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

User Manual
Inventory (External Indent)

Reference ID : U.MANUAL_INV_EXTERNAL INDENT-8th EDITION

Application reference: PhIS & CPS v1.8.1

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 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 (Expiration & Condemn) 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:

• Create a new Indent Intra Facility

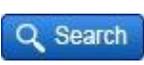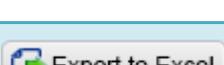• Create a new Indent Inter Facility
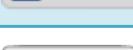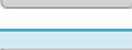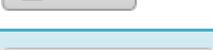
• Indent Approval

1.3   Organised Sections

These are the sections within this document:

• Section 1 : Introduction

• Section 2 : Application Standard Features

• Section 3 : External Indent

• 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

Module Legend			
Generate RIL	Recommended Indent List	Send for Approval	Send for HOD approval

Note
- _To learn more about Login Information, kindly click_ _Login Information_ _Modules for descriptive step._

2.2   Latest Enhancement and Updates

Latest Functions	Page
New_Indent (Inter Facility)	7

3.0   Indent

3.1 Overview

Indent in the PhIS consist of indenting from within the facility or outside from the facility. Within the facility the indenting process begins at the sub-store level where the personnel indent drugs and non-drugs routinely via Request Indent Quantity or at ad-hoc situation via supplementary where there is a sudden need to require the items.

3.1.1 User Group

This module is intended for storekeeper and pharmacists at the Pharmacy Store, Pharmacist and Assistant Pharmacist at the Sub Store; Sister and Nurse at the unit/ward (subject to user assign by the facility).

3.1.2 Functional Diagram
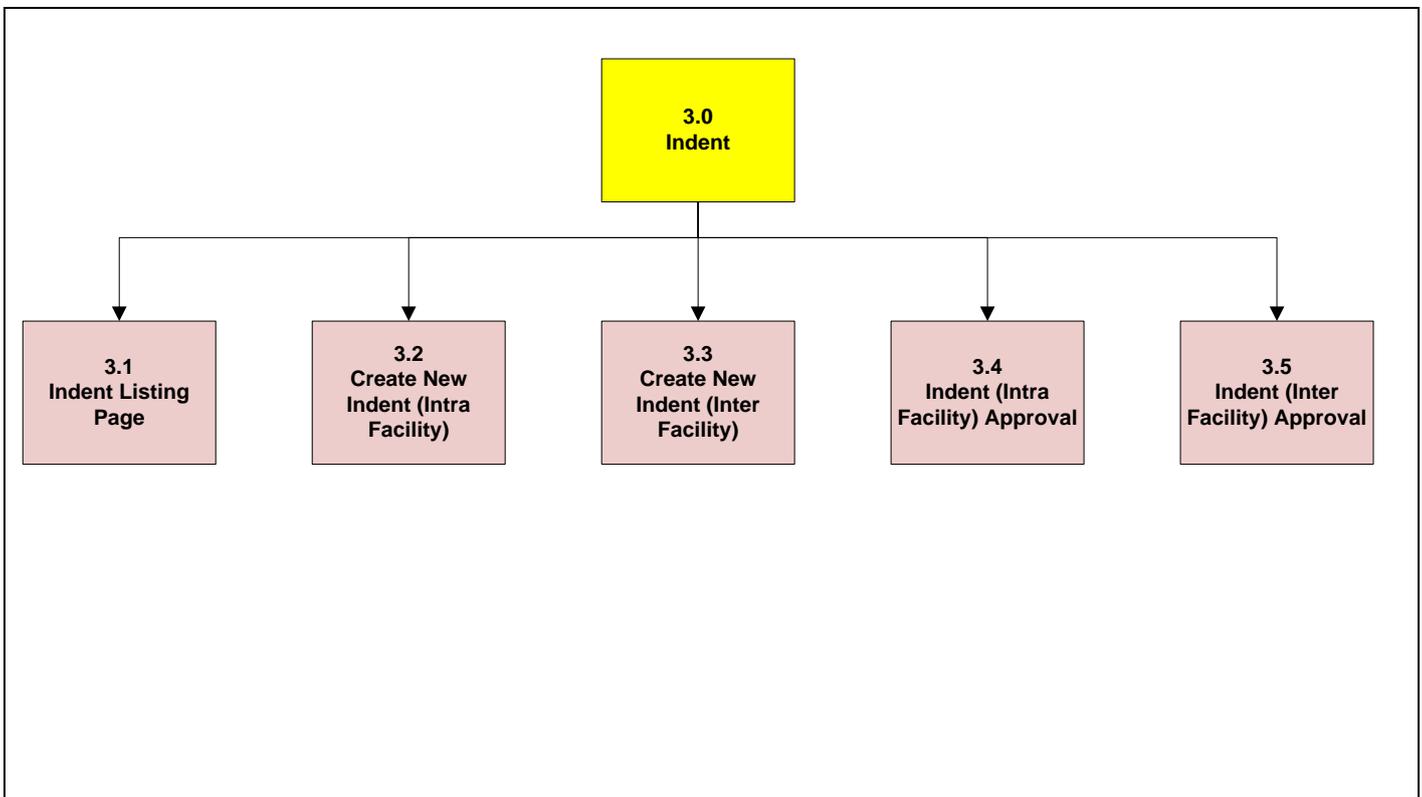
Figure 3.1

3.1.3 Functional Description

Indent comprises of three (3) main functions:

- **Indent (Intra)**
  Indent (Intra) is the indenting within facility
  This function allows user to view all existing transaction and create a new transaction

- **Indent (Inter)**
  Indent (Inter) is the indenting to externally facility
  This function allows user to view all existing transaction and create a new transaction

- **Indent Approval**
  This function is used for HOD to either approve or reject any indent transaction

3.2 External Indent

Requesting Unit will indent Drug/Non Drug items from the Supplying unit at different facility. In the indent process, the system will generate a list of items to indent where the quantity available of that item in store is less than the buffer level quantity as set in the Unit Catalogue of that unit.

3.2.1 View Existing Transaction

This page will display all the existing transaction of this sub-module based on the user's Requester Unit.

