *Vote Code List will contain summary information of Vote Code based on the items list generated from the RPL.*

- *RPL No will be generated when the user saves the transaction.*

- *Newly created RPL, **Status** will default to Open.*

- *Check on the **Special Approval** check box to purchase items from LP suppliers if PLSB or Contract Suppliers unable to supply needed Drug/Non Drug.*

Figure 3.2-4 Add Item Manually

STEP 10

Click on the [+ Add Item] button to add additional item into the RPL list and the Add Item screen will be displayed as shown in Figure 3.2-5
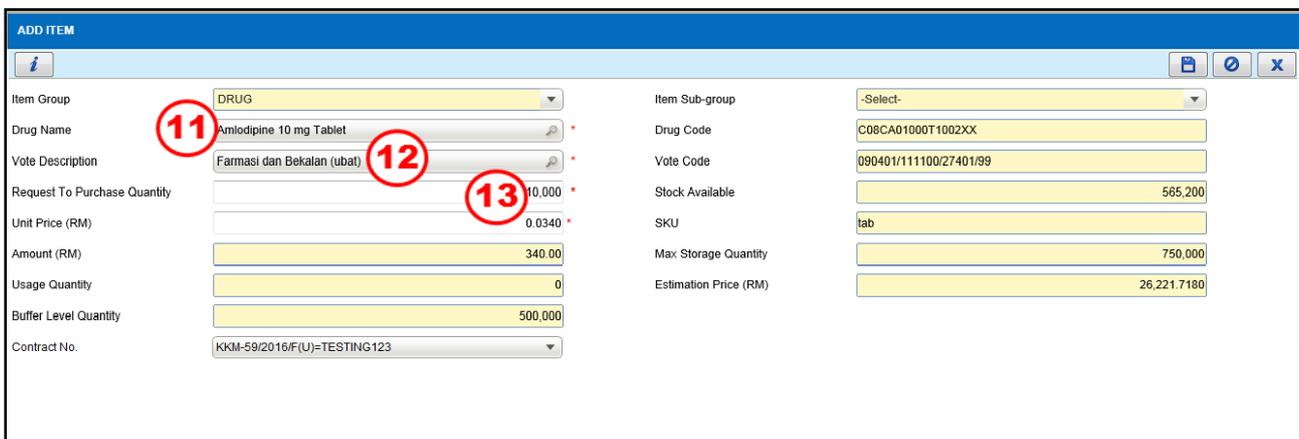
Figure 3.2-5 Add Item

STEP 11
Select ***Drug Name***

STEP 12
Select *Vote Description* from the drop down box if no default vote code has been set for the drug selected

STEP 13
Enter *Request To Purchase Quantity*

Note

- *Available Quantity is non-editable; it will be automatically displayed base on the selected item code.*

- *Unit price is will be displayed but is editable*

Note (fields that are non editable)

- *SKU for item code is set up at Item Master.*

- *Amount (RM) will be based on the Request to Purchase Quantity*

> *Amount (RM) = Request to Purchase Quantity * Unit Price (RM).*

- *Usage Quantity is default to 0 for first time procures and if the item has been purchased, value will be stated.*

- *The value for Estimation Price (RM) is based from Accumulate Total Quantity ÷ Amount Price.*
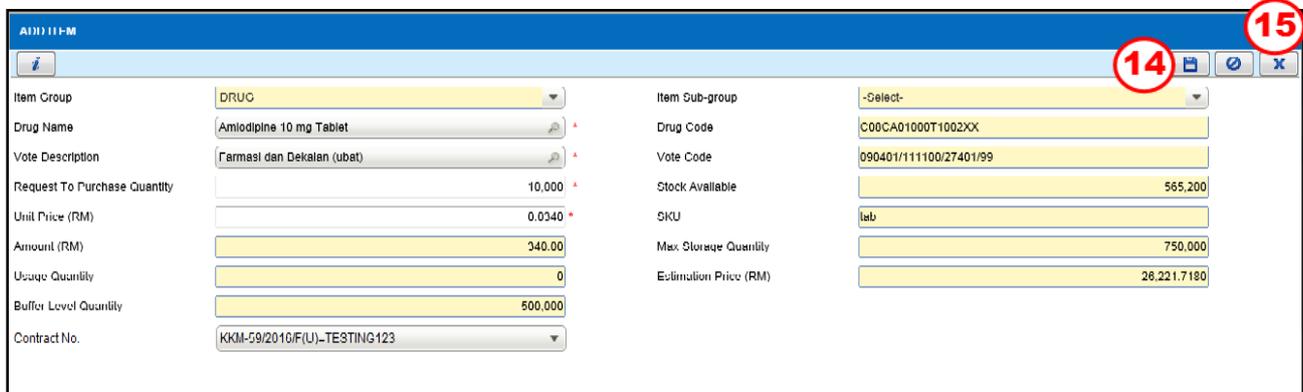
Figure 3.2-6 Add Item

STEP 14
Click on the [💾] button to save the selected drug to be added into RPL list

STEP 15
Click on the [X] to close the Add Item screen

Figure 3.2-7 Save Record

STEP 16

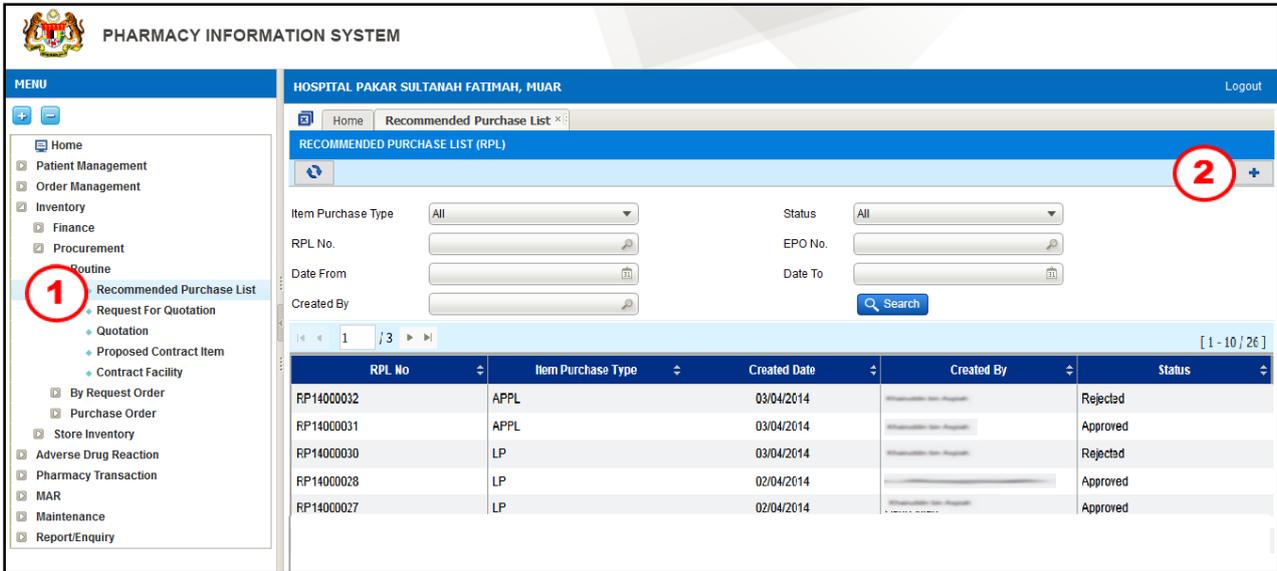Click on the 🖫 button to save the RPL transaction

Note

- *RPL No is generated after click save button.*

- *The transaction status is 'Open' after saved. After save, button for Send for Approval will be enabled.*

- *Click on the Send for Approval button to send the RPL to the HOD for approval.*

- *The transaction flow to Pharmacist to approve/reject through Task List. The status change to 'Pending for Approval'.*

STEP 17

Click on the ✗ to close the RPL screen

3.3 Create New Recommended Purchase List Contract For Specific Department (YES) Without Verification

To generate a Recommended Purchase List Contract record, perform the steps below:

Figure 3.3-1 New Recommended Purchase List (RPL)

The purpose of this screen is to allow the user to create Recommended Purchase List (RPL) whereby verification from HOD is not required. The transaction is for Specific Department and user have to select **Department Name** and **Unit Name** but **HOD Approval** is '*NO*'

STEP 1
Click on 'Inventory' menu followed by 'Procurement and Routine', and select 'Recommended Purchase List (RPL)

STEP 2
Click on the [+] button and the 'Recommended Purchase List' will be displayed in the New Transaction screen as shown in the Figure 3.3-2 New Recommended Purchase List (RPL)

Figure 3.3-2 New Recommended Purchase List (RPL)

STEP 3
Select *Item Purchase Type* as Contract

STEP 4
Select *For Specific Department is 'YES'*, function for *Send for HOD Approval* is enabled, but maintain 'NO'

STEP 5
Select *Department Name*

Note
*List of **Department Name** retrieved from Department Master.*

STEP 6
Select*Item Group* from the drop down box:
 - Drug
 - Non Drug

STEP 7
Select *Item Sub Class* will be retrieved from item sub class master table and will be displayed in a drop down box

STEP 8
Select to *View Near Expiration Quantity?* from the drop down box:
-     Yes
-     No

Note
If selection is 'Yes', user have to enter No of Days.
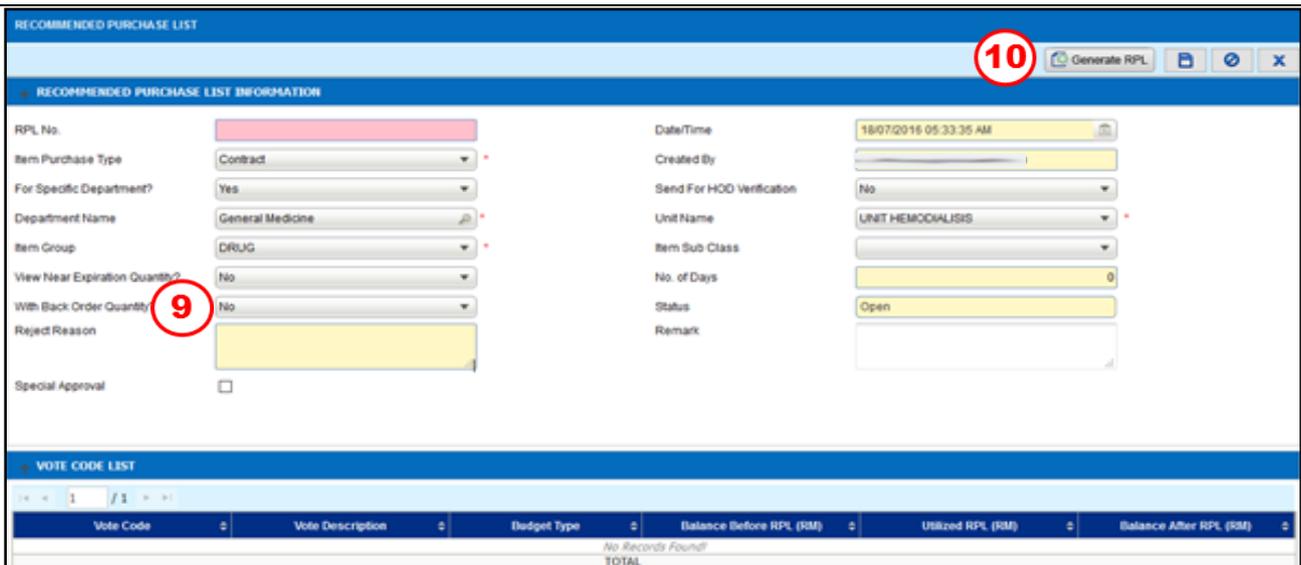
Figure 3.3-3 New Recommended Purchase List (RPL)

STEP 9
Select *With Back Order Quantity?*from the drop down box:
- Yes
- No

STEP 10
Click on the [Generate RPL] button to generate item based on selection criteria

Note
- *System is able to generate a list of items where the stock's quantity is less than the buffer level quantity.*

- *Buffer Level Quantity is set in theItem/Product Buffer Level.*

- *Summary information of Vote Code and Item List based on the list generated from the RPL.*
- *Vote Code List will contain summary information of Vote Code based on the items list generated from the RPL.*

- *RPL No will be generated when the user saves the transaction.*

- *Newly created RPL, **Status** will default to Open.*

- *Check on the **Special Approval** check box to purchase items from LP suppliers if PLSB or Contract Suppliers unable to supply needed Drug/Non Drug.*

Figure 3.3-4 Add Item

STEP 11

Click on the [+ Add Item] button to add additional item into the RPL list and the Add Item screen will be displayed as shown in Figure 3.3-5
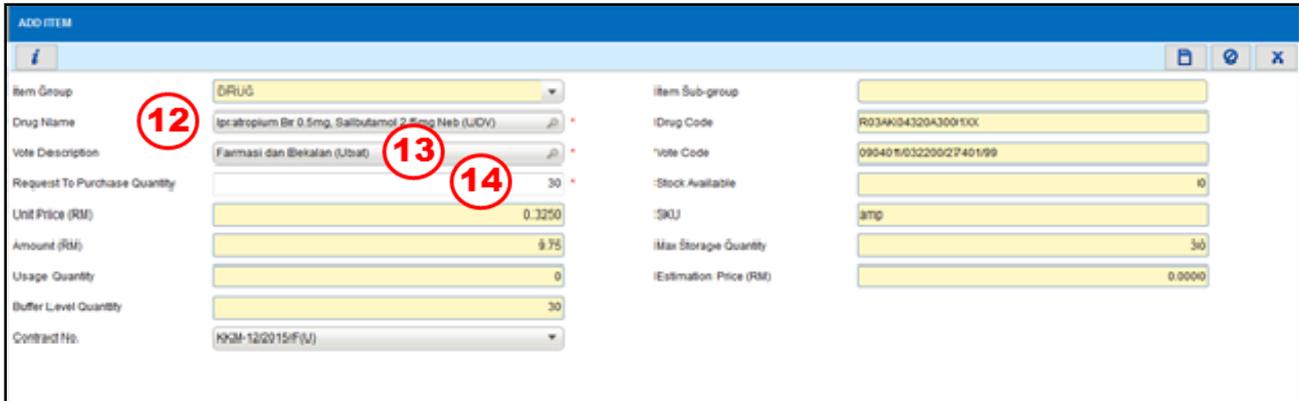