Figure 3.2-1 Indent listing Page

STEP 1

Click on 'Inventory' menu followed by 'Inventory Management', followed by click Distribution, click 'Indent' then 'Inter Facility Indent'

STEP 2

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

No	Field	Description	Remarks
a	Indent No	Indent Number	Display all existing Indent No. belongs to the requester unit.
b	External Indent No	External Indent Number	Display all existing external Indent number from others facility.
c	Indent Date From	Start date for the indent transaction	Format field (dd/mm/yy)
d	Created By	Name of the person who created the transaction	
e	Indent Status	Search by : - All - Cancel - Close - Open	Able to filter and search record(s)
f	Item Group	Search by : - All - Drug - Non Drug	Able to filter and search record(s)
g	Indent Date To	Start date for the indent transaction	Format field (dd/mm/yy)

h	Approval Status	Search by: - All - Approved - Open - Pending For Approval - Rejected	Able to filter and search record(s)
i	Drug and Non Drug	-	-

Table 3.1-1

STEP 3
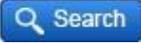
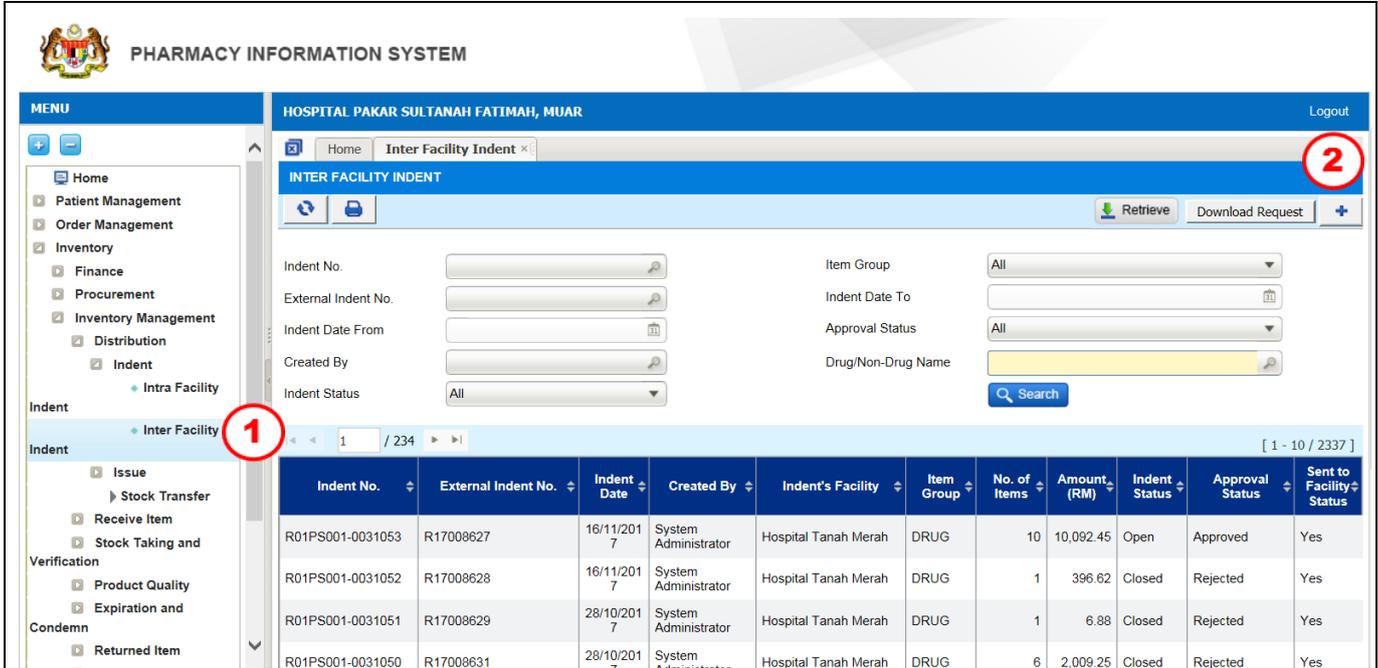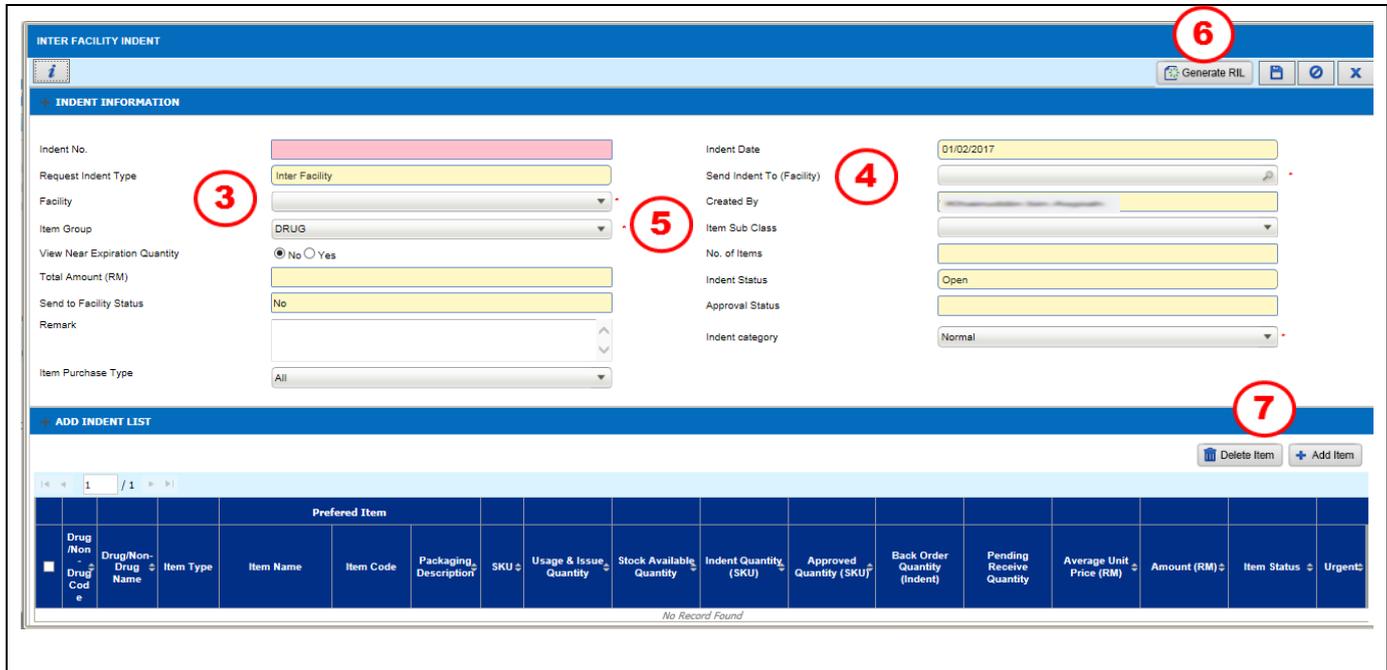Click on the [Q Search] button after input of criteria

STEP 4
Double-click on the selected record details listed as per Figure 3.2-1

Note
- *Red coloured Indent line indicates that there is an urgent item inside the indent.*

- *The screen will display the indent details.*

3.3 New Indent (Inter Facility)

To create a new record for Indent, perform steps below:

Figure 3.3-1 Create New External Indent

STEP 1

Click on 'Inventory' menu followed by 'Inventory Management', followed by click Distribution, click 'Indent' then 'Inter Facility Indent'

STEP 2

Click on the [+] button to create new record

PhIS

Note

Indent screen will be displayed as shown in the Figure 3.3-2.

Figure 3.3-2 New Indent Information

Note

- _Newly created Indent Record **Status** will default to 'Open'._

- _**Unit Name** will be defaulted based on user's login ID._

- _**Indent Date** will be defaulted to the system date/time._

STEP 3
Select **_Facility_**
- Clinic
- PKD
- MUSN/PBFN
- Hospital

STEP 4

Click on the 🔍 to search **_Sent to Indent To (Facility)_**
Note
- _List of **Facility** will be displayed as per Figure 3.3-3._

Figure 3.3-3 List of Facility Name

- *Double click to select the **Facility Name.***

STEP 5
Select **Item Group**
- DRUG
- NON DRUG

Note
- **Item Sub Class** is an optional field.

- **View Near Expiration Quantity** will default to 'NO'.

- If 'YES' radio button is selected for 'View Near Expiration Quantity', 'Number of Days' field will be enabled and mandatory for the user to enter.

- The system will display the quantity of drug that will expire prior to the number of days entered.

STEP 6

Click on the [Generate RIL] button

Note
- The system will generate the Recommended Indent List (RIL) based on the drug/non drug buffer level in the Unit Catalogue.

- Only item that has available quantity below buffer level will be displayed.

- **Indent Qty** will be suggested by the system.
  Formulae: Indent Qty = Max Storage Qty (SKU) – Available Qty (SKU).

STEP 7

Click on the [+ Add Item] button to add an item to indent if the item is not listed from the [Generate RIL] button
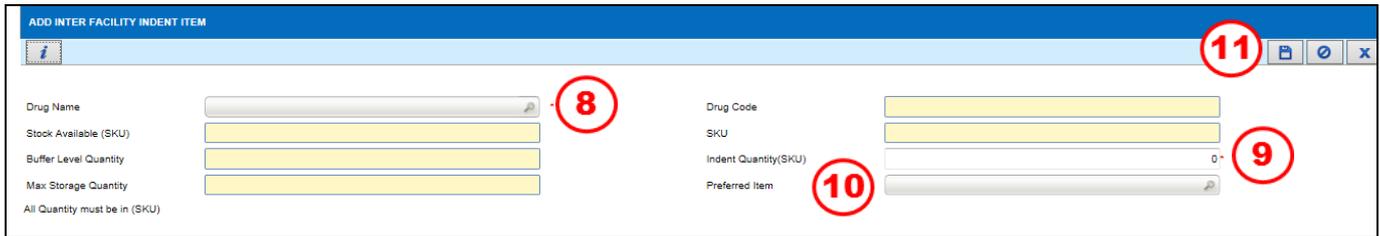
Figure 3.3-4 Add Indent Item

STEP 8

Click on the [magnifier icon] to search for **Drug Name**

Note
*List of **Drug Name** will be displayed as shown in Figure 3.3-5.*

STEP 9
Enter the **Indent Quantity(SKU)** to be indent

STEP 10
Enter the **preferred item** to be indent

Note
Preferred Item listing is displayed together with:
-Item Description,
-Item Code,
-Packaging Description, and
-Item Status (Default: Y/N).

Item Description	Item Code	Packaging Description	Default Item
Acarbose 50 mg Tablet	A10BF01000T1001XX.01	Box of 100 tab	Yes
Acarbose 50 mg Tablet	A10BF01000T1001-90	pack of 90 tablet	No
Acarbose 50 mg Tablet	A10BF01000T1001-30	pack of 30 tablet	No
Acarbose 50 mg Tablet	A10BF01000T1001-1	pack of 1 tablet	No

Figure 3.3-5 List of Item

STEP 11

Click on the [save icon] button to save the Add Indent Item

Note
After saving record, alert message will be displayed as per Figure 3.3-6.
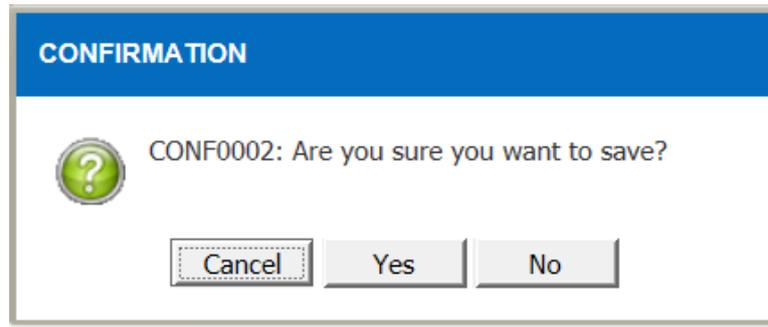
Figure 3.3-6 Save Record Alert Message

- *Click on the* Yes *button.*

Figure 3.3-7 Indent List

STEP 12
Change the quantity to be indent in the ***Indent Quantity*** field if needed

Note
*If the drugs are urgently needed, select on the **Urgent** check box.*

STEP 13
Click on the 💾 button to save the Indent transaction

Note
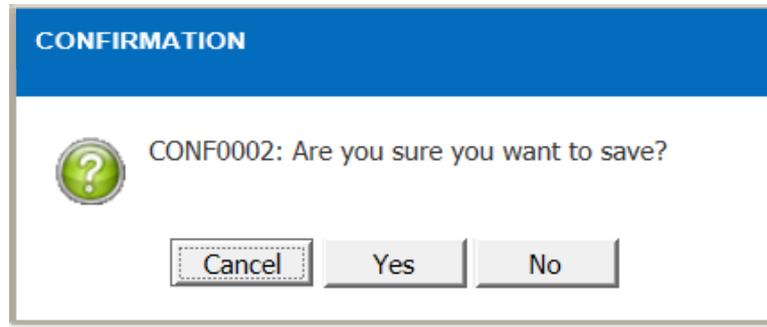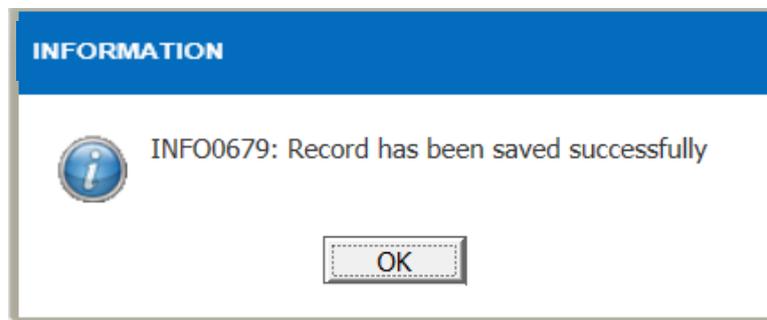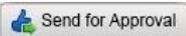- *After saving record, alert message will be displayed as per Figure 3.3-8 & Figure 3.3-9*

Figure 3.3-8 Save Record Alert Message

Figure 3.3-9 Save Record Alert Message

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

Character	Description	Value
1-2	Indent No	'R'
3-4	Current year in 'YY' format	14
5-10	Running no	Starting from 000001. This running number will be restarted to 000001 of every new financial year

Table 3.3-1

Figure 3.3-10 Send for Approval

STEP 14

Click on the [Send for Approval] button to send the Indent transaction to HOD for approval or click on the [Cancel Request] to cancel the request

Note

- *Click on the [Yes] button to send the record for Approval. An alert message will be displayed, and the **Status** will change to 'Pending for Approval'. This transaction will be available in the Approver's Task List for approval process.*