Figure 3.3-5 Add Item

STEP 12
Select *Drug Name*

STEP 13
Select *Vote Description* from the drop down box if no default vote code has been set for the drug selected
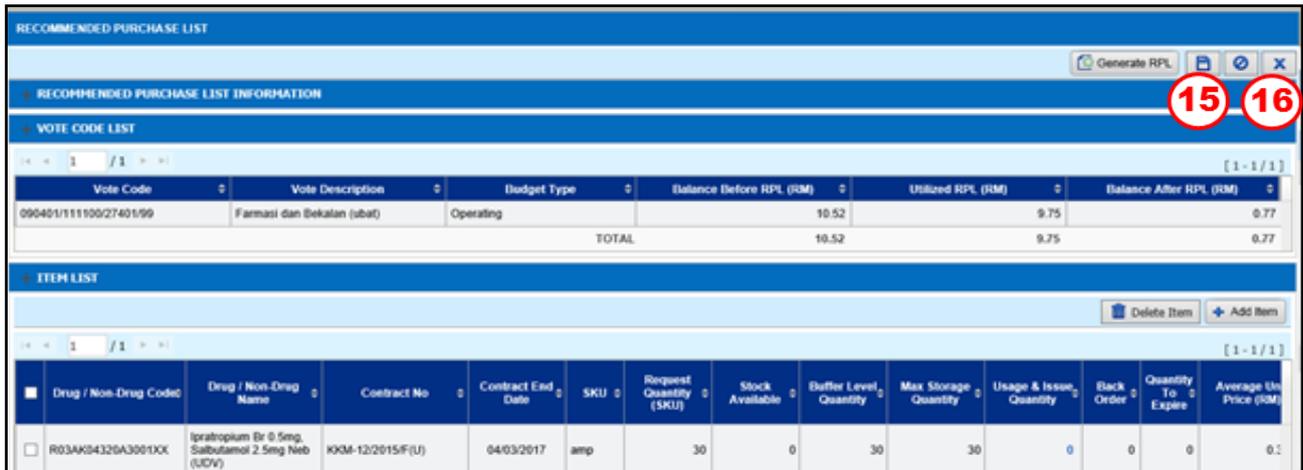
STEP 14
Enter *Request to Purchase Quantity*

Note

- *Available Quantity is non-editable; it will be automatically displayed base on the selected item code.*
- *Unit price is will be displayed but is editable*

Note (fields that are non editable)

- *SKU for item code is set up at Item Master.*

- *Amount (RM) will be based on the Request to Purchase Quantity*

*Amount (RM) = Request to Purchase Quantity * Unit Price (RM).*

- *Usage Quantity is default to 0 for first time procures and if the item has been purchased, value will be stated.*

- *The value for Estimation Price (RM) is based from Accumulate Total Quantity ÷ Amount Price.*

Figure 3.3-6 Save RPL

STEP 15

Click on the 💾 button to save the selected drug to be added into RPL list

Note

- *RPL No is generated after click save button.*

- *The transaction status is 'Open' after saved. After save, button for Send for Approval will be enabled.*

- *Click on the Send for Approval button to send the RPL to the HOD for approval.*
- *The transaction flow to Pharmacist to approve/reject through Task List. The status change to 'Pending for Approval'.*

STEP 16

Click on the ❎ to close the Add Item screen

3.4 Create New Recommended Contract For Specific Department (YES) With Verification

To create New RPL Contract, For Specific Department: YES, Send for Approval: YES, perform steps below
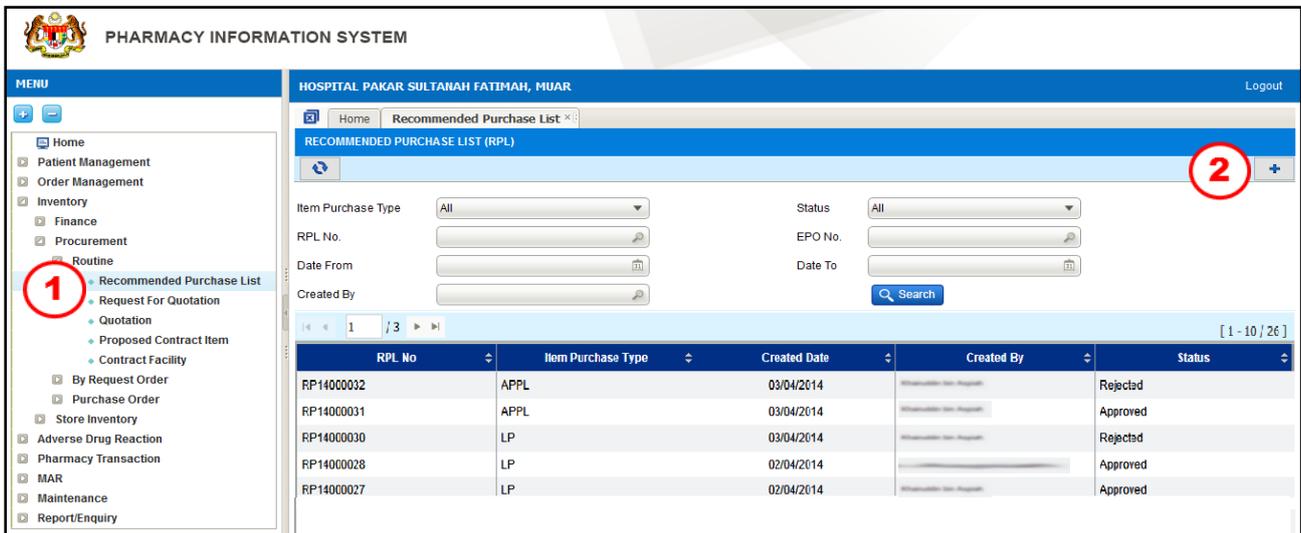
Figure 3.4-1 New Recommended Purchase List (RPL)

The purpose of this screen is to allow the user to create Recommended Purchase List (RPL) and Approval from HOD is required.The transaction is by Specific Department and user has to select Department Name and Unit Name. Users have to select 'Yes' for Send for HOD Verification.

STEP 1
Click on 'Inventory' menu followed by 'Procurement and Routine', and select 'Recommended Purchase List (RPL)

STEP 2
Click on the [+] button and the 'Recommended Purchase List' will be displayed in the New Transaction screen as shown in the Figure 3.4-2 New Recommended Purchase List (RPL)
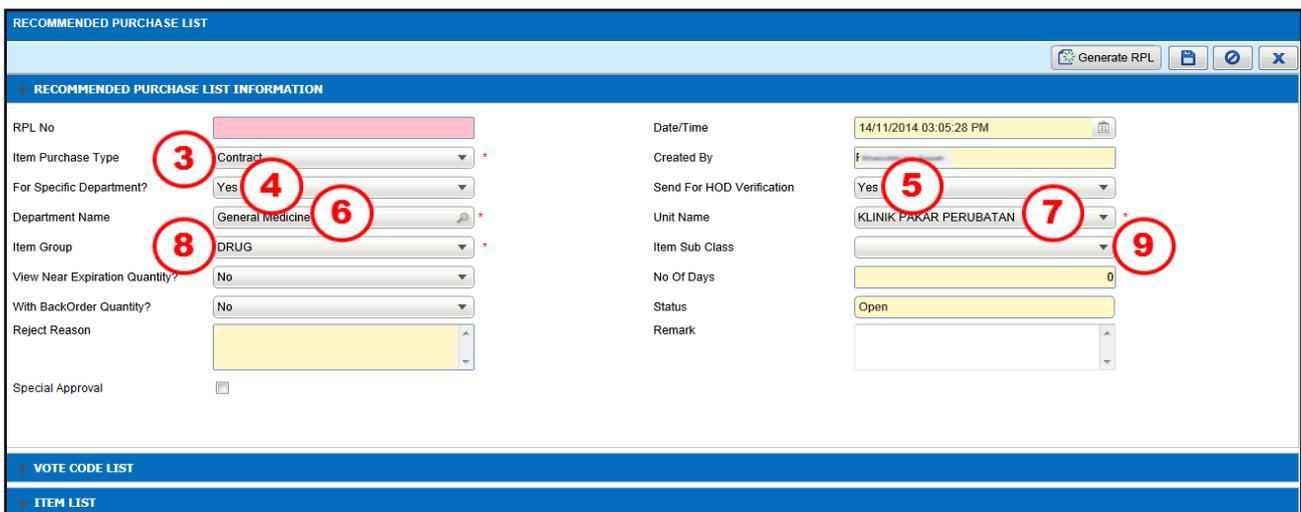
Figure 3.4-2 New Recommended Purchase List (RPL)

STEP 3
Select *Item Purchase Type* as Contract

STEP 4

Click **For Specific Department** and select '*Yes*', function for **Send for HOD Verification** is enabled

STEP 5
Click 'Yes' for **Send For HOD Verification**
Note
If Send For HOD Verification is 'Yes' the RPL transaction will send to respective HOD for verification.

STEP 6
Select **Department Name**
Note
List of Department Name retrieved from Department Master.

STEP 7
Select **Unit Name**

STEP 8
Select **Item Group** from the drop down box:
- Drug
- Non Drug

STEP 9
Select **Item Sub Class** is retrievable from item sub class master table and will be displayed in a drop down box
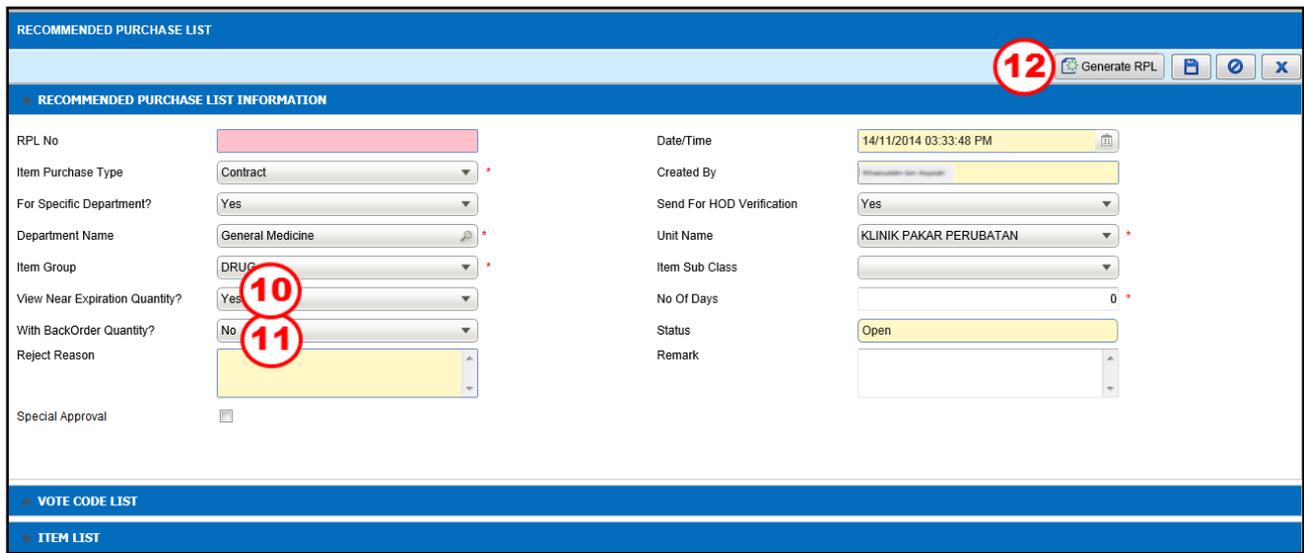
Figure 3.4-3 New Recommended Purchase List (RPL)

STEP 10

Select to **View Near Expiration Quantity?** from the drop down box:

- Yes
- No

Note

If selection is 'Yes', enter number of days in the **No of Days** *field.*

STEP 11
With Back Order Quantity? from the drop down box:
- Yes
- No

STEP 12
Click on the [Generate RPL] button to generate item based on selection criteria

Note

- *System is able to generate a list of items where the stock's quantity is less than the buffer level quantity.*

- *Buffer Level Quantity is set in theItem/Product Buffer Level.*

- *Summary information of Vote Code and Item List based on the list generated from the RPL.*

- *Vote Code List will contain summary information of Vote Code based on the items list generated from the RPL.*

- *RPL No will be generated when the user saves the transaction.*

- *Newly created RPL, Status will default to Open.*

- *Check on the Kelulusan Khas check box to purchase items from LP suppliers if PLSB or Contract Suppliers unable to supply needed Drug/Non-Drug.*
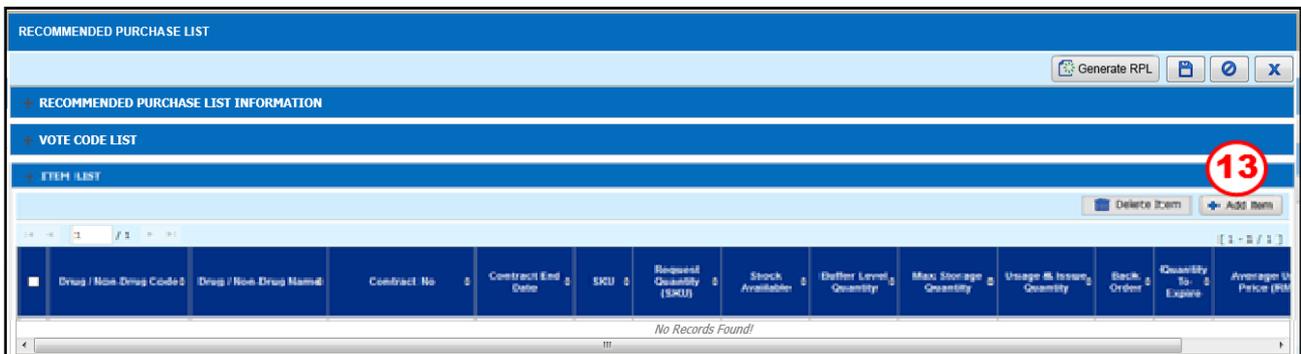
Figure 3.4-4 New Recommended Purchase List (RPL)

STEP 13

Click on the ➕ Add Item button to add additional item into the RPL list and the Add Item screen will be displayed as shown in Figure 3.4-5
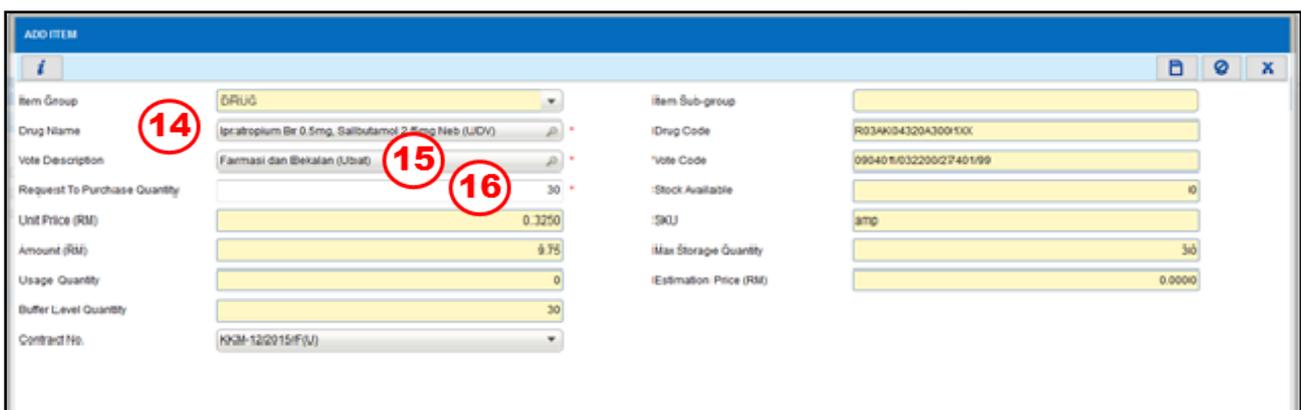
Figure 3.4-5 Add Item

STEP 14
Select **Drug Name**

STEP 15
Select **Vote Description** from the drop down box if no default vote code has been set for the drug selected

STEP 16
Enter *Request to Purchase Quantity*

Note

- *Available Quantity is non-editable; it will be automatically displayed base on the selected item code.*

- *Unit price (RM) will be displayed but is editable*

Note (fields that are non editable)

- *SKU for item code is set up at Item Master.*

- *Amount (RM) will be based on the Request to Purchase Quantity*

  *Amount (RM) = Request to Purchase Quantity * Unit Price (RM)*

- *Usage Quantity is default to 0 for first time procures and if the item has been purchased, value will be stated.*

- *The value for Estimation Price (RM) is based from Accumulate Total Quantity ÷ Amount Price.*
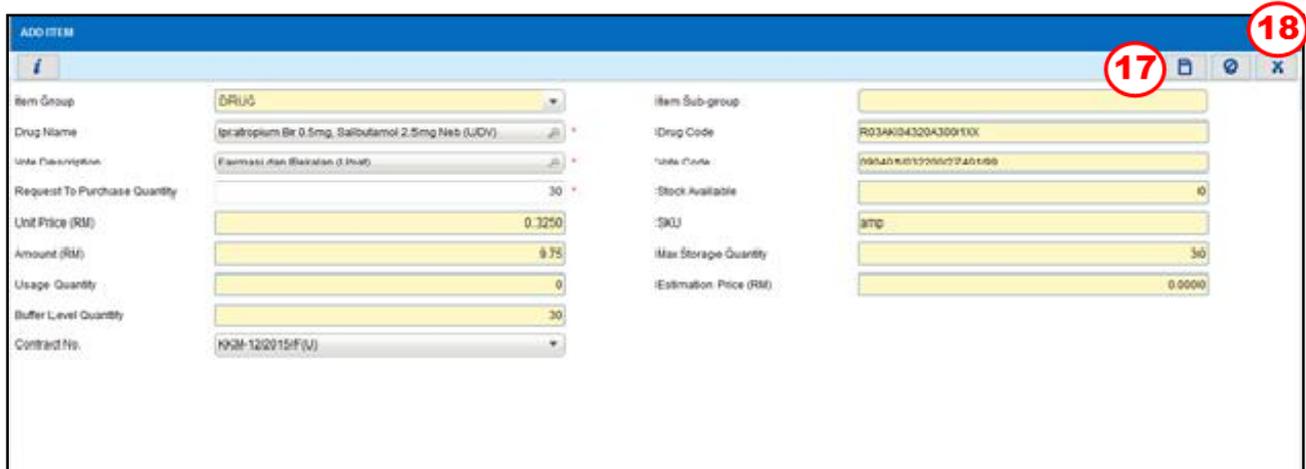
Figure 3.4-6 Add Item

STEP 17
Click on the 💾 button to save the selected drug to be added into RPL list

STEP 18
Click on the ✖ to close the Add Item screen

Figure 3.4-7 Recommended Purchase List (RPL)

STEP 19

Click on the [💾] button to save the RPL transaction

STEP 20

Click on the [✗] to close the RPL screen

Note

- *RPL No is generated after click save button.*
- *The transaction status is 'Open' after saved. After save, button for Send for Verification will be enabled.*

- *Click on the Send for Verification button to send the RPL to the HOD for verification.*

- *The transaction flow to HOD to approve/reject through Task List. The status change to 'Pending for Verification.*

3.5 Recommended Purchase List (RPL) Verification

To view and verify the Recommended Purchase List (RPL) record, perform the steps below:

Figure 3.5-1 Task List

The purpose of this screen is for the HOD to search and view the Recommended Purchase List (RPL) through Task List. The transaction is mainly for HOD to verify the RPL transaction.

STEP 1
Click on the *Transaction No*. hyperlink and the Recommended Purchase List (RPL) screen will be displayed as shown in Figure 3.5-2

Figure 3.5-2 Recommended Purchase List (RPL) Verify

STEP 2
Double click on the Item List and new screen will be shown in Figure 3.5-3

Note
HOD/Pharmacist can view summary of the entire vote code for all the item that generated by the system under the Vote Code List Section.

Under the Item List Section, HOD/Pharmacist is allowed to:
a) *View Usage & Issue Quantity*
b) *View No Of Vote Code*
c) *Add/Delete Item*
d) *Made a modification of the Vote Code List*

Figure 3.5-3 Recommended Purchase List (RPL) Verify

Figure 3.5-4 Vote Information

STEP 3
Click on the ➕Vote Code button to add more vote code in Vote Code List and new screen will be shown in Figure 3.5-4

Note
- *The reason to add vote code because of insufficient budget to procure the item.*
- *If double click on available vote in vote code list, the new screen will be shown to allow user to edit the vote code as shown in Figure 3.5-4.*

STEP 4
Select **Vote Description**

STEP 5
Insert **Request To Purchase Quantity**

STEP 6
Click on the 💾 button to save the transaction

Note

- *If click on the* [Yes] *button, record will be saved and new vote code will appear in Vote Code List.*

CONFIRMATION

CONF0002: Are you sure you want to save?

| Cancel | Yes | No |
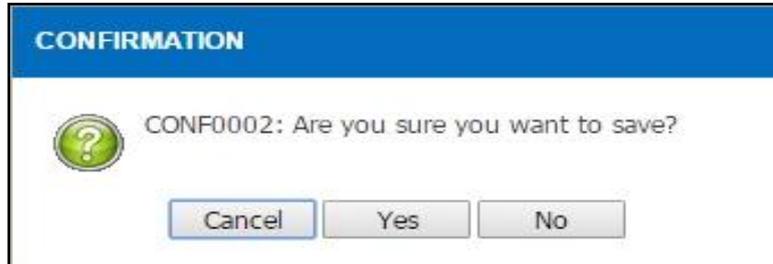
Figure 3.5-5 Alert Messages

- *If click on the* [No] *button, record will not be saved and will not be proceed to add vote code process.*
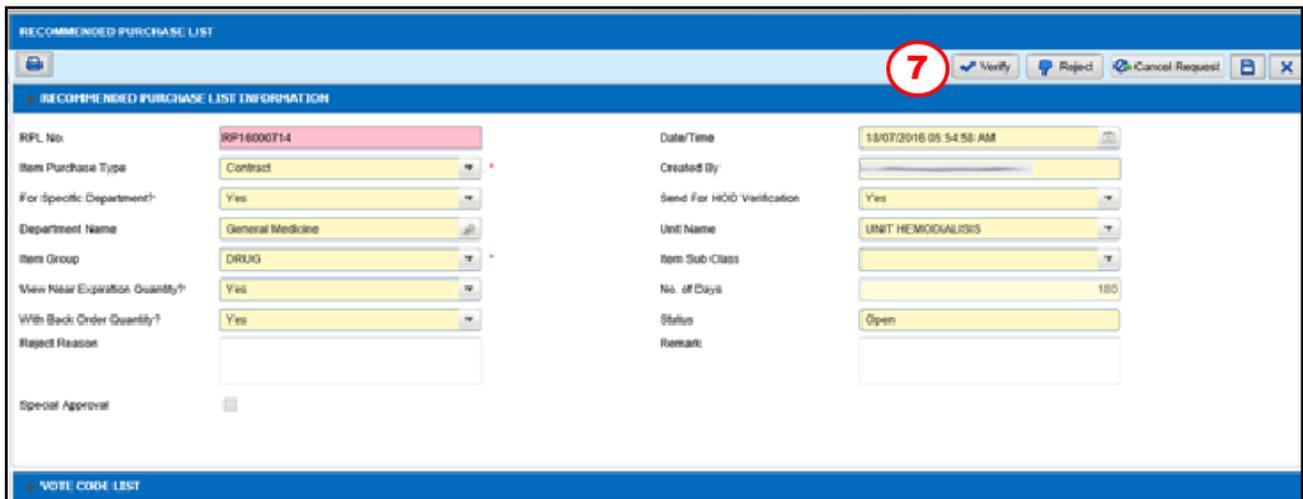
Figure 3.5-6 Verify Recommended Purchase List

STEP 7

Click on the [✔ Verify] button to proceed the transaction

Note

- *HOD rejects transaction, necessary to put remarks.*

- *If click on the* [Yes] *button, record will be verified and saved and proceed to Approval process.*

CONFIRMATION

CONF0002: Are you sure you want to save?

| Cancel | Yes | No |
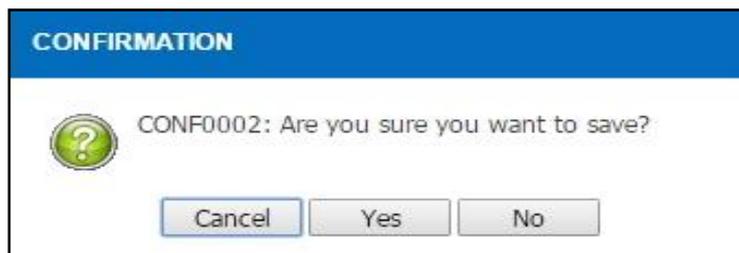
Figure 3.5-7 Alert Messages

- *If click on the* [No] *button, record will not be verified and will not be proceed to approval process as shown in Figure 3.5-7.*

- *If click on the* [👎 Reject] *button, the transaction will not proceed to Approval process*

- *Click on the* [OK] *button, record will be verified and sent for approval successfully*

INFORMATION

ⓘ INFO0679: Record has been saved successfully

[OK]

Figure 3.5-8 Record Verified Alert Messages

- *The transaction Status will be changed to 'Pending For Approval'.*

3.6 Recommended Purchase List (RPL) Contract Approval
To view and approve the Recommended Purchase List (RPL), perform the steps below:

Figure 3.6-1 Recommended Purchase List (RPL) Approval

The purpose of this screen is for the Pharmacist to search, edit and view the RPL with the status Pending for Approval.The transaction is for Pharmacist to approve the transaction to proceed with purchasing

STEP 1
Click one of the Transaction No. and system will be directed to related screen

Note
Pharmacist has an option by open listing page and search for 'Pending for Approval for' Recommended Purchase List.

Figure 3.6-2 Recommended Purchase List (RPL) Approval

STEP 2
Double-click on the Item List to view Item Information

STEP 3

Click on the [👍 Approve] button to approve the transaction and proceed to Generate EPO Details

Note
- *Before click on the [👍 Approve] button, HOD/Pharmacist is allowed to:*
    - *View Usage & Issue Quantity*
    - *View No Of Vote Code*
    - *Add/Delete Item*
    - *Made a modification of the Vote Code List*

- *To do modification on Vote Code, please repeat steps and refer the Figure below:*
    - *Recommended Purchase List (RPL) Step 3, Figure 3.5-3 Recommended Purchase List (RPL) Verify*
    - *Recommended Purchase List (RPL)Step 4-6, Figure 3.5-4 Vote Information*
    - *Recommended Purchase List (RPL) Step 7-8, Figure 3.5-6 Vote Information*

3.7 Purchase Order Listing Page

To view existing Purchase Order record, perform the steps below:

Figure 5.1-1 Purchase Order Listing Page

Purpose of this screen is to allow user to choose 3 order types which are APPL, Contract, and LP and proceed with procurement process

STEP 1
Click on 'Inventory' menu followed by
'Procurement and Routine', and select 'Purchase Order'

STEP 2
To search for existing purchase order transaction, you may search by criteria as follow:
  a) Order Type
      - APPL
      - Contract
      - LP
  b) Order No
  c) Purchase Type
      - Direct
      - Quotation
  d) LPO No
  e) Date From
  f) Date To
  g) Item Description
  h) Item Code
  i) Ep Status
      - Ep Approved
      - Ep Rejected
      - Pending for Ep Approval
  j) Status
      - ALL
      - Open
      - Pending to Approval
      - Approved
      - Cancelled
      - Closed
      - Rejected

Figure 5.1-2 Purchase Order Listing Page

STEP 3
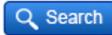
Click on the [🔍 Search] button after input criteria
The result displayed will be based on the entered criteria as shown in Figure 5.1-2
In circumstances of no criteria is input, the entire list of transaction will be displayed

STEP 4

Double click on the selected record and the details will be displayed

3.8 Create New Contract Purchase Order: RPL

To create a new Contract Purchase Order RPL transaction, perform the steps below:
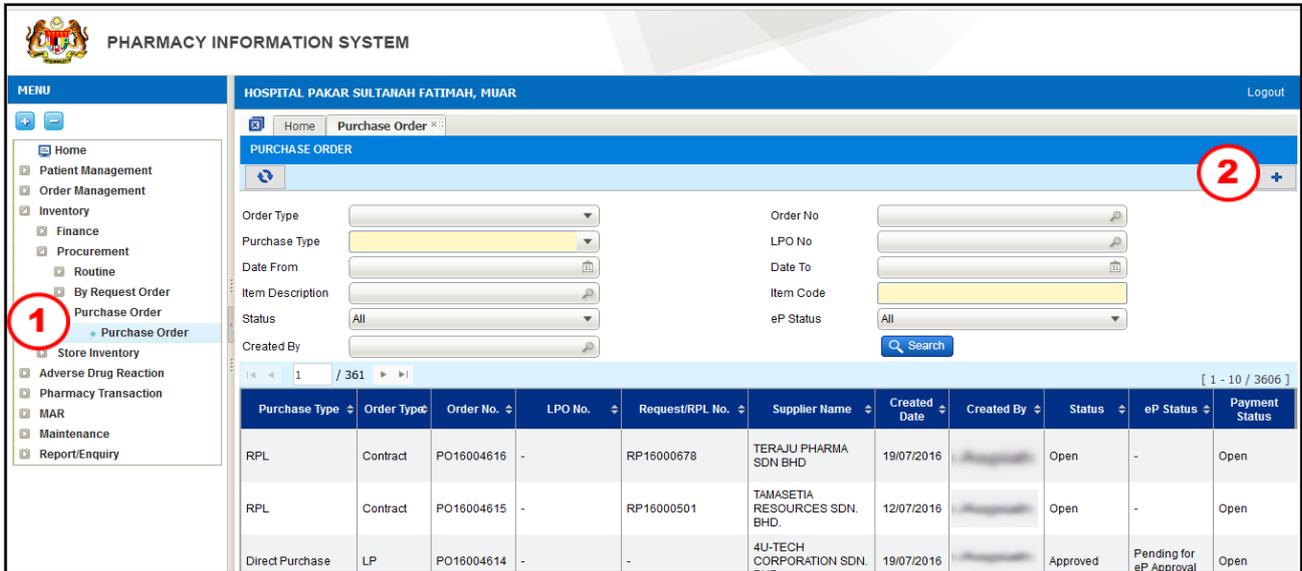
Figure 5.2-1 New Contract RPL Purchase Order

STEP 1
Click on 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Purchase Order'