- *If user clicks on the [No] button or [Cancel] button, there will be no changes applied and the screen will return to the Indent screen.*
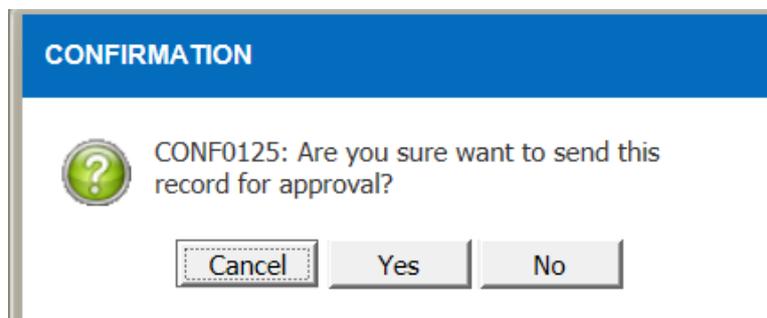

Figure 3.3-11 Send for Approval Record Alert Message

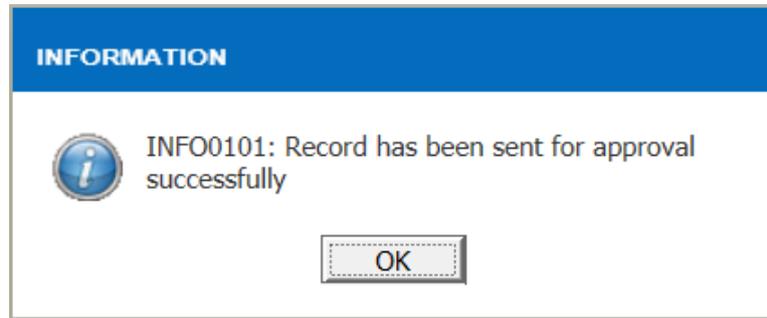- *Click on the [OK] button to confirm the request to be sent for approval.*

Figure 3.3-12 Alert Message

3.4   New Indent (SPUB)

To create a new record for Indent, perform steps below:

Figure 3.4-1 Create New External Indent

STEP 1

Click on 'Inventory' menu followed by 'Inventory Management', followed by click Distribution, click 'Indent' then 'Inter Facility Indent'

STEP 2

Click on the [+] button to create new record

Note

Indent screen will be displayed as shown in the Figure 3.4-2.

Figure 3.4-2 New Indent Information

Note
- *Newly created Indent Record **Status** will default to 'Open'.*

- ***Unit Name** will be defaulted based on user's login ID.*

- ***Indent Date** will be defaulted to the system date/time.*

STEP 3
Select ***Facility***
- Clinic
- PKD
- MUSN/PBFN
- Hospital

STEP 4
Click on the 🔍 to search ***Sent to Indent To (Facility)***
Note
- *List of **Facility** will be displayed as per Figure 3.4-3.*

Search Facility Name			X
Facility Name		Facility Code	
State			🔍 Search 🔄

| 1 / 94 ▶ ▶| | | [1 - 10 / 940] |

Facility Name ⇕	Facility Code ⇕	State ⇕
Kinik Kesihatan Sebuyau	21-13280185	Sarawak
KK Air Hangat	21-02070027	Kedah
KK Air Itam	21-07050018	Pulau Pinang
KK Air Kuning	21-05070018	Negeri Sembilan
KK Air Kuning	21-08090104	Perak
KK Air Puteh	21-11040017	Terengganu
KK Air Tawar 2	21-01040027	Johor
KK Air Tawar 5 (Felda)	21-01040129	Johor
KK Ajil	21-11030018	Terengganu
KK Almuktafi Billah Shah	21-11020019	Terengganu

Figure 3.4-3 List of Facility Name

- *Double click to select the **Facility Name.***

STEP 5
Select ***Item Group***
- DRUG
- NON DRUG

Note
- **Item Sub Class** is an optional field.

- **View Near Expiration Quantity** will default to 'NO'.

- If 'YES' radio button is selected for 'View Near Expiration Quantity', 'Number of Days' field will be enabled and mandatory for the user to enter.

- The system will display the quantity of drug that will expire prior to the number of days entered.

STEP 6
Select Indent Category as SPUB

Note
- The system will generate the List of drug/non-drug based on the drug/non drug buffer level in the Unit Catalogue.

- Only item that has available quantity below buffer level will be displayed.

- **Indent Qty** will be suggested by the system.
  Indent Qty = Max Storage Qty (SKU) – Available Qty (SKU).

STEP 7
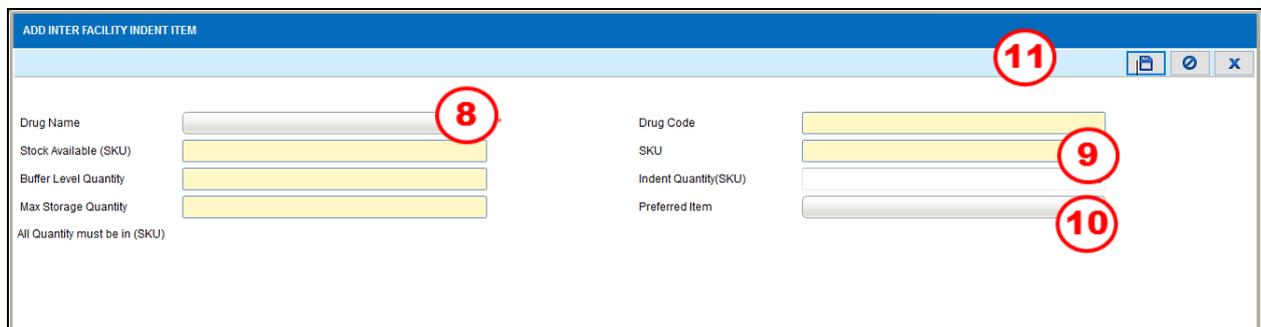Click on the **+ Add Item** button to add an item to indent.

Figure 3.4-4 Add Indent Item

STEP 8
Click on the 🔍 to search for **Drug Name**

Note
List of **Drug Name** will be displayed as shown in Figure 3.4-5.

STEP 9
Enter the **Indent Quantity(SKU)** to be indent

STEP 10
Enter the **preferred item** to be indent
Note
Preferred Item listing is displayed together with:
-Item Description,
-Item Code,
-Packaging Description, and
-Item Status (Default: Y/N).

Figure 3.4-5 Add Indent Item

STEP 11

Click on the 🖫 button to save the Add Indent Item

Note
After saving record, alert message will be displayed as per Figure 3.4-6.

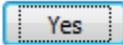**Figure 3.4-6 Save Record Alert Message**

- *Click on the* Yes *button.*

Figure 3.4-7 Indent List

STEP 12

Change the quantity to indent in the *Indent Quantity* field if needed

Note

*If the drugs are urgently needed, select on the **Urgent** check box.*

STEP 13

Click on the 🖫 button to save the Indent transaction

Note

- *After saving record, alert message will be displayed as per Figure 3.4-8 & Figure 3.4-9*
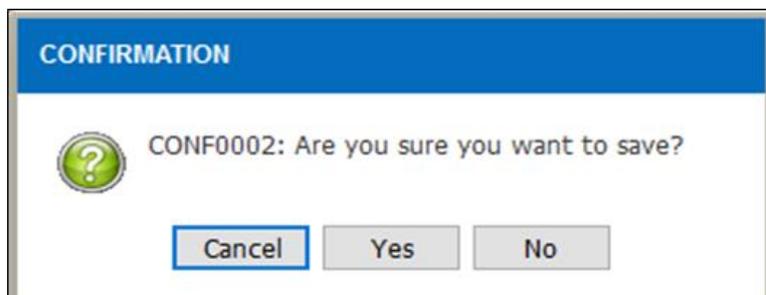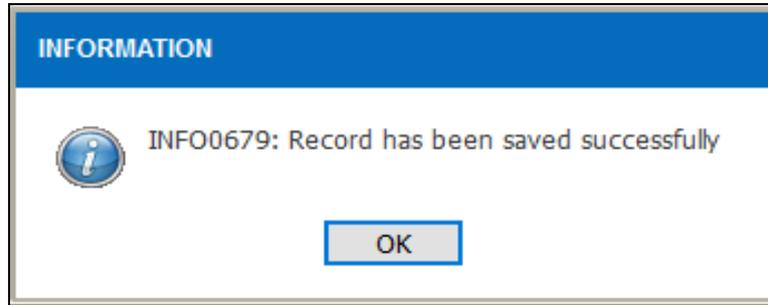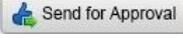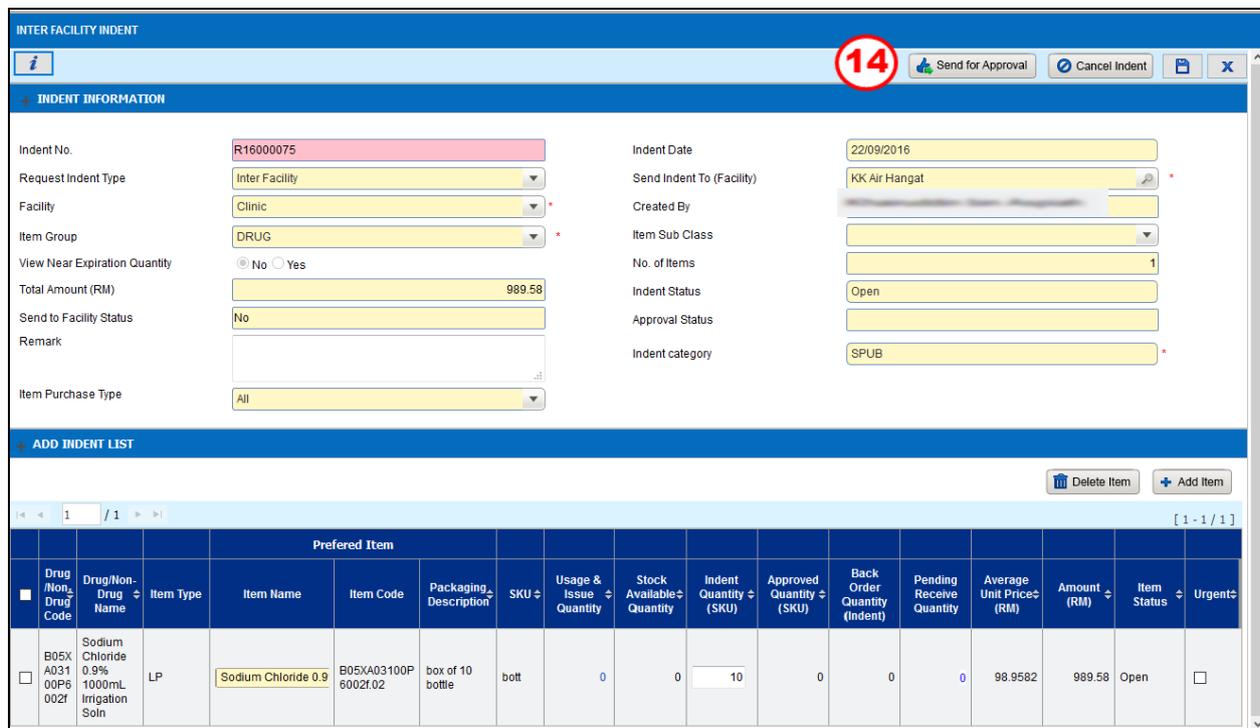

Figure 3.4-8 Save Record Alert Message

Figure 3.4-9 Save Record Alert Message

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

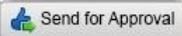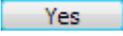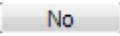| Character	Description	Value
1-2	Indent No	'R'
3-4	Current year in 'YY' format	14
5-10	Running no	Starting from 000001. This running number will be restarted to 000001 of every new financial year

Table 3.4-1

Figure 3.4-10 Send for Approval

STEP 14

Click on the [Send for Approval] button to send the Indent transaction to HOD for approval or click on the [Cancel Request] to cancel the request

Note
- *Click on the [Yes] button to send the record for Approval. An alert message will be displayed and the* ***Status*** *will change to 'Pending for Approval'. This transaction will be available in the Approver's Task List for approval process.*

- *If user clicks on the [No] button or [Cancel] button, there will be no changes applied and the screen will return to the Indent screen.*
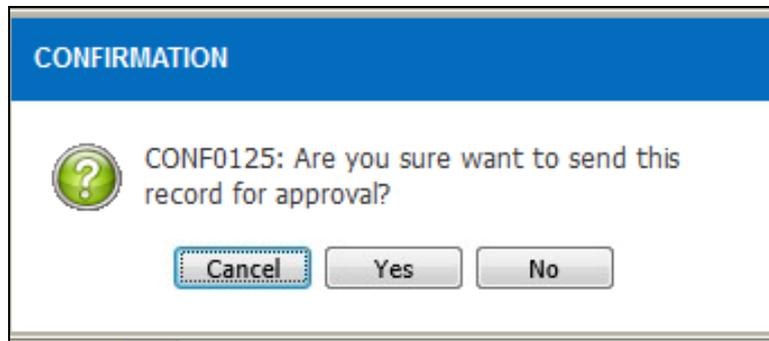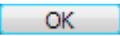
CONFIRMATION

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

[Cancel]   [Yes]   [No]

Figure 3.4-11 Send for Approval Record Alert Message

- *Click on the [OK] button to confirm the request to be sent for approval.*

INFORMATION

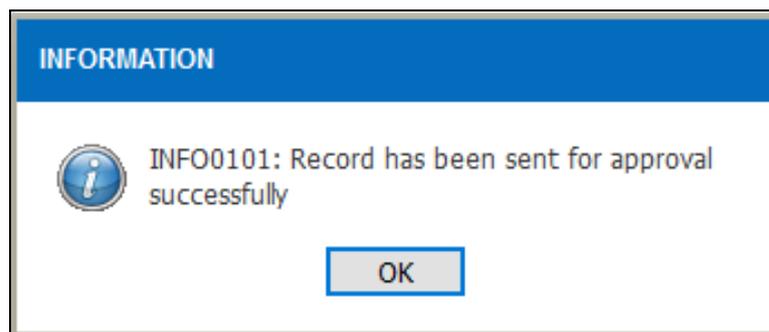INFO0101: Record has been sent for approval successfully

[OK]

Figure 3.4.12 Alert Message

3.5 New Indent (Manufacturing)

To create a new record for Indent, perform steps below:

Figure 3.5-1 Create New External Indent

STEP 1

Click on 'Inventory' menu followed by 'Inventory Management', followed by click Distribution, click 'Indent' then 'Inter Facility Indent'

STEP 2

Click on the [+] button to create new record

Note

Indent screen will be displayed as shown in the Figure 3.5-2.