STEP 2
Click on the [+] button and the **Contract Purchase Order** tab will be displayed in the **Purchase Order** screen as shown in the Figure 5.2-2
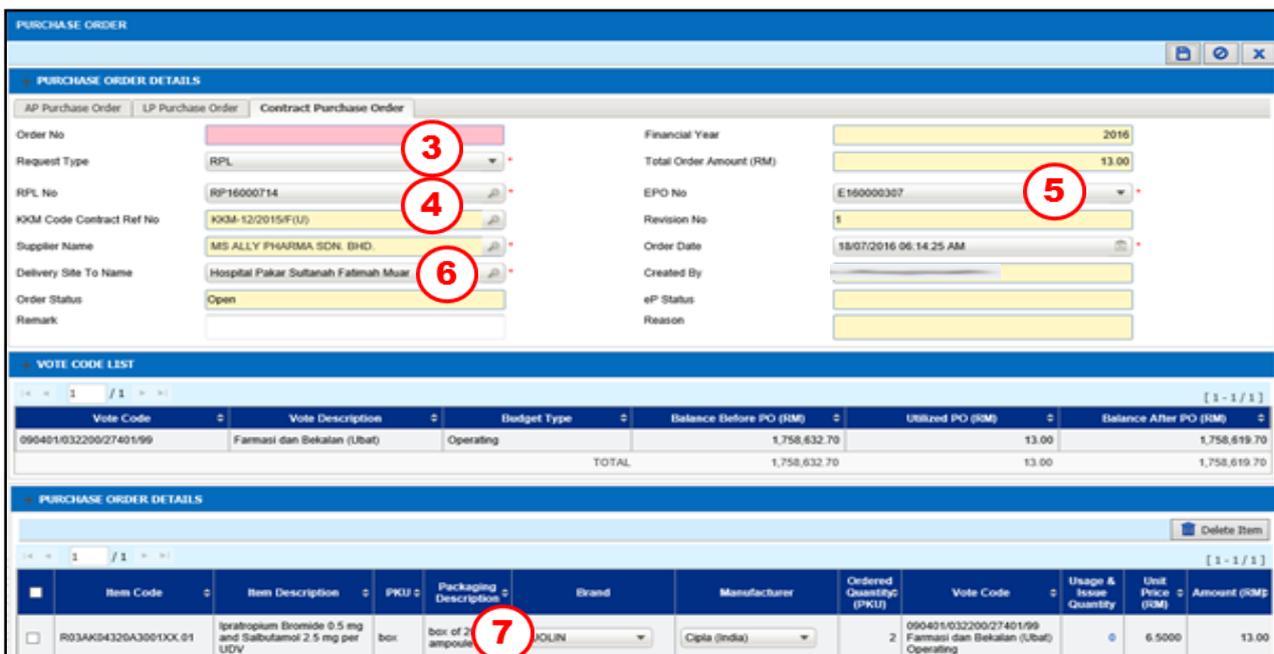
Figure 5.2-2 Contract RPL Purchase Order

STEP 3
Select on **Request Type** : RPL

STEP 4
Select available *RPL No*

STEP 5
Select available *EPO No*
Note
- *Order Date will default to server time.*

- *Supplier Name will be selected based on M.O.H given.*

STEP 6
Select available *Delivery Site To Name*

STEP 7
Double click on the item listed

Figure 5.2-3 Add Purchase Order Item

STEP 8
Select available *Brand*

STEP 9
Select *Manufacturer*

STEP 10

Click on the ⬚ button to save the modification and details will be displayed on Purchase Order Details


Figure 5.2-4 Contract Purchase Order

STEP 11
Click on the ⬚ button to save the modification

Figure 5.2-5 Contract Purchase Order

STEP 12
Click on the [Send for Approval] button to get approval from Pharmacist as per Figure 5.2-5

INFORMATION

INFO0125: EPO details updated

OK
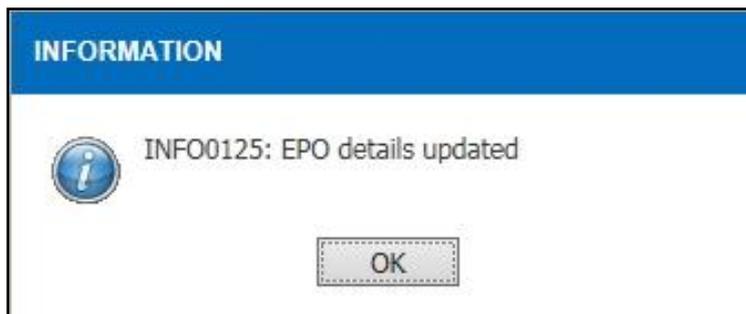
Figure 5.2-6 Alert Messages

Note

- *If click on the [Yes] button, record will be sent for approval and proceed to Approval process as shown in Figure 5.2-6.*

- *If click on the [No] button, record will not be sent to approval process as shown in Figure 5.2-6.*

INFORMATION

INFO0101: Record has been sent for approval successfully

OK

Figure 5.2-7 Alert Messages

- *Click on the [OK] button to updated data as shown in Figure 5.2-7.*

3.9   Contract Purchase Order Approval: RPL

Pharmacist will receive notification in Task List for any Purchase Order that needs to be approved

Figure 5.3-1 Purchase Order Approve

STEP 1
Double click on item details on Purchase Order Details to modify (refer Figure 5.2-3) :
   a)   Item Description
   b)   Vote Description
   c)   Change Order Qty
   d)   Brand
   e)   Manufacturer

STEP 2
Enter *Approved Quantity (PKU)*amount

STEP 3
Click on the [💾] button to save the modification and details will be displayed on Purchase Order Details

Figure 5.3-2 Add Purchase Order Item
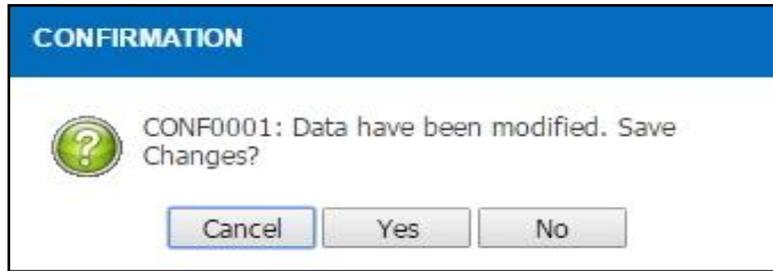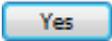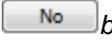
Figure 5.3-3 Alert Messages

Note

- *If click on the* ⬚Yes *button, record will be saved as shown in Figure 5.3-3.*

- *If click on the* ⬚No *button, record will not be saved as shown in Figure 5.3-3.*
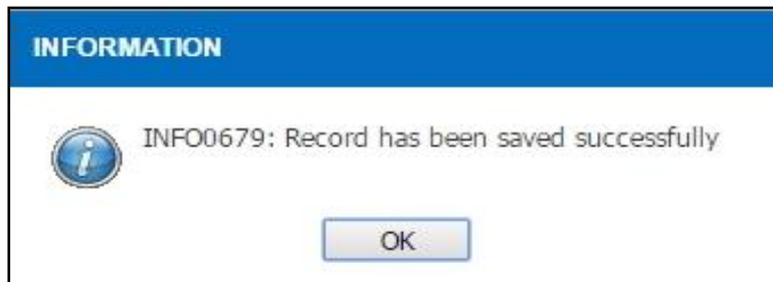
Figure 5.3-4 Alert Messages

- *Click on the* ⬚OK *button to update data as shown in Figure 5.3-4.*

Figure 5.3-5 Purchase Order

STEP 4

Click on the 👍Approve button to approve the transaction

Note

- *If click on the* **P Reject** *button, record will be rejected and end the process.*

- *If click on the* **+** *button, information of current item to be purchased will be deleted.*
  However, creating a new purchase order using the same RPL No. is allowed, except it will be different IPO.

STEP 5

Click on the **X** to close the screen

CONFIRMATION

CONF0128: Are you sure you want to approve the record?

Cancel   Yes   No
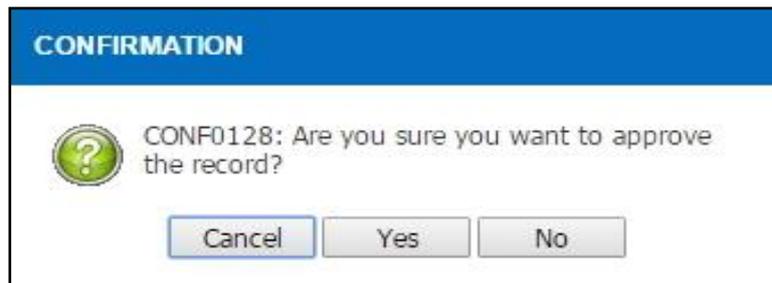
Figure 5.3-6 Alert Messages

Note

- *If click on the* **Yes** *button, record will be approved saved as shown in Figure 5.3-6.*

- *If click on the* **No** *button, record will not be approved save as shown in Figure 5.3-6.*

INFORMATION

INFO0673: Record approved successfully.

OK

Figure 5.3-7 Alert Messages
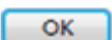
- *Click on the* **OK** *button to confirm approved and send for Ep Approval update data as shown in Figure 5.3-7.*

3.10 Create New Contract Purchase Order: Contract

To create a new Contract Purchase Order RPL transaction, perform the steps below:
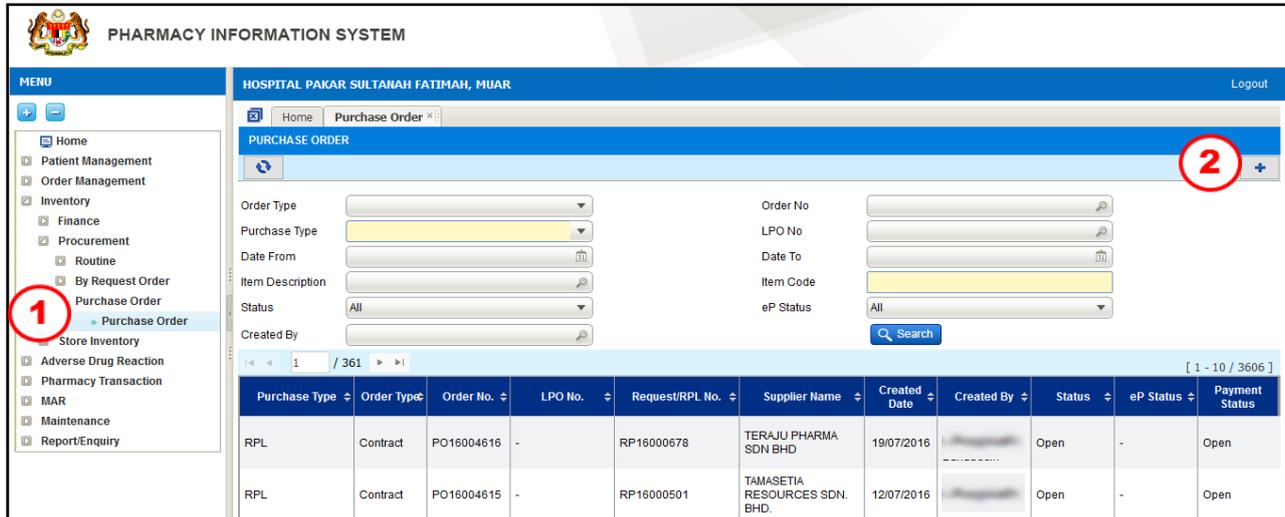
Figure 5.4-1 New Contract RPL Purchase Order

STEP 1
Click on 'Inventory' menu followed by 'Procurement and Routine', and select 'Purchase Order'

STEP 2
Click on the [+] button and the **Contract Purchase Order** tab will be displayed in the **Purchase Order** screen as shown in the Figure 5.4-2
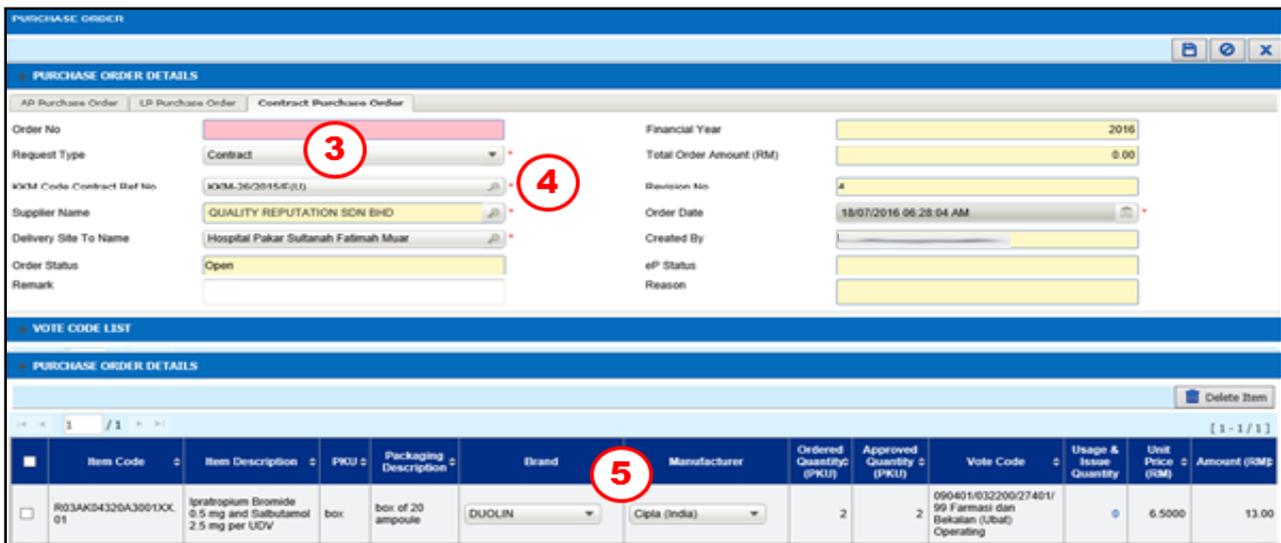

Figure 5.4-2 Contract RPL Purchase Order

STEP 3
Select on **Request Type** : Contract

STEP 4
Select available **KKM Code Contract Ref No**

Note
KKM Code Contract Ref No given by HQ to proceed with Purchase Order.

Figure 5.4-3 Add Purchase Order Item

STEP 5
Double click on the Purchase Order Details section to add order quantity for item

Note
- **Order Date** will default to server time.

- **Supplier Name** will be selected based on M.O.H given.