Figure 3.5-2 New Indent Information

Note
- *Newly created Indent record **Status** will default to 'Open'.*

- ***Unit Name** will be defaulted based on user's login ID.*

- ***Indent Date** will be defaulted to the system date/time.*

STEP 3
Select ***Facility***
- Clinic
- PKD
- MUSN/PBFN
- Hospital

STEP 4

Click on the 🔍 to search **Sent to Indent To (Facility)**
Note
- *List of **Facility** will be displayed as per Figure 3.5-3.*

Search Facility Name			X
Facility Name		Facility Code	
State			🔍 Search ⟳

◄ ◄ 1 / 94 ► ►|		[1 - 10 / 940]
Facility Name ⇕	**Facility Code** ⇕	**State** ⇕
Kinik Kesihatan Sebuyau	21-13280185	Sarawak
KK Air Hangat	21-02070027	Kedah
KK Air Itam	21-07050018	Pulau Pinang
KK Air Kuning	21-05070018	Negeri Sembilan
KK Air Kuning	21-08090104	Perak
KK Air Puteh	21-11040017	Terengganu
KK Air Tawar 2	21-01040027	Johor
KK Air Tawar 5 (Felda)	21-01040129	Johor
KK Ajil	21-11030018	Terengganu
KK Almuktafi Billah Shah	21-11020019	Terengganu

Figure 3.5-3 List of Facility Name

- *Double click to select the **Facility Name.***

STEP 5
Select ***Item Group***
- DRUG
- NON DRUG

Note

- **Item Sub Class** is an optional field.

- **View Near Expiration Quantity** will default to 'NO'.

- If 'YES' radio button is selected for 'View Near Expiration Quantity', 'Number of Days' field will be enabled and mandatory for the user to enter.

- The system will display the quantity of drug that will expire prior to the number of days entered.
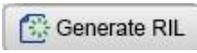
STEP 6
Select **Indent Category** as Manufacturing

Note
- The system will generate the drug/non drug name based on the list of drug/non drug available in the Unit Catalogue.

- Only item that has available quantity below buffer level will be displayed.

- **Indent Qty** will be suggested by the system.
  Indent Qty = Max Storage Qty (SKU) – Available Qty (SKU).

STEP 7

Click on the [+ Add Item] button to add an item to indent if the item is not listed from the [Generate RIL] button
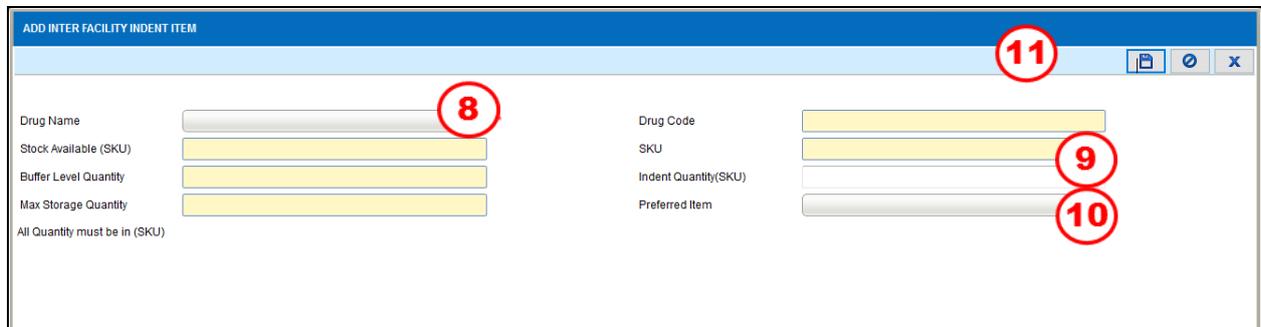
Figure 3.5-4 Add Indent Item

STEP 8

Click on the 🔍 to search for **Drug Name**

Note
List of **Drug Name** will be displayed as shown in Figure 3.5-5.

STEP 9
Enter the **Indent Quantity(SKU)** to be indent

STEP 10
Enter the **preferred item** to be indent
Note
Preferred Item listing is displayed together with:
-Item Description,
-Item Code,
-Packaging Description, and
-Item Status (Default: Y/N).

Figure 3.5-5 Add Indent Item

STEP 11

Click on the 🖫 button to save the Add Indent Item

Note
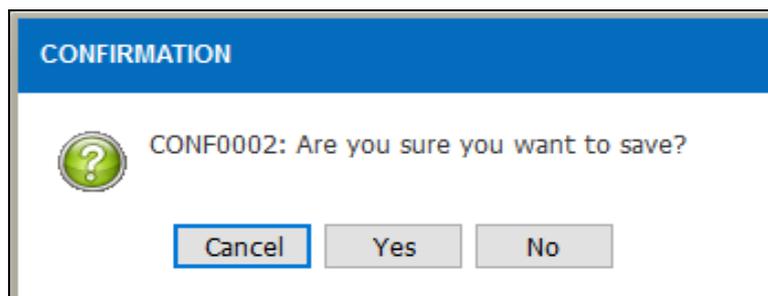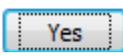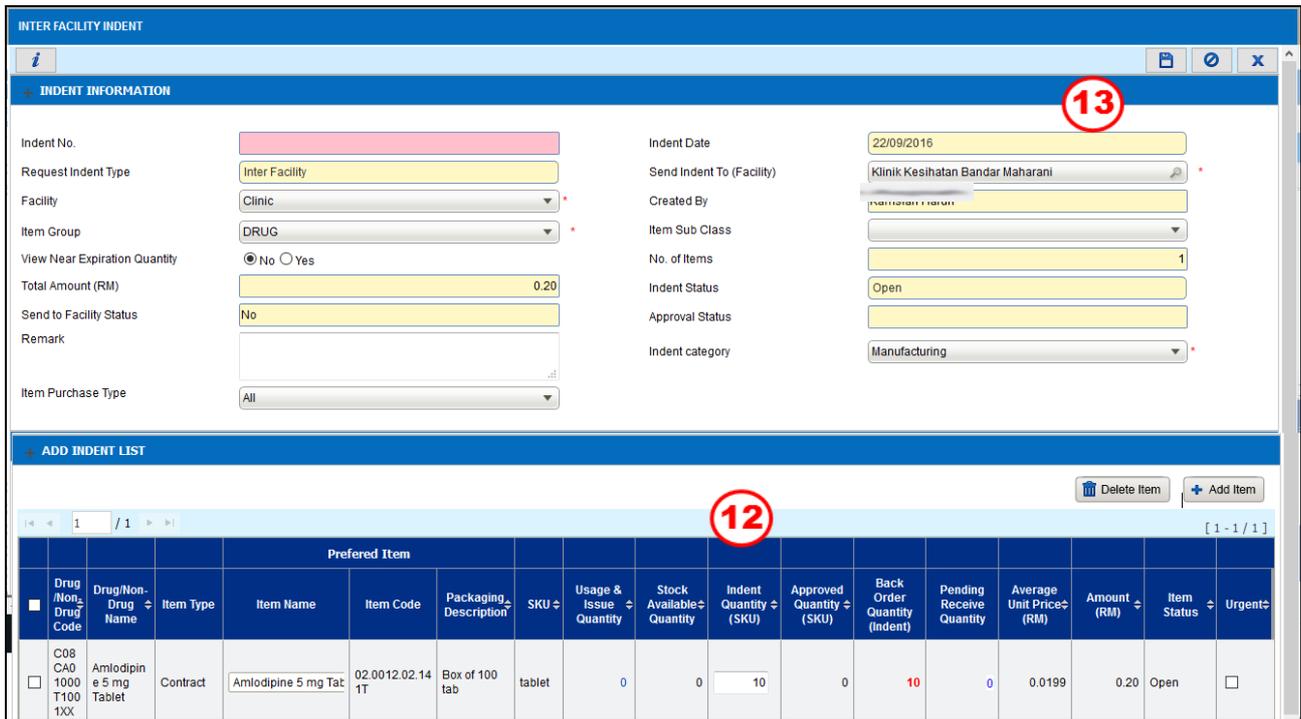*After saving record, alert message will be displayed as per Figure 3.5-6.*

Figure 3.5-6 Save Record Alert Message

- *Click on the Yes button.*

Figure 3.5-7 Indent List

STEP 12
Change the quantity to be indent in the *Indent Quantity* field if needed

Note
If the drugs are urgently needed, select on the ***Urgent*** *check box.*

STEP 13
Click on the 💾 button to save the Indent transaction

Note
- *After saving record, alert message will be displayed as per Figure 3.5-8 & Figure 3.5-9*
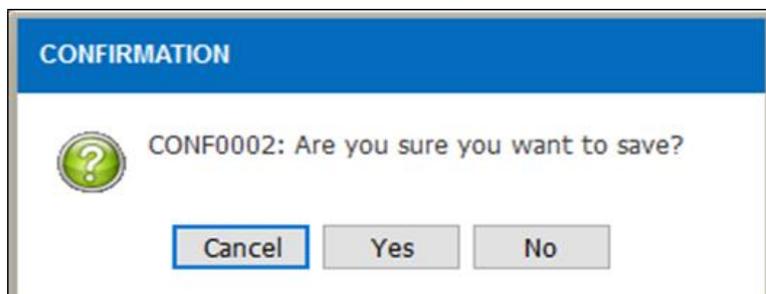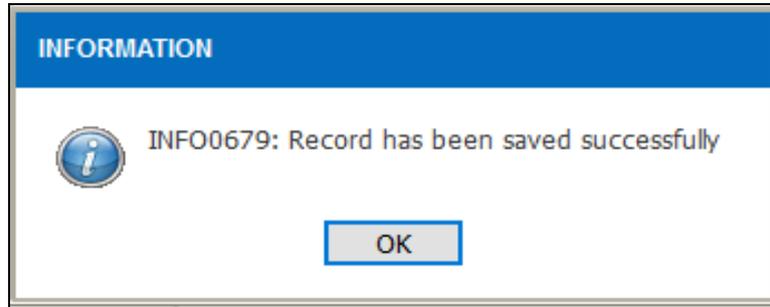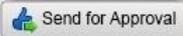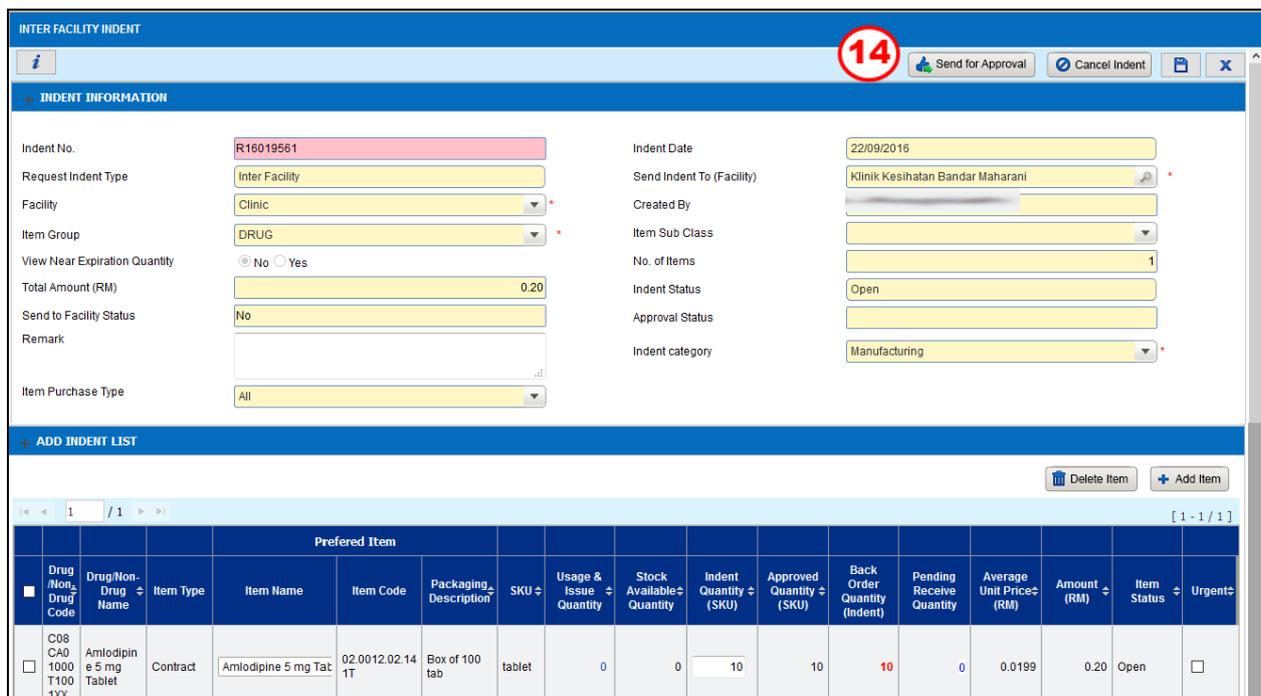