Figure 5.4-4 Contract Purchase Order

STEP 6
Select available **Vote Description**

STEP 7
Enter **Order Quantity (PKU)**

STEP 8
Select available **Brand**

STEP 9
Select available **Manufacturer**

STEP 10

Click on the 💾 button to save the modification

Figure 5.4-5 Contract Purchase Order

STEP 11
Click on the 🔧 Send for Approval button to get approval from Pharmacist. Refer Figure 5.4-5
Note
- *If click on the* Yes *button, record will be sent for approval and proceed to Approval process as shown in Figure 5.4-6.*

Figure 5.4-6 Alert Messages

- *If click on the* No *button, record will not be sent to approval process as shown in Figure 5.4-6*

- *Click on the* OK *button to updated data as shown in Figure 5.4-7.*

Figure 5.4-7 Alert Messag

3.11 Contract Purchase Order Approval: Contract

Pharmacist will receive notification in Task List for any Purchase Order that needs to be approved

Figure 5.5-1 Purchase Order Approve

STEP 1
Double click on item details on Purchase Order Details to modify :
   a) Item Description
   b) Vote Description
   c) Change Order Qty
   d) Brand
   e) Manufacturer

STEP 2
Enter *Approved Quantity (PKU)* amount

STEP 3
Click on the 🖫 button to save the modification and details will appear on Purchase Order Details

Figure 5.5-2 Add Purchase Order Item

Note
• *If click on the* Yes *button, record will be saved as shown in Figure 5.5-3.*

- *If click on the* [No] *button, record will not be saved as shown in Figure 5.5-3.*
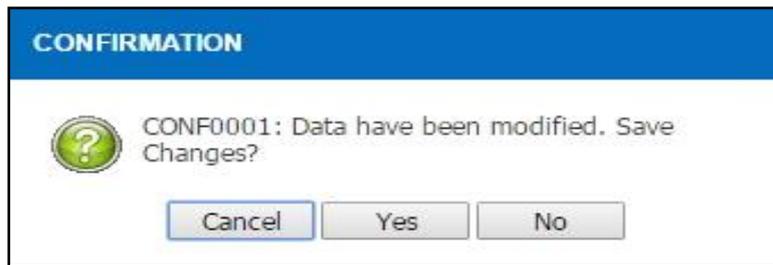
Figure 5.5-3 Alert Messages

Figure 5.5-4 Alert Messages

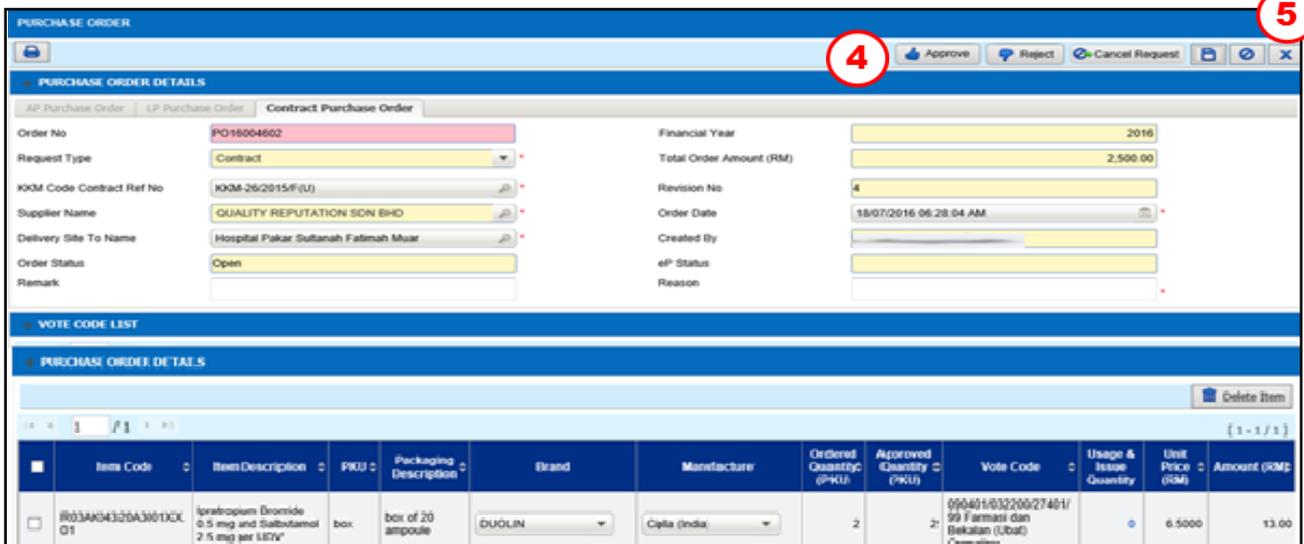- *Click on the* [OK] *button to update data as shown in Figure 5.5-4.*

Figure 5.5-5 Purchase Order

STEP 4

Click on the [👍 Approve] button to approve the transaction
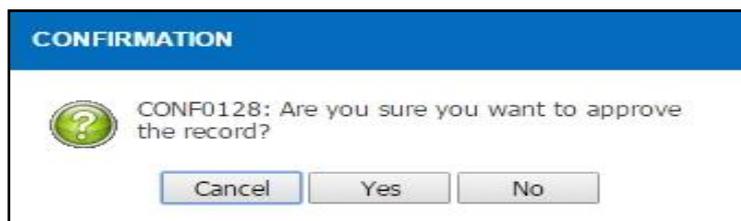
Figure 5.5-6 Alert Messages

Note

- *If click on the* [Reject] *button, record will be rejected and end the process.*

- *If click on the* [+] *button, information of current item to be purchased will be deleted. However, creating new purchase order using the same RPL No. is allowed, exception is different IPO.*

INFORMATION

INFO0673: Record approved successfully and Send for eP Approval.

OK

Figure 5.5-7 Alert Messages

STEP 5

Click on the [X] to close the screen

Note
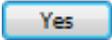
- *If click on the* [Yes] *button, record will be approved saved as shown in Figure 5.5-6.*

- *If click on the* [No] *button, record will not be approved saved as shown in Figure 5.5-6.*

- *Click on the* [OK] *button to confirm approved and send for eP Approval update data as shown in Figure 5.5-7.*

3.12 Proposed Contract Item Listing Page

This function is used to view existing Proposed Contract Item Recommended Purchase List (RPL) records.

Figure 4.0-1 Proposed Contract Item Listing Page

Purpose of this screen is to allow user to proceed with procurement of item more than 500K

STEP 1
Click on 'Inventory' menu followed by 'Procurement and Routine', and select 'Proposed Contract Item'

STEP 2
To search for existing Proposed Contract Item transaction, you may search by criteria as follow:
  a) Proposed Contract No
        - Item Group All
        - Drug
        - Non Drug
  b) Type
        - All
        - Requisition Order
        - RPL
  c) Status
        - Approved
        - Cancelled
        - Open
        - Pending For Approval
        - Rejected
  d) Date From
  e) Date To
  f) Created By

STEP 3
Click on the [Q Search] button after input criteria and the result displayed will be based on the entered criteria

STEP 4
Double click on the selected record and the details will be displayed

Figure 4.0-2 Purchase Order Listing Page

3.12.1 New Proposed Contract ItemRecord:Recommended Purchase List (RPL)
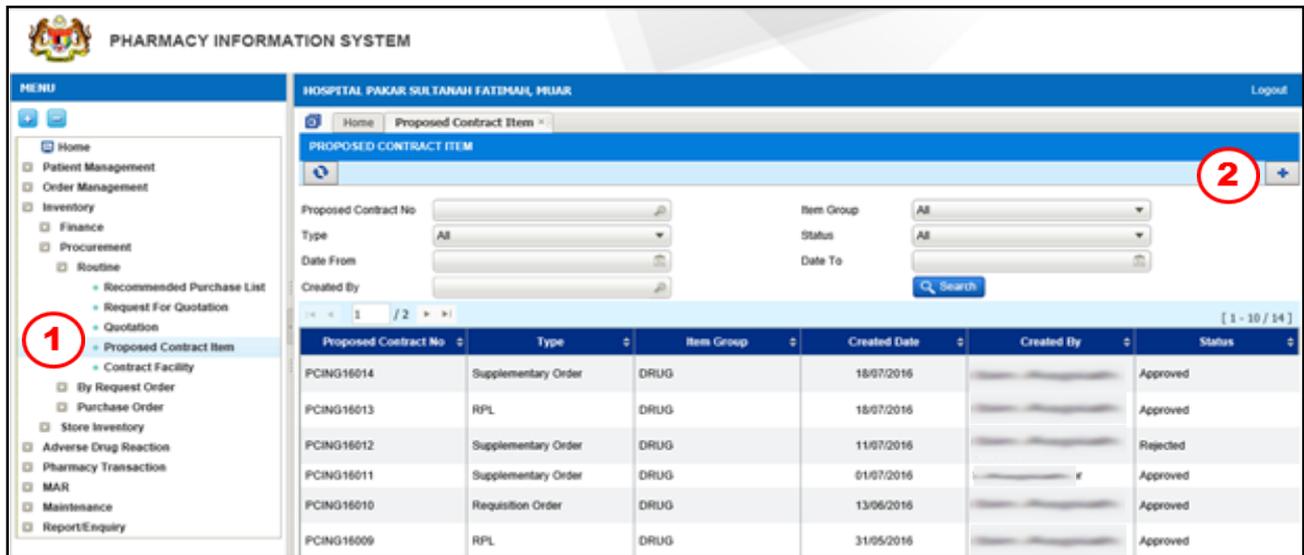
This function is to create a new record for type RPL

Figure 3.1.1-1 Create new Proposed Contract Item

STEP 1
Click on 'Inventory' menu follows by 'Procurement' then 'Routine' and click 'Proposed Contract Item'

STEP 2
Click on the [+] button to create new transaction

Note
- *Proposed Contract Item screen will be displayed as shown in the Figure 3.1.1-2.*

- *A newly created Proposed Contract Item record status will default to 'Open'.*
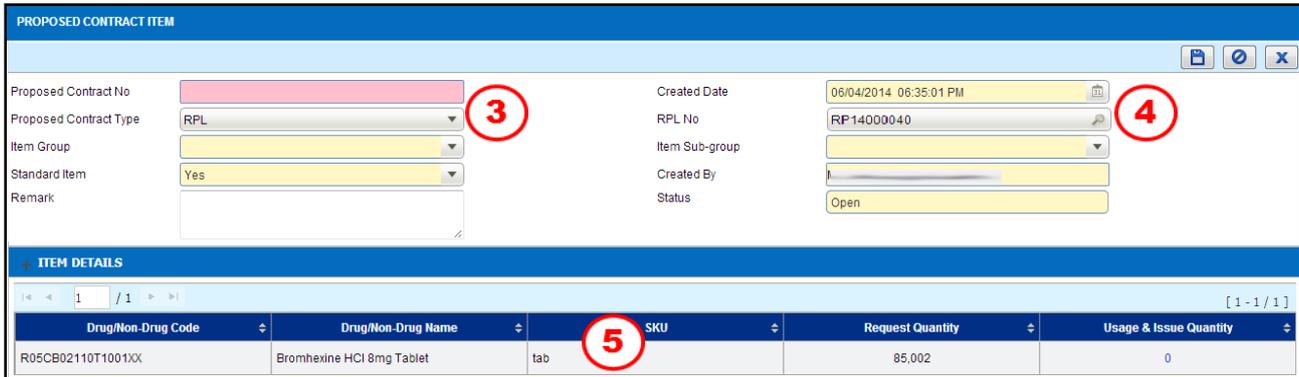
Figure 3.1.1-2 Proposed Contract Item

STEP 3
Select **Proposed Contract Type** as RPL from the dropdown box

Note
*If the user selects the **Proposed Contract Type** as RPL, **RPL No** search field will be displayed.*

STEP 4
Click on the 🔍 to search the **RPL No**

Note
List of item(s) will be listed under the Item List section.

STEP 5
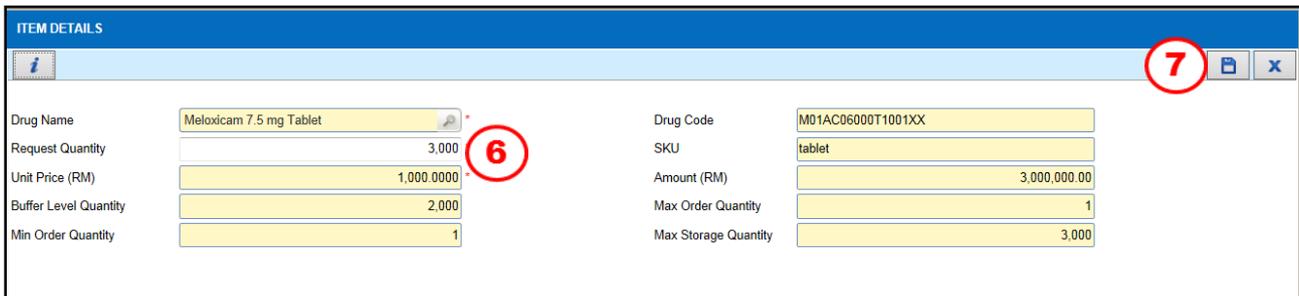Double click on the item details to insert Request Qty in Item Details

Figure 3.1.1-3 Item Details

STEP 6
Insert/Edit **Request Quantity**

Note

- **Unit Price (RM)** *is based on each item.*

- **Amount (RM)** *is total amount of item.*

- **SKU**: *Store Keeping Unit.*

- **Buffer Level Quantity** *is set up for buffer level of this item. Set up at Buffer Level Master.*

- **Min Order Quantity** *is minimum quantity to be ordered of this item.*

- **Max Order Quantity** *is maximum quantity to be ordered of this item.*

- **Max Storage Quantity** is for maximum of quantity to be stored.
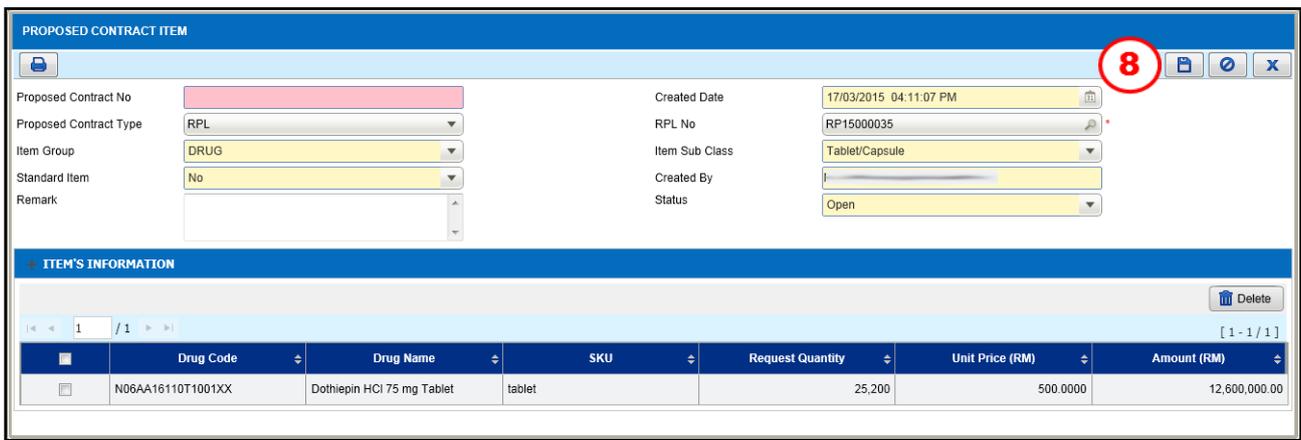
STEP 7

Click on the 🖫 button to save the transaction

STEP 8

Click on the 🖫 button to save the Proposed Contract Item

Note

After click on the 🖫 button, 👍 Send for Approval button will be enabled.

Figure 3.1.1-4 New Proposed Contract Item

Figure 3.1.1-5 Proposed Contract Item

STEP 9

Click on the 👍 Send for Approval button
Note
- Alert message will be displayed as per Figure 3.1.1-6& Figure 3.1.1-7.

CONFIRMATION

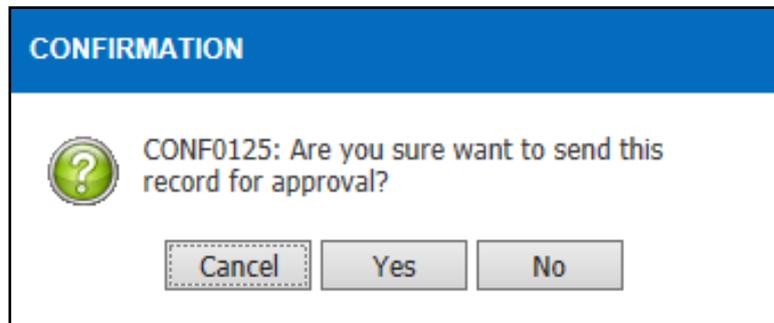CONF0125: Are you sure want to send this record for approval?

Cancel   Yes   No

Figure 3.1.1-6 Save Record Alert Message

- *Click on the* Yes *button.*

INFORMATION

INFO0101: Record has been sent for approval successfully
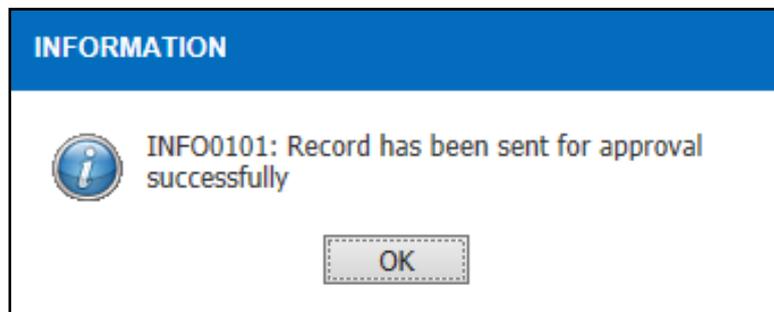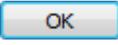
OK

Figure 3.1.1-7 Save Record Alert Message

- *Click on the* OK *button.*

- ***Proposed Contract No.*** *will be auto generated by system for future reference and the* Send for Approval *button will be enabled.*

3.12.2 New Proposed Contract Item : Supplementary Order

This function is to create a new record for type Supplementary Order

Note
Repeat **STEP 1** and **STEP 2** from section 3.1.1 *New Proposed Contract Item Record Recommended Purchase List (RPL)*
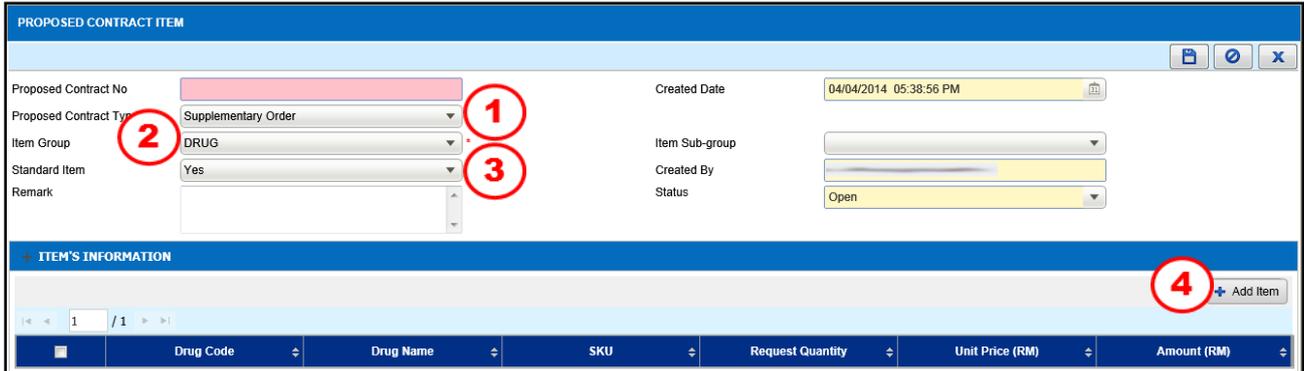

Figure 3.1.2-1 Proposed Contract Item

STEP 1
Select **Proposed Contract Type** as Supplementary Order from the dropdown box

STEP 2
Select either one of these from **Item Group** drop down box:
- Drug
- Non Drug

STEP 3
Select **Standard Item**
- Yes
- No

Note
- **Standard Item** options are used to determine whether the selected item is Standard Item or Non Standard Item.
- **Status** is default to 'Open'.

STEP 4

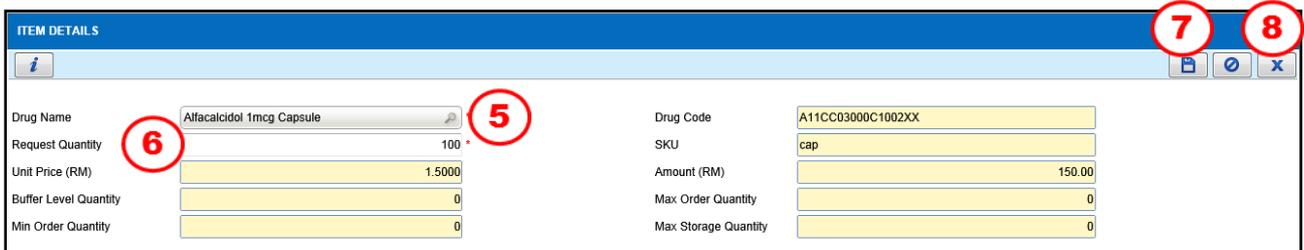Click on the [+ Add Item] button to search/add item in Item Information

Figure 3.1.2-2 Item Details

STEP 5
Select available **Drug Name**

STEP 6

Insert/Edit *Request Quantity*

Note
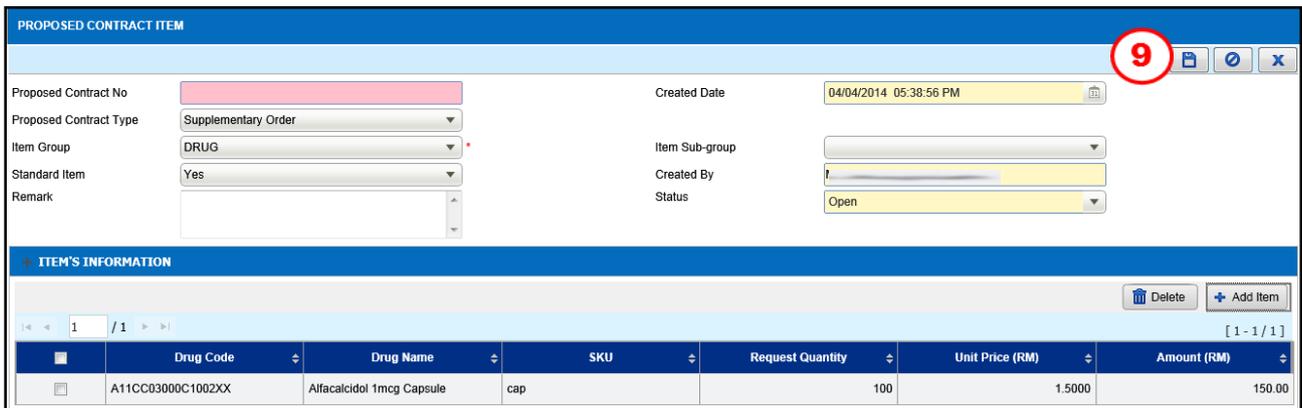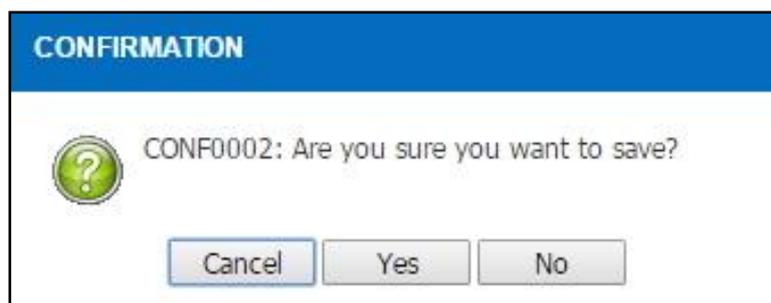
- *Unit Price (RM) is based on each item.*

- *Amount (RM) is total amount of item.*

- *SKU: Store Keeping Unit.*

- *Buffer Level Quantity is set up for buffer level of this item. Set up at Buffer Level Master.*

- *Min Order Quantity is minimum quantity to be ordered of this item.*

- *Max Order Quantity is maximum quantity to be ordered of this item.*

- *Max Storage Quantity is for maximum of quantity to be stored.*

STEP 7

Click on the 💾 button to save the transaction

STEP 8

Click on the ⊠ button to close the transaction

Figure 3.1.2-3 Proposed Contract Item

STEP 9

Click on the 💾 button to save the record

Note

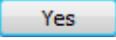- *After save record, alert message will be displayed as per Figure 3.1.2-4 & Figure 3.1.2-5.*

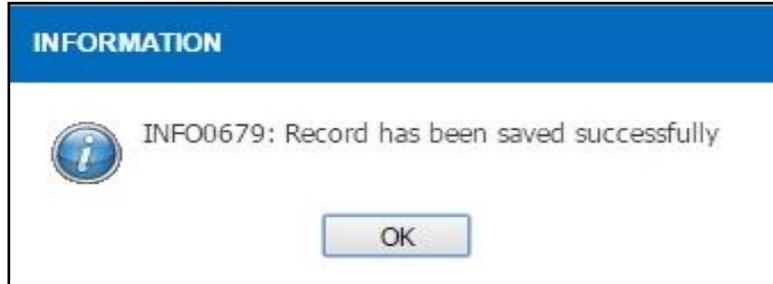
Figure 3.1.2-4 Save Record Alert Message

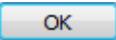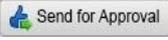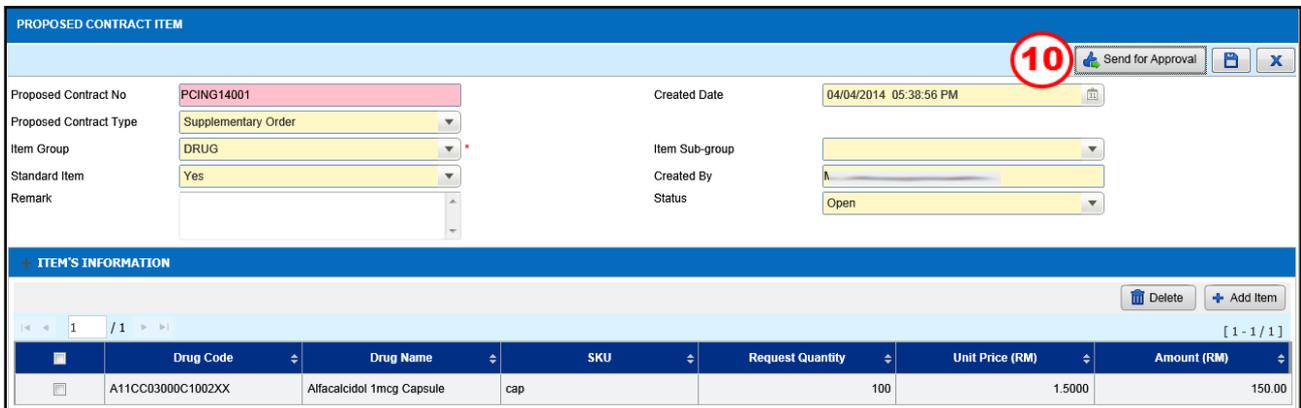- *Click on the* [Yes] *button.*

Figure 3.1.2-5 Save Record Alert Message

- *Click on the* [OK] *button.*

- **Proposed Contract No.** *will be auto generated by system for future reference and the* [Send for Approval] *button will be enabled.*

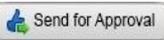| 1-2	Return No	'PCING'
3-4	Current year in 'YY' format	14
5-10	Running no	Starting from 000001. This running number will start with 000001 of every new financial year

Table 3.1.2-1

Figure 3.1.2-6 Proposed Contract Item Send for Approval

STEP 10

Click on the [Send for Approval] to send the transaction to HOD for approval

Note
- *After saving the record, alert messages will be displayed as per Figure 3.1.2-7& Figure 3.1.2-8.*
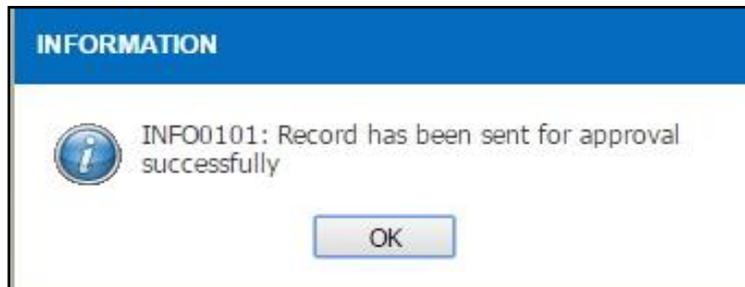

Figure 3.1.2-7 Alert Message

- *Click on the* [Yes] *button.*

INFORMATION

INFO0101: Record has been sent for approval successfully
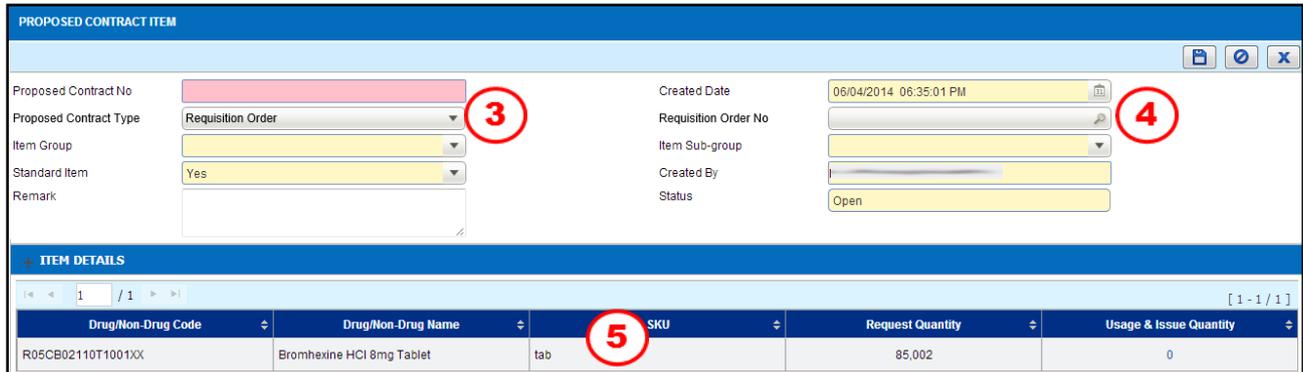
[OK]

Figure 3.1.2-8 Alert Message

- *Click on the* [OK] *button.*

- *The status will changed to Pending for Approval*

3.12.3 New Proposed Contract Item Requisition: Requisition Order

This function is to create a new record for type Requisition Order

Note

Repeat **STEP 1** *and* **STEP 2** *from section 3.1.1* New Proposed Contract Item Record Recommended Purchase List (RPL)

PROPOSED CONTRACT ITEM

Proposed Contract No		Created Date	06/04/2014 06:35:01 PM
Proposed Contract Type	Requisition Order ③	Requisition Order No ④	
Item Group		Item Sub-group	
Standard Item	Yes	Created By	
Remark		Status	Open

ITEM DETAILS

[1 - 1 / 1]

Drug/Non-Drug Code	Drug/Non-Drug Name	SKU ⑤	Request Quantity	Usage & Issue Quantity
R05CB02110T1001XX	Bromhexine HCl 8mg Tablet	tab	85,002	0

Figure 3.1.3-1 Proposed Contract Item

STEP 3
Select **Proposed Contract Type** as Requisition Order from the dropdown box
Note
If the user selects the **Proposed Contract Type** *as* Requisition Order*,* **Requisition OrderNo** *search field will be displayed.*

STEP 4

Click on the 🔍 to search the **Requisition Order No**
Note
List of item(s) will be listed under the Item List section.