Figure 3.5-8 Save Record Alert Message

Figure 3.5-9 Save Record Alert Message

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

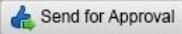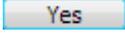| Character	Description	Value
1-2	Indent No	'R'
3-4	Current year in 'YY' format	14
5-10	Running no	Starting from 000001. This running number will be restarted to 000001 of every new financial year

Table 3.5-1

Figure 3.5-10 Send for Approval

STEP 14

Click on the [Send for Approval] button to send the Indent transaction to HOD for approval or click on the [Cancel Request] to cancel the request

Note
- *Click on the [Yes] button to send the record for Approval. An alert message will be displayed and the **Status** will change to 'Pending for Approval'. This transaction will be available in the Approver's Task List for approval process.*

- *If user clicks on the [No] button or [Cancel] button, there will be no changes applied and the screen will return to the Indent screen.*
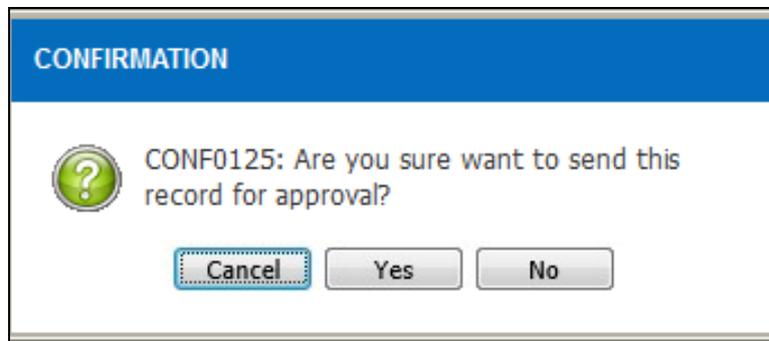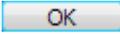
CONFIRMATION

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

[Cancel] [Yes] [No]

Figure 3.5-11 Send for Approval Record Alert Message

- *Click on the [OK] button to confirm the request to be sent for approval.*

INFORMATION

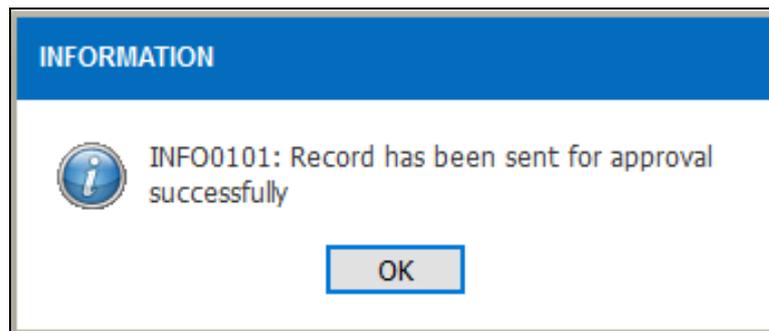INFO0101: Record has been sent for approval successfully

[OK]

Figure 3.5-12 Alert Message

3.6 Indent (Inter Facility) Approval

The Head of Department (HOD)/ Head of Unit will receive the 'Pending for Approval' Indent transaction in the Task List.

Figure 3.6-1 Task List

STEP 1

Click on the Transaction No. hyperlink and the Indent screen will be displayed as shown in the Figure 3.6-2

Note

User also able to refer to section 3.1 Indent Listing Page to search for the 'Pending for Approval' Indent record.
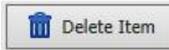

Figure 3.6-2 Indent Approval

STEP 2

Change the Indent ***Approved Quantity*** if necessary

Note

- *Approved Quantity will default to indent quantity but HOD is allowed to change the quantity.*
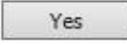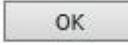
- *User is allowed to perform this:*

a) *Add new indent item by click on the* ➕ Add New Item *button*

b) *Delete indent item by click on the* 🗑 Delete Item *button.*

STEP 3

Click on the [👍 Approve] . button to approve the Indent record and the *Status* will be 'Approved'

Note

- *Click on the* [Yes] *button in Figure 3.6-3 followed by the* [OK] *button in Figure 3.6-4.*

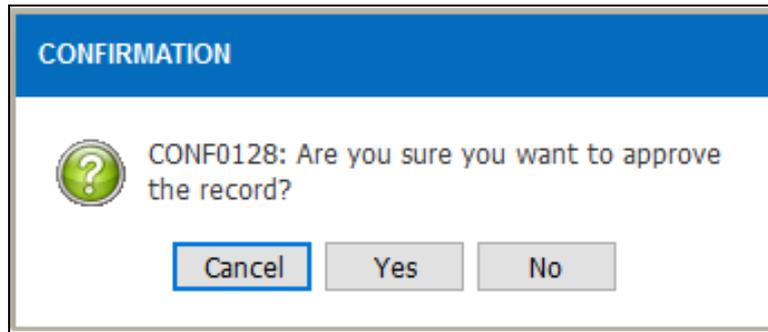**CONFIRMATION**

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

[Cancel] [Yes] [No]

Figure 3.6-3 Approve Record Alert Message

INFORMATION

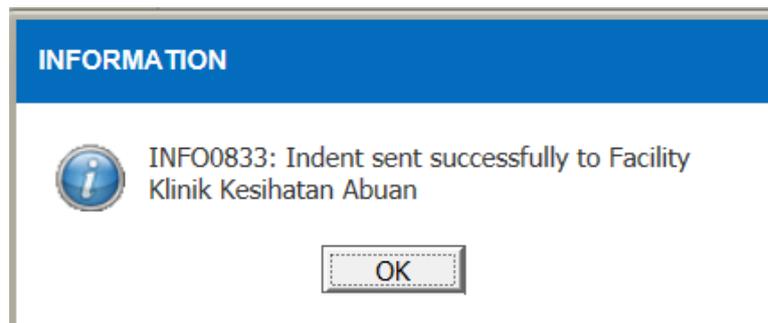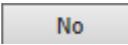(i) INFO0833: Indent sent successfully to Facility Klinik Kesihatan Abuan

[OK]

Figure 3.6-4 Approve Record Alert Message
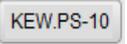
- *If user clicks on the* [No] *button, there will be no changes applied and the screen will return to the Indent screen.*

- Click on the [👎 Reject] . button to reject the Indent record and the status will be 'Rejected'

- ***Reject Reason*** *is mandatory to be entered to reject the Indent transaction*

- *After the indent transaction is approved,* [KEW.PS-10] *button will be enabled.*

- *If the Indent is rejected, indent **Status** will be 'Close'.*

Figure 3.6-5 Indent Detail

STEP 4

Click on the [KEW.PS-10] button to print indent detail

Note

- *The report will be in PDF format. The user is allowed to view/save/print the report.*

- *The issuer will retrieve the 'External Indent' in their Task List as 'Pending for Approval'. They have the right approve or reduce the number of requests or reject the request. After the request is approved, they will proceed to issue the item and generate the Issue Note at Issue Screen. The requestor will receive a notification and will need to perform Receiving Inter Facility.*

Figure 3.6-6 KEW.PS-10 Borang Pesanan Dan Pengeluaran Stok

4.0   Acronyms

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
RIQ	Recommended Issue Quantity

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