STEP 5
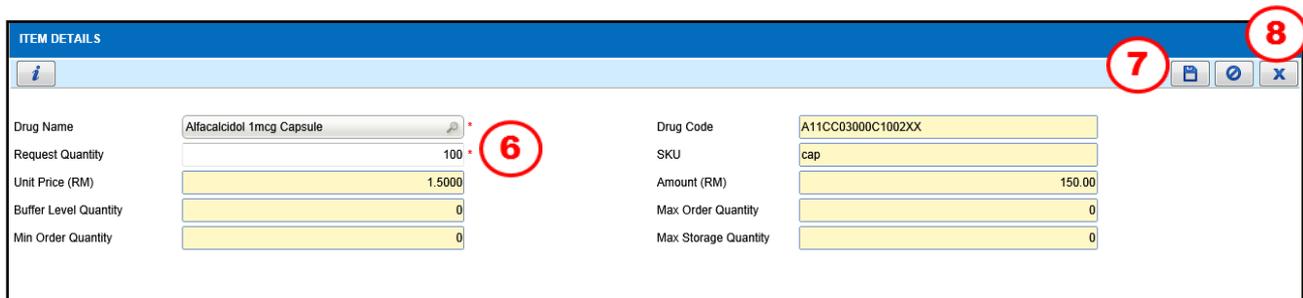Double click on the item details to insert Request Qty in Item Details

ITEM DETAILS

⑧ ⑦

Drug Name	Alfacalcidol 1mcg Capsule * ⑥	Drug Code	A11CC03000C1002XX
Request Quantity	100 *	SKU	cap
Unit Price (RM)	1.5000	Amount (RM)	150.00
Buffer Level Quantity	0	Max Order Quantity	0
Min Order Quantity	0	Max Storage Quantity	0

Figure 3.1.3-2 Item Details

STEP 6
Insert/Edit **Request Quantity**

Note

- **Unit Price (RM)** *is based on each item.*

- **Amount (RM)** *is total amount of item.*

- **SKU**: *Store Keeping Unit.*

- *Buffer Level Quantity is set up for buffer level of this item. Set up at Buffer Level Master.*

- *Min Order Quantity is minimum quantity to be ordered of this item.*

- *Max Order Quantity is maximum quantity to be ordered of this item.*

- *Max Storage Quantity is for maximum of quantity to be stored.*

STEP 7

Click on the [icon] button to save the transaction

STEP 8

Click on the [X] button to close the transaction

Figure 3.1.3-3 Proposed Contract Item

STEP 9

Click on the [icon] button to save the record

Note
- *After save record, alert message will be displayed as per Figure 3.1.3-4 & Figure 3.1.3-5.*
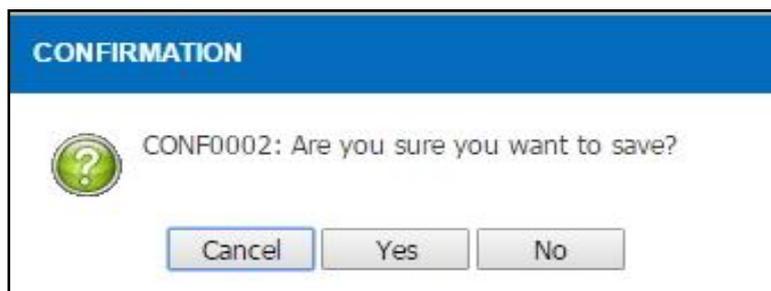
Figure 3.1.3-4 Save Record Alert Message
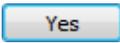
- *Click on the [Yes] button.*

Figure 3.1.3-5 Save Record Alert Message

- *Click on the* OK *button.*

STEP 10
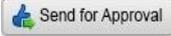
Proposed Contract No. *will be auto generated by system for future reference and the* Send for Approval *button will be enabled.*
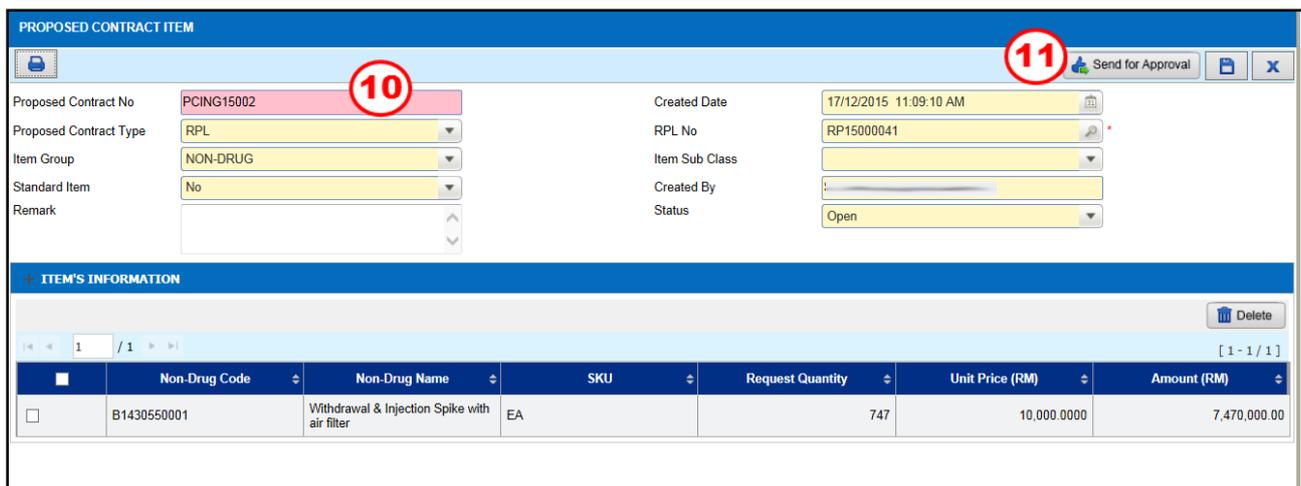
Figure 3.1.3-6 Proposed Contract Item Send for Approval

STEP 11

Click on the Send for Approval to send the transaction to HOD for approval
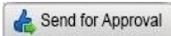
Note
- *After saving the record, alert messages will be displayed as per Figure 3.1.3-7 & Figure 3.1.3-8.*

Figure 3.1.3-7 Alert Message
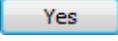
- *Click on the* [Yes] *button.*

Figure 3.1.3-8 Alert Message

- *Click on the* [OK] *button.*

- *The status willchange to Pending for Approval.*

3.13 Proposed Contract Item Approval

This function is used to approve Proposed Contract Item.

TASK LIST

No	Transaction Type	Transaction No.	Date/Time	Task Status	From Unit/Department	From User
1	Proposed Contract	PCING14001	04/04/2014 05:49 PM	Pending for Approval	STOR FARMASI	
2	Near Expiration Approval	E140000008	04/04/2014 03:59 PM	Pending For Approval	STOR FARMASI	
3	Near Expiration Approval	E140000007	04/04/2014 01:14 PM	Pending For Approval	STOR FARMASI	
4	Receive Internal	RT14000008	12/03/2014 03:40 PM	Pending to Receive	WAD 1 (PSY - P)	
5	Product Complaint	PC14000004	11/03/2014 09:22 PM	Investigation - Pending	UNIT FARMASI BEKALAN WAD	
6	Receive Internal	RT14000002	11/03/2014 09:13 PM	Pending to Receive	UNIT FARMASI BEKALAN WAD	
7	Product Complaint	PC14000003	11/03/2014 09:08 PM	Investigation - Pending	STOR FARMASI	

Figure 3.2-1 Task List

Note

- *The purpose of this screen is to inform Pharmacist to search any approval need to be done.*

- *User can also search by using Listing Page.*

- *The transaction is mainly for Pharmacist to approve the transaction.*

STEP 1
Click on Transaction No.

Note
System directly flow to the screen Proposed Contract Item.

PROPOSED CONTRACT ITEM

Proposed Contract No	PCING14001	Created Date	04/04/2014 05:49:56 PM
Proposed Contract Type	Supplementary Order	Requisition Order No	
Item Group	DRUG	Item Sub-group	
Standard Item	Yes	Created By	
Remark		Status	Pending for Approval
Reject Reason			

ITEM'S INFORMATION

	Drug Code	Drug Name	SKU	Request Quantity	Unit Price (RM)	Amount (RM)
	A11CC03000C1002XX	Alfacalcidol 1mcg Capsule	cap	100	1.5000	150.00

Figure 3.2-2 Proposed Contract Item Approval

STEP 2
User have to click [Approve] button to approve the transaction or click [Reject] button to reject the transaction

Note

- *Before click on the [Approve] button, HOD/Pharmacist is allowed to:*
  - *View Item Information*
  - *View No Of Proposed Contract*
  - *Add/Delete Item*

3.14 Contract Facility

This function is used to retrieve KKM Contract Reference No.
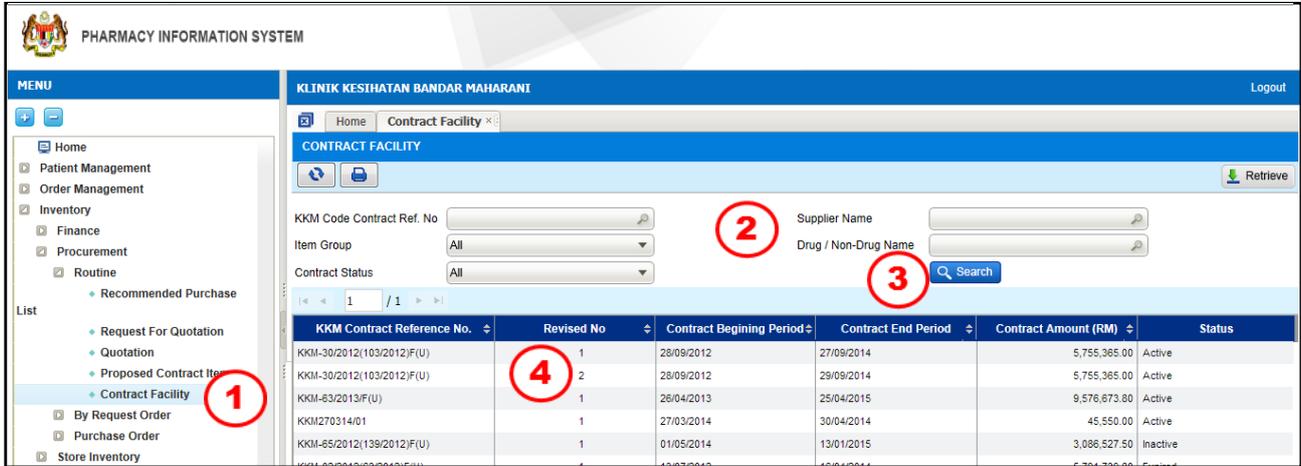
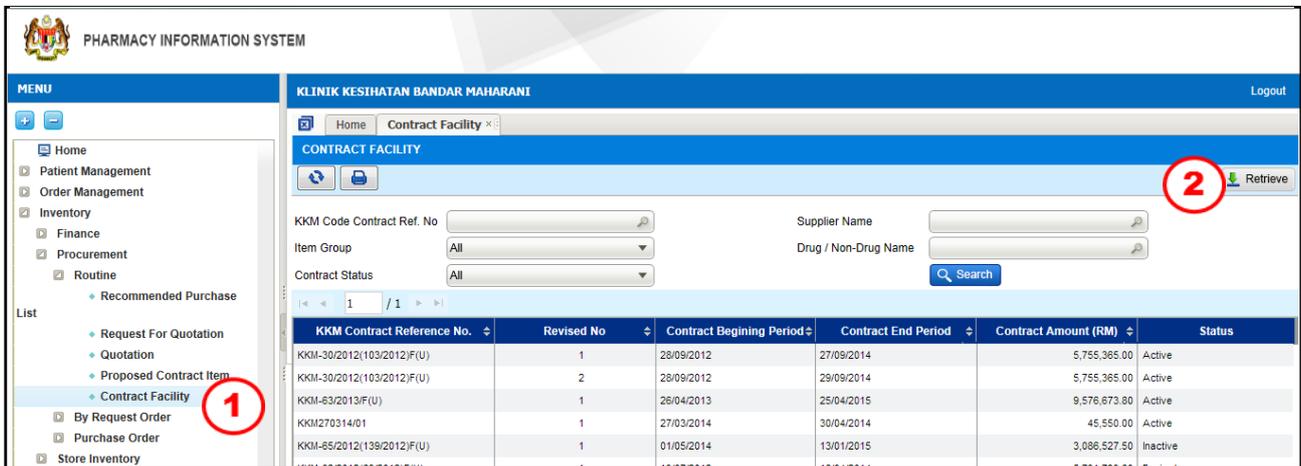**Figure 3.3-1 Contract Facility Listing Page**

STEP 1
Click on 'Procurement' menu follows by 'Routine' then 'Contract Facility'

STEP 2
To search for existing Indent record(s), user may search by criteria as follows:

No	Field	Description	Remarks
a	KKM Code Contract Ref No.	Contract Number	Display all existing KKM Code Contract Ref No.
b	Supplier Name	Supplier Name	Display all existing supplier
c	Item group	Search by: - All - DRUG - NON-DRUG	Able to filter and search record(s)
d	Drug/Non Drug Name	Drug/Non Drug Description	Display all existing supplier
e	Contract Status	Search by: - All - Active - Expired - Inactive	Able to filter and search record(s)

Table 3.3-1

STEP 3

Click on the [Q Search] button after input criteria

Note
The result display will be based on the entered criteria as shown in Figure 3.3-1.

STEP 4
Double click on the selected record details listed down as per Figure 3.3-1

Note
The details of the Contract Facility screen will be displayed.

3.14.1 Retrieve Contract Facility

This function is to see and retrieve any new contract created by Bahagian Perkhidmatan Farmasi (BPF)

Figure 3.3.1-1 Contract Facility Listing Page

STEP 1
Click on 'Procurement' menu follows by 'Routine' then 'Contract Facility'

STEP 2

Click on the [Retrieve] to retrieve all the retrieve the KKM Contract Reference No

Note
- *List of Reference No will display in Contract Facility List*
- *User can filter by Item Group, Drug/Non-Drug Name or Contract No according to Figure 3.3.1-2*
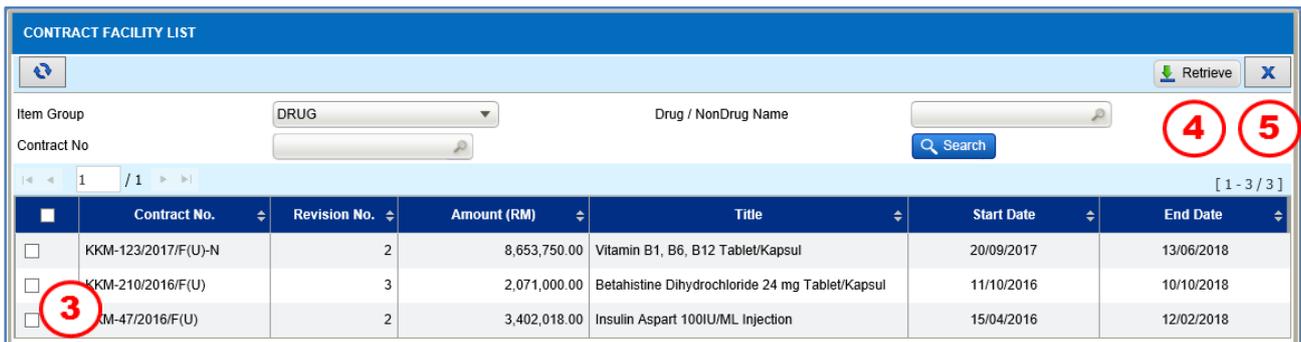
Figure 3.3.1-2 Contract Facility List

STEP 3
Select the Contract No's checkboxes as appropriate and user may select more than one

STEP 4

Click on the [Retrieve] button

STEP 5

Click on the [X] to close the transaction

Note
When user double click on any of the contract reference no, system will display the contract detail as per Figure 3.3.1-2.

Figure 3.3.1-3 Contract for Facility

Note
- *This screen is non editable.*
- *Under Item's Information these information will be displayed:*
    – *Drug/Non Drug Code*
    – *Drug/Non Drug Name*
    – *Item Code*
    – *Item Description*
    – *Brand Name*
    – *Supplier Name*
    – *Packaging Description*
    – *Effective Start Date*
    – *Effective End Date*
    – *Contract Unit Amount (RM)*
- *Under Item's Quantity these information will be displayed:*
    – *Item Code*
    – *Item Description*
    – *Brand Name*
    – *Quantity*
    – *LPO No*
    – *LPO Date*
    – *Purchase Qty*
    – *Contract Unit Price (RM)*
    – *Contract Amount (RM)*
- *Purchase order Status*

Figure 3.3.1-4 Purchase Order Status

3.14.2 Create New Purchase Order : Indent

Pharmacist allow to supply indent item using purchase order. To create a new Purchase Order, perform the step below:

Figure 3.14.2-1 Purchase Order Listing Page

STEP 1

Click on the 'Inventory' menu followed by 'Procurement' and 'Routine', and select 'Purchase Order'

STEP 2

Click on the [+] button and the purchase Order screen will be displayed as shown in Figure 3.14.2-1

Figure 3.14.2-2 Purchase Order

Figure 3.14.2-3 Purchase Order : Indent

STEP 3

Select *Request Type* as *Indent*

STEP 4

Click on the **KKM Code Contract Ref No** and **KKM Code Contract Ref No** window will be displayed as Figure 3.14.2-4

Figure 3.14.2-4 KKM Code Contract Ref No

Note

- *User is allowed to enter partially or fully searching criteria **KKM Code Contract Ref No**, **Item Description**, **Contract Start Date** and **Contract End Date**. Then click **Search** button*

- *Double click on the selected **KKM Code Contract Ref No***

STEP 5

Select **External Indent No** as per default

Figure 3.14.2-5 Purchase Order : Indent

STEP 6

Click on the **Delivery Site To Name** and **Delivery Site To Name Search** window will be displayed as **Figure 3.14.2-6**

Figure 3.14.2-6 Delivery Site To Name Search

Note

- *User is allowed to enter partially or fully searching criteria **Supplier Name** and **Supplier Code**. Then click* Q Search *button*

- *Double click on the selected Supplier Name*

Figure 3.14.2-7 Purchase Order : Indent

STEP 7

Double click on the item and *Add Purchase Order* item window will display as Figure 3.14.2-8

Figure 3.14.2-8 Purchase Order Item

STEP 8

Click on the *Vote Description* [icon] and *Search Vote Description* window will be displayed as Figure 3.14.2-9

Figure 3.14.2-9 Search Vote Description

Note

- User is allowed to enter partially or fully searching criteria for **Vote Name** and **Vote Code**. Then click [Search] button

- Double click on the selected **Vote Code**

Figure 3.14.2-10 Purchase Order Item

STEP 9

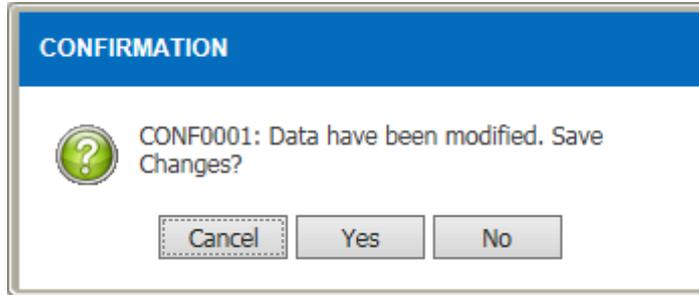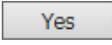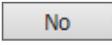Click on the [save icon] button to save the record

Figure 3.14.2-11 Confirmation Message

Note

- System will display a Confirmation Message as Figure 3..14.2-11
- Click on the [Yes] button to save the transaction
- Click on the [No] button to cancel the saved transaction
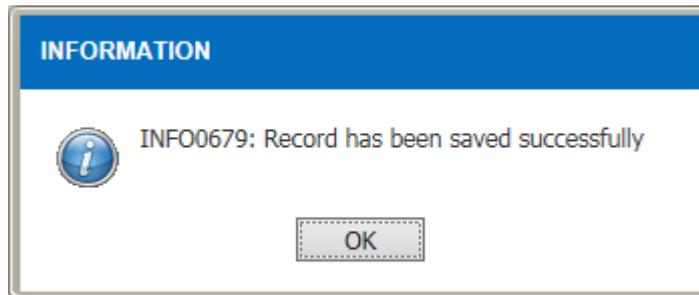- Click on the [Cancel] button to cancel the editing made at the Add Purchase Order Item screen

Figure 3.14.2-12 Information Message

Note

- System will display a Information Message as Figure 3.14.2-12
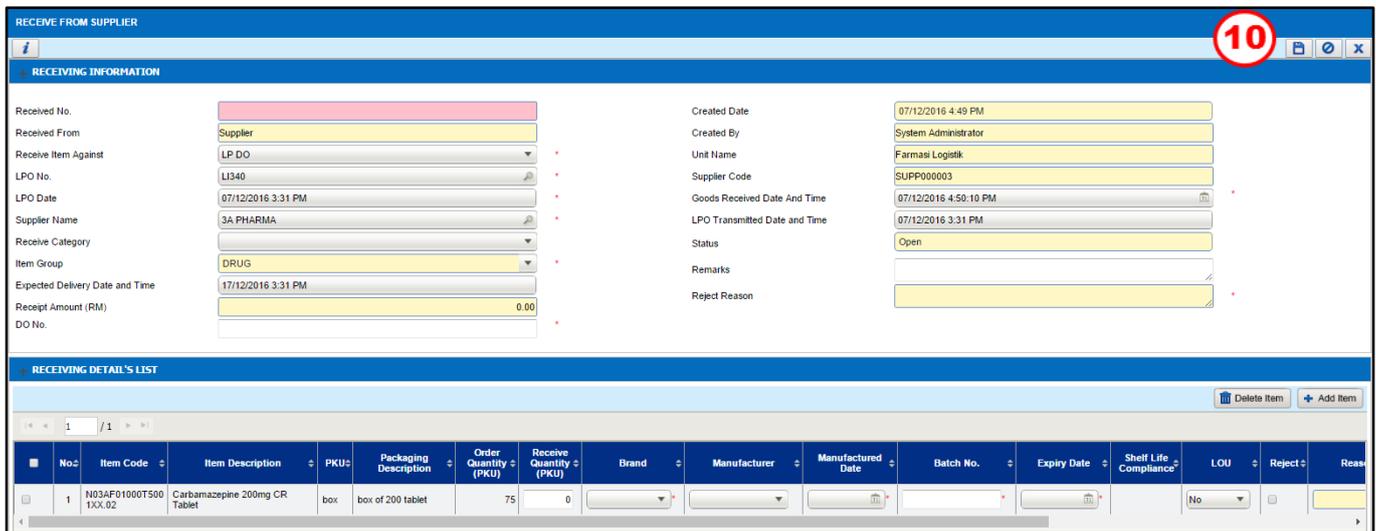- Click on the [OK] button to confirm

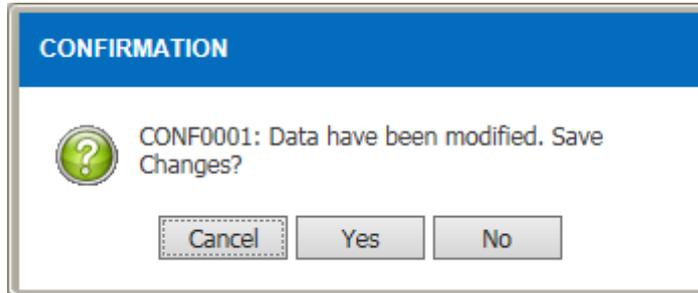**Figure 3.14.2-13 Purchase Order : Indent**

STEP 10

Click on the [💾] button to save the record

Figure 3.14.2-14 Confirmation Message

Note

- *System will display a Confirmation Message as Figure 3.14.2-14*
- *Click on the* [Yes] *button to save the transaction*
- *Click on the* [No] *button to cancel the saved transaction*
- *Click on the* [Cancel] *button to cancel from saving the record*
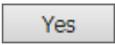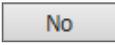
Figure 3.14.2-15 Information Message

Note

- *System will display a Information Message as Figure 3.14.2-15*
- *Click on the* [OK] *button to confirm*

Figure 3.14.2-16 Purchase Order : Indent

Note

- *User is allow to create another order by click on the* [+] *button*

- *Click on the* [Cancel Request] *button to cancel the order*
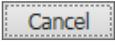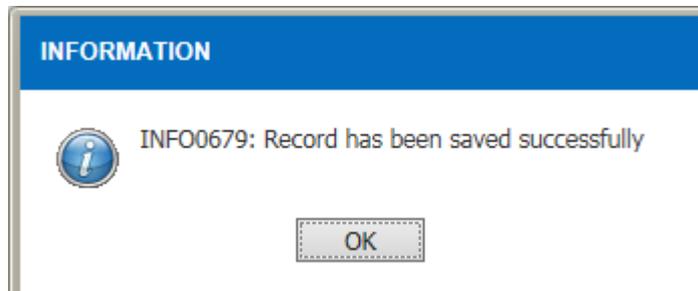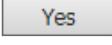
STEP 11

Click on the [Approve] button to approve the record

Note

- *System will be display a Confirmation Message as Figure 3.14.2-17*

- *Click on the* [Yes] *button to approve the record*
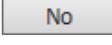
- *Click on the* [No] *or* [Cancel] *button to cancel for approval the record*
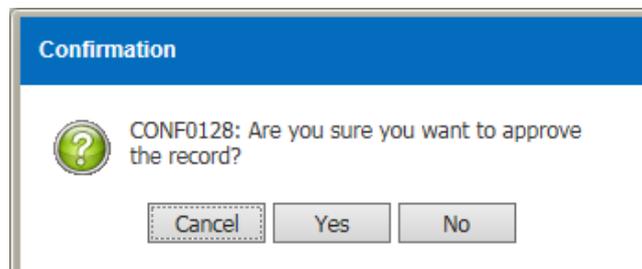
Figure 3.14.2-17 Confirmation Message

- *Information Message will display after click on the* [Yes] *button as Figure 3.14.2-17*
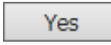
- *Click on the* [OK] *button to successfully approved the record and the Status change to Approved*
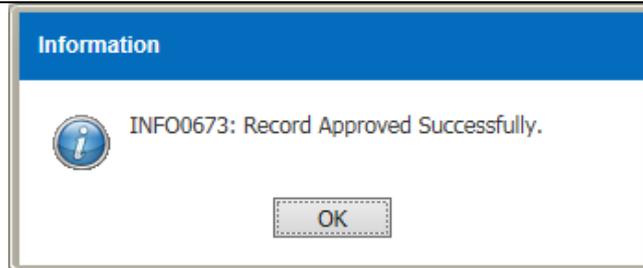
Figure 3.14.2-18 Information Message

- *Click on the* [Reject] *button to reject the order transaction*

<u>***Note***</u>

- *User need to enter reject reason as system will display an information Message as Figure 3.14.2-19*

Figure 3.14.2-19 Information Message

- ***Status*** *of the record will change to **Rejected***

4.0

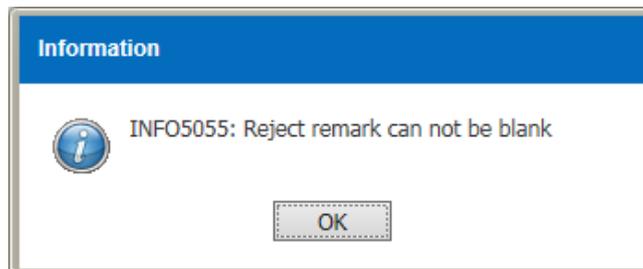| Abbreviation	Definition
MOH	Ministry of Health
KKM	Kementerian Kesihatan Malaysia
PhIS	Pharmacy Information System
CPS	Clinical Pharmacy System
PKU	Packaging Keeping Unit
SKU	Store Keeping Unit
TDM	Therapeutic Drug Monitoring
CDR	Cytotoxic Drug Reconstitution

5.0 Links To Inventory Modules

No	Module	PDF Links	No	Module	PDF Links
1	Finance	Click Here	15	Internal Indent	Click Here
2	Procurement Standard APPL	Click Here	16	Issue	Click Here
3	Procurement standard LP	Click Here	17	Receive From Supplier	Click Here
4	Procurement Standard Contract	Click Here	18	Receive Inter Facility	Click Here
5	Procurement Standard Quotation	Click Here	19	Receive Intra Facility	Click Here
6	Procurement Standard (RFQ)	Click Here	20	Return to Supplier	Click Here
7	Procurement Non Standard (Requisition Order)	Click Here	21	Return to Supplying Unit	Click Here
8	Quarantine	Click Here	22	Slow Moving	Click Here
9	Product Complaint	Click Here	23	Stock Taking And Verification	Click Here
10	Recalculate Buffer Level	Click Here	24	Stock Transfer	Click Here
11	Expiration And Condemn	Click Here	25	Year End	Click Here
12	Recall Product	Click Here	26	Penalty	Click Here
13	Payment	Click Here	27	IWP Budget	Click Here
14	External Indent	Click Here	28	IWP Order Authorization	Click Here